



AGENDA - CITY COUNCIL MEETING

April 19, 2022

6:30 p.m.

1. **CALL TO ORDER.**
2. **PLEDGE OF ALLEGIANCE - Invocation will be given by First Ward Councilmember Arlene Robinson**
3. **ROLL CALL.**
4. **ADOPTION OF AGENDA.**
5. **PRESENTATIONS/PROCLAMATIONS.**
 - A. **Sara Tackett - JDL Update**
6. **PUBLIC HEARINGS.**
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 April 5, 2022**

Approve the minutes of the regular City Council Meeting of April 5, 2022.
 - B. **Receipt of Alley Vacation Petition**

Receipt of petition to vacate a public alley off of Milwaukee Street between Prospect and E. Addison Street. Refer to City Attorney to verify legality, the City Planning

Commission to review and provide the Clerk's office with a recommendation, with item being presented to Council for consideration.

C. Funding Letters for Pension System

Receive the actuarial valuations as of June 30, 2021 for the Act 345 Policemen's & Firemen's Retirement Plan, the Employees Retirement System and the Policemen's and Firemen's Retirement System, and approve the actuarial funding necessary for the fiscal year 2022-2023.

D. Special Event Application for the Jackson High School Graduation Ceremony

Approve a request from Jackson High School to host their Graduation Ceremony on Friday, May 27, 2022 and use road closures on Wildwood Avenue near Jackson High School.

E. Special Event Application for the Jackson District Library Summer Reading Program Finale

Approve a request from the Jackson District Library to host their Summer Reading Program Finale on July 30, 2022 on the streets of downtown Jackson.

F. Special Event Application for the Jackson County Veteran's Council Memorial Day Procession and Ceremony

Approve a request from the Jackson County Veteran's Council to conduct their Memorial Day Procession and Ceremony on Monday, May 30, 2022 on the streets of downtown Jackson.

G. Special Event Application for the Amen 4 Youth, LLC Southside Summerfest Events

Approve a request from Amen for Youth, LLC to host their Southside Summerfest Events on May 21, June 11, July 23, and August 27 in Elnora Moorman Plaza and on High Street in Jackson.

H. Special Event Application for the Together We Can Make a Difference National Day of Prayer

Approve a request from Together We Can Make a Difference to host their National Day of Prayer on May 5, 2022 in Austin Blair Park.

I. Special Event Application for the "Together We Can Make a Difference" Garden Contest

Approve a request from the Together We Can Make a Difference to host their Garden Contest on May 21, 2022 in the City of Jackson.

J. Special Event Application for the World Vision Inc. Walk/Run

Approve a request from World Vision Inc. to host their Walk/Run on May 7, 2022 in/around the Sparks Foundation ("Cascades") Park.

K. Special Event Application for the Jackson Interfaith Shelter Summer Block Party

Approve a request from the Jackson Interfaith Shelter to host their Summer Block Party on August 6, 2022 on the streets of Jackson.

L. Special Event Application for the Jackson Civil War Muster

Approve a request from the Jackson Civil War Society to host their Civil War Muster on August 27 & 28, 2022 in/around the Sparks Foundation ("Cascades") Park.

M. Special Event Application for the Cascades Cycling Club's Ride of Silence

Approve a request from the Cascades Cycling Club to host their Ride of Silence on May 18, 2022 on the streets of Jackson.

N. Special Event Application for Spring Fling

Approve a request from the Jackson Downtown Development Authority to host their Spring Fling on Sunday, May 1, 2022 from 11am - 4pm in downtown Jackson.

10. OTHER BUSINESS.

11. NEW BUSINESS.

A. Changes to the Standard Lighting Contract for Streetlights with Consumers Energy for the addition of five new streetlights

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

B. Resolution to Decertify a Street with MDOT

Approve a resolution to decertify Cleveland Place with the Michigan Department of Transportation (MDOT) and authorize the Mayor and City Clerk to execute the resolution.

C. Recommendation for approval of the resolution to increase the Department of Public Works fee to \$80.00 per invoiced property to cover the costs incurred by the City to administer and enforce the Noxious Weed Ordinance of the Jackson Code of Ordinances, Chapter 26, Article III, Regulation of Grass, Noxious Weeds, Shrubbery, and Trees on Privately Owned Property

Approval of the resolution to increase the Department of Public Works fee to \$80 per invoiced property to cover the costs incurred by the City to administer and enforce the

Noxious Weed Ordinance of the Jackson Code of Ordinances, Chapter 26, Article III, Regulation of Grass, Noxious Weeds, Shrubbery, and Trees on Privately Owned Property.

D. Accounts Receivable Write-Off Request

Approve the Accounts Receivable Write-Off Request.

E. Amendment 1 to the 20-005 E. High Street Bridge Rehabilitation Engineering Contract

Approval of Amendment 1 to the 20-005 E. High Street Bridge Rehabilitation Engineering contract with Hubbell, Roth & Clark, Inc. (HRC) of Bloomfield Hills, MI, at a not-to-exceed cost of \$65,500.00, and authorization for the City Manager and City Engineer to sign the appropriate document.

F. Contract Award for the Martin Luther King Equality Trail Lighting Improvement Project

Approval of an award of the contract for the Martin Luther King Equality Trail Lighting Improvements project from Weatherwax Road to Prospect Street to Cochran Electric of Jackson, Michigan, at a cost of \$606,195.49 and authorization for the Mayor and City Clerk to execute the appropriate document(s) in accordance with the Purchasing Agent.

G. Professional Services Agreement for Assessing Services

Approve Professional Services Agreement in the total amount of \$99,600 to Quality Assessing Services, LLC for assessment services starting May 1, 2022 through April 30, 2023.

H. Presentation of Revised Special Assessment Policy

Review the proposed, revised Special Assessment Policy.

I. Zoning Map Amendment – West Ganson Street

Recommend approval to rezone 600 Steward Avenue and 506 W. Ganson Street from C-2 Community Commercial to R-3, Multiple Family Residential.

J. Zoning Map Amendment – Greenwood Avenue

Recommend approval to rezone 223 W. Wilkins, 227 W. Wilkins and 229 W. Wilkins from R-2 One and Two Family Residential to R-4, High Density Apartment and Office and rezone 222 W. Biddle, 702 Greenwood, 714 Greenwood and 718 Greenwood from C-2 Community Commercial to R-4, High Density Apartment and Office.

K. Resolution Approving an Application to the Michigan Department of Transportation for a Transportation Economic Development Fund (TEDF) Category F Grant for improvements to the intersections of Blackstone Street at Louis Glick Highway and Blackstone Street at Lansing Avenue

Approve a resolution for application to the Michigan Department of Transportation (MDOT) for a Transportation Economic Development Fund (TEDF) Category F Grant, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for improvements to the intersections of Blackstone Street with Louis Glick Highway and with Lansing Avenue.

L. Parking Lot Construction at Jackson Fire Department Station #1

Approval of an award for a contract to repair the parking lot for the Jackson Fire Department's Central Station at 518 N. Jackson St, to the Isabella Corporation of Mt. Pleasant, Michigan, for \$537,000; authorization for the Mayor and City Clerk to execute the appropriate document(s) in accordance with the Purchasing Agent.

12. CLOSED SESSION

- A. Conduct closed session to discuss specific pending litigation in the case of Bremiller v City of Jackson, et al., Jackson County Circuit Court Case No. 21-3295-NI, pursuant to MCL 15.268(e).**

13. CITY COUNCILMEMBER'S COMMENTS.

14. MANAGER'S COMMENTS.

15. ADJOURNMENT.

Jackson District Library UPDATE



JDL IS FINE FREE

JDL administrators recognized that fine revenues represented less than .1% of our budget, yet created a barrier for patrons to access their library. In September 2021, JDL forgave all existing fines, and ended fine collection for all patrons.



**START A NEW
CHAPTER AT JDL**

WE ARE NOW FINE FREE

THE JDL BOOKMOBILE IS BACK

After nearly 40 years, JDL bring mobile services back to Jackson County residents who may have trouble accessing library services. JDL's Bookmobile has regular stops throughout the county and will be in attendance at community events throughout the year.



BROOKLYN BRANCH EXPANSION

The expansion of JDL's Brooklyn Branch, doubled the size of the building, allowing for separate youth and adult spaces, and created a meeting space for the community to use for programming and meetings.



IMPROVING ACCESS IN JACKSON

JDL partnered with JATA and the City of Jackson to provide free wireless Internet access on public buses and in Horace Blackman Park.

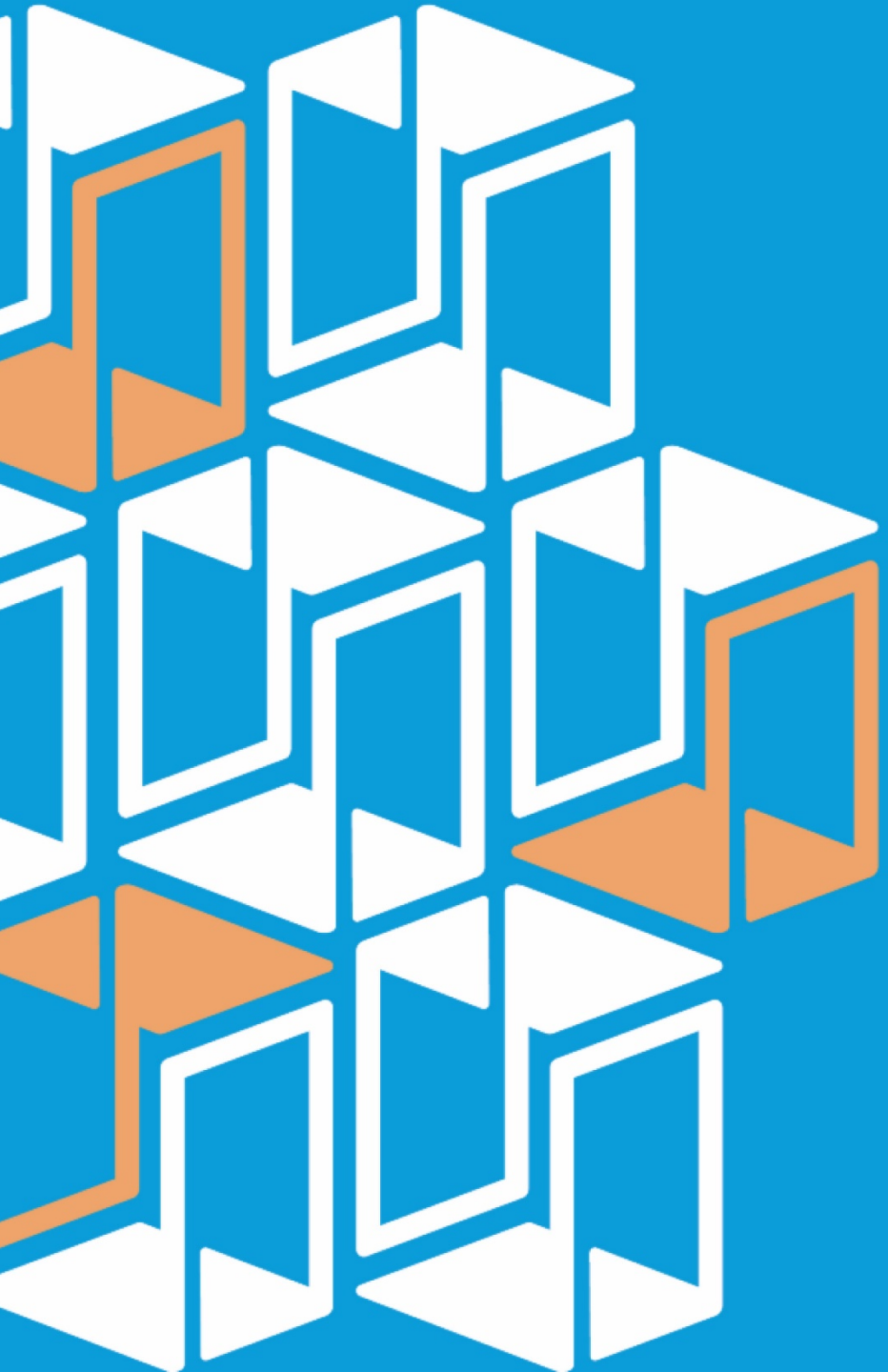


GRANTS & DONATIONS

In 2021 JDL received over \$60,000 in donations from foundations, businesses and personal donors. Over \$100,000 in grants were awarded to JDL.

Donations to JDL are used for on-going programming at all JDL branches including Storyfest and Young Poets Contest. Grants were written for Adult Literacy, Bookmobile, and facility improvements.





LOOKING
FORWARD

A NEW LIBRARY BRANCH

JDL recently purchased the former Spring Arbor Senior Center on Starr Street, where JDL will relocate the current Spring Arbor branch giving the community a larger, more up-to-date building.



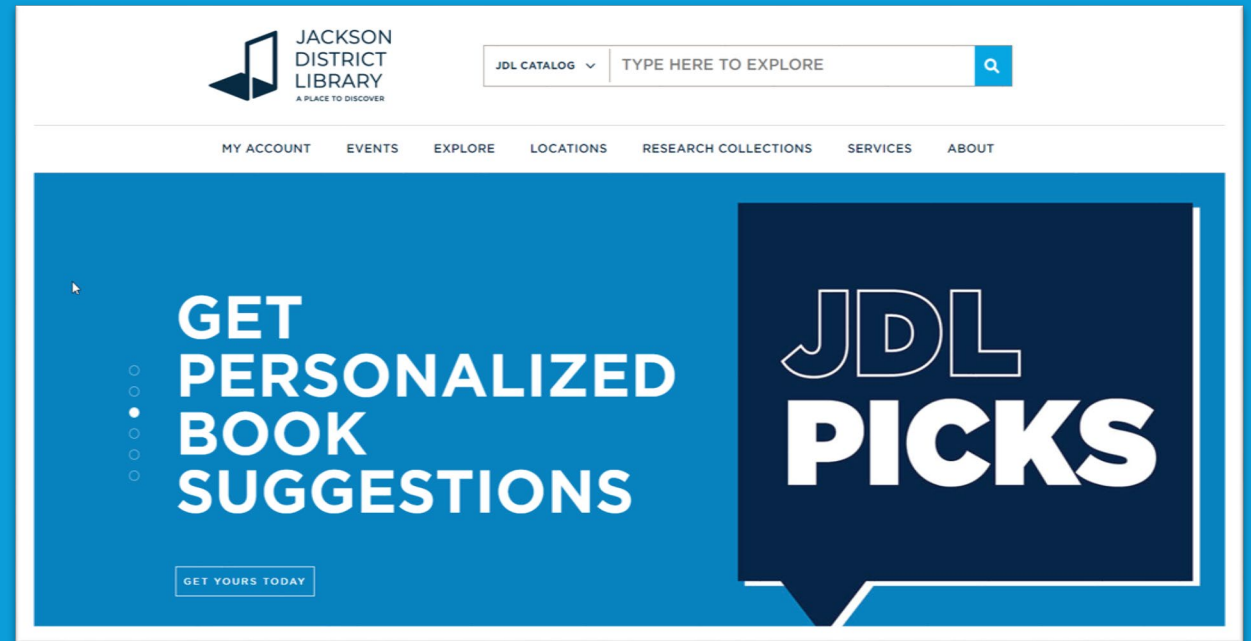
CARNEGIE LIBRARY FACE LIFT

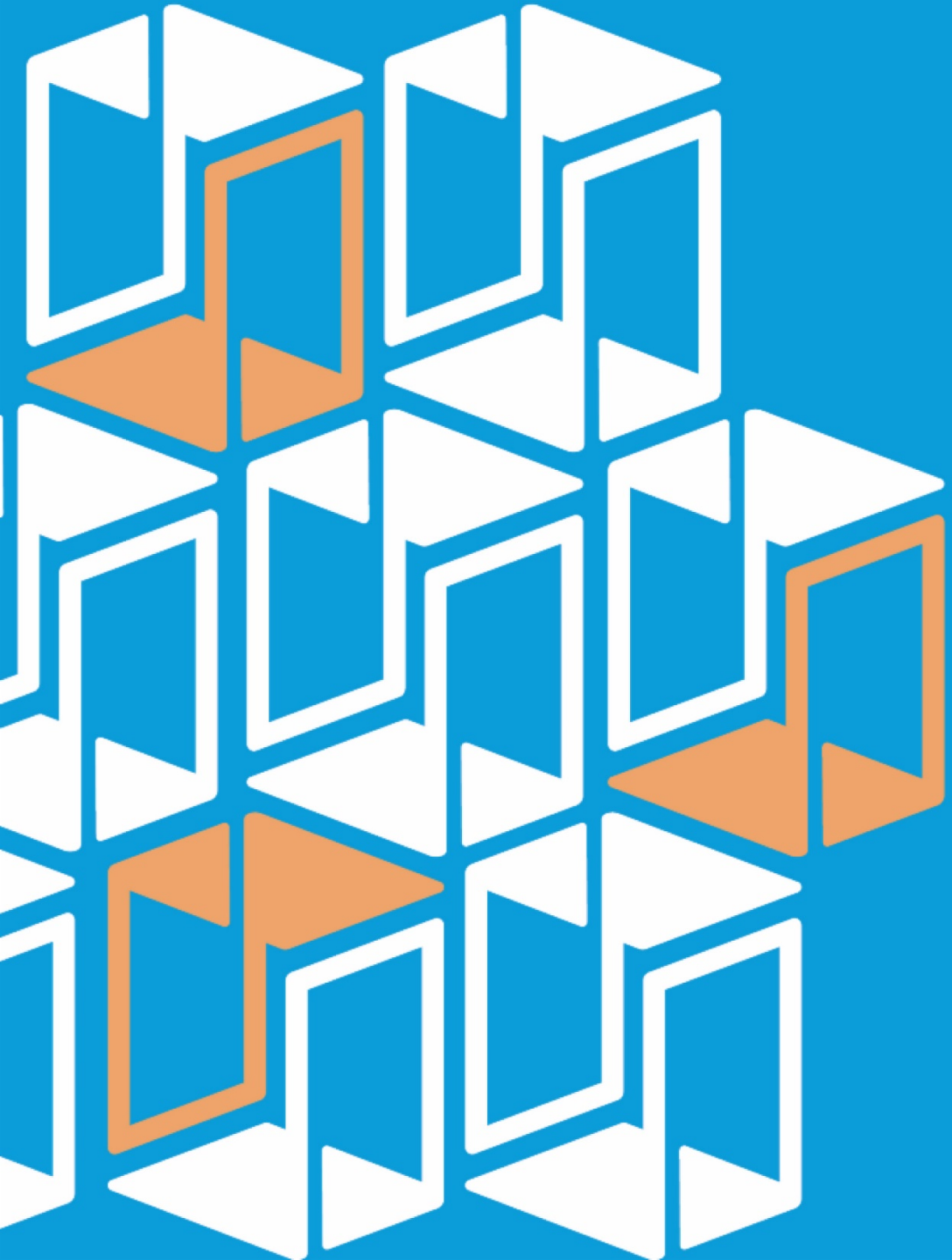
The Carnegie Library has been getting a full scale cleaning and repair of its masonry. Work began in the fall and will continue this spring. The children's area has been updated with paint, carpeting and lighting. Final touches on the building will include window repairs and new skylights.



A NEW WEBSITE

JDL will unveil a new website next month. The new site will have a fresh new look, offer easier access, and still have all of the online things users love about our current site.





PROGRAMMING AT JDL

JDL is looking forward to program offerings at all of our branches. April brings us the Poets Among Us: Young Poets Contest. JDL's Summer Reading Program begins soon and is for all members of the community. We will once again partner with JPS and the Meet up and Eat Up program this summer at which we offer outdoor programming at the Carnegie Library.





JACKSON
DISTRICT
LIBRARY

A PLACE TO DISCOVER



CITY COUNCIL MEETING MINUTES

April 5, 2022

CALL TO ORDER:

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

PLEDGE OF ALLEGIANCE AND INVOCATION:

Council joined in the Pledge of Allegiance. Invocation was given by Sixth Ward Councilmember Will Forgrave.

ROLL CALL:

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

Absent: Fourth Ward Councilmember Laura Dwyer Schlecte.

Also present: City Manager Jonathan Greene, City Attorney Matthew Hagerty, City Clerk Andrea Muray, City Assessor Jason Yoakam, Chief Equity Officer John Willis, Director of Neighborhood and Economic Operations Shane LaPorte, Downtown Development Authority Director Cory Mays, City Engineer Jon Dowling, and Director of Police and Fire Services Elmer Hitt.

ADOPTION OF AGENDA:

Motion was made by Councilmember Bunnell, seconded by Councilmember Dancy to adopt the agenda. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

PRESENTATIONS/PROCLAMATIONS: none.

PUBLIC HEARINGS: none.

CITIZEN COMMENTS:

Citizen comments were heard and the meeting continued.

PETITIONS & COMMUNICATION FROM CITY STAFF AND OTHER GOVERNMENTAL ENTITIES:

A. March Board of Review Meeting Minutes

Motion was made by Councilmember Forgrave, seconded by Councilmember Bunnell to accept and place on file the March Board of Review Meeting Minutes. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

B. Social District Update

Motion was made by Councilmember Forgrave, seconded by Councilmember Bunnell to accept and place on file the Social District Update. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

CONSENT CALENDAR:

A. Minutes of the Regular Meeting of March 22, 2022

Approve the minutes of the regular City Council Meeting of March 22, 2022.

B. Reappointments to the Jackson Area Transportation Authority

Approval and confirmation of the Mayor's recommendation to reappoint Chelsea Poole and Lezlie Bowles to the Jackson Area Transportation Authority Board of Directors, each for a term of three years, beginning immediately and ending on 3/31/25.

C. Approve a Revocable License for a Building Mounted Blade Sign at The Blue Julep at 143 W. Michigan Avenue

Approve a revocable license for The Blue Julep for the installation of a building mounted blade sign within the Michigan Avenue public right-of-way at 143 W. Michigan, and authorize the Mayor and City Clerk to execute the appropriate document(s).

D. Amend the Mayor's Recommended Appointment to the Environmental Commission

Amend the Mayor's recommendation to appoint Jane Flores to fill a vacancy on the Environmental Commission for a three-year term, beginning June 1, 2022 and expiring on May 29, 2025.

E. Approve a Resolution Supporting an Application for the RAISE (Rebuilding American Infrastructure with Sustainability and Equity) Grant to Improve the Martin Luther King, Jr. Drive Corridor between South Street and Morrell Street

Approve the RAISE grant resolution of support to reconstruct and redevelop Martin Luther King, Jr. Drive between South and Morrell Streets, with a City match of up to \$3,930,346.

Motion was made by Councilmember Bunnell, seconded by Vice Mayor Robinson to approve the consent calendar. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

OTHER BUSINESS:

A. Second Reading - Community Garden Ordinance

Approval of the Community Gardens Ordinance - as recommended by the Jackson City Planning Commission.

Motion was made by Vice Mayor Robinson, seconded by Councilmember Gunn to approve the Community Gardens Ordinance as recommended by the Jackson City Planning Commission. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

NEW BUSINESS:

A. Request to Adopt a Resolution Approving Selected Projects for Additional Funds for the 2023-2026 Transportation Improvement Plan (TIP)

Recommendation: *Adopt a resolution to approve the project list as selected for inclusion in the 2023-2026 Transportation Improvement Plan (TIP) and to acknowledge that the City is willing to pay the local match for the selected projects.*

Motion was made by Councilmember Forgrave, seconded by Vice Mayor Robinson to adopt a resolution to approve the project list as selected for inclusion in the 2023-2026 Transportation Improvement Plan (TIP) and to acknowledge that the City is willing to pay the local match for the selected projects. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

B. Changes to the Standard Lighting Contract for Streetlights with Consumers Energy for the Addition of Seven New Streetlights

Recommendation: *Approve the resolution for changes to the Standard Lighting Contract for seven streetlights with Consumers Energy and authorize the Mayor and City Clerk to execute the appropriate documents.*

Motion was made by Councilmember Bunnell, seconded by Councilmember Gunn to approve the resolution for changes to the Standard Lighting Contract for seven streetlights with Consumers Energy and authorize the Mayor and City Clerk to execute the appropriate documents. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

C. Request to Adopt a Resolution Approving the Project as Selected for the FY 2022 Federal Highway Funds Inclusion in the 2020-2023 Transportation Improvement Plan (TIP)

Recommendation: *Adopt a resolution to approve the project as selected for the FY 2022 Federal Highway Funds in the 2020-2023 Transportation Improvement Plan (TIP) and to acknowledge that the City is willing to pay the local match for the selected projects.*

Motion was made by Councilmember Forgrave, seconded by Councilmember Dancy to adopt a resolution to approve the project as selected for the FY 2022 Federal Highway Funds in the 2020-2023 Transportation Improvement Plan (TIP) and to acknowledge that the City is willing to pay the local match for the selected projects. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

D. Resolution to Apply for Local Bridge Program Funding Martin Luther King, Jr. Drive bridge over the Grand River

Recommendation: *Approve a resolution for application to the Michigan Department of Transportation (MDOT) for Local Bridge Funding, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for the Martin Luther King, Jr. Bridge over the Grand River.*

Motion was made by Vice Mayor Robinson, seconded by Councilmember Bunnell to approve a resolution for application to the Michigan Department of Transportation (MDOT) for Local Bridge Funding, authorize the Mayor and City Clerk to execute the resolution, and authorize the City Engineer to file an application for the Martin Luther King Jr. Bridge over the Grand River. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

E. Resolution to Apply for Local Bridge Program Funding for Preventative Maintenance for Three Bridges within the City of Jackson

Recommendation: *Approve a resolution for application to the Michigan Department of Transportation (MDOT) for Local Bridge Program Funding, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for Preventative Maintenance on three bridges within the City.*

Motion was made by Councilmember Dancy, seconded by Councilmember Forgrave to approve a resolution for application to the Michigan Department of Transportation (MDOT) for Local Bridge Program Funding, authorize the Mayor and City Clerk to execute the resolution, and authorize the City Engineer to file an application for Preventative Maintenance on three bridges within the City. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

F. Approve the Sale of the Hotel Hayes, City Owned Property Located at 228 W. Michigan Avenue to J. Jeffers & Co. for \$25,000

Recommendation: *Approve the sale of the Hotel Hayes, located at 228 W. Michigan Avenue to J. Jeffers & Co. of Milwaukee, Wisconsin for \$25,000.00. Authorize the City Manager to sign the Purchase Agreement and Property Transfer and Development Agreement; and any other authorized documents to complete the sale of the Property, making minor modifications as necessary.*

Motion was made by Councilmember Bunnell, seconded by Councilmember Gunn to approve the sale of the Hotel Hayes located at 228 W. Michigan Avenue to J. Jeffers & Co. of Milwaukee, Wisconsin for \$25,000.00, authorize the City Manager to sign the Purchase Agreement and Property Transfer and Development Agreement and any other authorized documents to complete the sale of the property making minor modifications as necessary. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Bunnell, and Forgrave (6). Nays: none. Motion carried.

CITY COUNCILMEMBER'S COMMENTS:

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

MANAGER'S COMMENTS:

City Manager Jonathan Greene offered comments.

ADJOURNMENT:

No further business being offered, a motion to adjourn was made by Councilmember Dancy, seconded by Councilmember Forgrave. Vote was done by voice with all in favor. Mayor Mahoney adjourned the meeting at 7:31 p.m.

MEMO TO: Mayor and City Councilmembers
FROM: Andrea Muray, City Clerk
DATE: April 19, 2022
SUBJECT: Receipt of Alley Vacation Petition

Recommendation:

Receipt of a petition circulated by Lawrence Pryor to vacate a public alley off of Milwaukee Street between Prospect and E. Addison Street.

Attached please find the subject petitions and map, circulated regarding a request for the alley vacation.

The procedure for an alley/street vacation calls for the petition to be review by the City Attorney's Office to verify its legality, the City Planning Commission to review and provide the Clerk's Office with a recommendation, and finally the item being presented to Council for consideration.

I recommend receipt of the petition and refer it to staff for appropriate action. Your consideration and concurrence is appreciated.

Martin Luther King Jr Dr

PROSPECT ST
E Prospect St

15 E MILWAUKEE ST

E Addison St

ADDISON ST



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:

AN EAST/WEST ALLEY IN BLOCK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD; LYING SOUTH OF E PROSPECT ST, WEST OF S MILWAUKEE ST, EAST OF S MARTIN LUTHER KING JR DR & NORTH OF E ADDISON ST. DESCRIBED AS BEGINNING AT THE SE CORNER OF LOT 1 OF SAID BLOCK 4. THENCE SOUTH ON THE WEST LINE OF S MILWAUKEE STREET TO NE CORNER OF LOT 25 OF SAID BLOCK, THENCE WEST TO NW CORNER OF LOT 19 OF SAID BLOCK THENCE NORTH TO SW CORNER OF LOT 14 OF SAID BLOCK, THENCE EAST TO THE SE CORNER OF LOT 1 OF SAID BLOCK AND POINT OF BEGINNING. JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADDITION CITY OF JACKSON, JACKSON COUNTY, 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:

OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
LESLIE F ANDERSON 140 E ADDISON ST JACKSON MI 49203 <i>Leslie F Anderson</i>	LOTS 23, 24 & 25 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD SPLIT/COMBINED ON 01/20/2013 FROM 5-174900000, 5-175000000, 5-175100000 5-1749.1000 140 E ADDISON ST	
(Please sign and print name and title of signator)		

*Needed for street vacations only.

Petition Circulated By:

Name:

Lawrence Pryor

Date:

7-10-21

Address:

130E Addison St

Signature

Lawrence Pryor

City, State, Zip:

JACKSON Mich 49203

Phone:

517-917-7490

*Lawrence Pryor
130E Addison St
JACKSON Mich 49203*

*4-5-2022
Lawrence Pryor
517-917-7490*

RECEIVED

CITY OF JACKSON

APR 06 2022

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:

AN EAST/WEST ALLEY IN BLOCK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD; LYING SOUTH OF E PROSPECT ST, WEST OF S MILWAUKEE ST, EAST OF S MARTIN LUTHER KING JR DR & NORTH OF E ADDISON ST. DESCRIBED AS BEGINNING AT THE SE CORNER OF LOT 1 OF SAID BLOCK 4. THENCE SOUTH ON THE WEST LINE OF S MILWAUKEE STREET TO NE CORNER OF LOT 25 OF SAID BLOCK, THENCE WEST TO NW CORNER OF LOT 19 OF SAID BLOCK THENCE NORTH TO SW CORNER OF LOT 14 OF SAID BLOCK, THENCE EAST TO THE SE CORNER OF LOT 1 OF SAID BLOCK AND POINT OF BEGINNING. JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADDITION CITY OF JACKSON, JACKSON COUNTY, 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:

OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
CITY OF JACKSON 161 W MICHIGAN AVE JACKSON MI 49201 JONATHAN GREENE TITLE: CITY MANAGER (Please sign and print name and title of signator)	LOTS 1 & 2 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD 5-173300000 1906 S MILWAUKEE ST FIRE STATION #2	
CITY OF JACKSON 161 W MICHIGAN AVE JACKSON MI 49201 JONATHAN GREENE TITLE: CITY MANAGER (Please sign and print name and title of signator)	LOT 15 BLK 4 FRANCIS ST ADD 5-186500000 133 E PROSPECT ST GREENSPACE	
CITY OF JACKSON 161 W MICHIGAN AVE JACKSON MI 49201 JONATHAN GREENE TITLE: CITY MANAGER (Please sign and print name and title of signator)	LOT 14 BLK 4 FRANCIS ST ADD 5-186400000 131 E PROSPECT ST	

RECEIVED
CITY OF JACKSON
APR 06 2022
CLERK'S OFFICE

Petition Circulated By:

Name: Lawrence Piper
 Address: 130 E Addison St
 City, State, Zip: JACKSON Mich 49203

Date: 4-5-20 22 By _____
 Signature: Lawrence Piper
 Phone: 517-917-7490

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:

AN EAST/WEST ALLEY IN BLOCK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD; LYING SOUTH OF E PROSPECT ST, WEST OF S MILWAUKEE ST, EAST OF S MARTIN LUTHER KING JR DR & NORTH OF E ADDISON ST. DESCRIBED AS BEGINNING AT THE SE CORNER OF LOT 1 OF SAID BLOCK 4. THENCE SOUTH ON THE WEST LINE OF S MILWAUKEE STREET TO NE CORNER OF LOT 25 OF SAID BLOCK, THENCE WEST TO NW CORNER OF LOT 19 OF SAID BLOCK THENCE NORTH TO SW CORNER OF LOT 14 OF SAID BLOCK, THENCE EAST TO THE SE CORNER OF LOT 1 OF SAID BLOCK AND POINT OF BEGINNING. JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADDITION CITY OF JACKSON, JACKSON COUNTY, 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:

OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
FRANCIS & PROSPECT LLC 29500 TELEGRAPH RD STE 110 SOUTHFIELD MI 48034	1739 LAND OWNED & USED AS ONE PARCEL & DESC AS ALL OF LOTS 7, 8, 18 & 19 ALSO E 26 FT OF LOT 9 & E 51 FT OF LOT 17 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 OF FRANCIS ST ADD & ALSO LOTS 9 & 11 BLK 4 FRANCIS ST ADD	
TITLE:		
(Please sign and print name and title of signator)		
5-186300000 VACANT LAND E PROSPECT ST		

*Needed for street vacations only.

Petition Circulated By:

Name: Lawrence Pryor
Address: 130 E. Addison
City, State, Zip: Jackson mich, 49203

Date: 4-5-2022
Signature: Lawrence Pryor
Phone: 517-917-7490

RECEIVED
CITY OF JACKSON
APR 06 2022
CLERK'S OFFICE
By _____

PETITION FOR STREET/ALLEY CLOSING

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

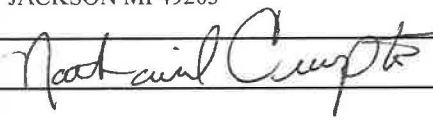
We the undersigned, being all of the persons owning property abutting on the street or alley, more particularly described as:

AN EAST/WEST ALLEY IN BLOCK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD; LYING SOUTH OF E PROSPECT ST, WEST OF S MILWAUKEE ST, EAST OF S MARTIN LUTHER KING JR DR & NORTH OF E ADDISON ST. DESCRIBED AS BEGINNING AT THE SE CORNER OF LOT 1 OF SAID BLOCK 4. THENCE SOUTH ON THE WEST LINE OF S MILWAUKEE STREET TO NE CORNER OF LOT 25 OF SAID BLOCK, THENCE WEST TO NW CORNER OF LOT 19 OF SAID BLOCK THENCE NORTH TO SW CORNER OF LOT 14 OF SAID BLOCK, THENCE EAST TO THE SE CORNER OF LOT 1 OF SAID BLOCK AND POINT OF BEGINNING. JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLOCKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADDITION CITY OF JACKSON, JACKSON COUNTY, STATE OF MICHIGAN.

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OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
NATHANIEL CRAMPTON 134 E ADDISON ST JACKSON MI 49203 	LOT 21 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD 5-174700000 134 E ADDISON ST	
(Please sign and print name and title of signator)		

*Needed for street vacations only.

Petition Circulated By:

Name: Lawrence Pryor

Date: 4-5-2022

Address: 130 E. Addison

Signature: Lawrence Pryor

City, State, Zip: Jackson Mich 49203

Phone: 517-917-7490

RECEIVED

CITY OF JACKSON

APR 06 2022

CLERK'S OFFICE

By _____

PETITION FOR STREET/ALLEY CLOSING

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

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OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
MICHAEL STEWART 132 E ADDISON ST JACKSON MI 49203	E 41 FT OF LOT 20 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD	
<i>Michael Stewart</i>		
7-10-2021	5-174600000 132 E ADDISON ST	
(Please sign and print name and title of signator)		

*Needed for street vacations only.

Petition Circulated By:

Name: Lawrence Rupp
Address: 120 E Addison St
City, State, Zip: Jackson Mich 49203

Date: 4-5-2022
Signature: Lawrence Rupp
Phone: 517-917-7490

RECEIVED
CITY OF JACKSON
APR 06 2022
CLERK'S OFFICE
By _____

PETITION FOR STREET/ALLEY CLOSING

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

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OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
MARCHITA D WILSON 137 E PROSPECT ST JACKSON MI 49203	W 37 FT OF LOT 6 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD	
MARCHITA D WILSON	5-173800000 137 E PROSPECT ST	
(Please sign and print name and title of signator)		

*Needed for street vacations only.

Petition Circulated By:

Name: Marchita Wilson
Address: 137 E Prospect
City, State, Zip: Jackson MI 49203

Date: July 10, 2021
Signature: Marchita Wilson
Phone: 782-4693

Lawrence Puy
130 E Addison St
Jackson Mich, 49203

4-5-2022
Lawrence Puy
517-917-7490

RECEIVED
CITY OF JACKSON
APR 06 2022
CLERK'S OFFICE
By _____

PETITION FOR STREET/ALLEY CLOSING

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


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OWNER OF PROPERTY & SIGNATURE/DATE	DESCRIPTION OF PROPERTY	LINEAL FEET OF FRONTAGE*
DREZHARAY LANGSTON 139 E PROSPECT ST JACKSON MI 49203	W 18 FT OF LOT 5 & E 19 FT OF LOT 6 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD	
DREZHARAY LANGSTON	5-173700000 139 E PROSPECT ST	
 7-11-2021		

*Needed for street vacations only.

Petition Circulated By:

Name: Lawrence Pugh

Date: 4-5-2022

Address: 130 E Addison St

Signature: Lawrence Pugh

City, State, Zip: Jackson Mich 49203

Phone: 517-917-7490

RECEIVED
CITY OF JACKSON
APR 06 2022
CLERK'S OFFICE
By _____

PETITION FOR STREET/ALLEY CLOSING

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KE'EISHA GLASPIE & DEMARQUAN THOMPSON 141 E PROSPECT ST JACKSON MI 49203	1735, 1736 LOTS 3 & 4 & E 38 FT OF LOT 5 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD	
KE'EISHA GLASPIE	5-173400000 141 E PROSPECT ST	
DEMARQUAN THOMPSON		

*Needed for street vacations only.

Petition Circulated By:

Name: *Demarquan Thompson*
Address: 141 E Prospect
City, State, Zip: Jackson MI, 49203

Date: 9/21/21
Signature: *Demarquan Thompson*
Phone: 872-702-1835

*Lawrence Pryor
130 E. Addison St
Jackson Mich 49203*

*4-5-2022
Lawrence Pryor
517-917-7490*

RECEIVED
CITY OF JACKSON
APR 06 2022
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By _____

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OSCAR GORE 136 E ADDISON ST JACKSON MI 49203	LOT 22 BLK 4 JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD	
<i>Oscar R. Gore</i> 7-10-2021	5-174800000 136 E ADDISON ST	
(Please sign and print name and title of signator)		

*Needed for street vacations only.

Petition Circulated By:

Name: *Lawrence Pryor*

Date: 4-5-2022

Address: 130 E Addison St

Signature: *Lawrence Pryor*

City, State, Zip: JACKSON m.ch 49203

Phone: 517-917-7490

RECEIVED

CITY OF JACKSON

APR 06 2022

CLERK'S OFFICE

By _____

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STEPHANIE BREEDLOVE 130 E ADDISON ST JACKSON MI 49203	LAND OWNED & USED AS ONE PARCEL & DESC AS E 26 FT OF LOT 16 BLK 4 FRANCIS ST ADD & W 1 FT OF LOT 20 BLK 4 OF JACKSON LAND & IMPROVEMENT CO'S SUB DIV OF BLKS 2 & 7 & PART OF BLKS 1, 3, 4, 5, 6, 11 & 12 FRANCIS ST ADD	
(Please sign and print name and title of signator)	5-186700000 130 E ADDISON ST	

*Needed for street vacations only.

Petition Circulated By:

Name: Stephanie Breedlove
Address: 130 E. Addison St
City, State, Zip: JACKSON, MI 49203

Date: 7-10-21
Signature: Stephanie Breedlove
Phone: _____

Lawrence Pryor
130 E. Addison St
JACKSON MICH 49203

4-5-2022
Lawrence Pryor
517-917-7490

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By _____

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VAN D KILGORE 128 E ADDISON ST JACKSON MI 49203	W 40.3 FT OF LOT 16 BLK 4 FRANCIS ST ADD 5-186600000 128 E ADDISON ST	

(Please sign and print name and title of signator)

*Needed for street vacations only.

Petition Circulated By:

Name: Jan D Kilgore
Address: 128 E Addison St
City, State, Zip: JACKSON MI 49203

Date: 06/07/21
Signature: [Handwritten Signature]
Phone: (517) 914-7400

Lawrence Pryor
130 E Addison St
Jackson Mich 49203

4-5-2022
Lawrence Pryor
517-917-7490

RECEIVED
CITY OF JACKSON
APR 06 2022
CLERK'S OFFICE
By _____

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Funding Letters for Pension Systems

Recommendation:

Receive the actuarial valuations as of June 30, 2021 for the Act 345 Policemen's & Firemen's Retirement Plan, the Employees Retirement System and the Policemen's and Firemen's Retirement System, and approve the actuarial funding necessary for the fiscal year 2022-2023.

Attached is a report from Philip Hones, Finance Director, regarding funding necessary for the fiscal year 2022-2023 per the actuarial valuations for the retirement systems.

I recommend approval of the funding letters. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Green, City Manager
FROM: Philip J. Hones, Finance Director
DATE: April 19, 2022



RECOMMENDATION: Receive the actuarial valuations as of June 30, 2021 for the Act 345 Policemen's & Firemen's Retirement Plan, the Employees Retirement System and the Policemen's and Firemen's Retirement System, and approve the actuarial funding necessary for the fiscal year 2022-2023.

SUMMARY

Attached with this report are letters of funding from the three City retirement systems, along with the valuation reports through June 30, 2021.

BUDGETARY CONSIDERATIONS

The recommended actuarial funding amounts for the City (employer contributions) approved by the pension boards are as follows:

Act 345 Policemen's & Firemen's Retirement Plan	\$5,674,911
Employees Retirement System	\$1,055,434
Policemens and Firemens Retirement System	\$ 260,185

HISTORY, BACKGROUND and DISCUSSION

Actuarial valuations are performed as of the end of each fiscal year to measure the pension systems' funding progress, to determine the employer contribution rate for the next fiscal year end (June 30, 2023), and to determine the actuarial information for Governmental Accounting Standards Board (GASB) Statement No. 67.

DISCUSSION OF THE ISSUE

Each year, the three City retirement systems (the Act 345 Retirement Plan, Employees Retirement System and Policemen's and Firemen's Retirement System), as required by the Act 345 of 1937 of Michigan, City of Jackson Code of Ordinances and City Charter, respectively, are required to certify to the City Council, for approval, the recommended contribution amounts to be made by the City to be paid into the funds.

POSITIONS

Requested action is to receive the actuarial reports and approve the letters of funding.

PJH/sms

ATTACHMENTS

April 19, 2022

The Honorable Mayor and
Members of the City Council
Jackson, Michigan

In accordance with Rule 15.1 of the City of Jackson Act 345 Retirement System, the Board of Trustees must certify to the City Council each year the amount of public funds needed to meet the requirements for annuities, benefits and other payments of the Retirement System for the ensuing fiscal year.

The adopted actuarial valuation of June 30, 2021 recommends that the 2022/23 contribution be as follows:

Employer (City) Contribution at 107.99% of payroll \$5,674,911

The computed employer contribution for the fiscal year ending June 30, 2023 is \$5,674,911, or 107.99% of total gross payrolls of the Police and Fire Department employees who are members of the Act 345 Retirement System. This is a decrease of \$264,920 from the fiscal year ending June 30, 2022 contribution amount of \$5,939,831, which was also 107.99% of total gross payrolls.

The return on actuarial value for the fiscal year was 11.1% compared to the assumed rate of return of 6.00%. The prior fiscal year's return on actuarial value was 7.4 % compared to the assumed rate of 6.00%

As of the valuation date, the Unfunded Actuarial Accrued Liability (UAAL) was \$31,931,143, and the funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) was 61.8%. At the time of last year's valuation, the UAAL was \$38,476,901, and the funded ratio was 55.2%.

The City is presently levying 9.61 mills to finance the Act 345 Retirement System. The tentative millage rate required to meet the recommended City contribution for the fiscal year 2022/2023 is 8.7 mills.

The Board of Trustees of the City of Jackson's Act 345 Retirement System hereby certifies to the City Council the amount of appropriation needed to operate said retirement system.

Sincerely,



Martin J. Griffin
Chairman

MJG/ss
Attachment

April 19, 2022

The Honorable Mayor and
Members of the City Council
Jackson, Michigan

In accordance with the Jackson City Code, Chapter 2, Section 2.534, the Board of Trustees of the City of Jackson Employees Retirement System shall annually certify to the City Council the contributions necessary to meet the requirements for annuities, benefits and other payments of the Retirement System for the ensuing fiscal year.

The adopted actuarial valuation of June 30, 2021 recommends that the 2022/23 contribution be as follows:

Employer (City) Contribution at 11.01 % of payroll \$1,055,434

The computed employer contribution for the fiscal year ending June 30, 2023 is \$1,055,434, or 11.01% of expected covered payroll. This is a decrease of \$48,571 from the fiscal year ending June 30, 2022 contribution amount of \$1,106,683, which was 12.27% of covered payroll.

The return on actuarial value for the fiscal year was 10.9% compared to assumed rate of return of 6.85%. The prior fiscal year's return on actuarial value was 6.5% compared to assumed rate of return of 6.85%.

As of the valuation date, the Unfunded Actuarial Accrued Liability (UAAL) is \$13,326,416, and the funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) is 76.3%. At the time of last year's valuation, the UAAL was \$15,291,823, and the funded ratio was 72.6%.

The Board of Trustees of the City of Jackson Employees Retirement System hereby certifies to the City Council the amount of appropriation needed to operate the retirement system.

Sincerely,



Heather Ehnis, Vice Chair
City of Jackson Employees Retirement System

HE/ss

Attachments

April 19, 2022

The Honorable Mayor and
Members of the City Council
Jackson, Michigan

In accordance with Serial Section 231, Section 19(f) of the City Charter, the Board of Trustees of the City of Jackson Policemen's & Firemen's Pension Fund must certify to the City Council each year the amount of public funds needed to meet the requirements for said Fund for the ensuing fiscal year.

The adopted actuarial valuation of June 30, 2021 recommends that the 2022/23 contribution be as follows:

Employer (City) Contribution \$ 260,185

The computed employer contribution for the fiscal year ending June 30, 2022 is \$260,185. This compares with the employer contribution for the fiscal year ending June 30, 2021 of \$363,236—a decrease of \$103,051.

The return on actuarial value for the fiscal year was 12.0% compared to the assumed rate of return of 6.0%. The prior fiscal year's return on actuarial value was 9.2%.

As of the valuation date, the Unfunded Actuarial Accrued Liability (UAAL) is \$1,596,158 and the funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) is 69.1%. At the time of last year's valuation, the UAAL was \$2,480,320 and the funded ratio was 57.3%.

The Board of Trustees of the City of Jackson's Policemen's and Firemen's Pension Fund hereby certifies to the City Council the amount of \$260,185 as the appropriation needed to operate said Fund in accordance with the City Charter and the State Constitution and in accordance with the computations of the actuary for the Fund.

Sincerely,



Martin Griffin, Chairman
City of Jackson Policemen's and Firemen's Pension Fund

MG/ss

City of Jackson Act 345 Policemen and Firemen Retirement System

Actuarial Valuation Report
as of June 30, 2021



Outline of Contents

Actuarial Valuation Report as of June 30, 2021

Pages	Items
--	Cover Letter
1-5	<i>Executive Summary</i>
	<i>Valuation Results and Comparative Information</i>
A-1	Funding Objective, Contribution Rates
A-2/3	Contributions to Fund Benefits, Employer Dollar Contributions
A-4	Experience Gain (Loss)
A-5	Development of Actuarial Value of Retirement System Assets
A-6	Valuation Results, Comparative Schedule
A-7	Funded Ratio Projection
A-8	Projected Future Employer Contribution Schedule
A-9	Summary Statement of System Resources and Obligations
A-10	Other Observations
A-11/12	Risk Measures
	<i>Summary of Benefit Provisions and Valuation data</i>
B-1/4	Summary of Act 345 Benefit Conditions
B-5/7	Retired Life Data
B-8/9	Active Members Data
B-10	Asset Information Submitted for Valuation
	<i>Funding Objective, Summary of Valuation Process, Methods and Assumptions</i>
C-1/2	Basic Funding Objective and Operation of the Retirement System
C-3/4	Actuarial Valuation Process
C-5/6	Actuarial Cost Method
C-7/11	Actuarial Assumptions
C-12	Miscellaneous and Technical Assumptions
C-13	Glossary





January 31, 2022

Board of Trustees
City of Jackson Act 345 Policemen and
Firemen Retirement System
Jackson, Michigan

**Re: City of Jackson Act 345 Policemen and Firemen Retirement System
Actuarial Valuation as of June 30, 2021**

Dear Board Members:

The results of the June 30, 2021 Annual Actuarial Valuation of the City of Jackson Act 345 Policemen and Firemen Retirement System are presented in this report.

This report was prepared at the request of the Board and is intended for use by the Retirement System and those designated or approved by the Board. This report may be provided to parties other than the System only in its entirety and only with the permission of the Board. GRS is not responsible for unauthorized use of this report.

The purposes of the valuation are to measure the System's funding progress and to determine the employer contribution rate for the fiscal year ending June 30, 2023 (beginning July 1, 2022). Information required by Statement Nos. 67 and 68 of the Governmental Accounting Standards Board (GASB) are provided in separate reports. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results associated with the benefits described in this report for purposes other than those identified above may be significantly different.

The contribution amount in this report is determined using the actuarial assumptions and methods disclosed in Section C of this report. This report includes risk measures on pages A-11 and A-12 but does not include a more robust assessment of the risks of future experience not meeting the actuarial assumptions. Additional assessment of risks was outside the scope of this assignment. We encourage a review and assessment of investment and other significant risks that may have a material effect on the System's financial condition.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed.

The findings in this report are based on data and other information through June 30, 2021. This valuation was based upon information furnished by the City, concerning Retirement System benefits, financial statements, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by the City.

This report was prepared using assumptions adopted by the Board. All actuarial assumptions used in this report are reasonable for the purposes of this valuation.

This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

This report has been prepared by actuaries who have substantial experience valuing public employee retirement systems. To the best of our knowledge, the information contained in this report is accurate and fairly presents the actuarial position of the System as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices, and with the Actuarial Standards of Practice issued by the Actuarial Standards Board.

Abra D. Hill, James R. Sparks and Derek Henning are Members of the American Academy of Actuaries (MAAA) and meet the Academy's Qualification Standards to render the actuarial opinions contained herein.


The signing actuaries are independent of the plan sponsor.

Gabriel, Roeder, Smith & Company will be pleased to review this valuation report with the Board of Trustees and to answer any questions pertaining to the valuation.

Respectfully submitted,
Gabriel, Roeder, Smith & Company


Abra D. Hill, ASA, FCA, MAAA


James R. Sparks, ASA, FCA, MAAA


Derek Henning, ASA, EA, MAAA
ADH/JRS/DH:dj



EXECUTIVE SUMMARY

Executive Summary

	<u>Valuation Results</u>	<u>Valuation Results</u>
Valuation Date	June 30, 2020	June 30, 2021
Contribution for Fiscal Year Ending	June 30, 2022	June 30, 2023
Assumed Investment Rate of Return	6.00%	6.00%
Recommended Employer Contributions		
Annual Amount	\$ 5,939,831	\$ 5,674,911
Percentage of Projected Covered Payroll	107.99%	107.99%
Membership		
Number of		
Active Members	66	67
Retirees and Beneficiaries	171	178
Inactive, Non-retired Members	4	4
Total	<u>241</u>	<u>249</u>
Total Active Member Payroll	\$ 5,184,829	\$ 4,953,225
Total Pensions Being Paid	\$ 5,146,411	\$ 5,505,933
Assets		
Market Value	\$46,605,620	\$58,190,807
Actuarial Value	47,343,222	51,724,559
Return on Market Value	2.8%	26.9%
Return on Actuarial Value	7.4%	11.1%
Ratio - Actuarial Value to Market Value	101.6%	88.9%
Actuarial Information		
Normal Cost %	19.29%	17.47%
Actuarial Accrued Liability (AAL)	\$85,820,123	\$83,655,702
Unfunded Actuarial Accrued Liability (UAAL)	38,476,901	31,931,143
Funded Ratio	55.2%	61.8%
Amortization Period (Active UAAL as of 6/30/2015)	9 years	8 years
Amortization Period (Retired UAAL as of 6/30/2015)	5 years	4 years
Amortization Period (Future (Gains)/Losses on UAAL)	15 years	15 years

Highlights/Changes

- Experience during the year was favorable in aggregate:
 - Investment return for the year was 26.9% on a market value basis. The rate of return on an Actuarial Value of Assets basis was 11.12% versus 6.00% assumed;
 - Actuarial liability gains due to more non-vested terminations than anticipated (6 actual vs 3.1 expected)

The Executive Summary gives an overview of the report. It cannot be used as a substitute for a thorough reading of the full report.

Executive Summary

Actuarial Valuation

This report presents the actuarial valuation of the City of Jackson Act 345 Policemen and Firemen Retirement System prepared as of June 30, 2021. Valuations are prepared annually.

The primary purposes of the valuation report are to measure the System's liabilities, to determine the required employer contribution rate based upon the System's funding policy and to analyze changes in the System's actuarial position.

In addition, the report provides summaries of the member data, financial data, plan provisions, and actuarial assumptions and methods.

Financing Objectives

The System is supported by member contributions, employer contributions, and net earnings on the investments of the fund. The employer contribution is determined by the actuarial valuation.

The combined member and employer contributions are intended to be sufficient to pay the normal cost and to amortize the Unfunded Actuarial Accrued Liability (UAAL). The UAAL as of June 30, 2021 is financed over multiple level percent of pay closed periods of no greater than 15 years. Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes in future years are to be amortized over a closed period not exceeding 15 years beginning with the valuation year in which they arise. The sources and financing of the UAAL are shown on page A-2.

Amortization Policy

In conjunction with the Funding Policy Study dated April 11, 2016, the Board approved an alternate funding policy. The newly adopted funding policy reduced the 20-year open level percent of pay amortization for the Active UAAL as of 6/30/2015 to a 15-year closed amortization period. The 12-year closed amortization period for the Retiree UAAL as of 6/30/2015 was unchanged at that time.

In conjunction with the Funding Policy Study dated March 21, 2018, the Board adopted to reduce the above amortization periods (13-years and 10-years remained as of the June 30, 2017 valuation) down one additional year to 12-year and 9-year closed amortizations respectively.

In conjunction with the Assumption Review Study dated January 18, 2019, the Board adopted to reduce the remaining 9-year closed amortization for the Retiree UAAL as of 6/30/2015 to an 8-year closed amortization (as of June 30, 2017 Actuarial Valuation, but not effective until the June 30, 2018 Actuarial Valuation). The 12-year closed amortization period for the Active UAAL as of 6/30/2015 was unchanged at that time.

As of the June 30, 2021 Actuarial Valuation, the closed amortization for the Retiree UAAL as of 6/30/2015 is now at 4 years and the amortization for the Active UAAL as of 6/30/2015 is now at 8 years. Additional (increases)/decreases in the UAAL beyond 6/30/2015 were amortized over separate 15-year closed periods beginning in the year they arose.

Future (increases)/decreases to the UAAL will be amortized separately ("new layers") over 15-year closed amortization periods. This "layered amortization" approach developed an "amortization schedule" of contribution rates which can be viewed at the bottom of page A-2. The most recent layer was created during this past 2021 Fiscal Year. This schedule may require periodic review by the Board.



Executive Summary

Contribution Requirement

The recommended employer contribution for the fiscal year ending June 30, 2023 (beginning July 1, 2022) is \$5,674,911, or 107.99% of projected covered payroll. By coincidence, there was no change as a percent of projected covered payroll from the recommended contribution rate for fiscal year ending June 30, 2022. The computed dollar employer contribution, however, declined by 4.5% from the prior year's recommended employer contribution (the dollar amount is expected to increase by 3.0% if all assumptions are met). See page A-2 for a detailed breakdown of the recommended employer contribution.

This valuation assumes that the plan sponsor will be able to make future contributions on a timely basis. Failure to receive the recommended employer contributions on a timely basis could jeopardize the sustainability of the System. We did not perform an analysis of the ability of the plan sponsor to make future contributions. Such an analysis is not within the scope of our assignment or within our analytical skill set.

Assets

The Actuarial Value of Assets is a smoothed Market Value. A smoothed value is used in order to dampen some of the year-to-year fluctuations in valuation results that would occur if the Market Value were used each year. The Actuarial Value of Assets (AVA) as of June 30, 2021 was \$51,724,559. The Market Value of Assets (\$58,190,807) is currently higher than the Actuarial Value of Assets by \$6,466,248 as of the valuation date (see page A-5). The excess investment returns for the 2021 fiscal year will continue to be recognized over the next three years. If the System earns the assumed rate of investment return (6.00%) over each of the next three years, there will be upward pressure on the funded status as the returns from the 2021 fiscal year continue to be recognized into the Actuarial Value of Assets.

Currently, there is no limit set by the Board for how far the Actuarial Value of Assets may deviate from the Market Value of Assets. The Board may wish to implement a "corridor," which restricts the Actuarial Value of Assets to a range of the Market Value of Assets (such as +/- 20%). In the current environment, restricting the Actuarial Value of Assets to between 80% and 120% of the Market Value of Assets will not change the Actuarial Value of Assets, as it is already between 80% and 120%.

Funded Status

As of the valuation date, the Actuarial Accrued Liability (AAL) was \$83,655,702 and the Actuarial Value of Assets (AVA) was \$51,724,559, resulting in an Unfunded Actuarial Accrued Liability (UAAL) of \$31,931,143. The funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) was 61.8%. At the time of last year's valuation, the UAAL was \$38,476,901, and the funded ratio was 55.2%. Currently, the Actuarial Value of Assets is only 88.9% of the Market Value of Assets. On a Market Value of Assets basis, the funded ratio would have been 69.6%. See page A-6 for a historical schedule of funded ratios.

The Funded Status and Unfunded Actuarial Accrued Liability are not appropriate for assessing the sufficiency of plan assets to cover the estimated cost of settling the plan's benefit obligations. By themselves, these measures are not appropriate for assessing the need for or the amount of future employer contributions.



Executive Summary

Plan Provisions

Effective July 1, 2012, new hires enter into a hybrid defined benefit and defined contribution plan.

Effective July 1, 2016, additional plan provision changes adjusted the retirement eligibility, benefit formula, and member contribution rates of members hired prior to and after the implementation of the hybrid plan. See Section B of the report for a summary of the updated benefit provisions. Further information regarding the new labor agreements can be found in the supplemental actuarial valuation dated December 1, 2017.

The June 30, 2021 Actuarial Valuation is based upon the current labor agreements that are in effect.

Actuarial Assumptions and Methods

No changes in actuarial assumptions or methods were made for the June 30, 2021 Actuarial Valuation.

Actuarial Experience

Net experience of the Retirement System was favorable during the year ending June 30, 2021, resulting in a gain of about \$3.3 million (3.9% of the prior year's Actuarial Accrued Liabilities). \$2.4 million of the \$3.3 million gain is attributable to recognized investment return (on the Actuarial Value of Assets) above the assumed rate of 6.00%. The remaining \$900 thousand is attributable to liability gains on System experience during the year.

The investment rate of return for the fiscal year ending 2021 on a Market Value basis was 26.89%, and 11.12% on an Actuarial Value basis. The reason these figures differ is because the Actuarial Value of Assets smooths prior investment gains and losses over a four-year period.

Additional gains to the System occurred as a result of more non-vested terminations of active members than assumed (6 members versus 3.1 assumed).

Looking Ahead

Future employer contributions in the absence of actuarial gains or losses are expected to remain fairly level as a percent of payroll over the next four years (fiscal years ending 2023-2026). After four years, the computed employer contribution rate is expected to nearly halve. Additionally, the total Normal Cost for new hires is expected to be lower than that of current active members. As new hires replace the current active population, the total contribution rate is expected to further decline. See page A-7 and A-8 for projected future contributions based upon the Board's Funding Policy.

Executive Summary

Public Act 202

Public Act 202 (PA 202) was signed into law December 20, 2017 and requires local units of government to electronically submit Form 5572 to the Michigan Department of Treasury (DOT) on an annual basis to evaluate the funded status of the retirement pension system. The local unit of government is considered underfunded if the actuarial accrued liability of a retirement pension system is less than 60% funded, and if the annual required contribution for all of the retirement systems of the local unit of government is greater than 10% of annual general fund operating revenues. An underfunded local unit of government is required to develop and submit for approval a corrective action plan for the local unit of government.

The Michigan State Treasurer has established uniform actuarial assumptions as required by PA 202 for use with the annual Form 5572 (Retirement System Annual Report). The use of the uniform assumptions for reporting was first required for the 2020 fiscal year.

The current valuation assumptions and/or methods used by the System match or fall in the range of uniform assumptions established by the Treasurer for PA 202 reporting purposes.

SECTION A

VALUATION RESULTS AND COMPARATIVE INFORMATION

Funding Objective

The funding objective of the Retirement System is to establish and receive contributions throughout the working lifetime of the members which, when combined with investment earnings, are sufficient to provide benefits during retirement.

Contribution Rates

The Retirement System is supported by member contributions, City contributions and investment income from Retirement System assets.

Contributions which satisfy the funding objective are determined by the annual actuarial valuation and are sufficient to:

- (1) Cover the actuarial present value of benefits allocated to the current year by the actuarial cost method described in Section C (the normal cost); and
- (2) Finance over a period of future years the actuarial present value of benefits not covered by valuation assets and anticipated future normal costs (Unfunded Actuarial Accrued Liability).

Computed contribution rates for the fiscal year beginning June 30, 2022 are shown on page A-2.

Contributions to Fund Benefits Expressed as Percent of Active Member Payroll for the Fiscal Year Ending June 30

Contributions For Fiscal Year Ending June 30,	2022	2023
Normal Cost		
Age & service	15.91 %	14.28 %
Casualty	2.22	2.15
Refunds	1.16	1.04
Total	19.29	17.47
Member contributions*	9.34	8.40
Employer Normal Cost	9.95	9.07
Unfunded Actuarial Accrued Liability		
Retirants and beneficiaries (as of 6/30/2015)	53.05	56.00
Active members (as of 6/30/2015)	30.17	32.53
Experience (Gain)/Loss in Fiscal Years 2016+	2.18	(3.23)
Changes in Benefit Provisions	(1.84)	(1.98)
Changes in Actuarial Assumptions/Methods	14.48	15.61
Total	98.04	98.92
Recommended Employer Contribution Rate	107.99 %	107.99 %
Recommended Employer Contribution Dollar Amount	\$5,939,831	\$5,674,911

* Computed as an average rate based upon expected average contributions for the 2021 and 2022 fiscal years, respectively. This rate is anticipated to decline as Non-Hybrid members are replaced with Hybrid members.

Detailed Illustration of Employer Contribution for Unfunded Actuarial Accrued Liability

Year Established	Amortization Period (Yrs)		Unfunded Actuarial Accrued Liability (UAAL)		UAAL Contribution for Fiscal Year Ending June 30, 2023	
	Initial	Remaining	Initial Amount*	Amount as of Valuation Date June 30, 2021	Dollar	% of Pay
Retiree Unfunded Actuarial Accrued Liability as of 6/30/2015						
6/30/2015	12	4	\$ 21,017,653	\$ 13,329,389	\$ 2,942,819	56.00%
Active Unfunded Actuarial Accrued Liability as of 6/30/2015						
6/30/2015	15	8	\$ 16,718,160	\$ 12,969,179	\$ 1,709,152	32.53%
(Gain)/Loss Amortization Layers (Fiscal Years 6/30/2016 and thereafter)						
<i>Changes from Experience</i>						
6/30/2016	15	10	\$ (46,697)	\$ (43,360)	\$ (4,805)	(0.09)%
6/30/2017	15	11	(160,450)	(155,203)	(15,981)	(0.30)%
6/30/2018	15	12	797,719	798,579	76,933	1.46%
6/30/2019	15	13	805,286	831,636	75,401	1.43%
6/30/2020	15	14	(89,709)	(95,092)	(8,155)	(0.16)%
6/30/2021	15	15	(3,321,864)	(3,321,864)	(293,179)	(5.58)%
<i>Changes from Benefit Provisions</i>						
6/30/2017	15	11	\$ (1,046,749)	\$ (1,012,516)	\$ (104,255)	(1.98)%
<i>Changes from Actuarial Assumptions/Methods & Non-recurring Items</i>						
6/30/2018	15	12	\$ 6,672,309	\$ 6,679,503	\$ 643,485	12.25%
6/30/2019	15	13	1,889,080	1,950,892	176,879	3.37%
Total UAAL Contribution				\$ 31,931,143	\$ 5,198,294	98.92%

* A negative UAAL initial amount represents actuarial gains or other reductions to liabilities versus expectations.



Determining Employer Dollar Contributions

For any period of time, the percent-of-payroll contribution rate needs to be converted to dollars.

The recommended procedure when the population is stable is: (1) at the end of each payroll period, multiply the active member payroll for the period by the employer contribution percent; and (2) promptly contribute the dollar amount so determined.

The total active member payroll used for this valuation was \$4,953,225. Applying the computed employer contribution rate of 107.99% to this payroll and adjusting for the time lag between the valuation date and the assumed contribution period (July 1, 2022 to June 30, 2023) produces a recommended employer contribution of \$5,674,911 for the 2023 fiscal year.

In an environment when the population is projected to decline by the time contributions are made, we recommend contributing the dollar amount shown above.

Actual employer contributions made to the trust for the last completed fiscal year were \$5,916,061.

For Illustrative Purposes, the Actuarial Value of Assets of \$51,724,559 were allocated as shown below. Please see page A-5 for information concerning the derivation of the Actuarial Value of Assets.

Reserves for	Present Valuation Assets Applied to			Totals
	Member Actuarial Accrued Liability	Retired Life Actuarial Liability	Contingency Reserve	
Employees' Contributions	\$4,898,638			\$ 4,898,638
Employer Contributions		\$93,155,534		93,155,534
Retired Benefit Payments		(46,329,613)		(46,329,613)
Totals	\$4,898,638	\$46,825,921	none	\$51,724,559

Experience Gain (Loss) June 30, 2021

	Actuarial Accrued Liability (A)	Actuarial Value of Assets (B)	Unfunded Actuarial Accrued Liability (C) = (A) - (B)
(1) Value at start of year	\$85,820,123	\$47,343,222	\$38,476,901
(2) Normal cost	1,030,158	N/A	1,030,158
(3) Actual contributions	N/A	6,401,525	(6,401,525)
(4) Disbursements	(7,237,277)	(7,237,277)	-
(5) Interest accrual	4,962,994	2,815,521	2,147,473
(6) Expected value before changes	84,575,998	49,322,991	35,253,007
(7) Increase due to plan amendment	-	-	-
(8) Increase due to revised assumptions	-	-	-
(9) Expected value after changes	84,575,998	49,322,991	35,253,007
(10) Actual value at end of year	83,655,702	51,724,559	31,931,143
(11) Gain/(loss) (9) - (10) for Liabilities (10) - (9) for Assets	\$ 920,296	\$ 2,401,568	\$ 3,321,864

The total experience gain of \$3,321,864 is to be amortized over a level percent-of-pay closed 15-year period (with a negative amortization payment). See the section titled Amortization Policy on page 2 a description of the amortization policy.

Valuation Date June 30,	Total Actuarial Gain/(Loss)
2012	\$ (4,929,000)
2013	696,000
2014	2,300,160
2015	(666,196)
2016	(46,697)
2017	(160,450)
2018	797,719
2019	805,286
2020	89,709
2021	3,321,864

Development of Actuarial Value of Retirement System Assets

Year Ended June 30:	2020	2021	2022	2023	2024
A. Actuarial Value Beginning of Year	\$43,866,351	\$47,343,222			
B. Market Value End of Year	46,605,620	58,190,807			
C. Market Value Beginning of Year	45,121,148	46,605,620			
D. Non-Investment Net Cash Flow	\$210,375	(835,752)			
D1. Projected Rate of Return	6.00%	6.00%			
E. Investment Income					
E1. Market Total: B – C – D	1,274,097	12,420,939			
E2. Amount for Immediate Recognition:					
D1 * (A + D / 2)	2,638,292	2,815,521			
E3. Amount for Phased-In Recognition: E1-E2	(1,364,195)	9,605,418			
F. Phased-In Recognition of Investment Income					
F1. Current Year: 0.25 x E3	(341,049)	2,401,355			
F2. First Prior Year	(55,714)	(341,049)	\$ 2,401,355		
F3. Second Prior Year	396,977	(55,714)	(341,049)	\$ 2,401,355	
F4. Third Prior Year	627,990	396,976	(55,714)	(341,048)	\$ 2,401,353
F5. Total Recognized Investment Gain:					
F1 + F2 + F3 + F4	628,204	2,401,568	2,004,592	2,060,307	2,401,353
G. Actuarial Value End of Year: A + D + E2 + F5	47,343,222	51,724,559			
H. Difference Between Market & Actuarial Value	(737,602)	6,466,248			
I. Ratio of Actuarial to Market Value of Assets	101.6%	88.9%			
J. Recognized Rate of Return	7.43%	11.12%			
K. Market Rate of Return	2.82%	26.89%			

The Actuarial Value of Assets recognizes assumed investment income (line E2) fully each year. Differences between actual and assumed investment income (line E3) are phased-in over a four-year period. During periods when investment performance exceeds the assumed rate, Actuarial Value of Assets will tend to be less than Market Value. During periods when investment performance is less than the assumed rate, Actuarial Value of Assets will tend to be greater than market value. The Actuarial Value of Assets is intended to be unbiased with respect to market Value.



Valuation Results Comparative Schedule

Valuation Date June 30,	Valuation Payroll	Actuarial Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded Actuarial Liability (UAAL)	Funded Ratio	Amortization Periods of UAAL			Computed Employer Contribution				
						Total/Active	Retired	(Gain)/Loss [^]	FYE	%	Recommended	Actual	
1985	\$ 1,928,000	\$ 11,952,650	\$ 3,651,133	\$ 8,301,517	30.5 %	31 yrs.				1987	31.80 %	\$ 664,265	\$ 671,002
1986	1,907,000	13,147,141	4,291,075	8,856,066	32.6	30				1988	33.62	694,603	701,708
1987 (a)	2,038,000	14,468,307	5,493,437	8,974,870	38.0	29				1989	33.50	739,880	739,880
1988	2,381,000	16,096,433	6,164,578	9,931,855	38.3	28				1990	33.07	853,381	853,381
1989	2,660,000	19,379,056	6,723,554	12,655,502	34.7	27				1991	36.18	1,042,702	1,042,702
1990 (b)	3,801,000	26,202,014	7,793,748	18,408,266	29.7	26				1992	38.43	1,582,581	1,582,581
1991 (a)	4,049,000	27,711,002	8,334,922	19,376,080	30.1	25				1993	39.18	1,719,200	1,719,200
1992	4,299,000	29,780,358	9,670,249	20,110,109	32.5	24				1994	39.28	1,829,821	1,829,821
1993	4,502,000	31,421,808	10,423,845	20,997,963	33.2	23				1995	40.05	1,953,923	1,953,923
1994 (a)	4,778,000	34,594,939	11,429,000	23,165,939	33.0	22				1996	40.81	2,097,978	2,097,978
1995	5,119,000	36,641,978	13,099,449	23,542,529	35.7	21				1997	40.39	2,224,513	2,224,513
1996	5,381,000	38,080,137	15,136,941	22,943,196	39.8	20				1998	39.46	2,284,381	2,284,381
1997	5,498,000	39,109,052	17,657,404	21,451,648	45.1	19				1999	38.38	2,270,386	2,270,386
1998 (a)	5,697,000	39,553,492	21,277,144	18,276,348	53.8	18				2000	33.63	2,051,490	2,051,490
1999	5,598,000	40,911,155	24,372,290	16,538,865	59.6	17				2001	32.72	1,970,575	1,970,575
2000	5,772,726	42,660,487	27,747,780	14,912,707	65.0	16				2002	30.88	1,882,139	1,882,139
2001	5,942,253	44,125,761	29,554,922	14,570,839	67.0	15				2003	29.86	1,895,548	1,895,548
2002 (a)	6,071,301	45,681,002	28,905,621	16,775,381	63.3	14				2004	33.81	2,192,507	2,192,507
2003 (a)	6,213,210	47,131,125	27,836,691	19,294,434	59.1	13				2005	37.16	2,466,634	2,466,634
2004 (a)	6,138,055	49,059,955	27,218,077	21,841,878	55.5	12				2006	41.89	2,807,991	2,327,991
2005 (a)	6,321,086	51,434,111	27,760,835	23,673,276	54.0	11				2007	44.89	3,098,776	3,098,776
2006	6,598,038	53,569,342	29,893,085	23,676,257	55.8	10				2008	45.66	3,289,972	3,289,972
2007 (a)	6,420,709	56,554,037	33,249,631	23,304,406	58.8	10	10 yrs.			2009	45.74	3,191,716	3,191,716
2008 (a)	6,655,270	59,227,859	36,002,509	23,225,350	60.8	10	9			2010	46.53	3,256,531	3,256,531
2009 (a)	6,767,459	61,904,907	35,907,494	25,997,413	58.0	15	15			2011	37.70	2,772,800	2,772,800
2010 (a)	6,235,955	62,210,658	35,632,432	26,578,226	57.3	15	15			2012	43.74	2,843,528	2,843,528
2011	4,629,536	62,431,199	33,801,498	28,629,701	54.1	15	15			2013	57.05	2,870,342	2,870,342
2012 (c)	4,548,146	65,436,998	32,257,445	33,179,553	49.3	20	15			2014	60.94	3,012,344	3,012,344
2013 (a)	4,975,503	70,374,532	33,995,966	36,378,565	48.3	20	14			2015	66.96	3,534,236	3,534,236
2014	4,998,321	70,668,317	36,656,819	34,011,498	51.9	20	13			2016	62.99	3,339,966	3,709,507
2015 (a)(d)	4,643,191	75,272,788	37,536,975	37,735,813	49.9	15	12			2017	83.20	4,098,288	4,098,288
2016	4,487,630	75,729,167	38,847,990	36,881,177	51.3	14	11	15 yrs.		2018	88.63	4,219,714	4,219,714
2017 (a)	4,688,436	74,700,336	40,355,727	34,344,609	54.0	12	9	14-15		2019	88.91	4,422,430	4,422,430
2018 (a)	4,882,939	81,919,369	41,781,894	40,137,475	51.0	11	7	13-15		2020	107.32	5,559,682	5,559,682
2019 (a)	5,185,126	85,118,886	43,866,351	41,252,535	51.5	10	6	12-15		2021	107.55	5,916,061	5,916,061
2020	5,184,829	85,820,123	47,343,222	38,476,901	55.2	9	5	11-15		2022	107.99	5,939,831	
2021	4,953,225	83,655,702	51,724,559	31,931,143	61.8	8	4	10-15		2023	107.99	5,674,911	

(a) After changes in benefit provisions and/or actuarial assumptions and actuarial cost methods.

(b) Includes transfers from Old Police-Fire plan through March 1991.

(c) After issuance of the June 30, 2012 valuation report, the Board requested a change in the amortization period. These results reflect the new methodology.

(d) After closure to the Active & Retired amortization policies and creation of the Gain/(Loss) Amortization schedule.

* An additional \$480,000 is held in the City's General Fund.

[^] In valuation years 2016 and thereafter, Actuarial (Gains)/Losses on the Unfunded Actuarial Accrued Liability for System experience, benefit changes, assumption and method changes in a given year are amortized over a new level percent-of-pay closed 15-year periods.



Funded Ratio Projection

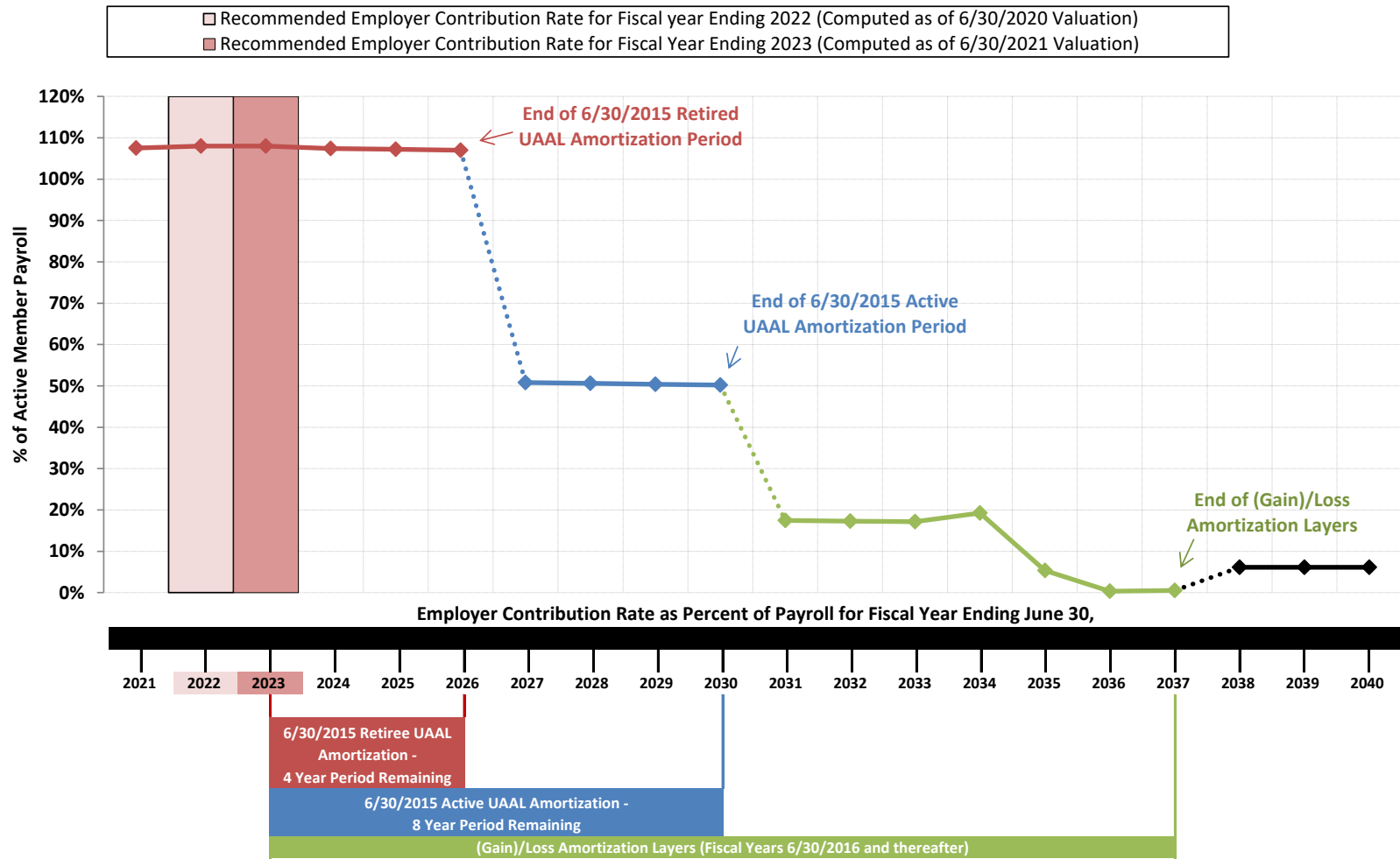
Based Upon Current Amortization Layers and 6.0% Return on Actuarial Value of Assets

Valuation Date	Actuarial Accrued Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded Actuarial Liability (UAAL)	Funded Ratio	Remaining Amortization Periods of UAAL			During Upcoming Fiscal Year		
					Active	Retired	(Gain)/Loss	Projected Total Contributions	Projected Benefit Payments	Assumed Investment Return on AVA
June 30, 2021	\$ 83,655,702	\$ 51,724,559	\$ 31,931,143	62%	8 yrs.	4 yrs.	10-15 yrs.	\$ 6,416,575	\$ 5,833,894	\$ 3,120,784
2022	83,556,493	55,428,024	28,128,469	66%	7	3	9-14	6,051,743	5,813,390	3,332,763
2023	83,462,588	58,999,140	24,463,448	71%	6	2	8-13	6,210,024	5,891,212	3,549,420
2024	83,285,317	62,867,372	20,417,945	75%	5	1	7-12	6,374,779	5,953,592	3,784,555
2025	83,037,426	67,073,114	15,964,312	81%	4	-	6-11	6,560,625	5,980,137	4,041,632
2026	82,768,334	71,695,234	11,073,099	87%	3	-	5-10	3,422,018	6,015,362	4,224,669
2027	82,450,071	73,326,560	9,123,511	89%	2	-	4-9	3,491,517	6,144,394	4,320,780
2028	81,972,992	74,994,464	6,978,528	91%	1	-	3-8	3,578,669	6,149,065	4,423,305
2029	81,471,447	76,847,372	4,624,074	94%	-	-	2-7	3,676,116	6,119,373	4,538,256
2030	80,987,530	78,942,372	2,045,158	97%	-	-	1-6	1,618,227	6,065,711	4,604,413
2031	80,554,543	79,099,301	1,455,242	98%	-	-	1-5	1,665,296	5,995,159	4,617,324
2032	80,195,313	79,386,762	808,551	99%	-	-	1-4	1,718,956	5,924,936	4,638,252
2033	79,913,423	79,819,033	94,389	100%	-	-	1-3	1,936,630	5,838,741	4,673,215
2034	79,733,258	80,590,138	(856,880)	101%	-	-	1-2	944,560	5,810,158	4,690,858
2035	79,579,123	80,415,398	(836,275)	101%	-	-	1	588,513	5,819,603	4,669,515
2036	79,423,037	79,853,824	(430,787)	101%	-	-	-	600,588	5,799,944	4,636,763
2037	79,291,232	79,291,232	-	100%	-	-	-	1,064,019	5,756,590	4,618,064

This projection is a visualization of how the System will achieve 100% funded status if all future actuarial assumptions are met. Actuarial assumptions may or may not materialize over time. This projection should not be construed as a forecast of actual cash flows or investment returns anticipated in the future.



Projected Future Employer Contributions as a Percentage of Expected Active Member Payroll



NOTE: Future (Gain)/Loss UAAL Amortization schedules are excepted to be \$0 if all Actuarial Assumptions are met. In reality, experience will deviate from assumptions. The (Gain)/Loss UAAL amounts are expected to float both above and below zero in any given year. These amounts are amortized over new independent 15-Year periods to smooth changes to future employer contributions as a result of System experience.

Summary Statement of System Resources and Obligations

Present Resources and Expected Future Resources

	<u>June 30, 2020</u>	<u>June 30, 2021</u>
A. Present valuation assets		
1. Net assets from the System's financial statements	\$46,605,620	\$58,190,807
2. Transfer from old plan	0	0
3. Market value adjustment	<u>737,602</u>	<u>(6,466,248)</u>
4. Valuation assets	\$47,343,222	\$51,724,559
B. Actuarial present value of expected future employer contributions		
1. For normal costs	\$ 3,867,893	\$ 4,067,998
2. For unfunded actuarial accrued liability	<u>38,476,901</u>	<u>31,931,143</u>
3. Total	\$42,344,794	\$35,999,141
C. Actuarial present value of expected future member contributions	<u>\$ 3,765,253</u>	<u>\$ 3,845,103</u>
D. Total present and expected future resources	<u><u>\$93,453,269</u></u>	<u><u>\$91,568,803</u></u>

Actuarial Present Value of Expected Future Benefit Payments

A. To retirants and beneficiaries		
1. Annual pensions	\$61,221,569	\$65,489,900
2. Reserve	<u>none</u>	<u>none</u>
3. Total	\$61,221,569	\$65,489,900
B. To vested terminated members	1,545,040	1,630,601
C. To present active members		
1. Allocated to service rendered prior to valuation date - actuarial accrued liability	\$23,053,514	\$16,535,201
2. Allocated to service likely to be rendered after valuation date	7,633,146	7,913,101
3. Transfer from old plan	<u>none</u>	<u>none</u>
4. Total	\$30,686,660	\$24,448,302
D. Total actuarial present value of expected future benefit payments	<u><u>\$93,453,269</u></u>	<u><u>\$91,568,803</u></u>

Other Observations

General Implications of Contribution Allocation Procedure or Funding Policy on Future Expected Contributions and Funded Status

Given the System's contribution allocation procedure, if all actuarial assumptions are met (including the assumption of the Retirement System earning 6.00% on the Market Value of Assets), it is expected that:

1. The employer normal cost is sufficient to cover the cost of benefits accruing each year;
2. The Unfunded Actuarial Accrued Liabilities (UAAL) will continue to be fully amortized; and
3. The funded status of the Retirement System will continue to increase gradually towards a 100% funded ratio.

Limitations of Funded Status Measurements

Unless otherwise indicated, a funded status measurement presented in this report is based upon the Actuarial Accrued Liability (AAL) and the Funding Value of Assets (FVA). Unless otherwise indicated, with regard to any funded status measurements presented in this report:

1. The measurement is inappropriate for assessing the sufficiency of Retirement System assets to cover the estimated cost of settling the Retirement System's benefit obligations; for example, transferring the liability to an unrelated third party in a market value type transaction.
2. The measurement is dependent upon the Actuarial Cost Method which, in combination with the Retirement System's amortization policy, affects the timing and amounts of future contributions. The amounts of future contributions will most certainly differ from those assumed in this report due to future actual experience differing from assumed experience based upon the actuarial assumptions. Even if the funded status measurement in this report was 100%, it would not be synonymous with no required future contributions. The Retirement System would still require future normal cost contributions (i.e., contributions to cover the cost of active membership accruing an additional year of service credit).
3. The measurement would produce a different result if the Market Value of Assets (MVA) were used instead of the FVA, unless the MVA is used in the measurement.

Limitations of Project Scope

Actuarial standards do not require the actuary to evaluate the ability of the plan sponsor or other contributing entities to make required contributions to the plan when due. Such an evaluation was not within the scope of this project and is not within the actuary's domain of expertise. Consequently, the actuary performed no such evaluation.

Risks to Future Employer Contribution Requirements

There are ongoing risks to future employer contribution requirements to which the Retirement System is exposed, such as:

- Actual and Assumed Investment Rate of Return
- Actual and Assumed Mortality Rates
- Amortization Policy

Risk Measures – Risks Associated with Measuring the Accrued Liability and Actuarially Determined Contribution

The determination of the accrued liability and the actuarially determined contribution requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability and the actuarially determined contribution that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the System's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

1. **Investment Risk** – actual investment returns may differ from the expected returns;
2. **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
3. **Contribution Risk** – actual contributions may differ from expected future contributions. For example, actual contributions may not be made in accordance with the plan's funding policy or material changes may occur in the anticipated number of covered employees, covered payroll, or other relevant contribution base;
4. **Salary and Payroll Risk** – actual salaries and total payroll may differ from expected, resulting in actual future accrued liability and contributions differing from expected;
5. **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed; and
6. **Other Demographic Risks** – members may terminate, retire or become disabled at times or with benefits other than assumed resulting in actual future accrued liability and contributions differing from expected.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

The computed contribution shown on page A-2 may be considered as a minimum contribution rate that complies with the Board's funding policy. The timely receipt of the actuarially determined contributions is critical to support the financial health of the plan. Users of this report should be aware that contributions made at the actuarially determined rate do not necessarily guarantee benefit security.

Risk Measures

(\$ in Thousands)

Actuarial Valuation Date (6/30)	(1) Actuarial Value of Assets	(2) Actuarial Accrued Liability (AAL)	(3) Unfunded AAL (UAAL) (2) - (1)	(4) Payroll	(5) Funded Ratio (1) / (2)	(6) Retiree Liabilities (RetLiab)	(7) RetLiab / AAL (6)/(2)	(8) AAL / Payroll (2) / (4)	(9) Assets / Payroll (1) / (4)	(10) UAAL / Payroll (3) / (4)	(11) Non-Invest. Cash Flow (NICF)	(12) NICF / Assets (11)/(1)	(13) Market Rate of Return	(14) 5-year Trailing Geometric Average
2017	\$ 40,356	\$ 74,700	\$ 34,344	\$ 4,688	54.0%	\$ 55,874	74.8%	1,593.4%	860.8%	732.6%	\$ (1,261)	(3.1)%	14.5%	N/A
2018 *	41,782	81,919	40,137	4,883	51.0%	58,396	71.3%	1,677.6%	855.7%	822.0%	(810)	(1.9)%	10.9%	N/A
2019 *	43,866	85,119	41,253	5,185	51.5%	60,195	70.7%	1,641.6%	846.0%	795.6%	(230)	(0.5)%	5.3%	5.5%
2020	47,343	85,820	38,477	5,185	55.2%	61,222	71.3%	1,655.2%	913.1%	742.1%	210	0.4%	2.8%	5.4%
2021	51,725	83,656	31,931	4,953	61.8%	65,490	78.3%	1,689.0%	1,044.3%	644.7%	(836)	(1.6)%	26.9%	11.8%

* Revised actuarial assumptions or methods were made from the prior year.

(5). The funded ratio is the most widely known measure of a plan's financial strength, but the trend in the funded ratio is much more important than the absolute ratio. The funded ratio should trend to 100%. As it approaches 100%, it is important to re-evaluate the level of investment risk in the portfolio and potentially to re-evaluate the assumed rate of return.

(6) and (7). The ratio of retiree liabilities to total accrued liabilities gives an indication of the maturity of the system. As the ratio increases, cash flow needs increase, and the liquidity needs of the portfolio change. A ratio on the order of 50% indicates a maturing system.

(8) and (9). The ratio of liabilities and assets to payroll gives an indication of both maturity and volatility. Many systems have ratios between 500% and 700%. Ratios significantly above that range may indicate difficulty in supporting the benefit level as a level % of payroll.

(10). The ratio of unfunded liability to payroll gives an indication of the plan sponsor's ability to actually pay off the unfunded liability. A ratio above approximately 300% or 400% may indicate difficulty in discharging the unfunded liability within a reasonable time frame.

(11) and (12). The ratio of Non-Investment Cash Flow to assets is an important measure of sustainability. Negative ratios are common and expected for a maturing system. In the longer term, this ratio should be on the order of approximately -3% based upon the current plan assumptions. A ratio that is significantly more negative than that for an extended period could be a leading indicator of potential exhaustion of assets.

(13) and (14). Investment return is probably the largest single risk that most systems face. The year-by-year return and the five-year geometric average both give an indication of the reasonableness of the system's assumed return. Of course, past performance is not a guarantee of future results. Market rate shown is based on actuarial estimation method and will differ modestly from figures reported by the investment consultant.

SECTION B

SUMMARY OF BENEFIT PROVISIONS AND VALUATION DATA

Brief Summary of Act 345 Benefit Conditions (June 30, 2021)

Service Retirement

Eligibility:

Police Command – in the unit as of February 28, 2016:

25 years of service

Police Command – hired on or before June 30, 2012 and promoted to unit after March 1, 2016:

25 years of service and 50 years of age

Police Command – hired after June 30, 2012 and before June 30, 2016:

28 years of service and 53 years of age

Police Command – hired on or after July 1, 2016:

30 years of service and 54 years of age.

Police Officers – hired on or before December 31, 1998:

25 years of service

Police Officers – hired between January 1, 1999 and June 30, 2012:

25 years of service and 50 years of age

Police Officers – hired between July 1, 2012 and June 30, 2016:

28 years of service and 53 years of age

Police Officers – hired on or after July 1, 2016:

30 years of service and 54 years of age

Fire Fighters – hired on or before December 31, 2003:

25 years of service

Fire Fighters – hired between January 1, 2004 and June 30, 2012:

28 years of service

Fire Fighters – hired between July 1, 2012 and June 30, 2016:

29 years of service

Fire Fighters – hired on or after July 1, 2016:

33 years of service

Amount:

Police Command – hired by the city on or before June 30, 2012:

3-year AFC (5-year AFC if entering the bargaining unit after October 10, 2016) times 2.9% for service accrued on or after July 1, 2007 and 2.5% for service accrued through June 30, 2007 for the first 25 years of service and 1.0% for service in excess of 25. 71% pension cap if promoted into the unit before February 28, 2016, 70% pension cap after. AFC is limited to only include up to 175 hours of overtime per year.

Police Command – hired by the city on or after July 1, 2012:

3-year AFC (5-year AFC if entering the bargaining unit after October 10, 2016) times 1.5% for the first 25 years of service and 1.0% for service in excess of 25 years. 50% pension cap. AFC is limited to only include up to 175 hours of overtime per year.

Police Officers – hired on or before June 30, 2012:

2.9% of 4-year (5-year if hired after January 1, 1999) AFC times first 25-years of service plus 1% of AFC times years of service in excess of 25 years. 71% pension cap if hired before December 31, 1998, 70% pension cap after.

Police officers – hired on or after July 1, 2012:

6-year AFC times 1.5% for the first 25 years of service and 1.0% for service in excess of 25 years. 60% pension cap.

Fire Fighters – hired on or before June 30, 2012:

3-year (4-year if hired after June 30, 2003) AFC times 2.9% for service accrued on or after February 1, 2009 and 2.75% for service accrued through February 1, 2009 for the first 25 years of service and 1.0% for service in excess of 25 years. 73% pension cap if hired before December 31, 2003, 75% pension cap after.

Fire Fighters – hired on or after July 1, 2012:

4-year (6 years if hired after July 1, 2016) AFC times 1.5% for the first 25 years of service and 1.0% for service in excess of 25 years. 50% pension cap.



Brief Summary of Act 345 Benefit Conditions (June 30, 2021)

Deferred Retirement

Eligibility: 10 or more years of service.

Amount: Computed as service retirement but based upon service, AFC and benefit in effect at termination. Benefit begins at date retirement would have occurred had member remained in employment.

Death after Retirement Survivor's Pension

Eligibility: Payable to a surviving spouse, if any, upon the death of a retired member who was receiving a straight life pension which was effective July 1, 1975 or later (effective July 1, 1991 or later for a disability retirant).

Amount: Spouse's pension equals 60% of the straight life pension the deceased retirant was receiving. (50% of a regular service retirement pension for the spouse of a disability retirant who dies prior to age 55.)

Non-Duty Death-in-Service Survivor's Pension

Eligibility: Payable to a surviving spouse, if any, upon the death of a member with 20 (10 for Fire Fighters) or more years of service.

Amount: Accrued straight life pension actuarially reduced in accordance with an Option I election.

Duty Death-in-Service Survivor's Pension

Eligibility: Payable upon the expiration of worker's compensation to the survivors of a member who died in the line of duty.

Amount: Same amount that was paid by worker's compensation.



Brief Summary of Act 345 Benefit Conditions (June 30, 2021)

Non-Duty Disability

Eligibility: Payable upon the total and permanent disability of a member with 5 or more years of service.

Amount: **Pre July 1, 2012 Hires:**

To age 55: 2.5% of AFC times years of service. For IAFF: 2.75% of AFC times years of service earned on or before June 30, 2009, and 2.9% of AFC times years of service earned on or after July 1, 2009.

At Age 55: Same as Service Pension.

Post July 1, 2012 Hires:

To Age 55: 1.5% of AFC times years of service for first 25 years and 1.0% of AFC times years of service in excess of 25 years.

At Age 55: Same as Service Pension.

Duty Disability

Eligibility: Payable upon the total and permanent disability of a member in the line of duty.

Amount: To age 55: 66-2/3% of AFC (33-1/3% of AFC for Hybrid Plan members and IAFF members hired post July 1, 2012).

At age 55: Same as Service Retirement.

Pension with service credit from date of disability to age 55.

Member Contributions

Amount: **Police Command – hired on or before June 30, 2012 and promoted to unit before March 1, 2016:**

11.50%

Police Command – hired on or before June 30, 2012 and promoted to unit after March 1, 2016:

12.50%

Police Command – hired on or after July 1, 2012:

6.00% for defined benefit plan

Police Officers – hired on or before June 30, 2012:

12.00%

Police Officers – hired on or after July 1, 2012:

6.00% for defined benefit plan

Fire Fighters – hired on or before June 30, 2012:

13.00%

Fire Fighter – hired on or after July 1, 2012:

4.75% for defined benefit plan



Brief Summary of Act 345 Benefit Conditions (June 30, 2021)

Annuity Withdrawal

At retirement, an employee may elect to withdraw their employee contributions (with interest) and the employee's annual or monthly pension benefit shall be reduced by the actuarial equivalent of the amount withdrawn as calculated by the City's actuary, using the rate of assumed investment return for immediate annuities as determined below:

Police Command – retiring on or before December 31, 2021:

3.00%

Police Command – members of the unit as of March 1, 2016 but withdraws on or after January 1, 2022:

6.00%

Police Command – members entering the unit on or after March 1, 2016:

8.50%

Police Officers – hired on or before December 31, 1998:

2.25% on contributions made on or before December 31, 2003 and 8.00% on contributions made on or after January 1, 2004. If retiring in calendar years 2017-2021 with a full-service retirement, 2.25% will be used for all contributions.

Police Officers – hired between January 1, 1999 and June 30, 2012:

5.50% on contributions made on or before December 31, 2003 and 8.25% on contributions made on or after January 1, 2004.

Police Officers – hired between July 1, 2012 and June 30, 2016:

8.25% on all contributions

Police Officers – hired on or after July 1, 2016:

8.50% on all contributions

Fire Fighters – hired on or before December 31, 2003:

1.50% on contributions made on or before January 31, 2009 and 5.25% on contributions made thereafter.

Fire Fighters – hired between January 1, 2003 and October 1, 2016:

1.85% on contributions made on or before January 31, 2009 and 6.75% on contributions made thereafter.

Fire Fighters – hired on or after July 1, 2016:

8.00% on all contributions



Retiree and Beneficiary Comparative Schedule

Year Ended June 30	No. Trans. During Year	Added to Rolls		Removed from Rolls		Rolls End of Year		% Incr. in Annual Pensions	Average Pension	Discounted Value of Pensions in Payment Status	
		No.	Annual Pensions*	No.	Annual Pensions	No.	Annual Pensions			Total	Average
1997		9	\$210,599			112	\$2,134,497	10.9 %	\$19,058	\$24,125,086	\$215,403
1998		2	55,252	1	\$ 38,556	113	2,151,193	0.8	19,037	24,045,700	212,794
1999	3	13	311,785	2	33,488	124	2,429,489	12.9	19,592	27,262,964	219,863
2000		3	147,992	1	16,233	126	2,561,248	5.4	20,327	28,281,473	224,456
2001		3	80,305	3	71,841	126	2,569,712	0.3	20,395	28,325,844	224,808
2002		4	124,746	1	9,347	129	2,685,111	4.5	20,815	29,398,266	227,894
2003		5	128,515	2	36,009	132	2,777,617	3.4	21,043	30,196,106	228,758
2004		5	100,650	1	11,293	136	2,866,974	3.2	21,081	30,921,701	227,365
2005		2	26,569	3	58,835	135	2,834,708	(1.1)	20,998	30,138,240	223,246
2006		1	10,994	2	36,346	134	2,809,356	(0.9)	20,965	29,461,802	219,864
2007		6	211,110	2	31,343	138	2,989,123	6.4	21,660	31,120,638	225,512
2008		5	144,654	2	49,720	141	3,084,057	3.2	21,873	31,791,641	225,473
2009		7	248,242	4	68,425	144	3,263,874	5.8	22,666	33,631,944	233,555
2010		7	247,487	3	34,389	148	3,476,972	6.5	23,493	35,719,893	241,351
2011		15 #	554,196 #	5	88,641	158	3,942,527	13.4	24,953	40,603,656	256,985
2012		6	263,910	1	18,603	163	4,187,834	6.2	25,692	42,966,261	263,597
2013		6	165,744	3	68,144	166	4,285,434	2.3	25,816	46,209,772	278,372
2014		6	143,053	8	121,272	164	4,307,215	0.5	26,264	46,115,204	281,190
2015		8	385,651	3	34,057	169	4,658,809	8.2	27,567	52,319,784	309,585
2016		5	174,283	5	80,477	169	4,752,615	2.0	28,122	52,993,123	313,569
2017		10	360,741	8	140,552	171	4,972,804	4.6	29,081	55,873,577	326,746
2018		2	97,190	1	30,949	172	5,039,045	1.3	29,297	58,396,288	339,513
2019		2	34,111	2	22,158	172	5,050,998	0.2	29,366	60,194,938	349,971
2020		5	194,187	6	98,774	171	5,146,411	1.9	30,096	61,221,569	358,021
2021		14	483,767	7	124,245	178	5,505,933	7.0	30,932	65,489,900	367,921

* Includes pension adjustments, when applicable.

Includes alternate payee of an active member, per Eligible Domestic Relations Order.



Retirees and Beneficiaries June 30, 2021 Tabulated by Type of Pension Being Paid

<u>Type of Pensions Being Paid</u>	<u>No.</u>	<u>Annual Pensions</u>
Age and Service Pensions		
Regular-benefit terminating at death of retiree	23	\$ 648,364
Regular-automatic benefit to spouse of deceased retiree	125	4,304,505
Option I-100% of benefit to spouse of deceased retiree	1	44,526
Survivor beneficiary	<u>21</u>	<u>253,574</u>
Total age and service pensions	170	\$ 5,250,969
Casualty Pensions		
Non-duty disability pension	1	\$ 35,238
Duty disability pension	5	176,241
Survivor beneficiary	<u>2</u>	<u>43,485</u>
Total casualty pensions	<u>8</u>	<u>\$ 254,964</u>
Total pensions being paid	178	\$ 5,505,933

Retirees and Beneficiaries June 30, 2021 Tabulated by Attained Age

Attained Age	Age & Service		Disability and Death-in-Service		Totals	
	No.	Annual Allowances	No.	Annual Allowances	No.	Annual Allowances
45 - 49	4	\$ 163,782	0	\$ 0	4	\$ 163,782
50 - 54	20	907,028	0	0	20	907,028
55 - 59	12	532,030	3	128,145	15	660,175
60 - 64	20	876,448	4	113,995	24	990,443
65 - 69	29	925,796	0	0	29	925,796
70 - 74	25	679,765	0	0	25	679,765
75 - 79	31	656,665	1	12,824	32	669,489
80	3	57,263	0	0	3	57,263
81	3	54,276	0	0	3	54,276
82	2	38,668	0	0	2	38,668
83	4	65,290	0	0	4	65,290
84	3	60,449	0	0	3	60,449
85	5	106,623	0	0	5	106,623
86	1	22,097	0	0	1	22,097
88	3	33,114	0	0	3	33,114
90	3	40,567	0	0	3	40,567
91	2	31,108	0	0	2	31,108
Totals	170	\$ 5,250,969	8	\$ 254,964	178	\$ 5,505,933

Average Age at Retirement: 50.3 years

Average Age Now: 69.3 years

Four (4) vested terminated members are currently being valued with deferred service pensions.

Active Members in Valuation Comparative Schedule

Valuation Date June 30	No.	No. of Transfers Incl.	Valuation Payroll	Average			
				Pay	% Incr.	Age	Service
1987	72	0	\$ 2,038,166	\$ 28,308	5.4 %	34.2 yrs.	8.6 yrs.
1988	76	3	2,381,388	31,334	10.7	34.9	9.3
1989	80	4	2,659,581	33,245	6.1	35.3	9.5
1990 #	113	18	3,800,291	33,631	-	36.5	10.8
1991	112	0	4,049,332	36,155	8.8	36.4	10.6
1992	117	10	4,298,912	36,743	1.6	35.5	9.8
1993	113	0	4,502,216	39,843	8.4	35.2	9.6
1994	113	3	4,778,047	42,284	6.1	36.3	10.7
1995	112	0	5,118,907	45,705	8.1	36.7	11
1996	119	0	5,380,560	45,215	1.1	36.1	10.6
1997	120	0	5,498,077	45,817	1.3	36.2	10.1
1998	119	0	5,697,163	47,875	4.5	36.6	10.7
1999	117	0	5,597,521	47,842	(0.1)	36.4	9.9
2000	115	0	5,772,726	50,198	4.9	37	10.2
2001	114	0	5,942,253	52,125	3.8	37.9	11
2002	115	0	6,071,301	52,794	(1.3)	37.8	10.9
2003	115	0	6,213,210	54,028	2.3	38.1	11.1
2004	110	0	6,138,055	55,801	3.3	38.9	12.2
2005	110	0	6,321,086	57,464	3.0	39.9	13.1
2006	109	0	6,598,038	60,532	5.3	41.1	14.1
2007	104	0	6,420,709	61,738	2.0	41	14.0
2008	105	0	6,655,270	63,384	2.7	40.9	14.1
2009	101	0	6,767,459	67,005	5.7	41.1	14.2
2010	94	0	6,235,955	66,340	(1.0)	41.3	14.6
2011	70	0	4,629,536	66,136	(0.3)	42.2	15.9
2012	62	0	4,548,146	73,357	10.9	42.2	15.9
2013	72	0	4,975,503	69,104	(5.8)	40.1	13.5
2014	72	0	4,998,321	69,421	0.5	40.4	13.8
2015	68	0	4,643,191	68,282	(1.6)	39.5	12.8
2016	63	0	4,487,630	71,232	4.3	39.5	13.0
2017	69	0	4,688,436	67,948	(4.6)	37.9	11.0
2018	70	0	4,882,939	69,756	2.7	37.6	10.9
2019	70	0	5,185,126	74,073	6.2	38.8	11.6
2020	66	0	5,184,829	78,558	6.1	38.6	11.6
2021	67	0	4,953,225	73,929	(5.9)	35.8	8.8

Includes transfers from Old Plan through March, 1991.



Active Members June 30, 2021 Tabulated by Valuation Divisions

Valuation Divisions	No.	Annual Payroll
Non-Hybrid		
Police Command	10	\$1,025,482
Police	6	502,792
Fire	7	714,062
Total Non-Hybrid	23	2,242,336
Hybrid		
Police Command	1	\$ 73,295
Police	26	1,758,767
Fire	17	878,827
Total Hybrid	44	2,710,889
Total Active members	67	\$4,953,225

Active Members June 30, 2021 by Attained Age and Years of Service

Attained Age	Years of Service to Valuation Date							No.	Valuation Payroll
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus		
15-19	1							1	\$ 43,714
20-24	5							5	226,817
25-29	12	3						15	920,399
30-34	7	3						10	623,407
35-39	4	7	4					15	1,146,278
40-44		1	2	5	2			10	966,749
45-49		2		1	4	1		8	732,924
50-54				1				1	94,345
55-59				1				1	80,101
63								1	118,491
Totals	29	16	6	8	6	1	1	67	\$4,953,225

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age:	35.8
Service:	8.8
Annual Pay:	\$73,929



Asset Information Submitted for Valuation

Valuation Assets - Market Value		Reserves for	
Cash & equivalents	\$ 1,646,504	Employees' contributions	\$ 4,898,638
Receivables & accruals	121,441	Employer contributions	99,621,782
Stocks	36,809,231	Retired benefit payments	(46,329,613)
Bonds	18,309,954		
Real Estate	2,220,468		
Account payable	(916,791)		
Total Current Assets	\$ 58,190,807	Total Reserves	\$58,190,807

Revenues and Expenditures

Balance - July 1, 2020	\$46,605,620
Revenues	
Employees' contributions	485,464
Employer contributions	5,916,061
Investment income	12,595,786
Expenditures	
Benefit payments	7,009,491
Refund of member contributions	227,786
Expenses	174,847
Balance - June 30, 2021	\$58,190,807

These amounts do not reflect the actuarial value adjustment of \$6,466,248. The derivation of this adjustment is on page A-5.

SECTION C

**FUNDING OBJECTIVE, SUMMARY OF VALUATION PROCESS,
METHODS AND ASSUMPTIONS**

Basic Funding Objective and Operation of the Retirement System

Benefit Promises Made Which Must Be Paid For. A retirement system is an orderly means of handing out, keeping track of, and financing contingent pension promises to a group of employees. As each member of the retirement system acquires a unit of service credit the member is, in effect, handed an "IOU" which reads: "Your Act 345 Retirement System promises to pay you one unit of retirement benefits, payments in cash commencing when you retire."

The principal related financial question is: ***When shall the money required to cover the "IOU" be contributed?*** This year, when benefit of the member's service is received? Or, some future year when the "IOU" becomes a cash demand?

The Constitution of the State of Michigan is directed to the question:

"Financial benefits arising on account of service rendered in each fiscal year shall be funded during that year and such funding shall not be used for financing unfunded accrued liabilities."

Section 9(2) of Act 345 is also directed to the question:

"Sec. 9(2). - - - For the purpose of creating and maintaining a fund for the payment of the pensions and other benefits payable hereunder, the said city, village or municipality, subject to the provisions of this act, shall appropriate, at the end of such regular intervals as may be adopted, quarterly, semi-annually, or annually, an amount sufficient to maintain actuarially determined reserves covering pensions payable or which might be payable on account of service performed and to be performed by active members and pensions being paid retired members and beneficiaries - - ."

Translated into actuarial terminology, the constitutional and Act 345 level percent-of-payroll contribution objective means that the contribution rate must total at least:

Normal Cost (the current value of benefits likely to be paid on account of members' service being rendered in the current year)

. . . plus . . .

Interest on Unfunded Actuarial Accrued Liability (unfunded actuarial accrued liability is the actuarial present value of benefits not covered by present assets and anticipated future normal costs).

If contributions to the Retirement System are less than the preceding amount, the difference, plus investment earnings not realized thereon, will have to be contributed at some later time, or benefits will have to be reduced, to satisfy the fundamental fiscal equation under which all retirement systems must operate; that is:

$$B = C + I - E$$

Benefit payments to any group of members and their beneficiaries cannot exceed the sum of:

Contributions received on behalf of the group.

. . . plus . . .

Interest earnings on contributions received and not required for immediate cash payment of benefits.

. . . minus . . .

Expenses incurred in operating the system.

A by-product of level percent-of-payroll financing is the accumulation of invested assets. Investment income becomes a major contributor to the Retirement System, and the amount is directly related to the amount of contributions and investment performance.

Computed Contribution Rate Needed to Finance Benefits. From a given schedule of benefits and from the data furnished, the contribution rate is calculated – *by means of an actuarial valuation* – the technique of assigning monetary values to the risks assumed in operating a retirement program.

Actuarial Valuation Process

An actuarial valuation is the process by which a balance between revenues (participant contributions, employer contributions and investment income) and obligations (benefits and expenses) is determined and its actuarial condition is measured.

The flow of activity constituting the valuation may be summarized as follows:

- A. ***Covered person information about:***
- each person receiving pension payments
 - each former participant with a vested pension not yet payable
 - each former participant who is not vested and has not claimed a member contribution refund
 - each active participant
- B. + ***Financial Information*** (assets, revenues, and expenditures)
- C. + ***Benefit Provisions***
- D. + ***Experience Estimates*** about the volume and incidence of future activities
- E. + ***Actuarial Cost Method*** for allocating costs to time periods
- F. + ***Mathematically combining the person information, financial information, benefit provisions, experience estimates and actuarial cost method***
- G. = Determination of:
- contribution rate for the plan year
 - current funded condition

Items A, B and C are furnished by the pension office and constitute the current knowns about the System. Since the majority of activities will occur in the future, estimates must be made about these future activities (Item D).

Demographic assumptions are generally selected on the basis of the System's historical activity, modified for expected future differences. Past activity of funds which are similar in nature to the fund being valued may be utilized if fund data or activities are insufficient to be reliable.

Fiscal assumptions, on the other hand, do not lend themselves to prediction on the basis of historical activity -- the reason being that both salary increases and investment return are impacted by inflation. Inflation defies reliable prediction. Fiscal assumptions are generally selected on the basis of what would be expected to occur in an inflation-free environment and then both are increased by some provision for long-term inflation.

This is a case where two wrongs may make a right. If inflation is higher than expected it will probably result in actual rates of salary increase and investment return which exceed the assumed rates. Salaries increasing faster than expected result in unexpected costs. Investment returns exceeding the assumed rate result in unanticipated assets. To a large degree, the additional assets will offset the additional cost over the long-term.

Once items A, B, C and D are available, the actuarial valuation process begins. The first step is to determine the plan's **total actuarial present value** for individuals in each of the 3 covered person categories.

Retired members now receiving monthly payments;
Vested terminated members not yet at retirement age; and
Active members.

The actuarial present value is the value today after taking into account the probabilities of payment and the effect of time of System promises to pay benefits in the future on the basis of both services already completed and projected future service.

Actuarial Cost Method

In addition to the actuarial assumptions, the actuary also makes use of an Actuarial Cost Method to allocate costs to particular years. In common with most public-sector plans, the City of Jackson Act 345 Policemen and Firemen Retirement System uses the Entry Age Normal method. Theoretically, this method produces a level pattern of funding over time, (as a percentage of member payroll) and thereby provides equity between various generations of tax payers. We continue to believe this method is appropriate for the City of Jackson Act 345 Policemen and Firemen Retirement System.

The total actuarial present value is allocated between projected future service and completed service by the actuarial cost method (Item E) – the **individual entry-age** method is being utilized for this valuation. The portion of the total actuarial present value allocated to projected future service is the **actuarial present value of future normal cost** -- normal cost being the series of annual costs, from entry age to retirement age, which will accumulate to the actuarial present value of the individual's benefit at the time of retirement or death. The remainder of the total actuarial present value is the **actuarial accrued liability**.

At this stage determination has been made of:

1. The total actuarial present value;
2. The actuarial present value of future normal cost; and
3. The actuarial accrued liability.

In the typical plan, the actuarial accrued liability may not be covered by the plan's Actuarial Value of Assets – leaving an **unfunded actuarial accrued liability** (see page C-6 for further discussion on unfunded actuarial accrued liability).

The Actuarial Value of Assets used for funding purposes is derived as follows: prior year valuation assets are increased by contribution and expected investment income and reduced by refunds and benefit payments. To this amount is added 25% of the difference between expected and actual investment income for each of the previous four years.

The next step in the valuation process is a determination of the contribution rate (Item G) required to support fund benefits in accordance with the funding objective (page A-1).

The contribution rate is determined in two basic components:

1. The normal cost component; and
2. The component which will finance (pay-off) the unfunded actuarial accrued liability over the period indicated on page A-2.

Actuarial Cost Method (Concluded)

The Unfunded Actuarial Accrued Liability (UAAL) was determined using the Actuarial Value of Assets and Actuarial Accrued Liability calculated as of the valuation date. The UAAL amortization payment (one component of the contribution requirement) is the level percent of pay required to fully amortize the UAAL. The UAAL attributed to active members effective June 30, 2015 was amortized over a 15-year closed period and the UAAL attributed to current retirees and beneficiaries was amortized over a 12-year closed period effective June 30, 2015. As of June 30, 2021, these amortization periods are at 8 and 4 years respectively.

Gains or losses to the UAAL that have occurred after June 30, 2015 and the current valuation date are amortized over 15-year closed periods. This UAAL payment reflects any payments expected to be made between the valuation date and the date contributions determined by this report are scheduled to begin. In future years, new gains and losses (experience along with other changes such as assumptions or benefit provisions) will be amortized separately (“new layers”) as they occur (over 15-year closed amortization periods). This will create an “amortization schedule” of contribution rates. This schedule will require periodic review by the Board.

Actuarial Assumptions Used for the Valuation

Funding objective contribution requirements and actuarial present values are calculated by applying estimates of future System activities (actuarial assumptions) to the benefit provisions and people information of the fund, using the actuarial cost method described on page C-5.

The principal areas of activity which require estimates are:

- (i) rates of inflation impacting assets of the System and active member pays
- (ii) long-term rates of investment return to be generated by the assets of the fund
- (iii) rates of salary increases to members
- (iv) rates of mortality among members, retirants and beneficiaries
- (v) rates of withdrawal of active members
- (vi) rates of retirement due to age and service
- (vii) rates of disability among members

In a valuation, the monetary effect of each activity is calculated for as long as a present covered person survives – a period of time which can be as long as a century.

Actual activities of the Retirement System will not coincide exactly with estimated activities due to the nature of the activities. Each valuation provides a complete recalculation of estimated future activities and takes into account the effect of differences between estimated and actual activities to date. The result is a continual series of adjustments (usually small) to the computed contribution rate.

From time-to-time, one or more of the estimates are modified to reflect experience trends (but not random or temporary year-to-year fluctuations).

The Board of Trustees sets the assumptions. Actuarial assumptions were most recently reviewed and adopted by the Board of Trustees for the June 30, 2018 Actuarial Valuation. The rationale for the economic and mortality assumptions is described in the report dated January 18, 2019. We recommend that the Board set a policy for regular reviews of the actuarial assumptions such as every five years.

All actuarial assumptions are expectations of future experience, not market measures.

The rate of net investment return used was 6.00% a year, compounded annually net of expenses. The assumed rate of price inflation is 2.25% per year resulting in a real rate of return of 3.75% per year. These rates were first used in the June 30, 2018 Actuarial Valuation. The assumed rate of wage inflation and payroll growth is 3.0% per year. This is the same payroll growth assumption used to amortize unfunded actuarial accrued liability.

This assumption was used to discount the value of future payments due at different points in time.

Approximate investment returns, for the purpose of comparisons with assumed returns, have been as follows:

	Year Ended June 30					5-Year Average*
	2021	2020	2019	2018	2017	
Nominal rate	26.9%	2.8%	5.3%	10.9%	14.5%	11.8 %
Inflation rate	5.4%	0.6%	1.6%	2.9%	1.6%	2.4 %
Real rate	21.5%	2.2%	3.7%	8.0%	12.9%	9.4 %

* Compound average annual rate of increase.

The nominal rates of return (i.e., market value rates) should not be used for measurement of an investment advisor's performance or for comparisons with other systems – to do so will mislead.

The rates of salary increase used are in accordance with the following graded table.

The merit and longevity assumption was first used for the June 30, 2018 valuation. Beginning with the June 30, 2013 valuation, a 3.00% assumption was used in recognition of wage inflation. This, combined with a graded allowance for promotion and longevity, is used to project current salaries to those upon which pension amounts will be based.

Years of Service	Annual Rate of Pay Increase		
	Base (Economic)	Merit & Longevity	Total
0 to 1	3.00 %	9.00 %	12.00 %
1 to 2	3.00	8.00	11.00
2 to 3	3.00	7.00	10.00
3 to 4	3.00	6.00	9.00
4 to 5	3.00	5.00	8.00
5 to 6	3.00	4.00	7.00
6 to 7	3.00	3.00	6.00
7 to 8	3.00	2.00	5.00
8 to 9	3.00	1.00	4.00
9 to 10	3.00	0.00	3.00
10+	3.00	0.00	3.00

Actual valuation payroll has increased at the following rate:

	Year Ended June 30					5-Year Average*
	2021	2020	2019	2018	2017	
Total payroll	(4.5) %	0.0 %	6.2 %	4.1 %	4.5 %	2.1 %
Average pay	(5.9)	6.1	6.2	2.7	(4.6)	0.9

* Compound average annual rate of increase.



The mortality table used was the RP-2014 Healthy Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 on a fully generational basis. This mortality basis was first used for the June 30, 2019 valuation. Sample values follow:

Sample Attained Ages in 2021	Probability of Dying Next Year		Future Life Expectancy (Years)	
	Male	Female	Male	Female
50	0.41%	0.27%	34.39	37.01
55	0.58	0.39	29.67	32.09
60	0.82	0.59	25.12	27.34
65	1.19	0.86	20.81	22.82
70	1.74	1.30	16.77	18.51
75	2.73	2.11	13.02	14.48
80	4.57	3.62	9.67	10.85
Ref:	2135 x 1.00	2136 x 1.00		

This assumption is used to measure the probabilities of each benefit payment being made after service retirement.

The RP-2014 Disabled Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 on a fully generational basis is used to measure the probabilities of each benefit payment being made after disability retirement.

The RP-2014 Employees Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis is used to measure the probabilities of members dying before retirement.

The weighting of duty and ordinary deaths-in-service is 50%/50%.

The **Annuity Withdrawal Provision** is explicitly modeled in the valuation for active members. The rate of assumed investment return to determine reduced monthly pension benefit are as follows:

Police Command Hired before 1997:	3.00%
Police Patrol Hired before 1997:	3.00%
Fire Hired before 2004:	3.00%
Police Command Hired on or after 1997:	6.00%
Police Patrol Hired on or after 1997:	6.00%
Fire Hired on or after 2004:	6.00%

An assumed investment rate of return for calculating the reduction in benefit due to annuity withdrawal of 6.00% is actuarially cost neutral to the System. In reality, if the member's effective rate is greater than 6.00%, the System will experience an actuarial liability gain in the event the member elects the annuity withdrawal option.

The rates of retirement used to measure the probability of eligible members retiring during the next year were as follows:

<u>Years of Service</u>	<u>Percents of Active Members Retiring within Next Year</u>
25	50 %
26	50
27	50
28	50
29	50
30+	100

<u>Sample Ages</u>	<u>Percents of Active Members Retiring within Next Year</u>
45	50 %
46	50
47	50
48	50
49	50
50	50
51	50
52	50
53	50
54	50
55	50
56	50
57	50
58	50
59	50
60+	100

100% of members are assumed to retire at age 60 with 10 years of service.

These rates were first used for the June 30, 2018 valuation.

Rates of separation from active membership are shown below (rates do not apply to members eligible to retire and do not include separation on account of death or disability). This assumption measures the probabilities of members remaining in employment. These rates were first used for the June 30, 2018 valuation.

Sample Ages	Years of Service	% of Active Members Separating within Next Year
ALL	0	16.00 %
	1	14.00
	2	12.00
	3	10.00
	4	8.00
	5	6.00
	6	5.00
	7	4.00
	8	3.00
	9	2.00
	10+	0.40

The interest rate currently being credited on refunds of accumulated contributions paid to terminating members was assumed to be 2% per annum.

Rates of disability were weighted 50% duty and 50% ordinary disability and are shown as follows:

Sample Ages	% of Active Members Becoming Disabled within Next Year
20	0.15 %
25	0.18
30	0.20
35	0.29
40	0.42
45	0.65
50	1.05
55	1.84
60	3.06

Summary of Assumptions Used

June 30, 2021

Miscellaneous and Technical Assumptions

Marriage Assumption	90% of all members are assumed to be married for purposes of death-in-service benefits and 80% for deaths after retirement.
Pay Increase Timing	Beginning of (Fiscal) year. This is equivalent to assuming that reported pays represent amounts paid to members during the year ended on the valuation date.
Decrement Timing	Decrements of all types are assumed to occur mid-year.
Eligibility Testing	Eligibility for benefits is determined based upon the age nearest birthday and service nearest whole year on the date the decrement is assumed to occur.
Benefit Service	Exact fractional service is used to determine the amount of benefit payable.
Decrement Relativity	Decrement rates are used directly from the experience study, without adjustment for multiple decrement table effects.
Decrement Operation	Disability and mortality decrements do not operate during the first 5 years of service. Disability and withdrawal do not operate during retirement eligibility.
Normal Form of Benefit	The assumed normal form of benefit is the 60% joint and survivor for married members and straight life for non-married members.
Liability Adjustments	None.
Incidence of Contributions	Contributions are assumed to be received continuously throughout the year based upon the computed percent-of-payroll shown in this report, and the actual payroll payable at the time contributions are made. New entrant normal cost contributions are applied to the funding of new entrant benefits.
Option Factors	Option factors are based upon 6.50% interest and the RP-2000 Combined Healthy Annuitant Mortality Table Projected to 2017 with Scale BB and 100% Unisex.
Data Adjustments	<p>For active members who were in the Police Command division at the beginning of year, their 2021 reported salary was reduced by 2% of the 2020 reported salary to account for a 2% retroactive raise.</p> <p>For one member who was indicated to have taken FMLA, last year's salary was used.</p>



Glossary

Accrued Service – The service credited under the plan which was rendered before the date of the actuarial valuation.

Actuarial Accrued Liability – The difference between (i) the actuarial present value of future plan benefits, and (ii) the actuarial present value of future normal cost. Sometimes referred to as "accrued liability" or "past service liability."

Actuarial Assumptions – Estimates of future plan experience with respect to rates of mortality, disability, turnover, retirement, rate or rates of investment income and salary increases. Decrement assumptions (rates of mortality, disability, turnover and retirement) are generally based on past experience, often modified for projected changes in conditions. Economic assumptions (salary increases and investment income) consist of an underlying rate in an inflation-free environment plus a provision for a long-term average rate of inflation.

Actuarial Cost Method – A mathematical budgeting procedure for allocating the dollar amount of the "actuarial present value of future plan benefits" between the actuarial present value of future normal cost and the actuarial accrued liability. Sometimes referred to as the "actuarial funding method."

Actuarial Equivalent – A single amount or series of amounts of equal value to another single amount or series of amounts, computed on the basis of the rate(s) of interest and mortality tables used by the plan.

Actuarial Present Value – The amount of funds presently required to provide a payment or series of payments in the future. It is determined by discounting the future payments at a predetermined rate of interest, taking into account the probability of payment.

Amortization – Paying off an interest-bearing liability by means of periodic payments of interest and principal, as opposed to paying it off with a lump sum payment.

Experience Gain (Loss) – A measure of the difference between actual experience and that expected based upon a set of actuarial assumptions during the period between two actuarial valuation dates, in accordance with the actuarial cost method being used.

Normal Cost – The annual cost assigned, under the actuarial funding method, to current and subsequent plan years. Sometimes referred to as "current service cost." Any payment toward the unfunded actuarial accrued liability is not part of the normal cost.

Reserve Account – An account used to indicate that funds have been set aside for a specific purpose and are not generally available for other uses.

Unfunded Actuarial Accrued Liability – The difference between the actuarial accrued liability and valuation assets. Sometimes referred to as "unfunded accrued liability."

Valuation Assets – The value of current plan assets recognized for valuation purposes.

City of Jackson
Employees Retirement System
Actuarial Valuation Report
as of June 30, 2021



City of Jackson Policemen's and Firemen's Pension Fund

Actuarial Valuation Report
as of June 30, 2021



Table of Contents

Actuarial Valuation Report as of June 30, 2021

Page	Items
--	Cover Letter
1-4	Executive Summary
	Valuation Results and Comparative Information
A-1	Contributions
A-2	Comparative Schedule (\$ Amounts in Thousands)
A-3	Development of Actuarial Value of Assets
A-4	City's Computed Contributions – Comparative Schedule
A-5	Cash Flow Projection 1 – Current Board Approved Policy
A-6	Cash Flow Projection 2 – Board Requested Alternative
A-7	Development of Gain/(Loss)
A-8	Other Observations
A-9/10	Risk Measures
	Summary of Benefit Provisions and Valuation Data Submitted by the Pension Fund
B-1/2	Summary of Benefit Provisions Evaluated and/or Considered
B-3	Summary of Asset Information
B-4/7	Retiree and Beneficiary Data
B-8	Active Member Data
	Actuarial Cost Methods, Actuarial Assumptions and Definitions of Technical Terms
C-1	Actuarial Cost Methods
C-2/3	Actuarial Assumptions
C-4	Definitions of Technical Terms



January 31, 2022 (Revised)

Board of Trustees
City of Jackson Policemen's and Firemen's
Pension Fund
Jackson, Michigan

**Re: City of Jackson Policemen's and Firemen's Pension Fund Actuarial Valuation as of
June 30, 2021**

The results of the June 30, 2021 Annual Actuarial Valuation of the City of Jackson Policemen's and Firemen's Pension Fund are presented in this report.

This report was prepared at the request of the Board and is intended for use by the Pension Fund and those designated or approved by the Board. This report may be provided to parties other than the Fund only in its entirety and only with the permission of the Board. GRS is not responsible for unauthorized use of this report.

The purpose of the valuation is to measure the Fund's funding progress and to determine the employer contribution rate for the fiscal year ending June 30, 2023 (beginning July 1, 2022). Information required by Statement Nos. 67 and 68 of the Governmental Accounting Standards Board (GASB) are provided in separate reports. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results, associated with the benefits described in this report, for purposes other than those identified above may be significantly different.

This report includes risk metrics on pages A-12 and A-13 but does not include a more robust assessment of the risks of future experience not meeting the actuarial assumptions. Additional assessment of risks was outside the scope of this assignment.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed. Continued receipt of employer contributions on a timely basis is essential for the sustainability of the Fund.

This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

The findings in this report are based on data and other information through June 30, 2021. This valuation was based upon information furnished by the Plan Administrator, concerning Pension Fund benefits, financial transactions, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by the Plan Administrator.

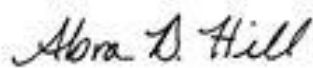
This report has been prepared by individuals who have substantial experience valuing public employee retirement systems. To the best of our knowledge, the information contained in this report is accurate and fairly presents the actuarial position of the Fund as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices, and with the Actuarial Standards of Practice issued by the Actuarial Standards Board.

Abra D. Hill, James R. Sparks and Derek Henning are Members of the American Academy of Actuaries (MAAA) and meet the Academy's Qualification Standards to render the actuarial opinions contained herein.

The signing actuaries are independent of the plan sponsor.

Gabriel, Roeder, Smith & Company will be pleased to review this valuation report with the Board of Trustees and to answer any questions pertaining to the valuation.

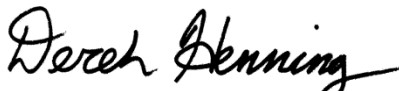
Respectfully submitted,
Gabriel, Roeder, Smith & Company



Abra D. Hill, ASA, FCA, MAAA



James R. Sparks, ASA, FCA, MAAA



Derek Henning, ASA, EA, MAAA

ADH/JRS/DH:dj

C0027



EXECUTIVE SUMMARY

Executive Summary

Valuation Date:	June 30, 2020	June 30, 2021
Contribution For Fiscal Year Ending:	June 30, 2022	June 30, 2023
Investment Rate of Return (net of expenses):	6.0%	6.0%
Computed Annual Employer Contributions:	\$ 363,236	\$ 260,185
Membership:		
Number of		
Active Members	0	0
Retirees and Beneficiaries	15	13
Inactive, Non-retired Members	0	0
Total	15	13
Total Pensions Being Paid	\$ 636,540	\$ 576,414
Assets:		
Market Value (MVA)	\$3,311,403	\$3,997,008
Actuarial Value (AVA)	3,334,482	3,576,789
Return on Actuarial Value	9.2%	12.0%
Return on Market Value	2.1%	25.8%
Ratio - Actuarial Value to Market Value	100.7%	89.5%
Actuarial Information:		
Normal Cost %	0%	0%
Actuarial Accrued Liability (AAL)	\$5,814,802	\$5,172,947
Unfunded Actuarial Accrued Liability (UAAL)	2,480,320	1,596,158
Funded Ratio on Actuarial Value of Assets	57.3%	69.1%
Amortization Period	7 years	6 years

Highlights

- The Fund’s experience for the 2021 Fiscal Year was favorable in comparison to expectations. Actuarial gains occurred as a result of:
 - Greater than expected mortality for the past year (3 benefit recipients deceased - \$306k gain);
 - COLA increases slightly lower than the assumed 3% per year (\$21k gain); and
 - Return on the Actuarial Value of Assets (12.0%) was higher than the assumed rate of 6.0% (\$196k gain).
- The Unfunded Actuarial Accrued Liabilities of \$1.6 million as of June 30, 2021 are amortized over a 6-year closed level-dollar amortization period.

This Executive Summary gives an overview of the entire report. It should not be used as a substitute for a thorough reading of the full report.



Executive Summary

Actuarial Valuation

This report presents the actuarial valuation of the City of Jackson Policemen's and Firemen's Pension Fund prepared as of June 30, 2021. Valuations are prepared annually as of July 1 of each year; the first day of the City of Jackson Policemen's and Firemen's Pension Fund plan and fiscal year.

The primary purposes of the valuation report are to measure the plan's liabilities to determine the required employer contribution rate based upon the Fund's funding policy and to analyze changes in the City of Jackson Policemen's and Firemen's Pension Fund's actuarial position.

In addition, the report provides summaries of the member data, financial data, plan provisions, and actuarial assumptions and methods.

Financing Objectives

The City of Jackson Policemen's and Firemen's Pension Fund is a very mature plan with no active members and is supported only by employer contributions and net earnings on the investments of the Fund. The employer contribution is determined by the actuarial valuation.

The employer contributions were intended to be sufficient to amortize the Unfunded Actuarial Accrued Liability (UAAL) over a 10-year level dollar closed period for liabilities beginning with the June 30, 2017 valuation. As of June 30, 2021, the remaining amortization period for retired liabilities is 6 years. The current amortization policy of financing the UAAL over a closed 6-year period projects employer contributions plus expected investment return on Fund assets (6.0% per annum) to offset expected annual benefit payments (\$ inflows = \$ outflows).

Plan Experience

Net experience for the Pension Fund was favorable during the year ending June 30, 2021. The sources of gains or (losses) on the UAAL are:

Item	Impact on UAAL
Actuarial Value of Assets Gain/(Loss)	\$ 196,154
COLA Gain/(Loss)	21,624
Mortality Gain/(Loss)	306,193
Total Experience Gain/(Loss)	\$ 523,971

The recognized rate of return on the Actuarial Value of Assets was 12.0% versus the assumed rate of investment return of 6.0%, resulting in an asset gain of \$196,154.

The assumed cost-of-living-adjustment increases are 3.00% for all retirees. Actual cost-of-living-adjustment increases granted for most retirees was 2.00% (with some granted 3.50% increases). On average the increase was below the 3.00% assumption, which resulted in a small gain for the year (\$21,624).

Three benefit recipients deceased during the last fiscal year (versus about 1 expected). This resulted in a liability mortality gain of \$306,193.



Executive Summary

Funded Status

The funded ratio of the Fund continued to improve thanks to continued employer contributions to fund the Unfunded Actuarial Accrued Liability and favorable plan experience. The Funded Status on an Actuarial Value of Assets basis improved to 69.1% as of June 30, 2021 versus 57.3% as of June 30, 2020 (assuming a 6.0% investment rate of return).

The funded status on a market value basis (i.e., If all future unrecognized investment gains were to be recognized immediately – item H of page A-3) would have been 77.3% as of June 30, 2021 (a 20.4% increase from 56.9% as of June 30, 2020).

Given the maturity of the Fund, in the near future it may be in the Board's interest to use the Market Value of Assets for future actuarial valuations (rather than the current Actuarial Value of Assets method). As of June 30, 2021, the funded status on a Market Value of Assets basis is about 12% more than the funded status on an Actuarial Value of Assets basis. At this time, the Actuarial Value of Assets has maintained fairly level over the past decade (\$3 to \$4 million range). We believe the Actuarial Valuation of Assets is an appropriate method for Funding purposes so long as the asset base continues to hold level. The use of the Actuarial Valuation of Assets valuation method helps smooth asset volatility resulting from higher or lower investment returns than assumed in a given year.

The Funded Status is not appropriate for assessing the sufficiency of Fund assets to cover the estimated cost of settling the plan's benefit obligations. By itself, this measure is not appropriate for assessing the need for or the amount of future employer contributions.

Assumptions and Methods:

As of the June 30, 2015 Actuarial Valuation, the long-term investment rate of return net of expenses was decreased from 7.5% to 6.0% and the closed amortization period was increased from 9 to 11 (see Alternate Funding Policy supplemental dated March 17, 2016).

As of the June 30, 2017 Actuarial Valuation, the closed amortization period was increased from 9 years to 10 years (see letter dated February 9, 2018).

The above changes were approved by the Board. As of June 30, 2021, this amortization period has 6 years remaining.

Executive Summary

Looking Ahead

The net cash flow (contributions less benefit payments) was about -4% of assets for the prior fiscal year. The 6.0% assumed rate of investment return is expected to mostly offset this negative cash flow in the near future. As a consequence, the projected assets are expected to remain somewhat level for the next 5 to 10 years with continued receipt of employer contributions and if all assumptions are met.

The current level of benefit payments, \$576,414, is large relative to the market value of assets of \$3,997,008 as of June 30, 2021. The amount of benefit payments, the value of funds in the trust, and the trust investment vehicles all should be monitored closely to avoid any short-term cash flow problems. Page A-5 shows projections under the current assumptions and amortization policies. It is important to understand that these projections are not forecasts, but rather projections based upon the valuation's assumptions.

As previously discussed, the Actuarial Value of Assets is less than the Market Value of Assets (by \$420,219 – see page A-3). This difference will be recognized over the next three years in the absence of offsetting losses/gains. In absence of future investment losses, this recognition will place upward pressure on the current funded status. The asset methodology should be monitored closely in the future. At this time, we believe the Actuarial Valuation of Asset methodology is reasonable.

GASB Accounting Standards

In June 2012, the GASB approved two new accounting standards for public sector retirement systems and governments, Statements No. 67 and No. 68. These new standards are a significant departure from the current standards. The GASB has stated that accounting standards should be separate from funding standards. In our view, the funding of the Pension Fund may continue unchanged. Separate reports were issued to the City with GASB Statement Nos. 67 and 68 information as of June 30, 2021.

Recommendation

We recommend that the Board continue with the current amortization policy and to monitor liquidity needs and asset allocations with the investment consultant.

SECTION A

VALUATION RESULTS AND COMPARATIVE INFORMATION

Contributions Needed to Finance Benefits of the Pension Fund for the Fiscal Year Beginning July 1, 2022

The computed employer contribution for the fiscal year beginning July 1, 2022 is \$260,185.

Continued timely receipt of employer contributions are critical to the well-being of the City of Jackson Policemen's and Firemen's Pension Fund.

The contribution is solely to pay for the Unfunded Actuarial Accrued Liability (UAAL). Currently the UAAL is \$1,596,158 based on the 6.0% assumed rate of investment return. The Unfunded Actuarial Accrued Liability was financed over a period of 6 years. The future employer contributions are assumed to be level dollar amounts needed to amortize the unfunded actuarial accrued liability over a 6-year period. Contribution amounts are assumed to be paid midway through the fiscal year. Dollar amounts are adjusted for the time lag between June 30, 2021 and the assumed contribution date.

The current amortization policy of financing the UAAL over a closed 6-year period projects that employer contributions plus expected investment return on Fund assets (6.0% per annum) will mostly offset expected annual benefit payments (\$ inflows = \$ outflows). The assumed rate of return of 6.0% per annum is considered a reasonable assumption based upon the condition the current asset base is sustainable.

In a cash flow deficient environment (absent employer contributions), the assumed rate of return of 6.0% per annum may become unsustainable.

Comparative contribution amounts for prior fiscal years are shown on page A-4.



Comparative Schedule (\$ Amounts in Thousands)

Valuation Date June 30	Actuarial Accrued Liability	Valuation Assets	Unfunded Actuarial Accrued Liability					Experience Gain/(Loss)
			Dollar Amount	Funded Status (on Valuation Assets)	Amortization Period (Yrs.)		Retired Lives	
					Actives	Retired		
1997 (b)	\$ 16,176	\$ 7,891	\$ 8,285	48.8%	36	19	\$ 110	
1998 (a)	13,879	8,997	4,882	64.8%	35	18	1,731	
1999	13,537	9,845	3,692	72.7%	34	17	1,005	
2000 (a)	11,747	11,518	229	98.1%	N/A	10	3,367	
2001	11,428	10,845	583	94.9%	N/A	9	(641)	
2002	11,267	9,355	1,912	83.0%	N/A	8	(1,286)	
2003	10,901	7,745	3,156	71.0%	N/A	7	(1,190)	
2004	10,753	6,418	4,335	59.7%	N/A	6	(1,256)	
2005	10,172	5,622	4,550	55.3%	N/A	5	(438)	
2006 (a)	10,931	5,560	5,371	50.9%	N/A	10	(413)	
2007	10,682	5,848	4,834	54.7%	N/A	10	(29)	
2008 (a)	11,056	5,533	5,523	50.0%	N/A	10	(88)	
2009 (a)	9,867	4,294	5,573	43.5%	N/A	19.65	(717)	
2010 (a)	9,464	4,029	5,435	42.6%	N/A	20.93	(220)	
2011	8,904	3,575	5,329	40.2%	N/A	13	(32)	
2012 (a)	8,481	3,245	5,236	38.3%	N/A	12	308	
2013	8,189	3,200	4,989	39.1%	N/A	11	(7)	
2014	8,165	3,286	4,879	40.2%	N/A	10	376	
2015 (a)	8,213	3,292	4,921	40.1%	N/A	11	259	
2016	7,912	3,305	4,606	41.8%	N/A	10	(13)	
2017	7,467	3,295	4,172	44.1%	N/A	10	129	
2018 (a)	7,362	3,281	4,081	44.6%	N/A	9	(54)	
2019	6,933	3,238	3,695	46.7%	N/A	8	123	
2020	5,815	3,334	2,480	57.3%	N/A	7	888	
2021	5,173	3,577	1,596	69.1%	N/A	6	524	

(a) After changes in assumptions and/or methods.

(b) After implementation of four-year smoothed funding value of assets.



Development of Actuarial Value of Assets

Year Ended June 30:	2020	2021	2022	2023	2024
A. Actuarial Value Beginning of Year	\$3,238,459	\$3,334,482			
B. Market Value End of Year	3,311,403	3,997,008			
C. Market Value Beginning of Year	3,433,846	3,311,403			
D. Non-Investment Net Cash Flow	(194,008)	(149,433)			
D1. Projected Rate of Return	6.00%	6.00%	6.00%		
E. Investment Income					
E1. Market Total: B - C - D	71,565	835,038			
E2. Amount for Immediate Recognition	188,487	195,586			
E3. Amount for Phased-In Recognition E1-E2	(116,922)	639,452			
F. Phased-In Recognition of Investment Income					
F1. Current Year: 0.25 x E3	(29,231)	159,863			
F2. First Prior Year	(912)	(29,231)	\$159,863		
F3. Second Prior Year	66,433	(912)	(29,231)	\$159,863	
F4. Third Prior Year	65,254	66,434	(910)	(29,229)	\$159,863
F5. Total Recognized Investment Gain	101,544	196,154	129,722	130,634	159,863
G. Actuarial Value					
G1. Preliminary Funding Value End of Year: A + D + E2 + F5	3,334,482	3,576,789			
G2. Upper Corridor Limit: B x 1.2	3,973,684	4,796,410			
G3. Lower Corridor Limit: B x 0.8	2,649,122	3,197,606			
G4. Final Funding Value	3,334,482	3,576,789			
H. Difference between Market & Funding Value	(23,079)	420,219			
I. Recognized Rate of Return - Funding Value	9.2%	12.0%			
J. Recognized Rate of Return - Market Value	2.1%	25.8%			
K. Ratio of Funding Value to Market Value	100.7%	89.5%			

The Actuarial Value of Assets recognizes assumed investment income (line E2) fully each year. Differences between actual and assumed investment income (line E3) are phased-in over a closed four-year period. During periods when investment performance exceeds the assumed rate, Actuarial Value of Assets will tend to be less than Market Value. During periods when investment performance is less than the assumed rate, Actuarial Value of Assets will be greater than Market Value. The Actuarial Value of Assets is unbiased with respect to Market Value. At any time, Actuarial Value of Assets may be either greater or less than Market Value. If actual and assumed rates of retirement income are exactly equal for three consecutive years, the Actuarial Value will become equal to Market Value.

Actuarial Value of Assets is restricted to the range of 80% to 120% of Market Value.



City's Computed Contributions – Comparative Schedule

Fiscal Year Ended June 30	Valuation Date June 30	Dollar Contributions	
		Computed	Actual
1999	1997	\$ 542,989	\$ 542,989
2000	1998	372,183	372,183
2001	1999	293,241	293,241
2002	2000	-	-
2003	2001	86,992	86,992
2004	2002	301,041	301,041
2005	2003	528,199	528,199
2006	2004	806,276	806,276
2007	2005	934,667	934,667
2008	2006	612,545	612,545
2009	2007	641,212	641,212
2010	2008	722,537 @	722,537
2011	2009	500,000 @	500,000
2012	2010	500,000 @	500,000
2013	2011	599,431 @	599,431
2014	2012	606,096 @	606,096
2015	2013	607,009	607,009
2016	2014	604,690 @	604,690
2017	2015	565,463 @	565,463
2018	2016	567,276	567,276
2019	2017	506,251	506,251
2020	2018	543,093 @	543,093
2021	2019	524,841	524,841
2022	2020	363,236	
2023	2021	260,185	

@ After changes in assumptions and/or methods.

Cash Flow Projection 1 – Current Board Approved Policy

6-Year Closed Amortization

6.0% Return on Actuarial Value of Assets (Net of Expenses)

Valuation Date	Actuarial Accrued Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded		Remaining Amortization Years of UAAL	During Upcoming Fiscal Year		
			Actuarial Liability (UAAL)	Funded Ratio		Projected Total Contributions	Projected Benefit Payments	Assumed Investment Return on AVA
2021	\$ 5,172,947	\$ 3,576,789	\$ 1,596,158	69%	6	\$ 363,236	\$ (562,973)	\$ 208,861
2022	4,903,708	3,585,914	1,317,794	73%	5	260,185	(550,711)	206,680
2023	4,630,939	3,502,067	1,128,872	76%	4	260,185	(537,049)	202,053
2024	4,355,870	3,427,255	928,614	79%	3	260,185	(521,951)	198,010
2025	4,079,840	3,363,499	716,341	82%	2	260,185	(505,334)	194,676
2026	3,804,358	3,313,026	491,331	87%	1	260,185	(487,137)	192,186
2027	3,531,081	3,278,260	252,821	93%	1	260,185	(467,341)	190,685
2028	3,261,789	3,261,789	-	100%	1	-	(445,971)	182,523
2029	2,998,342	2,998,342	-	100%	1	-	(423,117)	167,392
2030	2,742,617	2,742,617	-	100%	1	-	(398,943)	152,763
2031	2,496,437	2,496,437	-	100%	1	-	(373,694)	138,739
2032	2,261,482	2,261,482	-	100%	1	-	(347,690)	125,410
2033	2,039,201	2,039,201	-	100%	1	-	(321,333)	112,853
2034	1,830,721	1,830,721	-	100%	1	-	(295,053)	101,121
2035	1,636,789	1,636,789	-	100%	1	-	(269,286)	90,246
2036	1,457,749	1,457,749	-	100%	1	-	(244,417)	80,239
2037	1,293,572	1,293,572	-	100%	1	-	(220,742)	71,089
2038	1,143,918	1,143,918	-	100%	1	-	(198,495)	62,767
2039	1,008,191	1,008,191	-	100%	1	-	(177,835)	55,234
2040	885,590	885,590	-	100%	1	-	(158,845)	48,439
2041	775,184	775,184	-	100%	1	-	(141,549)	42,326
2042	675,962	675,962	-	100%	1	-	(125,895)	36,836
2043	586,903	586,903	-	100%	1	-	(111,762)	31,910
2044	507,051	507,051	-	100%	1	-	(98,995)	27,496
2045	435,553	435,553	-	100%	1	-	(87,440)	23,548
2046	371,661	371,661	-	100%	1	-	(76,951)	20,025
2047	314,735	314,735	-	100%	1	-	(67,405)	16,891
2048	264,221	264,221	-	100%	1	-	(58,702)	14,118
2049	219,637	219,637	-	100%	1	-	(50,760)	11,678
2050	180,554	180,554	-	100%	1	-	(43,515)	9,547
2051	146,586	146,586	-	100%	1	-	(36,929)	7,703
2052	117,360	117,360	-	100%	1	-	(30,964)	6,126
2053	92,522	92,522	-	100%	1	-	(25,594)	4,795
2054	71,723	71,723	-	100%	1	-	(20,817)	3,688
2055	54,594	54,594	-	100%	1	-	(16,628)	2,784
2056	40,750	40,750	-	100%	1	-	(13,025)	2,060
2057	29,785	29,785	-	100%	1	-	(9,987)	1,492
2058	21,289	21,289	-	100%	1	-	(7,484)	1,056
2059	14,862	14,862	-	100%	1	-	(5,471)	730
2060	10,121	10,121	-	100%	1	-	(3,898)	492
2061	6,715	6,715	-	100%	1	-	(2,703)	323
2062	4,335	4,335	-	100%	1	-	(1,821)	206
2063	2,721	2,721	-	100%	1	-	(1,190)	128
2064	1,659	1,659	-	100%	1	-	(754)	77
2065	981	981	-	100%	1	-	(463)	45
2066	563	563	-	100%	1	-	(275)	26
2067	314	314	-	100%	1	-	(158)	14
2068	170	170	-	100%	1	-	(88)	8
2069	90	90	-	100%	1	-	(47)	4
2070	47	47	-	100%	1	-	(25)	2
2071	24	24	-	100%	1	-	(13)	1
2072	12	12	-	100%	1	-	(7)	1
2073	6	6	-	100%	1	-	(3)	0
2074	3	3	-	100%	1	-	(2)	0
2075	1	1	-	100%	1	-	(1)	0
2076	0	0	-	100%	1	-	(0)	0



Cash Flow Projection 2 – For Display Purposes

6-Year Closed Amortization + 5-Year Open Amortization in 2024

6.0% Return on Actuarial Value of Assets (Net of Expenses)

Valuation Date	Actuarial Accrued Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded		Funded Ratio	Remaining Amortization Years of UAAL	During Upcoming Fiscal Year		
			Actuarial Accrued Liability (UAAL)	Actuarial Value of Assets (AVA)			Projected Total Contributions	Projected Benefit Payments	Assumed Investment Return on AVA
June 30, 2021	\$ 5,172,947	\$ 3,576,789	\$ 1,596,158		69%		\$ 363,236	\$ (562,973)	\$ 208,861
2022	4,903,708	3,585,914	1,317,794		73%	6	260,185	(550,711)	206,680
2023	4,630,939	3,502,067	1,128,872		76%	5	260,185	(537,049)	202,053
2024	4,355,870	3,427,255	928,614		79%	5	214,029	(521,951)	196,626
2025	4,079,840	3,315,959	763,881		81%	5	176,061	(505,334)	189,300
2026	3,804,358	3,175,986	628,372		83%	5	144,828	(487,137)	180,503
2027	3,531,081	3,014,181	516,901		85%	5	119,136	(467,341)	170,609
2028	3,261,789	2,836,585	425,204		87%	5	98,002	(445,971)	159,951
2029	2,998,342	2,648,567	349,775		88%	5	80,617	(423,117)	148,824
2030	2,742,617	2,454,891	287,726		90%	5	66,316	(398,943)	137,489
2031	2,496,437	2,259,752	236,684		91%	5	54,551	(373,694)	126,174
2032	2,261,482	2,066,784	194,697		91%	5	44,874	(347,690)	115,075
2033	2,039,201	1,879,043	160,159		92%	5	36,914	(321,333)	104,350
2034	1,830,721	1,698,974	131,747		93%	5	30,365	(295,053)	94,127
2035	1,636,789	1,528,413	108,376		93%	5	24,979	(269,286)	84,493
2036	1,457,749	1,368,599	89,150		94%	5	20,548	(244,417)	75,507
2037	1,293,572	1,220,236	73,335		94%	5	16,902	(220,742)	67,195
2038	1,143,918	1,083,593	60,326		95%	5	13,904	(198,495)	59,565
2039	1,008,191	958,566	49,624		95%	5	11,438	(177,835)	52,600
2040	885,590	844,769	40,821		95%	5	9,409	(158,845)	46,272
2041	775,184	741,605	33,580		96%	5	7,739	(141,549)	40,544
2042	675,962	648,339	27,623		96%	5	6,367	(125,895)	35,370
2043	586,903	564,180	22,723		96%	5	5,237	(111,762)	30,704
2044	507,051	488,359	18,692		96%	5	4,308	(98,995)	26,504
2045	435,553	420,177	15,376		96%	5	3,544	(87,440)	22,732
2046	371,661	359,013	12,648		97%	5	2,915	(76,951)	19,353
2047	314,735	304,331	10,404		97%	5	2,398	(67,405)	16,339
2048	264,221	255,663	8,559		97%	5	1,973	(58,702)	13,664
2049	219,637	212,596	7,040		97%	5	1,623	(50,760)	11,304
2050	180,554	174,763	5,791		97%	5	1,335	(43,515)	9,239
2051	146,586	141,822	4,764		97%	5	1,098	(36,929)	7,451
2052	117,360	113,441	3,919		97%	5	903	(30,964)	5,918
2053	92,522	89,299	3,224		97%	5	743	(25,594)	4,624
2054	71,723	69,071	2,652		96%	5	611	(20,817)	3,547
2055	54,594	52,413	2,181		96%	5	503	(16,628)	2,668
2056	40,750	38,955	1,794		96%	5	414	(13,025)	1,965
2057	29,785	28,309	1,476		95%	5	340	(9,987)	1,413
2058	21,289	20,075	1,214		94%	5	280	(7,484)	992
2059	14,862	13,863	999		93%	5	230	(5,471)	677
2060	10,121	9,299	822		92%	5	189	(3,898)	448
2061	6,715	6,039	676		90%	5	156	(2,703)	287
2062	4,335	3,779	556		87%	5	128	(1,821)	177
2063	2,721	2,263	457		83%	5	105	(1,190)	104
2064	1,659	1,282	376		77%	5	87	(754)	57
2065	981	672	309		68%	5	71	(463)	29
2066	563	309	255		55%	5	59	(275)	12
2067	314	104	209		33%	5	51	(158)	3
2068	170	-	170		0%	5	88	(88)	0
2069	90	-	90		0%	5	47	(47)	0
2070	47	-	47		0%	5	25	(25)	0
2071	24	-	24		0%	5	13	(13)	0
2072	12	-	12		0%	5	7	(7)	0
2073	6	-	6		0%	5	3	(3)	0
2074	3	-	3		0%	5	2	(2)	0
2075	1	-	1		0%	5	1	(1)	0
2076	0	-	-		0%	5	0	(0)	0



Development of Gain/(Loss)

Derivation	A. Actuarial Accrued Liability	B. Actuarial Value of Assets	C. Unfunded Actuarial Accrued Liability (A. - B.)
(1) Value at start of year	\$5,814,802	\$3,334,482	\$2,480,320
(2) Normal cost from last valuation	N/A	N/A	N/A
(3) Actual contributions	N/A	524,841	(524,841)
(4) Expected vs. Actual Disbursements	(643,618)	(674,274)	30,656
(5) Interest accrual [(1) + [(2) + (3) + (4)] / 2] x 6.00%	<u>329,580</u>	<u>195,586</u>	<u>133,994</u>
(6) Expected value before changes (1) + (2) + (3) + (4) + (5)	\$5,500,764	\$3,380,635	\$2,120,129
(7) Increase due to plan amendments	-	-	-
(8) Increase due to assumption changes	-	-	-
(9) Expected value after changes (6) + (7) + (8)	\$5,500,764	\$3,380,635	\$2,120,129
(10) Actual value at end of year	<u>5,172,947</u>	<u>3,576,789</u>	<u>1,596,158</u>
(11) Gain/(loss) (9) - (10) [(10) - (9) for assets]	\$ 327,817	\$ 196,154	\$ 523,971

Other Observations

General Implications of Contribution Allocation Procedure or Funding Policy on Future Expected Contributions and Funded Status

Given the Fund's contribution allocation procedure, if all actuarial assumptions are met (including the assumption of the Fund earning 6.00% on the Market Value of Assets), it is expected that:

1. The Unfunded Actuarial Accrued Liabilities (UAAL) will be fully amortized; and
2. The funded status of the Fund will continue to increase gradually towards a 100% funded ratio.

Limitations of Funded Status Measurements

Unless otherwise indicated, a funded status measurement presented in this report is based upon the Actuarial Accrued Liability (AAL) and the Funding Value of Assets (FVA). Unless otherwise indicated, with regard to any funded status measurements presented in this report:

1. The measurement is inappropriate for assessing the sufficiency of Fund assets to cover the estimated cost of settling the Fund's benefit obligations; for example, transferring the liability to an unrelated third party in a market value type transaction.
2. The measurement is dependent upon the Actuarial Cost Method which, in combination with the Fund's amortization policy, affects the timing and amounts of future contributions. The amounts of future contributions will most certainly differ from those assumed in this report due to future actual experience differing from assumed experience based upon the actuarial assumptions.
3. The measurement would produce a different result if the Market Value of Assets (MVA) were used instead of the FVA, unless the MVA is used in the measurement.

Limitations of Project Scope

Actuarial standards do not require the actuary to evaluate the ability of the plan sponsor or other contributing entities to make required contributions to the plan when due. Such an evaluation was not within the scope of this project and is not within the actuary's domain of expertise. Consequently, the actuary performed no such evaluation.

Risks to Future Employer Contribution Requirements

There are ongoing risks to future employer contribution requirements to which the Pension Fund is exposed, such as:

- Actual and Assumed Investment Rate of Return
- Actual and Assumed Mortality Rates
- Amortization Policy

Risk Measures – Risks Associated with Measuring the Accrued Liability and Actuarially Determined Contribution

The determination of the accrued liability and the actuarially determined contribution requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability and the actuarially determined contribution that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: Fund experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the Fund's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

1. **Investment Risk** – actual investment returns may differ from the expected returns;
2. **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
3. **Contribution Risk** – actual contributions may differ from expected future contributions. For example, actual contributions may not be made in accordance with the Fund's funding policy; and
4. **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

The computed contribution shown on page 1 of the Executive Summary may be considered as a minimum contribution rate that complies with the Board's funding policy. The timely receipt of the actuarially determined contributions is critical to support the financial health of the plan. Users of this report should be aware that contributions made at the actuarially determined rate do not necessarily guarantee benefit security.

Risk Measures

Actuarial Valuation Date (6/30)	(1) Actuarial Value of Assets	(2) Actuarial Accrued Liability (AAL)	(3) Unfunded AAL (UAAL) (2) - (1)	(4) Funded Ratio (1) / (2)	(5) Non-Invest. Cash Flow (NICF)	(6) NICF / Assets (5)/(1)	(7) Market Rate of Return	(8) 5-year Trailing Geometric Average
2016	\$ 3,305,211	\$ 7,911,702	\$ 4,606,491	41.8%	\$ (210,061)	(6.4)%	(5.8)%	N/A
2017	3,295,481	7,467,298	4,171,817	44.1%	(246,916)	(7.5)%	15.3%	N/A
2018 *	3,281,146	7,362,477	4,081,331	44.6%	(215,601)	(6.6)%	14.4%	N/A
2019	3,238,459	6,933,093	3,694,634	46.7%	(266,065)	(8.2)%	5.5%	6.3%
2020	3,334,482	5,814,802	2,480,320	57.3%	(194,008)	(5.8)%	2.1%	6.0%
2021	3,576,789	5,172,947	1,596,158	69.1%	(149,433)	(4.2)%	25.8%	10.5%

* Revised actuarial assumptions.

(4). The funded ratio is the most widely known measure of a plan's financial strength, but the trend in the funded ratio is much more important than the absolute ratio. The funded ratio should trend to 100%. As it approaches 100%, it is important to re-evaluate the level of investment risk in the portfolio and potentially to re-evaluate the assumed rate of return.

(5) and (6). The ratio of Non-Investment Cash Flow to assets is an important measure of sustainability. Negative ratios are common and expected for a maturing system such as the City of Jackson Policemen's and Firemen's Pension Fund. A ratio that is more negative than the assumed investment rate of return for an extended period could be a leading indicator of potential exhaustion of assets in the future.

(7) and (8). Investment return is probably the largest single risk that most systems face. The year-by-year return and the five-year geometric average both give an indication of the reasonableness of the system's assumed return. Of course, past performance is not a guarantee of future results. Market rate shown is based on an actuarial estimation method and will differ modestly from figures reported by the investment consultant.

SECTION B

SUMMARY OF BENEFIT PROVISIONS AND VALUATION DATA SUBMITTED BY PENSION FUND

Summary of Benefit Provisions Evaluated and/or Considered (June 30, 2021)

Regular Retirement (no reduction factor for age)

Eligibility – Age 55 with 25 years of credited service, or age 65 regardless of credited service.

Mandatory Retirement Age – Age 65.

Annual Amount – 2% of Final Average Salary (FAS) for each year of credited service, to a maximum of 60% of FAS.

Type of Final Average Salary – Average of annual salary for the five highest consecutive years of service within last 10 years preceding retirement.

Duty Disability Retirement

Eligibility – Total and permanent disability incurred in line of duty with the City.

Annual Amount – 66-2/3% of current salary at date of disability. Amount is offset by Worker's Compensation.

Non-Duty Disability Retirement

Eligibility – Total and permanent disability after 10 years of credited service and under the age of 55 years.

Annual Amount – 1-2/3% of final average salary for each year of credited service. Minimum is 20% of FAS; maximum is 50% of FAS.

Duty Death before Retirement

Eligibility – Death in line of duty with the City.

Annual Amount – 50% of final salary to surviving spouse, until remarriage or death, plus 10% to each unmarried child under age 18; maximum to spouse and children is 66-2/3% of final salary. Amounts are offset by Worker's Compensation.



Summary of Benefit Provisions Evaluated and/or Considered (June 30, 2021)

Non-Duty Death before Retirement

Eligibility – Death after 10 years of credited service.

Annual Amount – 1-1/2% of final average salary to eligible spouse (married at least 1 year to deceased member) for each year of credited service, payable beginning no earlier than age 45. Minimum is 20% of FAS; maximum is 40% of FAS. To each unmarried child under age 18, 10% of FAS with maximum of 50% of FAS for all minor children; total for spouse and children not to exceed 66-2/3% of FAS.

Automatic Death Benefit after Retirement

Upon the Death of a Regular Retiree the surviving spouse receives a benefit equal to 66-2/3% of the benefit **at retirement**. Upon the death of the Duty Disability retiree, the surviving spouse receives a benefit equal to 75% of the benefit the retiree received **at death**. These survivorship benefits will continue to increase with Post-Retirement Cost-of Living Adjustments.

Post-Retirement Cost-of-Living Adjustments

Pensions adjusted by same percent as increase in the pay of the rank last occupied.

Member Contributions

7% plus 1/2 of 1% for post-retirement cost-of-living adjustments.

Summary of Asset Information Submitted for Valuation

Balance Sheet

Reported Assets - Market Value		Reserves for	
Cash & equivalents	\$ 64,625	Members' contributions	\$ 0
Receivables & accruals	12	Employer's contributions	29,517,983
Stocks	1,655,944	Retired benefit payments	(25,520,975)
Bonds	1,439,677		
International stocks	836,750		
Total Current Assets	\$3,997,008	Total Reserves	\$ 3,997,008

Revenues and Expenditures

Reported Balance - 6/30/2020 \$3,311,403

Revenues

Members' contributions	0
Employer contributions	524,841
Investment income	858,610

Expenditures

Benefit payments	674,274
Refund of member contributions	none
Administrative & Investment expenses	23,572

Reported Balance - 6/30/2021 \$3,997,008



Retiree and Beneficiary Comparative Schedule (Annual Pensions Include Escalation)

Year Ended June 30	Added to Rolls		Removed from Rolls		Rolls End of Year		% Incr. in Annual Pensions	Average Pension	Discounted Value of Pensions		
	No.	Annual Pensions*		No.	Annual Pensions				Total	Average	
		New	COLAs		No.	Annual Pensions					
1997		\$ 66,799		3	\$ 22,494	78	\$1,438,054	3.2 %	\$18,437	\$15,690,172	\$201,156
1998		42,629		6	83,160	72	1,397,523	(2.8)	19,410	13,478,231	187,198
1999	1	44,820		4	54,045	69	1,388,298	(0.7)	20,120	13,126,607	190,241
2000	1	69,894		5	107,373	65	1,350,819	(2.7)	20,782	11,747,323	180,728
2001		44,704		4	79,319	61	1,316,204	(2.6)	21,577	11,427,707	187,339
2002		38,818		2	24,168	59	1,330,854	1.1	22,557	11,267,420	190,973
2003	3	105,612		6	148,099	56	1,288,367	(3.2)	23,007	10,900,752	194,656
2004			\$ 41,628	2	18,616	54	1,311,379	1.8	24,285	10,753,134	199,132
2005			42,898	4	91,966	50	1,262,311	(3.7)	25,246	10,172,322	203,446
2006			47,031	4	30,670	46	1,278,672	1.3	27,797	10,930,809	237,626
2007			43,468	2	66,876	44	1,255,264	(1.8)	28,529	10,681,885	242,770
2008	3	22,947	39,671	5	121,543	42	1,196,339	(4.7)	28,484	11,055,950	@ 263,237
2009	1	31,172	30,500	7	179,762	36	1,078,249	(9.9)	29,951	9,866,752	274,076
2010			28,465	3	43,249	33	1,063,465	(1.4)	32,226	9,463,639	286,777
2011	2	70,213	4,675	3	125,298	32	1,013,055	(4.7)	31,658	8,904,371	278,262
2012			7,083	3	46,283	29	973,855	(3.9)	33,581	8,481,396	@ 292,462
2013	0		13,234	1	5,871	28	981,217	0.8	35,043	8,189,493	292,482
2014	3	72,389	10,934	5	208,826	26	855,714	(12.8)	32,912	8,165,218	314,047
2015			10,114	2	53,498	24	812,330	(5.1)	33,847	8,213,377	@+ 342,224
2016			6,862	1	5,613	23	813,579	0.2	35,373	7,911,702	343,987
2017			7,480	2	54,805	21	766,254	(5.8)	36,488	7,467,298	355,586
2018			16,257	1	13,037	20	769,474	0.4	38,474	7,362,477	@ 368,124
2019			15,930	2	49,349	18	736,055	(4.3)	40,892	6,933,093	385,172
2020			14,650	3	114,165	15	636,540	(13.5)	42,436	5,814,802	387,653
2021	1	45,408	13,505	3	119,039	13	576,414	(9.4)	44,340	5,172,947	397,919

* Beginning in the 2004 valuation, changes in the annual pension are separated into benefits for the new members and cost of living adjustments for existing members. 2011 includes estimated benefits for one unreported surviving spouse.

@ After changes in assumptions and/or methods.

+ Alternate Funding Policy supplemental actuarial report dated March 17, 2016.



Retirees and Beneficiaries on Rolls Comparative Statement

Valuation Date June 30	No. on Rolls	Initial Pensions	Escalation Pensions	Total	Initial as Percent of Total
1997	78	\$ 641,341	\$ 796,713	\$ 1,438,054	44.6 %
1998	72	625,412	772,111	1,397,523	44.8
1999	69	609,245	779,053	1,388,298	43.9
2000	65	610,280	740,539	1,350,819	45.2
2001	61	591,432	724,772	1,316,204	44.9
2002	59	583,398	747,456	1,330,854	43.8
2003	56	601,739	686,628	1,288,367	46.7
2004	54	590,490	720,889	1,311,379	45.0
2005	50	560,207	702,104	1,262,311	44.4
2006	46	541,856	736,816	1,278,672	42.4
2007	44	529,973	725,291	1,255,264	42.2
2008	42	514,630	681,709	1,196,339	43.0
2009	36	464,420	613,829	1,078,249	43.1
2010	33	446,976	616,489	1,063,465	42.0
2011	32	444,354	568,701	1,013,055	43.9
2012	29	422,907	550,948	973,855	43.4
2013	28	418,926	562,291	981,217	42.7
2014	26	364,983	490,731	855,714	42.7
2015	24	341,918	470,412	812,330	42.1
2016	23	336,451	477,128	813,579	41.4
2017	21	302,959	463,295	766,254	39.5
2018	20	291,438	478,036	769,474	37.9
2019	18	278,670	457,385	736,055	37.9
2020	15	240,974	395,566	636,540	37.9
2021	13	206,871	369,543	576,415	35.9

Retirees and Beneficiaries as of June 30, 2021 Tabulated by Type of Pensions Being Paid

Type of Pension Being Paid	No.	Escalator Pensions	Initial Pensions	Total Annual Pensions
Present Plan (1957) Pensions				
Age & Service Pensions:				
- Straight Life	2	\$ 56,785	\$ 50,739	\$107,524
- Survivor Beneficiaries	<u>4</u>	<u>97,615</u>	<u>37,676</u>	<u>135,292</u>
- Totals	6	154,401	88,415	242,816
Casualty Pensions:				
- Disability	<u>7</u>	<u>215,142</u>	<u>118,456</u>	<u>333,599</u>
- Totals	7	215,142	118,456	333,599
Total Pensions Being Paid	13	\$369,543	\$206,871	\$576,414

Retirees and Beneficiaries as of June 30, 2021 Tabulated by Attained Age

Attained Age	Present Plan	
	No.	Annual Pensions
65 - 69	1	\$ 34,882
70 - 74	1	43,886
75 - 79	2	103,691
80	2	91,662
81	1	53,639
82	1	49,094
83	1	48,852
84	1	36,889
85	1	35,755
87	1	19,636
92	1	58,430
TOTALS	13	\$ 576,414

Average Age at Retirement: 48.2 yrs.

Average Age Now: 81.3 yrs.

Active Members *

Comparative Schedule

Valuation Date June 30	Active Members	Valuation Payroll	Average			
			Age	Service	Pay	% Incr.
1966	161	\$1,120,927	N/A yrs.	N/A yrs.	\$ 6,962	0.0 %
1967	154	1,112,452	38.8	12.3	7,224	3.8
1968	189	1,616,594	36.9	10.9	8,553	18.4
1969	171	1,491,991	37.8	11.7	8,725	2.0
1970	184	1,985,341	36.8	10.9	10,790	23.7
1971	181	2,069,097	37.4	11.7	11,431	5.9
1972	182	2,255,898	37.4	11.7	12,395	8.4
1973	172	2,245,755	37.3	11.7	13,057	5.3
1974	155	2,191,456	37.2	11.9	14,138	8.3
1975	153	2,561,103	38.1	12.7	16,739	18.4
1976	141	2,590,482	38.4	13.1	18,372	9.8
1977	124	2,356,400	38.4	13.0	19,003	3.4
1978	114	2,392,124	39.0	13.5	20,984	10.4
1979	110	2,466,966	40.3	14.7	22,427	6.9
1980	103	2,567,220	40.6	15.0	24,924	11.1
1981	90	2,562,461	41.6	16.0	28,472	14.2
1982	82	2,375,269	41.5	16.2	28,967	1.7
1983	73	2,216,742	41.9	16.7	30,366	4.8
1984	67	1,960,418	42.1	17.0	29,260	(3.6)
1985	56	1,680,335	42.1	17.2	30,006	2.5
1986	54	1,683,819	42.8	18.0	31,182	3.9
1987	51	1,652,602	43.6	18.8	32,404	3.9
1988	46	1,639,724	44.2	19.6	35,646	10.0
1989	33	1,285,310	44.9	20.3	38,949	9.3
1990	21	777,999	45.8	21.1	37,048	(4.9)
1991	6	251,480	47.8	22.0	41,913	13.1
1992	5	228,684	48.2	22.8	45,737	9.1
1993	5	237,750	49.2	23.8	47,550	4.0
1994	1	43,230	56.0	24.3	43,230	(9.1)
1995	1	43,139	57.0	25.3	43,139	(0.2)
1996	1	44,875	58.0	26.3	44,875	4.0
1997	1	50,098	59.0	27.3	50,098	11.6
1998	1	49,813	60.0	28.3	49,813	(0.6)
1999	1	51,016	60.8	29.3	51,016	2.4
2000	0	0	N/A	N/A	N/A	N/A

* As of the June 30, 2000 valuation, there are no longer active members.



SECTION C

ACTUARIAL COST METHODS, ACTUARIAL ASSUMPTIONS AND DEFINITIONS OF TECHNICAL TERMS

Actuarial Cost Methods Used for the Valuation

Financing of Unfunded Actuarial Accrued Liabilities: Unfunded actuarial accrued liability was financed over a period of the average life expectancy of remaining members rounded down to whole years. The indicated dollar amounts were assumed to remain level over the closed 6-year amortization period. Contribution amounts were assumed to be paid midway through the fiscal year.

The **Actuarial Value of Assets** used for funding purposes is derived as follows: prior year valuation assets are increased by contribution and expected investment income and reduced by refunds, benefit payments and expenses. To this amount is added 25% of the difference between expected and actual investment income for each of the previous four years. Beginning with the June 30, 2008 valuation, Actuarial Value of Assets are restricted to the range of 80% to 120% of market value of assets.

Actuarial Assumptions Used for the Valuation

The contribution requirements and actuarial present values of a pension fund are calculated by applying actuarial assumptions to the benefit provisions and people information of the Fund.

The principal areas of risk which require actuarial assumptions about future experiences are:

- (i) long-term rates of investment return to be generated by the assets of the Fund
- (ii) patterns of pay increases to members
- (iii) rates of mortality among members, retirees, and beneficiaries
- (iv) rates of withdrawal of active members
- (v) rates of disability among active members
- (vi) the age patterns of actual retirements

The monetary effect of each assumption is calculated for as long as a present covered person survives – a period of time which can be as long as a century.

Actual experience of the Fund will not coincide exactly with assumed experience, regardless of the wisdom of the assumptions. Each valuation provides a complete recalculation of assumed future experience and takes into account all past differences between assumed and actual experience. The result is a continual series of adjustments (usually small) to the computed contribution rate.

From time-to-time one or more of the assumptions are modified to reflect experience trends (but not random or temporary year-to-year fluctuations).

All actuarial assumptions are expectations of future experience, not market measures.

The investment return rate (net of expenses) used for valuation calculations was 6.0% a year, compounded annually. The assumed rate of price inflation was updated in the June 30, 2018 Actuarial Valuation to 2.25% per year resulting in a real rate of return of 3.75% per year.

No specific price inflation assumption is currently used in the valuation since there are no benefits that are specifically linked to price inflation. However, a price inflation assumption of 2.25% per year was considered in the building block development of the investment rate of return.

The investment return assumption of 6.0% per year is used to equate the value of payments due at different points in time and was first used for the revised June 30, 2015 valuation supplemental to re-compute the 2017 fiscal year employer contribution. Approximate investment returns, for the purpose of comparisons with assumed returns, have been as follows:

	Year Ended June 30					5-Year Average
	2021	2020	2019	2018	2017	
Nominal rate	12.0%	9.2%	7.1%	6.3%	7.5%	8.4%

The nominal rate (i.e., market value rate) of return was computed using the approximate formula $i = I$ divided by $1/2 (A + B - I)$, where I is actual realized investment income net of expenses plus market value adjustments, A is the beginning of year asset value, and B is the end of year asset value.

These rates of return should not be used for measurement of an investment advisor's performance or for comparisons with other pension funds – to do so will mislead.

Assumed rate of pension escalation: 3.0% per annum, compounded annually.

The mortality table used was the RP-2014 Healthy Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 on a fully generational basis. This table was first used for the June 30, 2018 valuation. Sample values for calendar year 2021 follow:

Sample Attained Ages	Probability of Dying Next Year		Future Life Expectancy (Years)	
	Male	Female	Male	Female
60	0.82%	0.59%	25.12	27.34
65	1.19	0.86	20.81	22.82
70	1.74	1.30	16.77	18.51
75	2.73	2.11	13.02	14.48
80	4.57	3.62	9.67	10.85
85	8.01	6.49	6.85	7.78
90	14.12	11.57	4.71	5.40
95	22.14	18.86	3.31	3.75
Ref:	2135 949	2136 950		

No adjustment is made for retirees who were previously designated as disabled upon retirement.

Definitions of Technical Terms

Accrued Service: Service credited under the fund which was rendered before the date of the actuarial valuation.

Actuarial Accrued Liability: The difference between the actuarial present value of future benefit payments and the actuarial present value of future normal costs. Also referred to as "accrued liability" or "past service liability."

Actuarial Assumptions: Estimates of expected future experience with respect to rates of mortality, disability, turnover, retirement, rate or rates of investment income and salary increases. Decrement assumptions (rates of mortality, disability, turn-over and retirement) and generally based on past experience, often modified for projected changes in conditions. Economic assumptions (salary increases and investment income) consist of the underlying rates in an inflation-free environment plus a provision for a long-term average rate of inflation.

Actuarial Cost Method: A mathematical budgeting procedure for allocating the dollar amount of the "actuarial present value of future benefit payments" between future normal costs and actuarial accrued liabilities. Sometimes referred to as the "actuarial valuation cost method."

Actuarial Equivalent: A single amount or series of amounts of equal actuarial present value to another single amount or series of amounts, computed on the basis of appropriate actuarial assumptions.

Actuarial Present Value: The amount of funds currently required to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payment. Also referred to as "present value."

Amortization: Paying off an interest-discounted amount with periodic payments of interest and principal – as opposed to paying it off with a lump sum payment.

Experience Gain/(Loss): The difference between actual actuarial costs and assumed actuarial costs – during the period between two valuation dates.

Normal Cost: The actuarial cost allocated to the current year by the actuarial cost method. Sometimes referred to as "current service cost."

Unfunded Actuarial Accrued Liabilities: The difference between Actuarial Accrued Liabilities and the Actuarial Value of Assets. Sometimes referred to as "unfunded past service liability," "unfunded accrued liability" or "unfunded supplemental present value."

Most pension funds have unfunded actuarial accrued liabilities. They arise each time new benefits are added and each time an experience loss is realized.

The existence of unfunded actuarial accrued liabilities is not in itself bad, any more than a mortgage on a house is bad. Unfunded actuarial accrued liabilities do not represent a debt that is payable today. What is important is the ability to control the amount of unfunded actuarial accrued liabilities and the trend in their amount (after due allowance for devaluation of the dollar).



January 31, 2022 (Revised)

Ms. Sandra M. Sykes
Pension Coordinator
City of Jackson
161 West Michigan Avenue
Jackson, Michigan 49201

Dear Sandy:

Enclosed, please find ten copies of the report of the annual Actuarial Valuation Report as of June 30, 2021 of the City of Jackson Policemen's and Firemen's Pension Fund.

Sincerely,

A handwritten signature in black ink that reads "Abra D. Hill". The signature is written in a cursive, flowing style.

Abra D. Hill, ASA, FCA, MAAA

ADH:dj
Enclosures

cc: Amanda Wedgwood (Electronic Copy)
The Rehman Group

Table of Contents

Report of June 30, 2021 Actuarial Valuation

<u>Page</u>	<u>Items</u>
--	Cover Letter
1-5	Executive Summary
	Valuation Results
A-1	Funding Objective and Contribution Rates
A-2/5	Development of Contributions
A-6/7	Financing of the Unfunded Actuarially Accrued Liability
A-8	Development of Actuarial Value of Assets
A-9	Valuation Results – Comparative Statement
A-10	Recommended and Actual Contributions – Comparative Statement
A-11	Current and Future Employer Contributions
A-12	Summary Statement of System Resources and Obligations
A-13	Active Member Experience Gain (Loss)
A-14	Other Observations
A-15/16	Risk Measures
	Summary of Benefit Provisions and Valuation Data
B-1/5	Summary of Benefit Provisions Evaluated or Considered
B-6/8	Retired Life Data
B-9	Inactive Member Data
B-10/15	Active Member Data
B-16	Asset Information
	Funding Objective, Summary of Valuation Process, Methods and Assumptions
C-1/2	Basic Funding Objective and Operation of the Retirement System
C-3/4	Actuarial Valuation Process
C-5	Actuarial Cost Method
C-6/11	Actuarial Assumptions
C-12	Miscellaneous and Technical Assumptions
C-13	Glossary



January 31, 2022

Board of Trustees
City of Jackson Employees Retirement System
Jackson, Michigan

**Re: City of Jackson Employees Retirement System Actuarial Valuation
as of June 30, 2021 Actuarial Disclosures**

Dear Board Members:

The results of the June 30, 2021 Annual Actuarial Valuation of the City of Jackson Employees Retirement System are presented in this report.

This report was prepared at the request of the Board and is intended for use by the Retirement System and those designated or approved by the Board. This report may be provided to parties other than the System only in its entirety and only with the permission of the Board. GRS is not responsible for unauthorized use of this report.

The purposes of the valuation are to measure the System's funding progress and to determine the employer contribution rate for the fiscal year ending June 30, 2023 (beginning July 1, 2022). Information required by Statement Nos. 67 and 68 of the Governmental Accounting Standards Board (GASB) are provided in separate reports. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results, associated with the benefits described in this report, for purposes other than those identified above may be significantly different.

The contribution amount in this report is determined using the actuarial assumptions and methods disclosed in Section C of this report. This report includes risk metrics on pages A-15 and A-16 but does not include a more robust assessment of the risks of future experience not meeting the actuarial assumptions. Additional assessment of risks was outside the scope of this assignment. We encourage a review and assessment of investment and other significant risks that may have a material effect on the System's financial condition.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed.

The findings in this report are based on data and other information through June 30, 2021. This valuation was based upon information furnished by the City, concerning Retirement System benefits, financial transactions, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by the City.

This report was prepared using assumptions adopted by the Board. All actuarial assumptions used in this report are reasonable for the purposes of this valuation.

This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

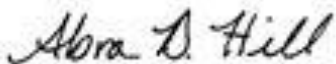
This report has been prepared by actuaries who have substantial experience valuing public employee retirement systems. To the best of our knowledge, the information contained in this report is accurate and fairly presents the actuarial position of the City of Jackson Employees Retirement System as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices and with the Actuarial Standards of Practice issued by the Actuarial Standards Board.

Abra D. Hill, Derek Henning and James R. Sparks are Members of the American Academy of Actuaries (MAAA). These actuaries meet the Academy's Qualification Standards to render the actuarial opinions contained herein.

The signing actuaries are independent of the plan sponsor.

Gabriel, Roeder, Smith & Company will be pleased to review this valuation and report with the Board of Trustees and to answer any questions pertaining to the valuation.

Respectfully submitted,
Gabriel, Roeder, Smith & Company



Abra D. Hill, ASA, FCA, MAAA



Derek Henning, ASA, EA, MAAA



James R. Sparks, ASA, FCA, MAAA

ADH/DH/JRS:dj



EXECUTIVE SUMMARY

Executive Summary

Valuation Date	June 30, 2020	June 30, 2021
Contribution for Fiscal Year Ending	June 30, 2022	June 30, 2023
Recommended Employer Contributions:		
Percentage of Projected Covered Payroll	12.27%	11.01%
Estimated Annual Amount	\$ 1,106,863	\$ 1,055,434
Membership		
Number of		
Active Members	148	154
Retirees and Beneficiaries	194	192
Inactive, Non-Retired Members	23	22
Total	365	368
Total Pensions Being Paid	\$ 3,602,392	\$ 3,625,122
Assets		
Market Value	\$39,166,667	\$47,877,576
Actuarial Value	40,465,579	42,827,484
Return on Market Value	3.0%	27.9%
Return on Actuarial Value	6.5%	10.9%
Ratio - Actuarial Value to Market Value	103.3%	89.5%
Actuarial Information		
Normal Cost %	9.30%	9.35%
Actuarial Accrued Liability (AAL)	\$55,757,402	\$56,153,900
Unfunded Actuarial Accrued Liability (UAAL)	15,291,823	13,326,416
Funded Ratio	72.6%	76.3%
Amortization Period (DROP UAAL as of 6/30/2007)	2 years	1 year
Amortization Period (Non-DROP UAAL as of 6/30/2016)	26 years	25 years
Amortization Period (Gain/(Loss) on UAAL)	30 years	30 years

Unfunded Actuarial Accrued Liability was financed as level percents of member payroll. Please refer to page A-6 for a schedule of financing periods.

Highlights/Changes

- Experience during the year was favorable in the aggregate:
 - Investment return for the year was 27.86% on a market value basis. The rate of return on an Actuarial Value of Assets basis was 10.87% versus 6.85% assumed;
 - Actuarial liability gains due to more retiree mortality than anticipated (10 actual vs 6 expected).

The Executive Summary gives an overview of the entire report. It cannot be used as a substitute for a thorough reading of the full report.



Executive Summary

Actuarial Valuation

This report presents the actuarial valuation of the City of Jackson Employees Retirement System prepared as of June 30, 2021. Valuations are prepared annually.

The primary purposes of the valuation report are to measure the System's liabilities, to determine the required employer contribution rate based upon the System's funding policy and to analyze changes in the System's actuarial position.

In addition, the report provides summaries of the member data, financial data, plan provisions, and actuarial assumptions and methods.

Financing Objectives

The System is supported by member contributions, employer contributions, and net earnings on the investments of the fund. The total contribution is determined by the actuarial valuation. The member contribution rate is set at one-half of the total computed contribution less amounts for the DROP which are contributed by the City. The member contribution rate is no more than the normal cost rate for each respective benefit tier (Non-hybrid or Hybrid). The employer contribution is the remainder.

The combined member and employer contributions are intended to be sufficient to pay the normal cost and to amortize the Unfunded Actuarial Accrued Liability (UAAL). The UAAL as of June 30, 2021 is financed over multiple level percent of pay closed periods of no greater than 30 years. Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes in future years are to be amortized over a closed period not exceeding 30 years beginning with the valuation year in which they arise. The sources and financing of the UAAL are shown on page A-6.

Amortization Policy

For the June 30, 2016 valuation, the Board adopted an Amortization Policy to finance the Unfunded Actuarial Accrued Liability (UAAL). The cost of the DROP is amortized over a closed 15-year period with 1 year remaining. The Non-DROP UAAL as of the June 30, 2016 valuation is financed over a closed period of 30 years starting with the contribution for the fiscal year ending June 30, 2018 (25 years remaining for the contribution attributable to the fiscal year ending June 30, 2023). Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes are to be amortized over a closed period not exceeding 30 years beginning with the valuation year in which they arise. The sources and financing of the UAAL are shown on page A-6. The most recent layers were created during this past 2021 Fiscal Year. This schedule may require periodic review by the Board.

Executive Summary

Contribution Requirement

The computed employer contribution for the fiscal year ending June 30, 2023 is 11.01% of covered payroll (\$1,055,434 estimated in dollars). This compares with an employer contribution for the fiscal year ending June 30, 2022 of 12.27% of covered payroll (\$1,106,863 estimated in dollars).

This valuation assumes that the plan sponsor will be able to make future contributions on a timely basis. Failure to receive the recommended employer contributions on a timely basis could jeopardize the sustainability of the System. We did not perform an analysis of the ability of the plan sponsor to make future contributions. Such an analysis is not within the scope of our assignment or within our analytical skill set.

Assets

The Actuarial Value of Assets is a smoothed Market Value. A smoothed value is used in order to dampen some of the year-to-year fluctuations in valuation results that would occur if the Market Value were used each year. The Actuarial Value of Assets (AVA) as of June 30, 2021 was \$42,827,484. The Market Value of Assets (\$47,877,576) is currently higher than the Actuarial Value of Assets by \$5,050,092 as of the valuation date (see page A-8). The excess investment returns for the 2021 fiscal year will continue to be recognized over the next three years. If the System earns the assumed rate of investment return (6.85%) over each of the next three years, there will be upward pressure on the funded status as the returns from the 2021 fiscal year continue to be recognized into the Actuarial Value of Assets.

The investment return rate for the plan year ending June 30, 2021 on a Market Value basis was 27.86%, while it was 10.87% on an Actuarial Value basis. These figures differ because of the asset valuation procedure described above.

Funded Status

As of the valuation date, the Actuarial Accrued Liability (AAL) was \$56,153,900 and the Actuarial Value of Assets (AVA) was \$42,827,484, resulting in an Unfunded Actuarial Accrued Liability (UAAL) of \$13,326,416. The funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) is 76.3%. At the time of last year's valuation, the UAAL was \$15,291,823, and the funded ratio was 72.6%. The Market Value of Assets is 85.3% of the Actuarial Accrued Liability. See page A-13 for the development of the actuarial gain or loss over the last year and page A-9 for a history of the funded ratios.

The Funded Status and Unfunded Actuarial Accrued Liability are not appropriate for assessing the sufficiency of plan assets to cover the estimated cost of settling the plan's benefit obligations. By themselves, these measures are not appropriate for assessing the need for or the amount of future employer contributions.

Executive Summary

Benefit Provisions

There were multiple benefit changes during between this and the last valuation as a result of updated labor agreements, specifically:

- For MAPE members hired on or after July 1, 2012, the benefit multiplier was raised from 1.25% to 1.50%
- For Non-Union Members, normal retirement conditions were changed to the table on page B-1.

These benefit changes increased the AAL by \$166,829 and increased the required contribution by 0.38% of payroll. Please see the Summary of Benefits in Section B, for full detail on the current plan provisions.

Actuarial Assumptions and Methods

There were no changes to assumptions or methods for the current valuation. The assumptions and methods are fully described in Section C.

Actuarial Experience

Net experience of the Retirement System was favorable during the year ending June 30, 2021, resulting in a gain of \$2.2 million (3.9% of the prior year's Actuarial Accrued Liabilities). \$1.6 million of the \$2.2 million gain is attributable to recognized investment return (on the Actuarial Value of Assets) above the assumed rate of 6.85%. The remaining \$600 thousand is attributable to liability gains on System experience during the year.

The investment rate of return for the fiscal year ending 2021 on a Market Value basis was 27.86%, and 10.87% on an Actuarial Value basis. The reason these figures differ is because the Actuarial Value of Assets smooth prior investment gains and losses over a four-year period.

Liability gains were primarily due greater retiree mortality than expected in the 2021 fiscal year (10 actual vs 6 assumed). The experience gains and losses are derived on page A-13.

Looking Forward

The total normal cost for new tier members hired on and after July 1, 2012 will be lower than the total normal cost for current members. This means that the total contribution rate is expected to decline as new tier members replace the current members.



Executive Summary

Stabilization Reserve

Beginning with the June 30, 2016 valuation, which was the basis for the contributions during the Fiscal Year ending June 30, 2018, the Board of Trustees established a Stabilization Reserve to stabilize anticipated fluctuations of future member contribution rates.

For the fiscal year ended June 30, 2021, the actual member contribution rate of 9.97% for non-hybrid in addition to the prepaid contribution from fiscal year 2019 of 0.68% matched the computed contribution of 10.65%. As of June 30, 2021, the Member Stabilization Reserve is \$22,490. This represents 0.54% of the current non-hybrid member payroll and can be utilized to reduce the non-hybrid member contributions as a percent-of-pay for the fiscal year ending 2023 if desired by the Board. The reserve amount is held as a Retirement System liability as of June 30, 2021.

Public Act 202

Public Act 202 (PA 202) was signed into law December 20, 2017 and requires local units of government to electronically submit Form 5572 to the Michigan Department of Treasury (DOT) on an annual basis to evaluate the funded status of the retirement pension system. The local unit of government is considered underfunded if the actuarial accrued liability of a retirement pension system is less than 60% funded, and if the annual required contribution for all of the retirement systems of the local unit of government is greater than 10% of annual general fund operating revenues. An underfunded local unit of government is required to develop and submit for approval a corrective action plan for the local unit of government.

The Michigan State Treasurer has established uniform actuarial assumptions as required by PA 202 for use with the annual Form 5572 (Retirement System Annual Report). The use of the uniform assumptions for reporting will be required for the 2019 fiscal year (note that the Department of Treasury is encouraging early adoption).

The current valuation assumptions and/or methods used by the System match or fall in the range of uniform assumptions established by the Treasurer for PA 202 reporting purposes.

Reserve Transfers

The June 30, 2021 actuarial present value of retirement allowances exceeded the balance in the Reserve for Retired Benefit Payments. In order to maintain a balance between the assets and the liabilities allocated to retired lives, the following transfer to the Reserve for Retired Benefit Payments from the Reserve for Employer Contributions is assumed:

Transfers to Reserve for Retired Benefit Payments from Reserve for Employer Contributions	
General	Water and Sewage
\$617,489	\$373,736



SECTION A

VALUATION RESULTS

Funding Objective

The funding objective of the Retirement System is to establish and receive contributions, expressed as percents of active member payroll, which will remain approximately level from year-to-year and will not have to be increased for future generations of citizens.

Contribution Rates

The Retirement System is supported by member contributions, City contributions and investment income from Retirement System assets.

Contributions, which satisfy the funding objective, are determined by the annual actuarial valuation and are sufficient to:

- (1) Cover the actuarial present value of benefits allocated to the current year by the actuarial cost method described in Section C (the normal cost); and
- (2) Finance over a period of future years the actuarial present value of benefits not covered by valuation assets and anticipated future normal costs (unfunded actuarial accrued liability).

Computed total member and employer contribution rates for the fiscal year ending June 30, 2023 are shown on page A-2.

The Contribution rates computed on page A-2 are further split between the members and the employer on pages A-3 through A-5 based upon the below criteria:

- *A-3 – Scenario 1 – Board adopts to not use the Member Stabilization Reserve.*
- *A-4 – Scenario 2 – Board adopts to use all of the Member Stabilization Reserve.*
- *A-5 – Scenario 3 – Board adopts to use part of the Member Stabilization Reserve such that the Member Contribution Rate remains constant.*

Regardless of the decision above, the Employer contribution rate as a percent of member payroll for the fiscal year ending June 30, 2023 is computed to be 11.01%.

Development of Contributions

Total Contribution Rate

Total Member and Employer Contributions for	Fiscal Year Ending June 30, 2023		
	Non-Hybrid	Hybrid	Total Weighted Averages
Normal Cost (NC)			
Age and Service Allowances	9.53 %	6.08 %	7.65 %
Disability and Survivor	0.74	0.52	0.62
Refunds of Member Contributions	1.46	0.76	1.08
Total Normal Cost	11.74 %	7.35 %	9.35 %
Unfunded Actuarial Accrued Liability (UAAL)			
UAAL - DROP	1.88 %	1.88 %	1.88 %
UAAL - Non-DROP	8.36	8.36	8.36
Total Unfunded Actuarial Accrued Liability	10.24 %	10.24 %	10.24 %
Total Computed Contribution (Member+Employer)	21.98 %	17.59 %	19.59 %

Notes

The Member and Employer Portions are derived on the subsequent pages. Results are shown based upon using none, all, or part of the Member Stabilization Reserve for Non-Hybrid members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2021	FYE 2022	Change
Non-Hybrid Members			
Scenario 1 - Use None of Reserve	9.97%	10.05%	0.08%
Scenario 2 - Use All of Reserve	9.97%	9.51%	-0.46%
Scenario 3 - Use Partial Reserve	9.97%	9.97%	0.00%
Hybrid Members	6.81%	7.35%	0.54%

Please refer to page A-6 for a detailed breakdown of the sources and financing periods of UAAL (10.24%).

Subsequent to the June 30, 2007 valuation, the Board adopted a DROP to be funded by employer contributions for 15 years beginning July 1, 2008. This percentage is based on a closed 15-year amortization of the estimated change in UAAL plus the change in normal cost associated with the DROP. There is one year left in the amortization period.



Development of Contributions

Member and Employer Contribution Rate

Scenario 1 – None of Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023			Illustrative Dollar Contributions
	Non-Hybrid ²	Hybrid ³	Total Weighted Averages	
Member Portion				
a. Total Member Portion ¹	10.05 %	7.35 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.00 %	0.00 %	0.00 %	-
c. Member Contributions (a. - b.)	10.05 %	7.35 %	8.58 %	\$ 822,491
Employer Portion			11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)			19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid Contribution: Minimum of 1/2 x 11.74 % + 1/2 x 8.36 % = 10.05 % and 11.74% results in 10.05%

³ Hybrid Contribution: Minimum of 1/2 x 7.35 % + 1/2 x 8.36 % = 7.86 % and 7.35% results in 7.35%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, the reserve is not used to offset the Non-Hybrid Member Contributions for the fiscal year ending June 30, 2023. The resulting Member Contribution is 10.05% for Non-Hybrid Members and 7.35% for Hybrid Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid Members	9.97%	10.05%	0.08%
Hybrid Members	6.81%	7.35%	0.54%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	-
Remaining Balance as of 6/30/21	\$ 22,490



Development of Contributions

Member and Employer Contribution Rate

Scenario 2 – All of Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023			Illustrative Dollar Contributions
	Non-Hybrid ²	Hybrid ³	Total Weighted Averages	
Member Portion				
a. Total Member Portion ¹	10.05 %	7.35 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.54 %	0.00 %	0.25 %	23,965
c. Member Contributions (a. - b.)	9.51 %	7.35 %	8.33 %	\$ 798,525
Employer Portion			11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)			19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid Contribution: Minimum of 1/2 x 11.74 % + 1/2 x 8.36 % = 10.05 % and 11.74% results in 10.05%

³ Hybrid Contribution: Minimum of 1/2 x 7.35 % + 1/2 x 8.36 % = 7.86 % and 7.35% results in 7.35%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, all \$22,490 of the reserve is used to offset the Non-Hybrid member contribution by of pay for the fiscal year ending June 30, 2023. The resulting Member Contribution is 9.51% for Non-Hybrid Members and 7.35% for Hybrid Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid Members	9.97%	9.51%	-0.46%
Hybrid Members	6.81%	7.35%	0.54%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	22,490
Remaining Balance as of 6/30/21	\$ -



Development of Contributions

Member and Employer Contribution Rate

Scenario 3 – Partial Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023			Illustrative Dollar Contributions
	Non-Hybrid ²	Hybrid ³	Total Weighted Averages	
Member Portion				
a. Total Member Portion ¹	10.05 %	7.35 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.08 %	0.00 %	0.04 %	3,834
c. Member Contributions (a. - b.)	9.97 %	7.35 %	8.54 %	\$ 818,656
Employer Portion			11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)			19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid Contribution: Minimum of 1/2 x 11.74 % + 1/2 x 8.36 % = 10.05 % and 11.74% results in 10.05%

³ Hybrid Contribution: Minimum of 1/2 x 7.35 % + 1/2 x 8.36 % = 7.86 % and 7.35% results in 7.35%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, \$3,261 of the reserve is used to offset the Non-Hybrid member contribution by 0.08% of pay for the fiscal year ending June 30, 2022. The resulting Member Contribution is 9.97% for Non-Hybrid Members and 7.35% for Hybrid Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid Members	9.97%	9.97%	0.00%
Hybrid Members	6.81%	7.35%	0.54%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	3,261
Remaining Balance as of 6/30/21	\$ 19,229



Financing of the Unfunded Actuarially Accrued Liability

Year Established	Amortization Period (Yrs)		Unfunded Actuarial Accrued Liability (UAAL)		UAAL Contribution for Fiscal Year Ending July 1, 2023		
	Initial	Remaining	Initial Amount	Amount as of Valuation Date June 30, 2021	Dollar	% of Pay	
<i>DROP Unfunded Actuarial Accrued Liability Closed Amortization</i>							
6/30/2007	15	1	N/A	\$ 332,634	\$ 180,292	1.88%	
<i>Unfunded Actuarial Accrued Liability as of June 30, 2016</i>							
6/30/2016	30	25	\$ 8,954,539	\$ 9,004,658	\$ 562,394	5.87%	
<i>(Gain)/Loss Amortization Layers (Fiscal Years 6/30/2017 and thereafter)</i>							
<i>Changes from Experience</i>							
6/30/2017	30	26	\$ (147,142)	\$ (162,115)	\$ (9,890)	(0.10)%	
6/30/2018	30	27	270,468	294,961	17,619	0.18%	
6/30/2019	30	28	(288,828)	(311,951)	(18,267)	(0.19)%	
6/30/2020	30	29	194,596	207,926	11,949	0.13%	
6/30/2021	30	30	(2,177,302)	(2,177,302)	(129,802)	(1.35)%	
<i>Changes from Benefit Provisions</i>							
6/30/2017	30	26	\$ (127,091)	\$ (140,024)	\$ (8,542)	(0.09)%	
6/30/2018	30	27	125,916	137,319	8,203	0.09%	
6/30/2021	30	30	\$166,829	\$166,829	\$9,946	0.11%	
<i>Changes from Actuarial Assumptions/Methods</i>							
6/30/2018	30	27	\$ 5,477,460	\$ 5,973,481	\$ 356,823	3.72%	
Totals				\$ 13,326,416	\$ 980,725	10.24%	



In financing the actuarial accrued liability, the valuation assets of \$42,827,484 were distributed as shown below. Please see page A-8 for information concerning the derivation of valuation assets.

Reserves	Present Valuation Assets Applied to			Totals
	Member Actuarial Accrued Liability	Retired Life Actuarial Liability	Contingency Reserve	
Employees' Contributions	\$ 6,966,675			\$ 6,966,675
Employer Contributions	(284,140)	\$ 991,225		707,085
Retired Benefit Payments		35,153,724	none	35,153,724
Totals	\$ 6,682,535	\$ 36,144,949	none	\$ 42,827,484

Assets were applied against actuarial accrued liability in determining unfunded actuarial accrued liability as follows:

	Retired Lives	Active Members	Totals
Computed Actuarial Accrued Liability	\$ 36,144,949	\$ 20,008,951	\$ 56,153,900
Applied Assets	36,144,949	6,682,535	42,827,484
Unfunded Actuarial Accrued Liability	\$ none	\$ 13,326,416	\$ 13,326,416

Development of Actuarial Value of Retirement System Assets

Year Ended June 30:	2018	2019	2020	2021	2022	2023	2024
A. Actuarial Value Beginning of Year	\$39,624,195	\$39,885,637	\$39,887,893	\$40,465,579			
B. Market Value End of Year	40,299,277	39,948,240	39,166,667	47,877,576			
C. Market Value Beginning of Year	39,184,811	40,299,277	39,948,240	39,166,667			
D. Non-Investment Net Cash Flow							
D1. Net Cash Flow (NCF)	(2,300,383)	(2,371,807)	(1,958,603)	(1,930,510)			
D2. NCF/Market Value Beginning of Year: D1 / C	(5.9)%	(5.9)%	(4.9)%	(4.9)%			
E. Investment Income							
E1. Market Total: B - C - D1	3,414,849	2,020,770	1,177,030	10,641,419			
E2. Amount for Immediate Recognition	2,885,550	2,650,932	2,665,239	2,705,772			
E3. Amount for Phased-In Recognition: E1-E2	529,299	(630,162)	(1,488,209)	7,935,647			
F. Phased-In Recognition of Investment Income							
F1. Current Year: 0.25 x E3	132,325	(157,541)	(372,052)	1,983,912			
F2. First Prior Year	268,318	132,325	(157,541)	(372,052)	\$1,983,912		
F3. Second Prior Year	(519,971)	268,318	132,325	(157,541)	(372,052)	\$1,983,912	
F4. Third Prior Year	(204,397)	(519,971)	268,318	132,324	(157,539)	(372,053)	\$1,983,911
F5. Total Recognized Investment Gain: F1 + F2 + F3 + F4	(323,725)	(276,869)	(128,950)	1,586,643	1,454,321	1,611,859	1,983,911
G. Actuarial Value End of Year: A + D1 + E2 + F5	39,885,637	39,887,893	40,465,579	42,827,484			
H. Difference Between Market & Actuarial Value	413,640	60,347	(1,298,912)	5,050,092			
I. Recognized Rate of Return	6.66%	6.13%	6.52%	10.87%			
J. Market Rate of Return	8.98%	5.17%	3.02%	27.86%			
K. Ratio of Actuarial Value to Market Value: G / B	99.0%	99.8%	103.3%	89.5%			

The Actuarial Value of Assets recognizes assumed investment income (line E2) fully each year. Differences between actual and assumed investment income (line E3) are phased-in over a closed four-year period. During periods when investment performance exceeds the assumed rate, Actuarial Value of Assets will tend to be less than Market Value. During periods when investment performance is less than the assumed rate, Actuarial Value of Assets will tend to be greater than Market Value. The Actuarial Value of Assets is unbiased with respect to Market Value. At any time, it may be either greater or less than Market Value. If actual and assumed rates of retirement income are exactly equal for four consecutive years, the Actuarial Value will become equal to Market Value.



Valuation Results Comparative Statement

	(1)	(2)	(3)	(4)	(5)	(6)	(7)
			Unfunded				
Valuation Date	Actuarial Value of Assets	Valuation Payroll	Actuarial Accrued Liability (AAL)	Actuarial Accrued Liability (UAAL)	Amortization Period Years [^]	Funded Ratio (1) / (3)	Gain (Loss)
6/30/01(a)	\$ 36,120	\$ 8,532	\$ 27,705	\$ (8,415)	N/A	130.4 %	\$ (209)
6/30/02	35,151	9,257	29,372	(5,779)	N/A	119.7	(2,937)
6/30/03(a)	33,229	9,691	29,902	(3,327)	N/A	111.1	(3,368)
6/30/04(a)	32,919	9,600	31,417	(1,502)	N/A	104.8	(1,788)
6/30/05	32,395	9,600	33,016	621	N/A	98.1	(1,899)
6/30/06	31,867	10,091	35,019	3,152	30	91.0	(2,449)
6/30/07(a)	34,236	10,119	38,091	3,855	30	89.9	381
6/30/08(a)	35,618	10,295	40,907	5,289	30	87.1	(469)
6/30/09	34,971	10,184	42,855	7,884	30	81.6	(2,485)
6/30/10(a)	34,124	8,969	43,283	9,159	30	78.8	(1,518)
6/30/11	32,986	8,169	43,916	10,930	30	75.1	(1,466)
6/30/12(a)	32,117	8,479	48,321	16,204	30	66.5	(2,084)
6/30/13	33,538	7,970	48,773	15,235	30	68.8	1,539
6/30/14	35,921	7,609	49,373	13,452	30	72.8	1,953
6/30/15	37,072	7,211	48,882	11,810	30	75.8	1,702
6/30/16(a)	38,406	7,292	48,224	9,818	30	79.6	784
6/30/17(a)	39,624	7,533	48,898	9,274	29-30	81.0	147
6/30/18(a)	39,886	8,102	54,888	15,002	28-30	72.7	(270)
6/30/19	39,888	8,424	54,960	15,072	27-30	72.6	289
6/30/20	40,466	8,503	55,757	15,291	26-30	72.6	(195)
6/30/21	42,827	9,036	55,987	13,160	25-30	76.5	2,177
6/30/21(a)	42,827	9,036	56,154	13,327	25-30	76.3	2,177

(a) After changes in benefit provisions and/or actuarial assumptions and actuarial cost methods.

[^] The UAAL associated with the DROP was amortized as a level percent-of-payroll over a closed period of 15 years beginning July 1, 2008. For fiscal year ending June 30, 2023, there is 1 year left in the amortization period. The UAAL associated with the June 30, 2016 Valuation was amortized as a level percent-of-payroll contribution over a closed period of 30 years for fiscal year ending June 30, 2018. For fiscal year ending June 30, 2023, there are 25 years left in the amortization period. Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes are to be amortized over a closed period not exceeding 30 years beginning with the valuation year in which they arise.

Recommended and Actual Contributions Comparative Statement

Fiscal Year	Valuation Date	Dollar Contributions		% of Payroll Contributions*		Percentage Contributed
		Projected [^]	Actual	Recommended	Actual	
02/03	6/30/01	\$ 360,777	\$ 378,931	3.93 %	3.93 %	100 %
03/04	6/30/02	391,420	383,883	3.93	3.93	100
04/05 (a)	6/30/03	413,924	388,706	3.93	3.93	100
05/06 (a)	6/30/04	584,257	572,520	5.60	5.60	100
06/07	6/30/05	721,955	722,422	6.92	6.92	100
07/08	6/30/06	832,376	803,042	7.59	7.59	100
08/09 (a)	6/30/07	841,320	793,649	7.65	7.65	100
09/10 (a)	6/30/08	863,777	750,439	7.72	7.72	100
10/11	6/30/09	945,179	786,824	8.54	8.54	100
11/12 (a)	6/30/10	861,134	817,748	9.21	9.21	100
12/13	6/30/11	880,750	845,595	9.92	9.92	100
13/14 (a)	6/30/12	1,126,236	986,872	12.52	12.52	100
14/15	6/30/13	1,033,247	947,436	12.22	12.22	100
15/16	6/30/14	958,228	889,235	11.87	11.87	100
16/17	6/30/15	938,653	933,208	12.27	12.27	100
17/18 (a)	6/30/16	774,365	821,020	10.01	10.01	100
18/19 (a)	6/30/17	779,188	835,541	9.75	9.75	100
19/20 (a)	6/30/18	1,067,587	1,058,427	12.42	12.42	100
20/21	6/30/19	1,073,343	1,068,745	12.01	12.01	100
21/22	6/30/20	1,106,863		12.27		
22/23	6/30/21	1,055,434		11.01		

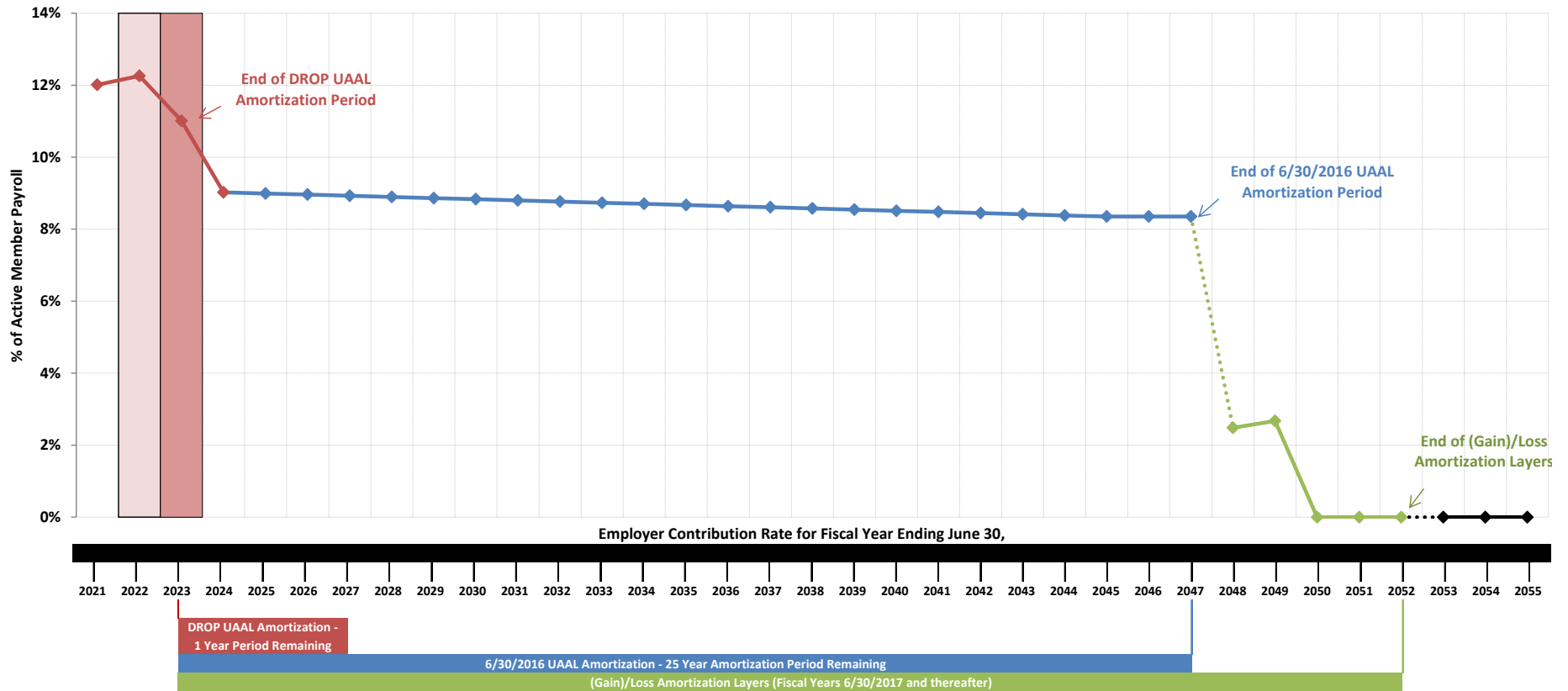
(a) After changes in benefit provisions and/or actuarial assumptions and actuarial cost methods.

* Minimum employer contributions of 2.5% of payroll pursuant to Ordinance amendments effective July 1, 1990, 1991, and 2007 plus a contribution for Early Retirement Window and for DROP.

[^] Projected dollar contributions are based on a projected payroll and will not match dollar contributions when pay increases differ from assumptions.

Current and Future Employer Contributions as a Percentage of Expected Active Member Payroll

- Recommended Employer Contribution Rate for FYE 2022 (Computed as of 6/30/2020 Valuation)
- Recommended Employer Contribution Rate for FYE 2023 (Computed as of 6/30/2021 Valuation)



NOTE: Any Future (Gain)/Loss UAAL Amortization schedules are exempted to be \$0 if all Actuarial Assumptions are met. In reality, experience deviates from assumptions. The (Gain)/Loss UAAL amounts are expected to float both above and below zero in any given year. These amounts are amortized over new independent 30-Year periods to smooth changes to future employer contributions as a result of System experience.



Summary Statement of System Resources and Obligations

Present Resources and Expected Future Resources

	June 30, 2020			June 30, 2021		
	General	Water & Sewage	Totals	General	Water & Sewage	Totals
A. Present value of System assets						
1. Net assets from financial statements	\$32,695,354	\$ 6,471,313	\$39,166,667	\$41,395,796	\$ 6,481,780	\$47,877,576
2. Reduction for contribution stabilization	0	0	0	0	0	0
3. Market value adjustment	1,084,299	214,613	1,298,912	(4,366,399)	(683,693)	(5,050,092)
4. Valuation assets	33,779,653	6,685,926	40,465,579	37,029,397	5,798,087	42,827,484
B. Present value of expected future employer contributions						
1. For normal costs	\$ 1,711,047	\$ 533,587	\$ 2,244,634	\$ 1,912,546	\$ 641,503	\$ 2,554,049
2. For unfunded actuarial accrued liability	8,831,729	6,460,094	15,291,823	6,063,246	7,263,170	13,326,416
3. Total	10,542,776	6,993,681	17,536,457	7,975,792	7,904,673	15,880,465
C. Actuarial present value of expected future member contributions	\$ 3,257,468	\$ 957,682	\$ 4,215,150	\$ 3,246,201	\$ 927,664	\$ 4,173,865
D. Total	\$47,579,897	\$14,637,289	<u>\$62,217,186</u>	\$48,251,390	\$14,630,424	<u>\$62,881,814</u>

Actuarial Present Value of Expected Future Benefit Payments

	June 30, 2020			June 30, 2021		
	General	Water & Sewage	Totals	General	Water & Sewage	Totals
A. To retirants and beneficiaries	\$27,376,093	\$ 8,891,077	\$36,267,170	\$27,277,938	\$ 8,867,011	\$36,144,949
B. To vested terminated members	2,668,763	442,707	3,111,470	2,251,106	475,338	2,726,444
C. To present active members						
1. Allocated to service rendered prior to valuation date	12,566,526	3,812,236	16,378,762	13,563,599	3,718,908	17,282,507
2. Allocated to service likely to be rendered after valuation date	4,968,515	1,491,269	6,459,784	5,158,747	1,569,167	6,727,914
3. Total	17,535,041	5,303,505	22,838,546	18,722,346	5,288,075	24,010,421
D. Total	\$47,579,897	\$14,637,289	<u>\$62,217,186</u>	\$48,251,390	\$14,630,424	<u>\$62,881,814</u>



Active Member Experience Gain (Loss) Year Ended June 30, 2021

	Actuarial Accrued Liability (A)	Actuarial Value of Assets (B)	Unfunded Actuarial Accrued Liability (C) = (A) - (B)
(1) Value at start of year	\$55,757,402	\$40,465,579	\$15,291,823
(2) Normal cost from last valuation	840,334	N/A	840,334
(3) Actual contributions	N/A	1,809,562	(1,809,562)
(4) Disbursements	(3,740,072)	(3,740,072)	-
(5) Interest accrual [(1) + [(2)+(3)+(4)]1/2]*6.85%	<u>3,720,066</u>	<u>2,705,772</u>	<u>1,014,294</u>
(6) Expected value before changes (1)+(2)+(3)+(4)+(5)	56,577,730	41,240,841	15,336,889
(7) Increase due to plan amendments	166,829	-	166,829
(8) Increase due to method changes	-	-	-
(9) Increase due to revised assumptions	<u>-</u>	<u>-</u>	<u>-</u>
(10) Expected value after changes (6)+(7)+(8)+(9)	56,744,559	41,240,841	15,503,718
(11) Actual value at end of year	<u>56,153,900</u>	<u>42,827,484</u>	<u>13,326,416</u>
(12) Gain (loss) (10)-(11) [(Gain) loss for assets]	590,659	(1,586,643)	2,177,302

Valuation Date June 30,	Actuarial Gain/(Loss) (in Thousands)
2013	\$1,539
2014	1,953
2015	1,702
2016	784
2017	147
2018	(270)
2019	289
2020	(195)
2021	2,177

Other Observations

General Implications of Contribution Allocation Procedure or Funding Policy on Future Expected Contributions and Funded Status

Given the System's contribution allocation procedure, if all actuarial assumptions are met (including the assumption of the Retirement System earning 6.85% on the Market Value of Assets), it is expected that:

1. The employer normal cost is sufficient to cover the cost of benefits accruing each year;
2. The Unfunded Actuarial Accrued Liabilities (UAAL) will continue to be fully amortized; and
3. The funded status of the Retirement System will continue to increase gradually towards a 100% funded ratio.

Limitations of Funded Status Measurements

Unless otherwise indicated, a funded status measurement presented in this report is based upon the Actuarial Accrued Liability (AAL) and the Funding Value of Assets (FVA). Unless otherwise indicated, with regard to any funded status measurements presented in this report:

1. The measurement is inappropriate for assessing the sufficiency of Retirement System assets to cover the estimated cost of settling the Retirement System's benefit obligations; for example, transferring the liability to an unrelated third party in a market value type transaction.
2. The measurement is dependent upon the Actuarial Cost Method which, in combination with the Retirement System's amortization policy, affects the timing and amounts of future contributions. The amounts of future contributions will most certainly differ from those assumed in this report due to future actual experience differing from assumed experience based upon the actuarial assumptions. Even if the funded status measurement in this report was 100%, it would not be synonymous with no required future contributions. The Retirement System would still require future normal cost contributions (i.e., contributions to cover the cost of active membership accruing an additional year of service credit).
3. The measurement would produce a different result if the Market Value of Assets (MVA) were used instead of the FVA, unless the MVA is used in the measurement.

Limitations of Project Scope

Actuarial standards do not require the actuary to evaluate the ability of the plan sponsor or other contributing entities to make required contributions to the plan when due. Such an evaluation was not within the scope of this project and is not within the actuary's domain of expertise. Consequently, the actuary performed no such evaluation.

Risks to Future Employer Contribution Requirements

There are ongoing risks to future employer contribution requirements to which the Retirement System is exposed, such as:

- Actual and Assumed Investment Rate of Return
- Actual and Assumed Mortality Rates
- Amortization Policy

Risk Measures – Risks Associated with Measuring the Accrued Liability and Actuarially Determined Contribution

The determination of the accrued liability and the actuarially determined contribution requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability and the actuarially determined contribution that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the System's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

1. **Investment Risk** – actual investment returns may differ from the expected returns;
2. **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
3. **Contribution Risk** – actual contributions may differ from expected future contributions. For example, actual contributions may not be made in accordance with the plan's funding policy or material changes may occur in the anticipated number of covered employees, covered payroll, or other relevant contribution base;
4. **Salary and Payroll Risk** – actual salaries and total payroll may differ from expected, resulting in actual future accrued liability and contributions differing from expected;
5. **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed; and
6. **Other Demographic Risks** – members may terminate, retire or become disabled at times or with benefits other than assumed resulting in actual future accrued liability and contributions differing from expected.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

The computed contribution shown on page A-2 may be considered as a minimum contribution rate that complies with the Board's funding policy. The timely receipt of the actuarially determined contributions is critical to support the financial health of the plan. Users of this report should be aware that contributions made at the actuarially determined rate do not necessarily guarantee benefit security.

Risk Measures

(\$ in Thousands)

Actuarial Valuation Date (6/30)	(1) Actuarial Value of Assets	(2) Actuarial Accrued Liability (AAL)	(3) Unfunded AAL (UAAL) (2) - (1)	(4) Payroll	(5) Funded Ratio (1) / (2)	(6) Retiree Liabilities (RetLiab)	(7) RetLiab / AAL (6)/(2)	(8) AAL / Payroll (2) / (4)	(9) Assets / Payroll (1) / (4)	(10) UAAL / Payroll (3) / (4)	(11) Non-Invest. Cash Flow (NICF)	(12) NICF / Assets (11)/(1)	(13) Market Rate of Return	(14) 5-year Trailing Geometric Average
2017 *	\$ 39,624	\$ 48,898	\$ 9,274	\$ 7,533	81.0%	\$ 31,707	64.8%	649.1%	526.0%	123.1%	\$ (1,857)	(4.7)%	10.7%	N/A
2018 *	39,886	54,888	15,002	8,102	72.7%	35,078	63.9%	677.5%	492.3%	185.2%	(2,300)	(5.8)%	9.0%	N/A
2019	39,888	54,960	15,072	8,424	72.6%	35,669	64.9%	652.4%	473.5%	178.9%	(2,372)	(5.9)%	5.2%	6.2%
2020	40,466	55,757	15,291	8,503	72.6%	36,267	65.0%	655.7%	475.9%	179.8%	(1,959)	(4.8)%	3.0%	5.9%
2021	42,827	56,154	13,327	9,036	76.3%	36,145	64.4%	621.4%	474.0%	147.5%	(1,931)	(4.5)%	27.9%	10.8%

* Revised actuarial assumptions.

(5). The funded ratio is the most widely known measure of a plan's financial strength, but the trend in the funded ratio is much more important than the absolute ratio. The funded ratio should trend to 100%. As it approaches 100%, it is important to re-evaluate the level of investment risk in the portfolio and potentially to re-evaluate the assumed rate of return.

(6) and (7). The ratio of retiree liabilities to total accrued liabilities gives an indication of the maturity of the system. As the ratio increases, cash flow needs increase, and the liquidity needs of the portfolio change. A ratio on the order of 50% indicates a maturing system.

(8) and (9). The ratio of liabilities and assets to payroll gives an indication of both maturity and volatility. Many systems have ratios between 500% and 700%. Ratios significantly above that range may indicate difficulty in supporting the benefit level as a level % of payroll.

(10). The ratio of unfunded liability to payroll gives an indication of the plan sponsor's ability to actually pay off the unfunded liability. A ratio above approximately 300% or 400% may indicate difficulty in discharging the unfunded liability within a reasonable time frame.

(11) and (12). The ratio of Non-Investment Cash Flow to assets is an important measure of sustainability. Negative ratios are common and expected for a maturing system. In the longer term, this ratio should be on the order of approximately -4% based upon current plan assumptions. A ratio that is significantly more negative than that for an extended period could be a leading indicator of potential exhaustion of assets.

(13) and (14). Investment return is probably the largest single risk that most systems face. The year-by-year return and the five-year geometric average both give an indication of the reasonableness of the system's assumed return. Of course, past performance is not a guarantee of future results. Market rate shown is based on actuarial estimation method and will differ modestly from figures reported by the investment consultant.



SECTION B

SUMMARY OF BENEFIT PROVISIONS AND VALUATION DATA

Summary of Benefit Provisions Evaluated or Considered (June 30, 2021)

Voluntary Retirement (no reduction for age)

MAPE Members

Eligibility –

Hired on or before June 30, 2016		
Retiring on or before December 31, 2021	Retiring on or after January 1, 2022	Hired on or after July 1, 2016
Age 60 & 10 years of service	Age 65 & 10 years of service	Age 65 & 10 years of service
Age 58 & 25 years of service	Age 62 & 25 years of service	37 years of service
30 years of service	Age 56 & 30 years of service	

Final Average Compensation - Retiring on or before October 31, 2024: Average of annual compensations for the period of 3 consecutive years producing the highest average and contained within the last 10 years immediately preceding retirement. **Retiring after October 31, 2024:** Average of annual compensations for the last 5 consecutive years of credited service.

Non-Union Members

Eligibility –

Retiring on or before October 31, 2029	
Age 62 & 10 years of service	
Age 58 & 27 years of service	
32 years of service	
Retiring on or after November 1, 2029	
Hired before December 31, 2018	Hired between January 1, 2018 and December 31, 2019
Age 64 & 10 years of service	Age 68 & 10 years of service
Age 59 & 27 years of service	39 years of service
Age 58 & 32 years of service	
Hired between January 1, 2020 and December 31, 2021	Hired on or after January 1, 2022
Age 70 & 10 years of service	Age 72 & 10 years of service
40 years of service	41 years of service



Summary of Benefit Provisions Evaluated or Considered (June 30, 2021)

Final Average Compensation

Hired before December 31, 1996: The average of the employee’s last three consecutive years of credited service.

Hired on or after January 1, 1997 and before June 30, 2012: The average of the employee’s last four consecutive years of credited service.

Hired on or after July 1, 2012 and before December 31, 2016: The average of the employee’s last six consecutive years of credited service.

Hired on or after January 1, 2017: The average of the employees last eight consecutive years of service.

Hired on or after January 1, 2018: The average of the employees last nine consecutive years of service.

Annual Amount (MAPE & Non-Union) – Total service times 2.0% of Final Average Compensation (FAC). Members hired on or after July 1, 2012 receive total service times 1.25% of FAC (1.50% for MAPE members).

Pension Cap (MAPE) – No annual pension of future retirements shall equate to more than 72% of the FAC.

Pension Cap (Non-Union) – The maximum annual pension amount shall be determined in accordance to the following table:

General Employees Retirement Plan (Hired before June 30, 2012)		Hybrid Pension Plan (Hired on or after July 1, 2012)	
Years of Service	Pension Cap as percentage of FAC	Years of Service	Pension Cap as percentage of FAC
Over 10 and less than 20	35%	Over 10 and less than 20	24%
Over 20 and less than 25	47%	Over 20 and less than 25	28%
Over 25 and less than 30	54%	Over 25 and less than 30	32%
Over 30 and less than 32	62%	Over 30 and less than 35	41%
Over 32 and less than 35	68%	Over 35 and less than 40	45%
Over 35 and less than 36	70%	40 and over	47%
Over 36 and less than 38	71%		
Over 38	73%		



Summary of Benefit Provisions Evaluated or Considered (June 30, 2021)

Deferred Retirement (vested benefit)

Eligibility – Termination of City employment at any age after 10 years of credited service.

Annual Amount – Accrued regular retirement amount based on credited service and FAC at time of termination.

The deferred benefit is payable at the following ages based on hire date:

Hire Date	Benefit Payable at Age
Hired prior to December 31, 2011	56
Hired between January 1, 2012 and December 31, 2017	60
Hired between January 1, 2018 and December 31, 2023	64
Hired After January 1, 2024	68

Deferred Retirement Option Plan (DROP)

The DROP Program has been closed as of June 30, 2015.

Duty Disability Retirement

Eligibility – Total and permanent disability incurred in line of duty with the City for which worker's compensation is being paid.

Annual Amount – Computed in the same manner as the regular retirement amount based on FAC and credited service at time of disability retirement. Minimum is \$150 per month for benefit group (MAPE); minimum is 10% of the first \$4,200 of FAC plus 15% of FAC in excess of \$4,200 for benefit group general. At expiration of worker's compensation period, amount is recomputed to include years during which worker's compensation was paid.

Non-Duty Disability Retirement

Eligibility – Total and permanent disability after 10 or more years of credited service.

Annual Amount – Computed in same manner as the regular retirement amount based on FAC and credited service at the time of disability retirement; minimum is \$150 per month for benefit group (MAPE); minimum is 10% of first \$4,200 of FAC plus 15% of FAC in excess of \$4,200 for other members.



Summary of Benefit Provisions Evaluated or Considered (June 30, 2021)

Duty Death before Retirement

Eligibility – Death in line of duty with the City.

Annual Amount – To the spouse: One-third of member's final compensation. To one or two children: One-fourth of member's final compensation. To three or more children: An equal share of one-half of the member's final compensation. Amount to spouse continues to remarriage or death; amount to children continues to earlier of marriage, adoption, death, or attainment of age 18. Maximum total amount payable – \$2,100 per year.

Non-Duty Death before Retirement

Eligibility – 10 or more years of credited service.

Annual Amount – Computed in the same manner as regular retirement based on credited service and FAC at time of death actuarially reduced for a 100% joint and survivor election. Amount is payable to designated beneficiary; otherwise, automatically to surviving spouse.

Member Contributions

One-half of total computed contribution less amounts associated with early retirement windows or the DROP Program which are contributed by the City. The member contribution is capped at normal cost. In no event will the member or City contribution be less than 2.50%.

Other Benefits

Military Service Buyback – Up to six years of military service may be purchased at no cost to the System.

Service Credit Purchase Option – A contractual employee may be eligible to purchase service credits at no cost to the System.

Annuity Withdrawal Option – For MAPE and Non-Union: Actuarial reduction of the member's monthly retirement benefit for such withdrawals. All such annuities shall be calculated at a discount rate that is no less than cost neutral (approximately 8%).

Summary of Benefit Provisions Evaluated or Considered (June 30, 2021)

The former description of Voluntary Retirement is listed here for comparison purposes.

Voluntary Retirement (no reduction for age) – before Changes

Eligibility – 30 or more years of service, or age 55 with 25 or more years of service, or age 60 with 10 or more years of service.

Annual Amount – Total service times 2.0% of Final Average Compensation (FAC). Members hired on or after July 1, 2012 receive total service times 1.25% of FAC.

Final Average Compensation – *MAPE Members:* Average of annual compensations for the period of 3 consecutive years producing the highest average and contained within the last 10 years immediately preceding retirement. *Non-Union Members:* Average of annual compensations for the last 3 consecutive years of credited service.

Retirants and Beneficiaries Comparative Schedule

Year Ended June 30	Added to Rolls		Removed from Rolls		Rolls End of Year		Active Per Retired	Average Allowances	Discounted Value of Allowances	
	No.	Annual Allowances	No.	Annual Allowances	No.	Annual Allowances			Total	Average
1997	2	\$ 6,616	4	\$ 49,203	140	\$ 1,002,576	1.6	\$ 7,161	\$ 8,856,225	\$ 63,259
1998	8 *	94,502	8	47,606	140	1,049,472	1.6	7,496	8,759,984	62,571
1999	9	132,738	5	51,966	144	1,130,244	1.6	7,849	9,645,640	66,984
2000	8	89,189	9	72,390	143	1,147,043	1.6	8,021	9,985,860	69,831
2001	10	315,129	4	34,351	149	1,427,821	1.5	9,583	11,663,240	78,277
2002	3	25,078	6	72,356	146	1,380,543	1.6	9,456	11,250,485	77,058
2003	8	151,848	9	122,197	145	1,410,194	1.6	9,725	11,543,221	79,608
2004	5	137,576	10	55,440	140	1,492,330	1.6	10,660	12,546,008	89,614
2005	10	160,093	6	62,364	144	1,590,059	1.5	11,042	13,296,443	92,336
2006	3	47,969	4	19,433	143	1,618,595	1.5	11,319	13,411,809	93,789
2007	12	237,858	5	90,787	150	1,765,666	1.4	11,771	15,258,928	101,726
2008	13	237,891	15	112,425	148	1,891,132	1.4	12,778	16,609,084	112,224
2009	12	252,745	5	67,914	155	2,075,963	1.3	13,393	18,296,979	118,045
2010	16	363,025	4	20,738	167	2,418,251	1.1	14,481	21,354,990	127,874
2011	14	268,775	11	90,471	170	2,596,555	1.0	15,274	22,839,916	134,352
2012	7	117,332	4	95,693	173	2,618,194	1.0	15,134	24,416,337	141,135
2013	16	365,285	8	120,395	181	2,863,084	0.9	15,818	26,671,859	147,358
2014	10	164,865	8	97,152	183	2,930,797	0.8	16,015	27,282,134	149,083
2015	17	367,099	13	230,032	187	3,067,864	0.7	16,406	29,088,408	155,553
2016	13	296,180	12	135,161	188	3,228,883	0.8	17,175	30,646,556	163,014
2017	7	205,713	5	56,448	190	3,378,148	0.7	17,780	31,706,913	166,878
2018	10	223,662	7	128,506	193	3,473,304	0.7	17,996	35,077,887	181,751
2019	10	264,651	8	175,768	195	3,562,187	0.8	18,268	35,668,923	182,918
2020	7	164,434	8	124,228	194	3,602,393	0.8	18,569	36,267,170	186,944
2021	8	179,869	10	157,140	192	3,625,122	0.8	18,881	36,144,949	188,255

* Reflects retirements due to Early Retirement Window provision.



Retirants and Beneficiaries June 30, 2021 Tabulated by Type of Allowances Being Paid

Type of Allowances Being Paid	No.	Annual Retirement Benefits	
Age and Service Allowances			
Regular allowances - benefit terminating at death of retirant	70	\$	1,388,519
Option I allowance - cash refund annuity plus pension terminating at death of retirant	2		37,973
Option II allowance - joint and survivor benefit	50		962,595
Option III allowance - modified joint and survivor benefit	45		945,563
Allowance to survivor beneficiary of deceased retirant	19		221,132
Total age and service allowances	186	\$	3,555,782
Casualty Allowances			
Disability			
Regular	2	\$	22,139
Option I	0		-
Option II	1		9,392
Option III	0		-
Disability allowance			
Survivor beneficiary	2		25,311
Allowance to survivor beneficiary of deceased member	1		12,498
Total casualty allowances	6	\$	69,340
Total Allowances Being Paid	192	\$	3,625,122

Retirants and Beneficiaries June 30, 2021 Tabulated by Attained Age

Attained Age	Age & Service		Casualty		Totals	
	No.	Annual Allowances	No.	Annual Allowances	No.	Annual Allowances
50 - 54	2	\$ 81,046	1	\$ 12,498	3	\$ 93,544
55 - 59	10	317,741	0	0	10	317,741
60 - 64	19	457,945	2	31,729	21	489,674
65 - 69	50	1,092,045	1	9,225	51	1,101,270
70 - 74	42	812,404	2	15,888	44	828,292
75 - 79	26	398,646	0	0	26	398,646
80	1	6,640	0	0	1	6,640
81	3	29,056	0	0	3	29,056
82	7	96,130	0	0	7	96,130
83	4	40,395	0	0	4	40,395
84	4	46,045	0	0	4	46,045
85	3	35,112	0	0	3	35,112
86	3	32,758	0	0	3	32,758
87	1	2,893	0	0	1	2,893
88	3	31,803	0	0	3	31,803
89	2	17,775	0	0	2	17,775
90	1	12,024	0	0	1	12,024
92	3	15,471	0	0	3	15,471
94	2	29,853	0	0	2	29,853
Totals	186	\$ 3,555,782	6	\$ 69,340	192	\$ 3,625,122

Inactive Members June 30, 2021 Tabulated by Attained Age

Included in the valuation were 22 inactive members. An inactive member is a member who has left City employment with entitlement to a retirement allowance after attaining eligible retirement age.

Attained Age	No.	Annual Estimated Allowances
40	1	\$ 9,490
42	1	17,334
46	1	14,500
47	1	12,361
48	2	32,392
52	2	50,471
54	2	52,694
55	2	35,772
56	1	15,773
57	3	60,760
58	2	23,082
59	2	13,906
65	1	14,205
74	1	610
Totals	22	\$ 353,350

Active Members June 30, 2021 Tabulated by Valuation Divisions

Valuation Divisions	No.	Annual Payroll
General members	45	\$3,270,211
Water & Sewage members	12	862,265
Hybrid Plan - General	73	3,680,075
Hybrid Plan - Water & Sewage	24	1,223,302
Total Active members	154	\$9,035,853

Number Added to and Removed from Active Membership

Year Ended June 30	Number Added During Year		Terminations During Year								Active Members End of Year
			Normal Retirement		Disability Retirement		Died-in- Service		Other Withdrawal		
	A	E	A	E	A	E	A	E	A	E	
2007	6	13	9	4.1	0	0.6	0	0.5	4	9.1	213
2008	15	16	8	4.7	0	0.6	1	0.4	7	7.3	212
2009	8	17	10	5.3	0	0.6	0	0.4	7	8.0	203
2010	6	27	14	4.9	1	0.6	0	0.4	12	7.5	182
2011	11	22	11	4.9	1	0.5	0	0.4	10	6.5	171
2012	10	12	5	3.1	0	0.4	0	0.3	7	6.4	169
2013	3	16	10	6.1	0	0.4	0	0.3	6	4.9	156
2014	11	26	7	4.9	0	0.4	0	0.3	19	5.1	141
2015	22	27	12	10.7	0	0.3	0	0.3	15	5.4	136
2016	19	14	6	2.7	0	0.4	0	0.2	9	7.1	141
2017	10	13	4	2.7	0	0.4	0	0.2	9	8.3	138
2018	27	22	5	2.5	0	0.4	0	0.2	17	7.8	143
2019	23	19	7	5.4	0	0.2	0	0.1	12	12.4	147
2020	18	17	4	5.3	0	0.2	0	0.1	13	13.8	148
2021	24	18	2	5.5	0	0.1	0	0.1	16	13.2	154
15-Yr Total	213	279	114	72.8	2	6.1	1	4.2	163	122.8	

A Represents actual number.

E Represents expected number.



Comparative Schedule

Valuation Date June 30	Active Members					Valuation Payroll	Average		
	General	Water & Sewage (W&S)	Hybrid Plan General	Hybrid Plan Water&Sewage	Totals		Age	Service	Pay
1997	168	52			220	\$ 7,340,045	43.7 yrs.	10.5 yrs.	\$ 33,364
1998	169	50			219	7,339,189	43.7	10.2	33,512
1999	175	49			224	7,784,073	43.8	10.0	34,750
2000	175	49			224	8,338,326	43.9	10.2	37,225
2001	177	47			224	8,532,237	44.6	10.5	38,090
2002	181	53			234	9,256,930	45.1	10.8	39,560
2003	182	51			233	9,691,157	45.7	11.3	41,593
2004	174	52			226	9,599,830	46.4	12.0	42,477
2005	169	51			220	9,599,573	46.7	12.4	43,634
2006	169	51			220	10,090,797	47.5	12.8	45,867
2007	163	50			213	10,119,228	47.8	13.1	47,508
2008*	160	52			212	10,295,133	47.6	13.0	48,562
2009*	156	47			203	10,183,663	47.9	13.2	50,166
2010*	139	43			182	8,968,814	48.3	13.3	49,279
2011*	127	44			171	8,169,376	47.7	13.2	47,774
2012*	127	42			169	8,479,118	48.0	13.5	50,172
2013*	114	39	3		156	7,970,005	48.0	13.7	51,090
2014*	96	31	14		141	7,609,280	48.3	13.5	53,967
2015	78	26	26	6	136	7,210,840	47.5	12.2	53,021
2016	70	25	36	10	141	7,291,841	46.6	11.4	51,715
2017	63	23	39	13	138	7,532,921	46.7	11.2	54,586
2018	56	21	46	20	143	8,102,276	46.2	10.4	56,659
2019	52	15	57	23	147	8,424,050	45.7	9.5	57,306
2020	47	14	66	21	148	8,503,052	46.1	9.4	57,453
2021	45	12	73	24	154	9,035,853	46.8	9.3	58,674

* DROP participants are included in the Active demographic data.

**General Active Members
(Hired before July 1, 2012)
as of June 30, 2021
by Attained Age and Years of Service**

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
40-44	0	0	3	0	0	0	0	3	\$ 206,741
45-49	0	1	3	4	4	0	0	12	853,088
50-54	0	0	1	5	3	1	0	10	835,498
55-59	0	0	2	1	3	1	4	11	744,587
60	0	0	0	1	1	0	0	2	134,384
61	0	0	0	0	1	0	0	1	57,896
62	0	0	0	2	1	0	0	3	207,525
63	0	0	0	0	1	0	0	1	53,437
64	0	0	1	0	0	1	0	2	177,055
Totals	0	1	10	13	14	3	4	45	\$3,270,211

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 53.2 years
Service: 20.1 years
Annual Pay: \$72,671

**Water and Sewage Active Members
(Hired before July 1, 2012)
as of June 30, 2021
by Attained Age and Years of Service**

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
35-39	0	1	0	2	0	0	0	3	\$202,524
45-49	0	0	1	0	0	0	0	1	68,080
50-54	0	0	0	0	0	0	1	1	81,598
55-59	0	0	1	0	1	2	0	4	326,019
60	0	0	0	0	1	0	0	1	56,814
61	0	0	0	1	0	0	0	1	53,462
69	0	0	1	0	0	0	0	1	73,768
Totals	0	1	3	3	2	2	1	12	\$862,265

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 52.0 years
Service: 19.2 years
Annual Pay: \$71,855

**Hybrid Plan – General Active Members
(Hired on or after July 1, 2012)
as of June 30, 2021
by Attained Age and Years of Service**

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
20-24	2	0	0	0	0	0	0	2	\$ 72,246
25-29	7	0	0	0	0	0	0	7	290,454
30-34	9	1	0	0	0	0	0	10	419,619
35-39	5	4	0	0	0	0	0	9	441,913
40-44	8	3	0	0	0	0	0	11	671,829
45-49	7	1	0	0	0	0	0	8	447,991
50-54	11	4	0	0	0	0	0	15	811,199
55-59	4	0	0	0	0	0	0	4	228,881
61	2	1	0	0	0	0	0	3	101,957
62	1	0	0	0	0	0	0	1	58,240
64	0	2	0	0	0	0	0	2	99,109
74	1	0	0	0	0	0	0	1	36,637
Totals	57	16	0	0	0	0	0	73	\$ 3,680,075

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 43.3 years
Service: 3.0 years
Annual Pay: \$50,412

**Hybrid Plan – Water and Sewage Active Members
(Hired on or after July 1, 2012)
as of June 30, 2021
by Attained Age and Years of Service**

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
20-24	2	0	0	0	0	0	0	2	\$ 107,044
25-29	2	0	0	0	0	0	0	2	85,468
30-34	1	0	0	0	0	0	0	1	39,211
35-39	4	0	0	0	0	0	0	4	183,904
40-44	2	2	0	0	0	0	0	4	199,345
45-49	4	2	0	0	0	0	0	6	340,528
50-54	0	1	0	0	0	0	0	1	55,532
55-59	1	0	0	0	0	0	0	1	39,853
63	1	1	0	0	0	0	0	2	133,245
64	1	0	0	0	0	0	0	1	39,172
Totals	18	6	0	0	0	0	0	24	\$ 1,223,302

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 43.1 years
Service: 3.1 years
Annual Pay: \$50,971

Asset Information Submitted for Valuation

Reported Assets - Market Value	Reserve for
Cash & Equivalents	\$ 723,151
Receivables & Accruals	59,975
Stocks	22,069,738
Bonds	12,706,878
International Securities	9,904,311
Real Estate	2,413,523
Accounts Payable	0
Total Current Assets	\$ 47,877,576
Employees' Contributions	
General	\$ 5,346,151
Water & Sewage	1,620,524
Total Employee Contributions	6,966,675
Employer Contributions	
General	9,389,196
Water & Sewage	(3,632,019)
Total Employer Contributions	5,757,177
Retired Benefit Payments	35,153,724
Undistributed Investment Income	none
Total Reserve Accounts	\$47,877,576

Revenues and Expenditures

	Total System
Balance - July 1, 2020	\$39,166,667
Revenues	
Employees' Contributions	740,817
Employer Contributions	1,068,745
Investment Income	10,883,503
Expenditures	
Benefit Payments	3,696,842
Refund of Member Contributions	43,230
Expenses	242,084
Balance - June 30, 2021	\$47,877,576

These amounts do not reflect the funding value adjustment of \$5,050,092. The derivation of this adjustment is on page A-8.



SECTION C

**FUNDING OBJECTIVE, SUMMARY OF VALUATION PROCESS,
METHODS AND ASSUMPTIONS**

Basic Funding Objective and Operation of the Retirement System

Benefit Promises Made Which Must Be Paid For. A retirement system is an orderly means of handing out, keeping track of, and financing contingent pension promises to a group of employees. As each member of the retirement system acquires a unit of service credit they are, in effect, handed an "IOU" which reads: *"The Employees Retirement System promises to pay you one unit of retirement benefits, payments in cash commencing when you retire."*

The principal related financial question is: When shall the money required to cover the "IOU" be contributed? This year, when the benefit of the member's service is received? Or, some future year when the "IOU" becomes a cash demand?

The Constitution of the State of Michigan is directed to the question:

"Financial benefits arising on account of service rendered in each fiscal year shall be funded during that year and such funding shall not be used for financing unfunded accrued liabilities."

This Retirement System meets this constitutional requirement by having the following **Funding Objective: To establish and receive contributions (expressed as a percentage of active member payroll) which will remain approximately level from year-to-year** and will not have to be increased for future generations of taxpayers.

Translated into actuarial terminology, a level percent-of-payroll contribution objective means that the contribution rate must be at least:

Normal Cost (the current value of benefits likely to be paid on account of members' service being rendered in the current year)

. . . plus . . .

Interest of the Unfunded Actuarial Accrued Liability (the difference between the actuarial accrued liability and current system assets).

If contributions to the Retirement System are less than the preceding amount, the difference, plus investment earnings not realized thereon, will have to be contributed at some later time, or, benefits will have to be reduced, to satisfy the fundamental fiscal equation under which all retirement systems must operate; that is:

$$B = C + I - E$$

Benefit payments to any group of members and their beneficiaries cannot exceed the sum of:

Contributions received on behalf of the group

. . . plus . . .

Interest earnings on contributions received and not required for immediate payment of benefits

. . . minus . . .

Expenses incurred in operating the System.

There are retirement systems designed to defer the bulk of contributions far into the future. Lured by artificially low present contributions, the inevitable consequence of a relentlessly increasing contribution rate – to a level greatly in excess of the level percent-of-payroll rate – is ignored. ***This method of financing is prohibited in Michigan by the state constitution.***

A by-product of the level percent-of-payroll contribution objective is the accumulation of invested assets for varying periods of time. Investment income becomes a major contributor to the Retirement System, and the amount is directly related to the amount of contributions and investment performance.

Computed Contribution Rate Needed to Finance Benefits. From a given schedule of benefits and from the data furnished, the contribution rate is calculated by means of an actuarial valuation – the technique of assigning monetary values to the risks assumed in operating a retirement system.

The Actuarial Valuation Process

An actuarial valuation is the process by which a balance between revenues (participant contributions, employer contributions and investment income) and obligations (benefits and expenses) is determined and its actuarial condition is measured.

The flow of activity constituting the valuation may be summarized as follows:

- A. *Covered person information about:***
- each person receiving pension payments
 - each former participant with a vested pension not yet payable
 - each former participant who is not vested and has not claimed a member contribution refund
 - each active participant
- B. + *Financial Information* (assets, revenues, and expenditures)**
- C. + *Benefit Provisions* (Retirement Ordinance)**
- D. + *Experience Estimates* about the volume and incidence of future activities**
- E. + *Actuarial Cost Method* for allocating costs to time periods**
- F. + *Mathematically combining the person information, financial information, benefit provisions, experience estimates and actuarial cost method***
- G. = Determination of:**
- contribution rate for the plan year
 - current funded condition

Items A, B and C are furnished by the pension office and constitute the current known information about the System. Since the majority of activities will occur in the future, estimates must be made about these future activities (Item D).

Demographic assumptions are generally selected on the basis of the System's historical activity, modified for expected future differences. Past activity of funds which are similar in nature to the fund being valued may be utilized if fund data or activities are insufficient to be reliable.

Fiscal assumptions, on the other hand, do not lend themselves to prediction on the basis of historical activity – the reason being that both salary increases and investment return are impacted by inflation. Inflation defies reliable prediction. Fiscal assumptions are generally selected on the basis of what would be expected to occur in an inflation-free environment and then both are increased by some provision for long-term inflation.

This is a case where two wrongs may make a right. If inflation is higher than expected it will probably result in actual rates of salary increase and investment return which exceed the assumed rates. Salaries increasing faster than expected result in unexpected costs. Investment return exceeding the assumed rate result in unanticipated assets. To a large degree the additional assets will offset the additional cost over the long-term.

Once items A, B, C and D are available, the actuarial valuation process begins. The first step is to determine the plan's **total actuarial present value** for individuals in each of the 3 covered person categories.

Retired members now receiving monthly payments;
Vested terminated members not yet at retirement age; and
Active members.

The actuarial present value is the value today, after taking into account the probabilities of payment and the effect of time, of System promises to pay benefits in the future on the basis of both services already completed and projected future service.

Actuarial Cost Method

The total actuarial present value is allocated between projected future service and completed service by the actuarial cost method (Item E) -- the **individual entry-age** method is being utilized for this valuation. The portion of the total actuarial present value allocated to projected future service is the **actuarial present value of future normal cost** -- normal cost being the series of annual costs, from entry-age to retirement age, which will accumulate to the actuarial present value of the individual's benefit at the time of retirement or death. The remainder of the total actuarial present value is the **actuarial accrued liability**.

At this stage, determination has been made of:

1. The total actuarial present value;
2. The actuarial present value of future normal cost; and
3. The actuarial accrued liability.

In the typical plan, the actuarial accrued liability may not be covered by the plan's accrued assets – leaving an **unfunded actuarial accrued liability**. If the plan's accrued assets equal or exceed the actuarial accrued liability, the plan's accrued obligations are said to be "fully funded."

The next step in the valuation process is a determination of the contribution rate (Item G) required to support System benefits in accordance with the funding objective (page A-1).

The contribution rate is determined in two basic components:

1. The normal cost component; and
2. The component which will finance (pay off) the unfunded actuarial accrued liability over the periods indicated on page A-2.

The Unfunded Actuarial Accrued Liability (UAAL) was determined using the Actuarial Value of Assets and Actuarial Accrued Liability calculated as of the valuation date. The UAAL amortization payment (one component of the contribution requirement) is the level percent of pay required to fully amortize the UAAL. The UAAL attributed to the Deferred Retirement Option Plan is amortized over a 15-year period being effective with the June 30, 2008 valuation (2 years remain as of June 30, 2020). The UAAL attributed to the June 30, 2016 valuation is amortized over a 30-year closed period effective with the June 30, 2016 valuation (26 years remain as of June 30, 2020).

Gains or losses to the UAAL that have occurred after June 30, 2016 and the current valuation date are amortized over 30-year closed periods. This UAAL payment reflects any payments expected to be made between the valuation date and the date contributions determined by this report are scheduled to begin. In future years, new gains and losses (experience along with other changes such as assumptions or benefit provisions) will be amortized separately ("new layers") as they occur (over 30-year closed amortization periods). This will create an "amortization schedule" of contribution rates. This schedule will require periodic review by the Board.

Actuarial Assumptions Used for the Valuation

Funding objective contribution requirements and actuarial present values are calculated by applying estimates of future System activities (actuarial assumptions) to the benefit provisions and people information of the fund, using the actuarial cost method described on page C-5.

The principal areas of activity which require estimates are:

- (i) Rates of inflation impacting assets of the System and active member pays
- (ii) Long-term rates of investment return to be generated by the assets of the System
- (iii) Rates of salary increase to members
- (iv) Rates of mortality among members, retirants and beneficiaries
- (v) Rates of withdrawal of active members
- (vi) Rates of retirement due to age and service
- (vii) Rates of disability among members

In making a valuation, the monetary effect of each activity is calculated for as long as a present covered person survives – a period of time which can be as long as a century.

Actual activities of the Retirement System will not coincide exactly with estimated activities due to the nature of the activities. Each valuation provides a complete recalculation of estimated future activities and takes into account the effect of differences between estimated and actual activities to date. The result is a continual series of adjustments (usually small) to the computed contribution rate. From time-to-time one or more of the estimates are modified to reflect experience trends (but not random or temporary year-to-year fluctuations).

The Board of Trustees sets the assumptions. Actuarial assumptions were most recently reviewed and adopted by the Board of Trustees for the June 30, 2018 actuarial valuation. The rationale for the economic and mortality assumptions is described in the report dated January 11, 2019. Other assumptions are based in part on plan experience and reviewed from time-to-time. We recommend the Board set a policy for regular reviews of the actuarial assumptions, such as every five years.

All actuarial assumptions are expectations of future experience, not market measures.

The investment return rate used for valuation calculations was 6.85% net of expenses, compounded annually. The assumed rate of price inflation is 2.25% per year resulting in a real rate of return of 4.6% per year. The assumed rate of wage inflation and payroll growth is 3.0% per year. This is the same payroll growth assumption used to amortize unfunded actuarial accrued liability.

This assumption is used to equate the value of payments due at different points in time and was first used for the June 30, 2018 valuation. Approximate investment returns, for the purpose of comparisons with assumed returns, have been as follows:

	Year Ended June 30				
	2021	2020	2019	2018	2017
Nominal rate	10.9 %	6.5 %	6.1 %	6.7 %	8.2 %
Inflation rate	5.4	0.6	1.6	2.9	1.6
Real rate	5.5	5.9	4.5	3.8	6.6

These rates of return should not be used for measurement of an investment advisor's performance or for comparisons with other systems – to do so will mislead.

Salary increase rates used to project current pays to those upon which a benefit will be based are represented by the following table and were first used for the June 30, 2012 valuation.

Sample Ages	Annual Rate of Salary Increase for Sample Ages	
	Base Economic	Merit and Longevity
20	3.00 %	4.00 %
25	3.00	3.50
30	3.00	2.90
35	3.00	2.30
40	3.00	1.70
45	3.00	1.20
50	3.00	1.00
55	3.00	0.50
60	3.00	0.00

Changes actually experienced in average pay and total payroll have been as follows:

	Year Ending					5-Year Average
	2021	2020	2019	2018	2017	
Average pay (all members)	2.1%	0.3%	1.1%	3.8%	5.6%	2.6%
Total payroll	6.3%	0.9%	4.0%	7.6%	3.3%	4.4%
Average pay (continuing members)	4.1%	4.7%	5.5%	5.6%	7.7%	5.5%

The mortality table used was the RP-2014 Healthy Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis. This table was first used for the June 30, 2018 valuation. Sample values follow:

Sample Ages in 2021	Probability of Dying Next Year		Future Life Expectancy (Years)	
	Male	Female	Male	Female
50	0.41%	0.27%	34.39	37.01
55	0.58	0.39	29.67	32.09
60	0.82	0.59	25.12	27.34
65	1.19	0.86	20.81	22.82
70	1.74	1.30	16.77	18.51
75	2.73	2.11	13.02	14.48
80	4.57	3.62	9.67	10.85
Ref:	2135 x 1.00	2136 x 1.00		

This assumption is used to measure the probabilities of each benefit payment being made after service retirement.

The RP-2014 Disabled Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis is used to measure the probabilities of each benefit payment being made after disability retirement.

The RP-2014 Employees Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis is used to measure the probabilities of members dying before retirement.

The rates of retirement used to measure the probability of eligible members retiring during the next year are listed below. These tables were first used for the June 30, 2018 valuation.

For MAPE members hired **before** July 1, 2016 or Non-Union members hired **before** January 1, 2016:

<u>Retirement Ages</u>	<u>Percent Retiring</u>
50	18 %
51	18
52	18
53	18
54	18
55	18
56	18
57	18
58	18
59	20
60	20
61	20
62	25
63	20
64	20
65	40
66	40
67	40
68	40
69	40
70	100

Additionally, MAPE members hired **before** July 1, 2016 or Non-Union members hired **before** January 1, 2016 retiring with 30 or more years of service (and an age depending on eligibility requirements):

<u>Service Years</u>	<u>Proposed Table Percent Retiring</u>
30	50 %
31	50
32	50
33	50
34	50
35	100

For MAPE members hired **after** July 1, 2016 or Non-Union members hired **after** January 1, 2016 retiring under the age 65+ and 10 years of service condition:

<u>Retirement Ages</u>	<u>Proposed Table Percent Retiring</u>
65	50 %
66	50
67	50
68	50
69	50
70	100

For MAPE members hired after July 1, 2016, **100%** are assumed to retire after reaching 37 or more years of service.

For Non-Union members hired after January 1, 2016, **100%** are assumed to retire after reaching 38 or more years of service.

Rates of separation from active membership are represented by the following table (rates do not apply to members eligible to retire and do not include separation on account of death or disability). This assumption measures the probabilities of members remaining in employment. This table was first used for the June 30, 2018 valuation.

Basis		% of Active Members Separating within Next Year
Service Based		
Years of service:	0	25.00 %
	1	20.00
	2	15.00
	3	12.50
	4	10.00
Age Based		
Sample Ages:	25	8.40
	30	7.70
	35	6.16
	40	2.59
	45	1.75
	50	1.75
	55	1.75
	60	1.75

Rates of disability are represented by the following table. This assumption measures the probabilities of active members becoming disabled. This table was first used for the June 30, 2018 valuation.

Sample Ages	% of Active Members Separating from Disability	
	Male	Female
35	0.04 %	0.05 %
40	0.10	0.18
45	0.13	0.20
50	0.25	0.28
55	0.45	0.38
60	0.71	0.51
65	0.83	0.62

Miscellaneous and Technical Assumptions

Marriage Assumption	90% for purposes of death-in-service benefits and 80% for deaths after retirement.
Pay Increase Timing	Beginning of (Fiscal) year. This is equivalent to assuming that reported pays represent amounts paid to members during the year ended on the valuation date.
Decrement Timing	Decrements of all types are assumed to occur mid-year.
Eligibility Testing	Eligibility for benefits is determined based upon the age nearest birthday and service nearest whole year on the date the decrement is assumed to occur.
Benefit Service	Exact fractional service is used to determine the amount of benefit payable.
Decrement Relativity	Decrement rates are used directly from the experience study, without adjustment for multiple decrement table effects.
Decrement Operation	Disability and mortality decrements do not operate during the first 5 years of service. Disability and turnover do not operate during retirement eligibility.
Normal Form of Benefit	The normal form of benefit is the straight life form. 1/2 year of benefit service added to service for retirees to simulate a load for service purchase.
Option Factors	Option factors are based upon 6% interest and the RP-2000 Mortality Table projected to 2017 using scale BB, with 64% unisex blend.
Incidence of Contributions	Contributions are assumed to be received continuously throughout the year based upon the Board adopted contribution rates, and the actual payroll payable at the time contributions are made.
Data Adjustments	None.

Glossary

Accrued Service: Service credited under the System which was rendered before the date of the actuarial valuation.

Actuarial Accrued Liability: The difference between the actuarial present value of future benefit payments and the actuarial present value of future normal costs. Also referred to as "accrued liability" or "past service liability."

Actuarial Assumptions: Estimates of expected future experience with respect to rates of mortality, disability, turnover, retirement, rate or rates of investment income and salary increases. Decrement assumptions (rates of mortality, disability, turnover and retirement) are generally based on past experience, often modified for projected changes in conditions. Economic assumptions (salary increases and investment income) consist of the underlying rate in an inflation-free environment plus a provision for a long-term average rate of inflation.

Actuarial Cost Method: A mathematical budgeting procedure for allocating the dollar amount of the "actuarial present value of future benefit payments" between future normal costs and actuarial accrued liabilities. Sometimes referred to as the "actuarial cost method."

Actuarial Equivalent: A single amount or series of amounts of equal actuarial present value to another single amount or series of amounts, computed on the basis of appropriate actuarial assumptions.

Actuarial Present Value: The amount of funds currently required to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payment. Also referred to as "present value."

Amortization: Paying off an interest-discounted amount with periodic payments of interest and principal – as opposed to paying it off with a lump sum payment.

Experience Gain (Loss): The difference between actual costs and assumed actuarial costs – during the period between two valuation dates.

Funding Value (of Assets): The value of assets used in the actuarial valuation. Typically, cost value with an adjustment toward market.

Normal Cost: The actuarial cost allocated to the current year by the actuarial cost method. Sometimes referred to as "current service cost."

Unfunded Actuarial Accrued Liability: The difference between the actuarial accrued liabilities and the actuarial value of system assets. Sometimes referred to as "unfunded past service liability," "unfunded accrued liability" or "unfunded supplemental present value."



February 28, 2022

CONFIDENTIAL

Ms. Sandy Sykes
Pension Coordinator
City of Jackson Employees Retirement System
161 West Michigan Avenue
Jackson, Michigan 49201

**Re: City of Jackson Employees Retirement System
Employee Contribution Rate Analysis**

Dear Ms. Sykes:

As requested, we have performed an actuarial analysis of the City of Jackson Employees Retirement System's actuarially determined member and employer contribution rates for the Fiscal Year ending June 30, 2023.

If you have any questions regarding our calculations, please contact us.

Sincerely,
Gabriel, Roeder, Smith & Company

A handwritten signature in black ink, appearing to read "James R. Sparks". The signature is fluid and cursive.

James R. Sparks, ASA, FCA, MAAA

JRS:rl
Enclosures

cc: Philip Hones (City of Jackson)
Jonathan Greene (City of Jackson)
Derek A. Henning (GRS)
Abra D. Hill (GRS)

City of Jackson

Employees Retirement System

Contribution Rate Analysis Supplemental

Submitted To: Ms. Sandy Sykes, Pension Coordinator

Date: February 28, 2022

Submitted By: James R. Sparks, ASA, FCA, MAAA, Derek A. Henning, ASA, EA, MAAA and
Abra D. Hill, ASA, FCA, MAAA
Gabriel, Roeder, Smith & Company

This analysis contains the results, requested by the Board of the City of Jackson Employees Retirement System, measuring the June 30, 2021 Actuarial Valuation's recommended employee and employer contribution rates for the Fiscal Year Ending June 30, 2023 based upon splitting the active member population into additional cohorts.

The City of Jackson Employees Retirement System is funded by member and employer contributions. The total contribution rate (member and employer) is determined annually by the Retirement System's Actuary based upon the Board's funding policy. This rate is then split equally between the City and the employees. The minimum total contribution rate from the City and employees is 5.0% (2.5% City plus 2.5% employees). The employee contribution is not to exceed the plan's normal cost. The term "normal cost" refers to the actuarial cost of additional benefits accrued by active members in the Retirement System in a given year.

Currently, the calculation for member contribution rates is split into two cohorts to account for materially different benefit provisions of members:

- Members hired on or before June 30, 2012 (Non-Hybrid); and
- Members hired on or after July 1, 2012 (Hybrid)

Updated benefit provisions adopted in the past year resulted in members of the Michigan Association of Public Employees (MAPE) having materially different benefits from non-unionized members of the Retirement System.

Therefore, an analysis was requested by the Board of Trustees to determine member and employer contribution rates based upon the following active member cohorts of the Retirement System:

- Members of the Michigan Association of Public Employees (MAPE) hired on or before June 30, 2012 (Non-Hybrid);
- Members of the Michigan Association of Public Employees (MAPE) hired on or after July 1, 2012 (Non-Hybrid);
- Non-Union members hired on or before June 30, 2012 (Non-Hybrid); and
- Non-Union members hired on or after July 1, 2012 (Hybrid).

City of Jackson

Employees Retirement System

Contribution Rate Analysis Supplemental

Data and assumptions from the June 30, 2021 Actuarial Valuation were used for this analysis, specifically:

- 6.85% assumed rate of investment return
- 3.00% assumed rate of wage inflation and payroll growth

A brief summary of the data used in the analysis is presented below:

Valuation Divisions	No.	Annual Payroll	Average in Years	
			Age	Service
Non-Hybrid MAPE	31	\$1,953,331	53.9	18.8
Non-Hybrid Non-Union	26	2,179,145	51.8	21.2
Hybrid MAPE	36	1,615,035	39.6	3.0
Hybrid Non-Union	61	3,288,342	45.4	3.0
Total Active members	154	\$9,035,853	46.8	9.3

A summary of benefit provisions for the above members can be found in Section B of the June 30, 2021 Actuarial Valuation Report.

The normal cost for each active member cohort is shown below:

Valuation Division	Normal Cost %
Non-Hybrid MAPE Members	12.06%
Non-Hybrid Non-Union Members	11.44%
Hybrid MAPE Members	8.20%
Hybrid Non-Union Members	6.95%
Total Weighted Average	9.35%

City of Jackson
Employees Retirement System
Contribution Rate Analysis Supplemental

June 30, 2021 Actuarial Valuation (Page A-3)

Member and Employer Contribution Rate for Fiscal Year Ending June 30, 2023
Scenario 1 – None of the Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023			Illustrative Dollar Contributions
	Non-Hybrid ²	Hybrid ³	Total Weighted Averages	
Member Portion				
a. Total Member Portion ¹	10.05 %	7.35 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.00 %	0.00 %	0.00 %	-
c. Member Contributions (a. - b.)	10.05 %	7.35 %	8.58 %	\$ 822,491
Employer Portion			11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)			19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid Contribution: Minimum of 1/2 x 11.74 % + 1/2 x 8.36 % = 10.05 % and 11.74% results in 10.05%

³ Hybrid Contribution: Minimum of 1/2 x 7.35 % + 1/2 x 8.36 % = 7.86 % and 7.35% results in 7.35%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, the reserve is not used to offset the Non-Hybrid Member Contributions for the fiscal year ending June 30, 2023. The resulting Member Contribution is 10.05% for Non-Hybrid Members and 7.35% for Hybrid Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid Members	9.97%	10.05%	0.08%
Hybrid Members	6.81%	7.35%	0.54%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	\$ -
Remaining Balance as of 6/30/21	\$ 22,490

City of Jackson
Employees Retirement System
Contribution Rate Analysis Supplemental

Supplemental Analysis – Separate Member Rates for MAPE & Non-Union Members
Member and Employer Contribution Rate for Fiscal Year Ending June 30, 2023
Scenario 1 – None of the Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023				Total Weighted Averages	Illustrative Dollar Contributions
	Non-Hybrid		Hybrid			
	MAPE ²	Non-Union ³	MAPE ⁴	Non-Union ⁵		
Member Portion						
a. Total Member Portion ¹	10.21 %	9.90 %	8.20 %	6.95 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	-
c. Member Contributions (a. - b.)	10.21 %	9.90 %	8.20 %	6.95 %	8.58 %	\$ 822,491
Employer Portion					11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)					19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid MAPE Contribution: Minimum of 1/2 x 12.06 % + 1/2 x 8.36 % = 10.21 % and 12.06% results in 10.21%

³ Non-Hybrid Non-Union Contribution: Minimum of 1/2 x 11.44 % + 1/2 x 8.36 % = 9.90 % and 11.44% results in 9.90%

⁴ Hybrid MAPE Contribution: Minimum of 1/2 x 8.20 % + 1/2 x 8.36 % = 8.28 % and 8.20% results in 8.20%

⁵ Hybrid Non-Union Contribution: Minimum of 1/2 x 6.95 % + 1/2 x 8.36 % = 7.66 % and 6.95% results in 6.95%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, the reserve is not used to offset the Non-Hybrid MAPE & Non-Union Member Contributions for the fiscal year ending June 30, 2023. The resulting Member Contributions are 10.21% for Non-Hybrid MAPE members, 9.90% for Non-Hybrid Non-Union Members, 8.20% for Hybrid MAPE members, and 6.95% for Hybrid Non-MAPE Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid MAPE Members	9.97%	10.21%	0.24%
Non-Hybrid Non-Union Members	9.97%	9.90%	-0.07%
Hybrid MAPE Members	6.81%	8.20%	1.39%
Hybrid Non-Union Members	6.81%	6.95%	0.14%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	\$ -
Remaining Balance as of 6/30/21	\$ 22,490



City of Jackson
Employees Retirement System
Contribution Rate Analysis Supplemental

June 30, 2021 Actuarial Valuation (Page A-4)

Member and Employer Contribution Rate for Fiscal Year Ending June 30, 2023
Scenario 2 – ALL of the Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023			Illustrative Dollar Contributions
	Non-Hybrid ²	Hybrid ³	Total Weighted Averages	
Member Portion				
a. Total Member Portion ¹	10.05 %	7.35 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.54 %	0.00 %	0.25 %	23,965
c. Member Contributions (a. - b.)	9.51 %	7.35 %	8.33 %	\$ 798,525
Employer Portion			11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)			19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid Contribution: Minimum of 1/2 x 11.74 % + 1/2 x 8.36 % = 10.05 % and 11.74% results in 10.05%

³ Hybrid Contribution: Minimum of 1/2 x 7.35 % + 1/2 x 8.36 % = 7.86 % and 7.35% results in 7.35%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, all \$22,490 of the reserve is used to offset the Non-Hybrid member contribution by 0.54% of pay for the fiscal year ending June 30, 2023. The resulting Member Contribution is 9.51% for Non-Hybrid Members and 7.35% for Hybrid Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid Members	9.97%	9.51%	-0.46%
Hybrid Members	6.81%	7.35%	0.54%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	22,490
Remaining Balance as of 6/30/21	\$ -

City of Jackson
Employees Retirement System
Contribution Rate Analysis Supplemental

Supplemental Analysis – Separate Member Rates for MAPE & Non-Union Members
Member and Employer Contribution Rate for Fiscal Year Ending June 30, 2023
Scenario 2 – ALL of Member Stabilization Reserve Used

Contribution Sources	Fiscal Year Ending June 30, 2023				Total Weighted Averages	Illustrative Dollar Contributions
	Non-Hybrid		Hybrid			
	MAPE ²	Non-Union ³	MAPE ⁴	Non-Union ⁵		
Member Portion						
a. Total Member Portion ¹	10.21 %	9.90 %	8.20 %	6.95 %	8.58 %	\$ 822,491
b. Member Stabilization Reserve	0.54 %	0.54 %	0.00 %	0.00 %	0.25 %	23,965
c. Member Contributions (a. - b.)	9.67 %	9.36 %	8.20 %	6.95 %	8.33 %	\$ 798,525
Employer Portion					11.01 %	\$ 1,055,434
Total Computed Contribution (Member+Employer)					19.59 %	\$ 1,877,924

¹ The minimum of 1/2 Total Normal Cost + 1/2 Non-DROP UAAL Contribution and Total Normal Cost from page A-2

² Non-Hybrid MAPE Contribution: Minimum of 1/2 x 12.06 % + 1/2 x 8.36 % = 10.21 % and 12.06% results in 10.21%

³ Non-Hybrid Non-Union Contribution: Minimum of 1/2 x 11.44 % + 1/2 x 8.36 % = 9.90 % and 11.44% results in 9.90%

⁴ Hybrid MAPE Contribution: Minimum of 1/2 x 8.20 % + 1/2 x 8.36 % = 8.28 % and 8.20% results in 8.20%

⁵ Hybrid Non-Union Contribution: Minimum of 1/2 x 6.95 % + 1/2 x 8.36 % = 7.66 % and 6.95% results in 6.95%

Notes

As of June 30, 2021, the Member Stabilization Reserve (for Non-Hybrid) is \$22,490. Under this scenario, all \$22,490 of the reserve is used to offset the Non-Hybrid MAPE & Non-Union member contributions by 0.54% of pay for the fiscal year ending June 30, 2023. The resulting Member Contributions are 9.67% for Non-Hybrid MAPE members, 9.36% for Non-Hybrid Non-Union Members, 8.20% for Hybrid MAPE members, and 6.95% for Hybrid Non-MAPE Members.

The percentage point change in the member contribution rate from the prior fiscal year is shown below:

	Member Contributions as Percentages of Payroll		
	FYE 2022	FYE 2023	Change
Non-Hybrid MAPE Members	9.97%	9.67%	-0.30%
Non-Hybrid Non-Union Members	9.97%	9.36%	-0.61%
Hybrid MAPE Members	6.81%	8.20%	1.39%
Hybrid Non-Union Members	6.81%	6.95%	0.14%

The remaining balance of the Member Stabilization Reserve is shown below:

	Member Stabilization Reserve (Non-Hybrid)
Balance as of 6/30/21	\$ 22,490
Balance used for FYE-2023 Member Contribution Rate	22,490
Remaining Balance as of 6/30/21	\$ -

City of Jackson

Employees Retirement System

Contribution Rate Analysis Supplemental

Comments

Comment 1 — The calculations of member and employer contribution rates are dependent upon actuarial assumptions used in the valuation which change over time. Currently, the System assumes an investment return of 6.85% for Actuarial Valuation purposes. A lower assumed rate of investment return for valuation purposes would likely place upward pressure on future contribution rates for members and the employer.

Comment 2 — This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

Comment 3 — The calculations are based upon assumptions regarding future events, which may or may not materialize. They are also based upon present plan provisions that are outlined in the report. If you have reason to believe that the assumptions that were used are unreasonable, that the plan provisions are incorrectly described, that important plan provisions relevant to this proposal are not described, or that conditions have changed since the calculations were made, you should contact the authors of this report prior to relying on information in the report.

Comment 4 — If you have reason to believe that the information provided in this report is inaccurate, or is in any way incomplete, or if you need further information in order to make an informed decision on the subject matter of this report, please contact the authors of the report prior to making such decision.

Comment 5 — No statement in this report is intended to be interpreted as a recommendation in favor of changes, or in opposition to them.

MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Jackson High School Graduation Ceremony

Recommendation:

Approve a request from Jackson High School to host their Graduation Ceremony on Friday, May 27, 2022 and use road closures on Wildwood Avenue near Jackson High School.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the Jackson High School Graduation Ceremony.

I recommend approval of the special event application for the Jackson High School Graduation Ceremony. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from Jackson High School to host their Graduation Ceremony on Friday, May 27, 2022 and use road closures on Wildwood Avenue near Jackson High School.

SUMMARY: Graduation ceremony for 2022 Jackson High School seniors and their families

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
<u>Public Works</u>	X		<u>\$200.00</u>
		<i>TOTAL</i>	<i>\$200.00</i>

CONDITIONS & CONSIDERATIONS

Road closures

INSURANCE STATUS

Approved and on file with the DDA and City Attorney

ATTACHMENTS: Special Event Application: Jackson High School Graduation Ceremony



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|---|--|
| <input type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input type="checkbox"/> Event Map –Please indicate the location of all items | |

Make checks payable to “Downtown Development Authority”

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: JACKSON High School	
Address: 544 Wildwood Ave	Phone: (517) 841-3702
Tax ID#: 38-6001907	Website:
Contact Name: MONICA PIERCE	Phone: 517-841-3701 Email: MONICA.PIERCE@JPSK12.ORG
Contact Name: Kim Edwards	Phone: 517-841-3702 Email: Kimberley.Edwards@JPSK12.ORG
Contact Name During Event: Willie Lewis	Phone: (517) 841-3729

Event Information

Event Name:				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
5-27-22	5:00 pm	6:00 pm	8:30 pm	9:00 pm

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

Do you expect this event to occur again next year? yes What is the expected attendance for this event? 2000

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: Graduation Ceremony

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

- Horace Blackman Park
- GrandRiver Farmers Market Pavilion
- Bucky Harris Park
- CP Federal City Square (Stage)
- Ella Sharp Park (requires Ella Sharp Board approval)
- MLK Equality Trail
- Other Location: Jackson High Football Stadium
- Streets: Wildwood Ave, Stewart ~~Highway~~
- Other Park: _____

Brief description of Event

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

Graduation Ceremony

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

Street Name: <u>Wildwood Ave</u>	Cross Streets: <u>Stewart</u>
Closure Start Date: <u>5-27-22</u> Time: <u>5:00pm</u>	Closure End Date: <u>5-27-22</u> Time: <u>8:30pm</u>
Street Name: _____	Cross Streets: _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____
Street Name: _____	Cross Streets: _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____
Street Name: _____	Cross Streets: _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____
Street Name: _____	Cross Streets: _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____
Street Name: _____	Cross Streets: _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

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

Electrical Power: Indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____

All electrical lines MUST be covered to limit tripping hazards.

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

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

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

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

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

Traffic Cones

Mobile Stage (please circle 15-foot or 25-foot version)

Other: Setup Same as last year

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority as additional insured"
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|---|--|---|
| <input type="checkbox"/> Route Plan | <input type="checkbox"/> Emergency Vehicle Access | <input type="checkbox"/> Restroom Locations |
| <input type="checkbox"/> Vendor Locations | <input type="checkbox"/> Dispersal Locations | <input type="checkbox"/> Tables |
| <input type="checkbox"/> Tent Locations | <input type="checkbox"/> Trash Receptacles | <input type="checkbox"/> Requested Reserved Parking |
| <input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Electrical Wires & Outlets |

If these details change, a revised map must be provided seven days prior to event.

Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

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

Signature: _____

Monica Reese

Date: _____

3-10-22

Office Use ONLY

Application Received:

Date:

Time:

By:

Application Fee Received:

Application Requirements

Application **MUST** be submitted 60 days **PRIOR** to event
*****NO EXCEPTIONS*****

Application **MUST** be submitted along with all required attachments to:
City of Jackson Downtown Development Authority
Office
161 W Michigan Ave, 5th Floor
Jackson Michigan, MI 49201 or cmays@cityofjackson.org
(517) 768-6410

Prohibited Items

Additional fees may apply if policies are not followed

No ground stakes
No confetti or glitter
No use of outlets without prior approval



Map data ©2021 200 ft



Just need
Wildwood Ave
Closed

Jackson

Michigan

Sunny · 57°F
11:58 AM



Directions



Save



Nearby



Send to your
phone



Share

Quick facts

CERTIFICATE OF INSURANCE

Producer SET SEG 1520 Earl Ave East Lansing, MI 48823	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.
---	---

COMPANIES AFFORDING COVERAGE

Insured Jackson Public Schools 522 Wildwood Ave Jackson, MI 49202	A MASB-SEG Property/Casualty Pool, Inc.
---	--

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

CO LTR	TYPE OF INSURANCE	POLICY NUMBER	EFFECTIVE DATE	EXPIRATION DATE	LIMITS	
A	GENERAL LIABILITY <input checked="" type="checkbox"/> Comprehensive Form <input checked="" type="checkbox"/> Premises/Operations <input checked="" type="checkbox"/> Products/Completed Operations <input checked="" type="checkbox"/> Contractual <input checked="" type="checkbox"/> Independent Contractors <input checked="" type="checkbox"/> Broad Form Property Damage <input checked="" type="checkbox"/> Personal Injury	PC-0000297	7/1/21	7/1/22	BI & PD COMBINED OCCURRENCE BI & PD COMBINED AGGREGATE PERSONAL INJURY OCCURRENCE	\$1,000,000 N/A \$1,000,000

DESCRIPTION City of Jackson and the Downtown Development Authority are added as an additional insured for liability but only as respects to the activities performed by or on behalf of the named Insured regarding the district's Graduation on May 27, 2022.

CERTIFICATE HOLDER City of Jackson and Downtown Development Authority 161 W. Michigan Avenue Jackson, MI 49201	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING COMPANY WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO MAIL SUCH NOTICE SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE COMPANY, ITS AGENTS OR REPRESENTATIVES.
---	---

AUTHORIZED REPRESENTATIVE

Deana Coolidge

Deana Coolidge
PROPERTY/CASUALTY DEPARTMENT

Date 03/10/22

MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Jackson District Library Summer Reading Program Finale

Recommendation:

Approve a request from the Jackson District Library to host their Summer Reading Program Finale on July 30, 2022 on the streets of downtown Jackson.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the Jackson District Library Summer Reading Program Finale

I recommend approval of the special event application for the Jackson District Library Summer Reading Program Finale. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Jackson District Library to host their Summer Reading Program Finale on July 30, 2022 on the streets of downtown Jackson.

SUMMARY: Reading program finale party, centered around this year's theme, "Oceans of Possibilities." Event will include pirates, merfolk, games, crafts, and tons of fun for the whole family!

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
<u>Public Works</u>	X		<u>\$400.00</u>
	<i>TOTAL</i>		<i>\$400.00</i>

CONDITIONS & CONSIDERATIONS

Road closures

INSURANCE STATUS

Approved and on-file with the DDA and City Attorney's office

ATTACHMENTS: Special Event Application: JDL Summer Reading Program Finale



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|--|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input checked="" type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input checked="" type="checkbox"/> Event Map —Please indicate the location of all items | |

Make checks payable to “Downtown Development Authority”

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: JACKSON District Library	
Address: 244 Michigan Ave	Phone: (517) 905 1318
Tax ID#:	Website: www.myjdl.com
Contact Name: Anna Clark	Phone: 517 905 1318 Email: clark@myjdl.com
Contact Name: Anne de Irala	Phone: 517 905 Email:
Contact Name During Event: Anna Clark	Phone: () same as above

Event Information

Event Name:				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
July 30, 2022	11:00 am	1:00 PM	4:00 PM	1 hour

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

Do you expect this event to occur again next year? maybe? What is the expected attendance for this event? 100

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: Summer Reading Program Finale

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

- Horace Blackman Park
- GrandRiver Farmers Market Pavilion
- Bucky Harris Park
- CP Federal City Square (Stage)
- Ella Sharp Park (requires Ella Sharp Board approval)
- MLK Equality Trail
- Other Location: _____
- Streets: Michigan Ave - Blackstone to Hayes Ct.
- Other Park: _____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary!
JDL's Summer Reading Finale Party! This year's theme is Oceans of Possibilities - we will have Pirates, merfolk, games, crafts + tons of fun. This is an all ages event.

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

Street Name: Michigan Ave Cross Streets Blackstone / Hayes Ct.
Closure Start Date: 7-30-22 Time: 11am Closure End Date: 7-30-22 Time: 5pm
Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____
Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____
Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____
Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____
Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

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

- Electrical Power:** Indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****
- Water Needs:** Indicate water requirements: _____
 Amount of water needed: _____ Locations of where water is needed: _____
- Food/Vendors:** Indicate vendors requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____ Number of vendors: _____
- Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
 Start Time: _____ End Time: _____
- Amusement or Carnival Rides:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Fireworks:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Traffic Cones Mobile Stage (please circle **15-foot** or **25-foot** version)
- Other: _____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

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

- | | | |
|--|--|--|
| <input type="checkbox"/> Route Plan
<input type="checkbox"/> Vendor Locations
<input type="checkbox"/> Tent Locations
<input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Emergency Vehicle Access
<input type="checkbox"/> Dispersal Locations
<input type="checkbox"/> Trash Receptacles
<input checked="" type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Restroom Locations
<input type="checkbox"/> Tables
<input type="checkbox"/> Requested Reserved Parking
<input type="checkbox"/> Electrical Wires & Outlets |
|--|--|--|

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

Special Event Application

Certification & Signature

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

Signature: _____



Date: _____

3-3-22

Office Use ONLY

Application Received:

Date:

Time:

By:

Application Fee Received:

Application Requirements

Application **MUST** be submitted 60 days PRIOR to event
NO EXCEPTIONS

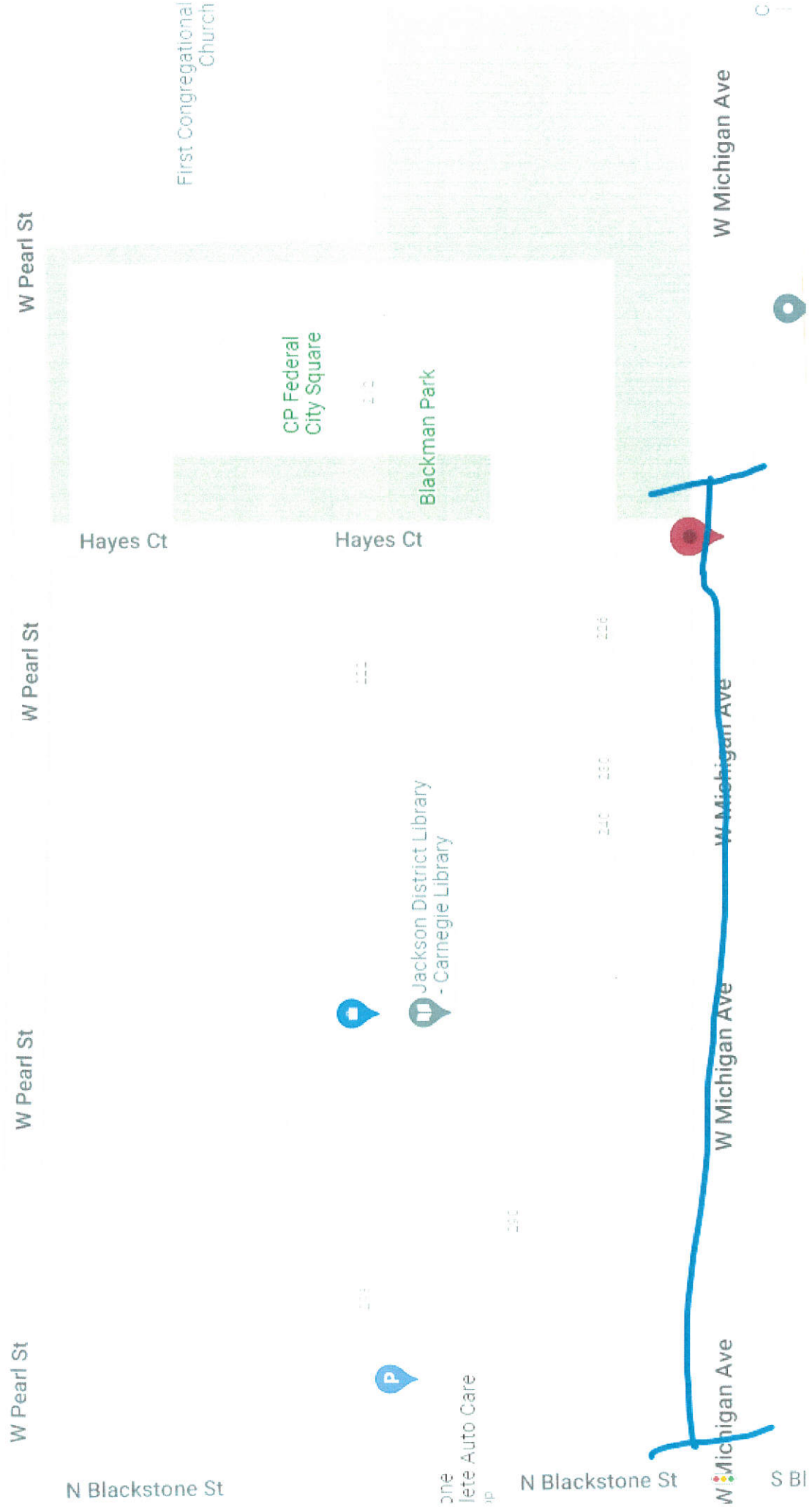
Application **MUST** be submitted along with all required attachments to:

City of Jackson Downtown Development Authority
Office
161 W Michigan Ave, 5th Floor
Jackson Michigan, MI 49201 or cmays@cityofjackson.org
(517) 768-6410

Prohibited Items

Additional fees may apply if policies are not followed

No ground stakes
No confetti or glitter
No use of outlets without prior approval





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

2/18/2022

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

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

PRODUCER The Craft Agency Inc. 2533 Spring Arbor Rd P O Box 1187 Jackson MI 49204	CONTACT NAME: Dawn Fisher PHONE (A/C, No, Ext): (517) 787-0077 E-MAIL ADDRESS: dmf@craftagency.com	FAX (A/C, No): (517) 787-9356
	INSURER(S) AFFORDING COVERAGE	
INSURED Jackson District Library 244 W Michigan Avenue Jackson MI 49201	INSURER A: Massachusetts Bay Ins Co NAIC # 22306	
	INSURER B: Hanover Ins Co 22292	
	INSURER C: Allmerica Financial Benefit Ins 41840	
	INSURER D:	
	INSURER E:	
	INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** 22/23 **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ODH0348002	7/1/2022	7/1/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ Included GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ Included
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS			AHH0350290	7/1/2022	7/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			ODH0348002	7/1/2022	7/1/2023	EACH OCCURRENCE \$ 3,000,000 AGGREGATE \$ 3,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	W2H0378858	7/1/2022	7/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 500,000 E.L. DISEASE - EA EMPLOYEE \$ 500,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
A	Property Coverage			ODH0348002	7/1/2022	7/1/2023	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 City of Jackson and Downtown Development Authority included as additional insured with respect to general liability. 07/30/22 SRP Finale.

CERTIFICATE HOLDER

cmays@cityofjackson.org

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

CANCELLATION

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

AUTHORIZED REPRESENTATIVE

David Craft/DMF

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POLICY NUMBER:

BUSINESSOWNERS
BP 04 48 01 06

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

**ADDITIONAL INSURED – DESIGNATED PERSON
OR ORGANIZATION**

This endorsement modifies insurance provided under the following:

BUSINESSOWNERS COVERAGE FORM

SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s):	
City of Jackson Downtown Development Authority	161 W. Michigan Ave. Jackson, MI 49201
Information required to complete this Schedule, if not shown above, will be shown in the Declarations.	

The following is added to Paragraph C. **Who Is An Insured** in Section II – Liability:

- 3. Any person(s) or organization(s) shown in the Schedule is also an additional insured, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf in the performance of your ongoing operations or in connection with your premises owned by or rented to you.

MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Jackson County Veteran's Council Memorial Day Procession and Ceremony

Recommendation:

Approve a request from the Jackson County Veteran's Council to conduct their Memorial Day Procession and Ceremony on Monday, May 30, 2022 on the streets of downtown Jackson.

Attached are memos from Cory Mays regarding the Special Event Application for the Jackson County Veteran's Council Memorial Day Procession and Ceremony.

I recommend approval of the special event application for the Jackson County Veteran's Council Memorial Day Procession and Ceremony. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Jackson County Veteran's Council to conduct their Memorial Day Procession and Ceremony on Monday, May 30, 2022 on the streets of downtown Jackson.

SUMMARY: Procession from downtown Jackson to the Mount Evergreen Cemetery, followed by a memorial service at the cemetery.

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$400.00
Public Works	X		\$600.00
	<i>TOTAL</i>		<i>\$1,000.00</i>

CONDITIONS & CONSIDERATIONS

Street closures; city's stage on wheels

INSURANCE STATUS

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

ATTACHMENTS: Special Event Application: Memorial Day Procession and Ceremony



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|---|--|
| <input type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input type="checkbox"/> Event Map -Please indicate the location of all items | |

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: JACKSON County Veterans Council	
Address: 3200 Lansing Ave 49202	Phone: (517) 960-9268
Tax ID#:	Website:
Contact Name: DAVID WELIHAN	Phone: 517-960-9268 Email: david_welihan@hotmail.com
Contact Name:	Phone: Email:
Contact Name During Event: David Welihan	Phone: (517) 960-9268

Event Information

Event Name: Memorial Day Procession and Ceremony				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
MAY 30, 2022	9:30 AM	10:00 AM	12:00 PM	12:00 PM

Has this event occurred before? Yes, (if yes, how many previous years? 75) No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? 150+

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: _____

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

- Horace Blackman Park
- GrandRiver Farmers Market Pavilion
- Bucky Harris Park
- CP Federal City Square (Stage)
- Ella Sharp Park (requires Ella Sharp Board approval)
- MLK Equality Trail

Other Location: War memorial south side Mt Evergreen cemetery

Streets: Michigan Ave, Jackson St, Morrell, Greenwood, Rockwell

Other Park: _____

Brief description of Event

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

Processional march along Jackson, Morrell, Greenwood, Rockwell to the cemetery. A memorial ceremony will take place at the cemetery.

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

Street Name: Michigan Ave Cross Streets Jackson & Mechanic

Closure Start Date: May 30, 2022 Time: 9:30am Closure End Date: May 30, 2022 Time: 10:00am

Street Name: Cortland Cross Streets _____

Closure Start Date: May 30, 2022 Time: 10:00am Closure End Date: May 30, 2022 Time: 10:30am

Street Name: Washington Cross Streets _____

Closure Start Date: May 30, 2022 Time: 10:00am Closure End Date: May 30, 2022 Time: 10:30

Street Name: Wesley Cross Streets _____

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

Street Name: Wilkins Cross Streets _____

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

Street Name: Greenwood / Morrell Cross Streets _____

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

needed for procession

City Resources Requests

Not all resources may be available at your requested site.

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

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

Water Needs: Indicate water requirements: N/A
 Amount of water needed: _____ Locations of where water is needed: _____

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

Alcohol Sales: (If yes attach liquor license and liquor liability insurance)
 Start Time: N/A End Time: _____

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

Fireworks: If yes indicate electrical requirements: N/A
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____

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

Other: Stage at cemetery

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

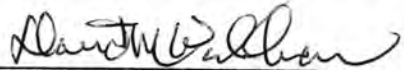
<input checked="" type="checkbox"/> Route Plan	<input type="checkbox"/> Emergency Vehicle Access	<input type="checkbox"/> Restroom Locations
<input type="checkbox"/> Vendor Locations	<input type="checkbox"/> Dispersal Locations	<input type="checkbox"/> Tables
<input type="checkbox"/> Tent Locations	<input type="checkbox"/> Trash Receptacles	<input type="checkbox"/> Requested Reserved Parking
<input type="checkbox"/> Assembly Locations	<input type="checkbox"/> Requested Street Closures	<input type="checkbox"/> Electrical Wires & Outlets

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

Special Event Application

Certification & Signature

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

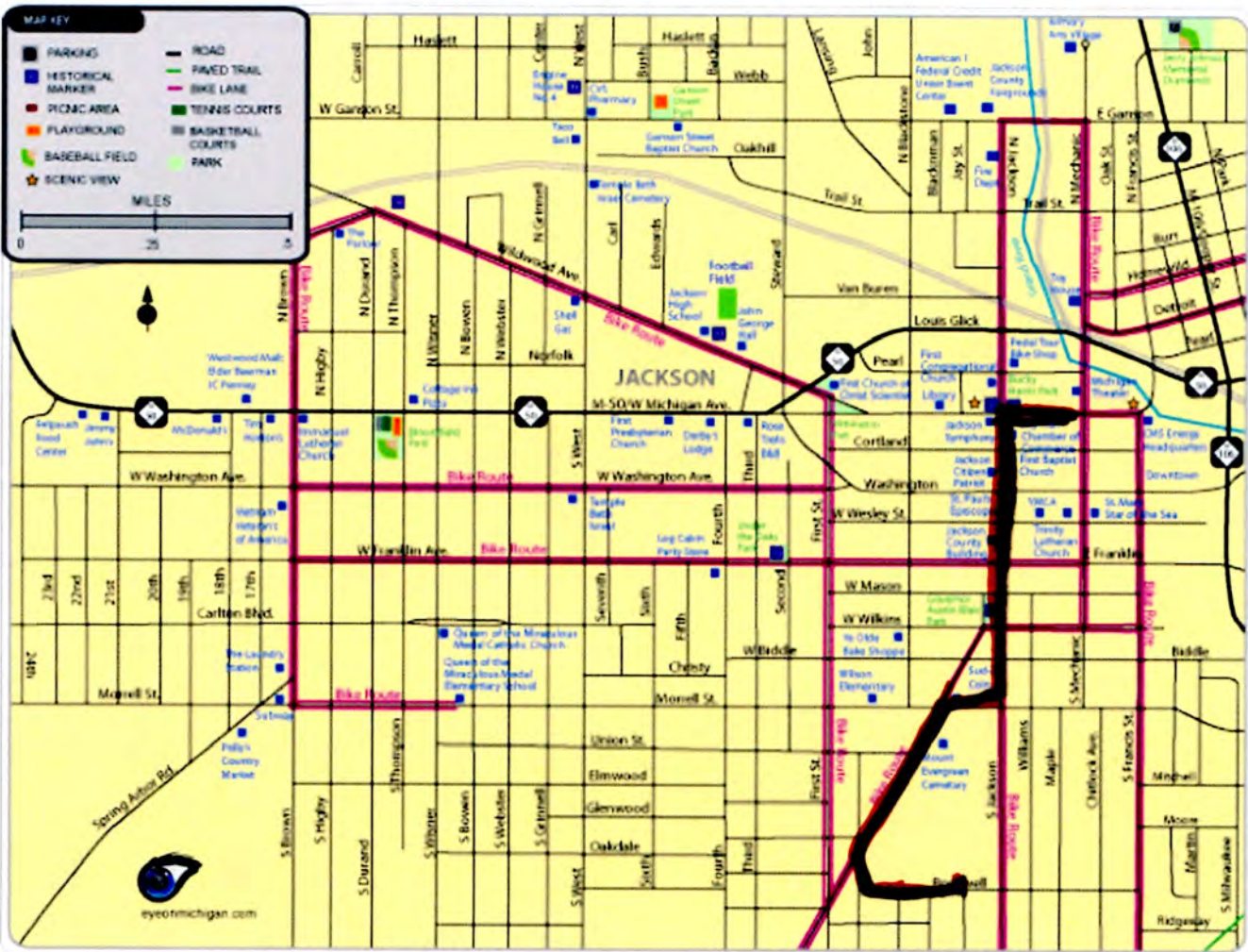
Signature: 

Date: March 18, 2022

Office Use ONLY
Application Received:
Date:
Time:
By:
Application Fee Received:

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





MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Amen 4 Youth, LLC Southside Summerfest Events

Recommendation:

Approve a request from Amen for Youth, LLC to host their Southside Summerfest Events on May 21, June 11, July 23, and August 27 in Elnora Moorman Plaza and on High Street in Jackson.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the Amen 4 Youth, LLC Southside Summerfest Events.

I recommend approval of the special event application for the Amen 4 Youth, LLC Southside Summerfest Events. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from Amen for Youth, LLC to host their Southside Summerfest Events on May 21, June 11, July 23, and August 27 in Elnora Moorman Plaza and on High Street in Jackson.

SUMMARY: Family-friendly neighborhood gatherings celebrating the history and culture of Jackson's South side.

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
<u>Public Works</u>	X		<u>\$2,400.00</u>
	<i>TOTAL</i>		<i>\$2,400.00</i>

CONDITIONS & CONSIDERATIONS

Road closures; electricity

INSURANCE STATUS

Approved and on-file with the DDA and City Attorney's office

ATTACHMENTS: Special Event Application: Southside Summerfest Events



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|---|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input checked="" type="checkbox"/> Event Map <i>—Please indicate the location of all items</i> | |

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information	
Sponsoring Organization Legal Name:	AMEN 4 Youth, LLC
Address:	134 E. Addison St. Phone: (313) 263 7353
Tax ID#:	80-0932605 Website: southsidesummerfestwixsite.com
Contact Name:	Hakim Crampton Phone: 313 263-7353 Email: southsidesummerfes@gmail.com
Contact Name:	Phone: Email:
Contact Name During Event:	Southside Festival Series Phone: (313) 263 7353

Event Information				
Event Name:				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
5/21 • 6/11 • 7/23 8/27	9am	11am	6pm	7pm

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

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

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: _____

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

Horace Blackman Park GrandRiver Farmers Market Pavilion
 Bucky Harris Park CP Federal City Square (Stage)
 Ella Sharp Park (requires Ella Sharp Board approval) MLK Equality Trail

Other Location: _____

Streets: Milwaukee @ High St

Other Park: Elnora Moorman Plaza

Brief description of Event

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

Southside Festival Series is an Annual celebration of Community and Culture, featuring local Business Vendors, community leaders, and entertainment.

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

Street Name: ~~XXXXXXXXXX~~ Milwaukee Cross Streets: ~~XXXXXXXXXXXXXXXXXX~~ High St.

Closure Start Date: 5/21 ^{10/11} Time: 9am Closure End Date: 5/21 Time: 7pm

Street Name: Milwaukee ^{7/23/8/27} Cross Streets: Stanley St.

Closure Start Date: 5/21 ^{6/11} Time: 9am Closure End Date: same Time: 7pm

Street Name: _____ Cross Streets: _____

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

Street Name: _____ Cross Streets: _____

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

Street Name: _____ Cross Streets: _____

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

Street Name: _____ Cross Streets: _____

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

City Resources Requests

Not all resources may be available at your requested site.

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

- Electrical Power:** Indicate electrical requirements: Power @ Plaza Terminal
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: Along Milwaukee @ The corner of High St
****All electrical lines MUST be covered to limit tripping hazards. ****
- Water Needs:** Indicate water requirements: _____
 Amount of water needed: _____ Locations of where water is needed: _____
- Food/Vendors:** Indicate vendors requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____ Number of vendors: _____
- Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
 Start Time: _____ End Time: _____
- Amusement or Carnival Rides:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Fireworks:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Traffic Cones (12) Mobile Stage (please circle 15-foot or 25-foot version)
- Other: Trash Cans (12)

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|---|--|---|
| <input type="checkbox"/> Route Plan | <input type="checkbox"/> Emergency Vehicle Access | <input type="checkbox"/> Restroom Locations |
| <input type="checkbox"/> Vendor Locations | <input type="checkbox"/> Dispersal Locations | <input type="checkbox"/> Tables |
| <input type="checkbox"/> Tent Locations | <input type="checkbox"/> Trash Receptacles | <input type="checkbox"/> Requested Reserved Parking |
| <input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Electrical Wires & Outlets |

If these details change, a revised map must be provided seven days prior to event.

Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

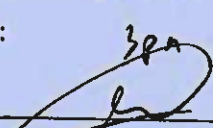
Special Event Application

Certification & Signature

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

Signature: Hakim Nathaniel Crumpton

Date: 3/11/2022

Office Use ONLY	
Application Received:	
Date:	3/15/22
Time:	3:00
By:	
Application Fee Received:	✓ \$50

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

Southside Festival Series 2022 Covid 19 Plan

Southside Summer Fest Series (May 21st, June 11th, July 23rd, and August 27th) Covid 19 Plan follows CDC Guidelines for Large Gatherings. Below are the Guidelines we will follow along with Protocols to be followed by our Staff and Volunteers.

CDC Guidelines for Large Gatherings

Physical (Social) Distancing

- Adjust the size of an event based on the ability of attendees from different households to *stay 6 feet (2 arm lengths) apart*.
- Remind attendees upon arrival to stay at least 6 feet away from people who don't live with them.
- Discourage attendees and staff from greeting others with physical contact (for example, handshakes). Include this reminder on signs about physical distancing.
- Find additional information below about how to modify layouts and maintain healthy environments.

Masks

- Require that staff and attendees wear well-fitting masks that fit completely over their nose and mouth. Make a plan beforehand for how compliance will be monitored and ensured.
- Encourage attendees ahead of the event to bring and use masks at the event. Consider having masks on-hand to provide to staff and attendees who do not bring their own.
- Advise staff and attendees that masks should **not** be placed on babies or children younger than 2 years old, anyone who has trouble breathing, or anyone who is unconscious, incapacitated, or otherwise unable to remove the mask without assistance.

The following categories of people are exempt from the requirement to wear a mask:

- A child under the age of 2 years.
- A person with a disability who cannot wear a mask, or cannot safely wear a mask, for reasons related to the disability.
- A person for whom wearing a mask would create a risk to workplace health, safety, or job duty as determined by the workplace Risk Assessment.

Hand Hygiene and Respiratory Etiquette

Require staff and attendees to wash their hands frequently (for example, before, during, and after taking tickets, or after touching garbage) with soap and water for at least 20 seconds and increase monitoring to ensure adherence. If soap and water are not readily available, staff and attendees can use hand sanitizer that contains at least 60% alcohol and rub their hands until dry.

Encourage guests to avoid singing or shouting, especially indoors. If possible, keep music levels down so people don't have to shout or speak loudly to be heard.

Adequate Supplies

- Ensure that you have adequate supplies to support. Supplies include soap, water, hand sanitizer containing at least 60% alcohol, a way to dry hands (e.g., paper towels, hand dryer), tissues, disinfectant wipes, masks (as feasible), and no-touch trash cans.

Signs and Messages

- Post signs in highly visible locations (for example, at entrances, in restrooms) that promote everyday protective measures and describe how to stop the spread of germs by properly wearing a mask, physical distancing, and washing hands.
- Broadcast regular announcements on reducing the spread of COVID-19 on public address systems.
- Include messages (for example, videos) about behaviors that prevent spread of COVID-19 when communicating with staff, vendors, and attendees (such as on the invitation, on the event website, and through event social media accounts).
- Consider developing signs and messages in multiple languages and formats (for example, large print, braille, American Sign Language) for people who have limited vision or are blind or people who are deaf or hard of hearing.

Day of Event Covid 19 On Site Logistical Plan

Welcome Tent

- Face Masks, Hand Sanitizer, First Aid, Temperature Checks, Covid 19 Safety Recommendations, Free Water, Event Info

Restrooms

- Porta Potty (2) and Hand Sanitizers available in each

Staff & Volunteers

- 2 Staff
- 2 Volunteers

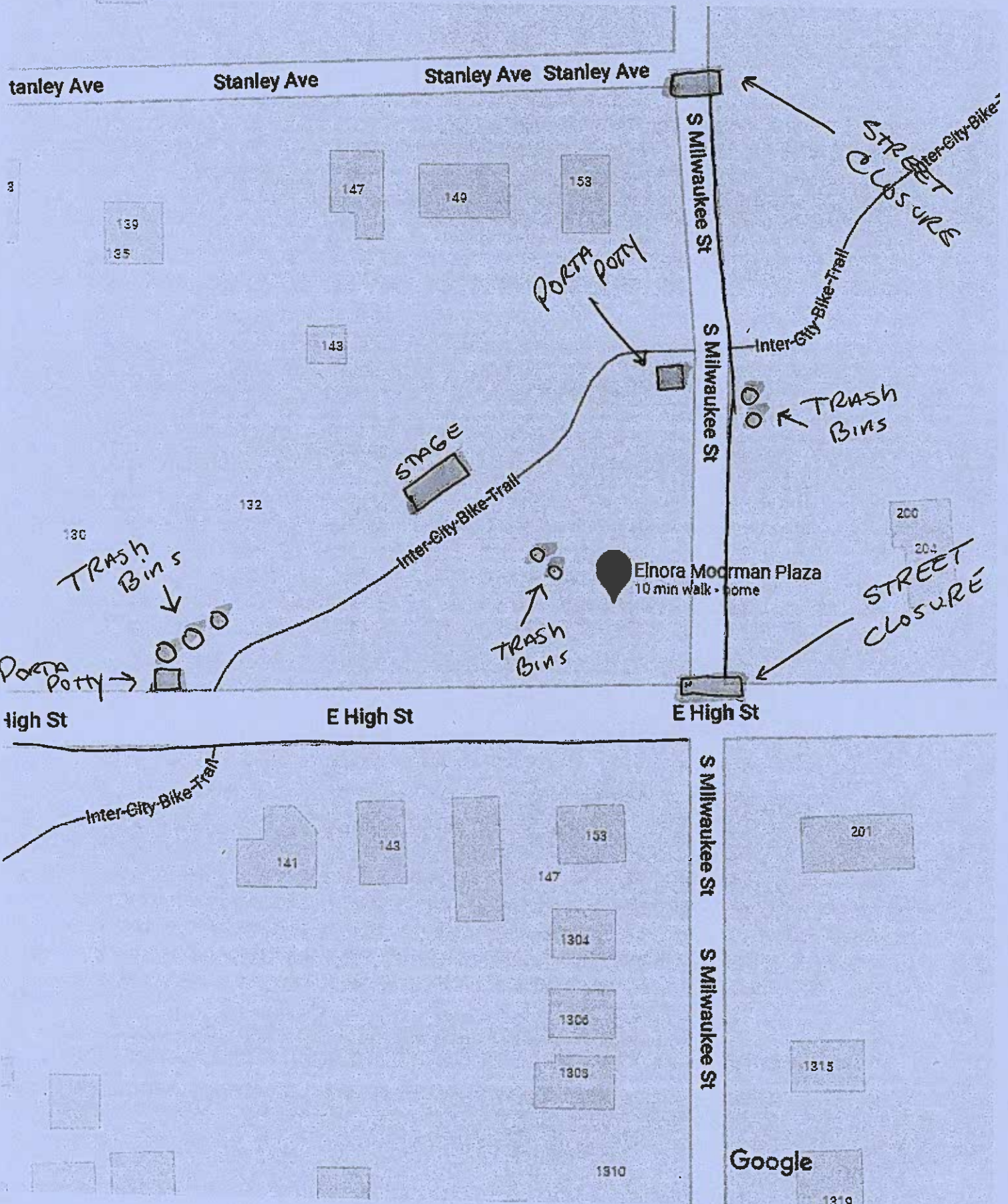
Signage

- Posted Covid 19 Safety Guidelines and Directions to Welcome Tent (Face Masks, First Aid, Hand Sanitizer) and Restrooms.

Hygiene and Cleaning/Sanitizing

- Hourly Sanitizing of Restroom Facilities

Google Maps Elnora Moorman Plaza





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
3/29/2022

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

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

PRODUCER Harry O. Culp Insurance Agency, Inc 214 E Jefferson St Grand Ledge, MI 48837	CONTACT NAME: Vicki Paski PHONE (A/C, No, Ext): 517-627-8441 FAX (A/C, No): E-MAIL ADDRESS: vicki@culpagency.com
INSURER(S) AFFORDING COVERAGE	
INSURER A: Auto-Owners Insurance Company NAIC # 18988	
INSURER B: _____	
INSURER C: _____	
INSURER D: _____	
INSURER E: _____	
INSURER F: _____	

INSURED
 Amen 4 Youth, LLC
 134 E Addison St
 Jackson MI 49203

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

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: _____			06788882	03/28/2022	03/28/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/PROP AGG \$ 2,000,000 \$
	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N		N/A			PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 City of Jackson & Jackson Downtown Development Authority are additional insureds on CGL.

CERTIFICATE HOLDER City of Jackson Jackson Downtown Development Authority 161 W Michigan Ave Jackson, MI 49201	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE Vicki Paski
---	--

MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Together We Can Make a Difference National Day of Prayer

Recommendation:

Approve a request from Together We Can Make a Difference to host their National Day of Prayer on May 5, 2022 in Austin Blair Park.

Attached are memos from Cory Mays regarding the Special Event Application for the Together We Can Make a Difference National Day of Prayer.

I recommend approval of the special event application for the Together We Can Make a Difference National Day of Prayer. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from Together We Can Make a Difference to host their National Day of Prayer on May 5, 202 in Austin Blair Park.

SUMMARY: An annual gathering where people read from the Old Testament, New Testament, and Psalms/Proverbs so that the entire Bible is presented during the course of the event.

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
<u>Public Works</u>	X		<u>\$0.00</u>
	<i>TOTAL</i>		<i>\$0.00</i>

CONDITIONS & CONSIDERATIONS

None

INSURANCE STATUS

On file and current (approved by the city attorney's office)

ATTACHMENTS: Special Event Application: Together We Can Make a Difference National Day of Prayer



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|---|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input type="checkbox"/> Event Map —Please indicate the location of all items | |

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: <i>Together We Can Make a Difference</i>	
Address: <i>224 W. Wilkms, Jackson, MI 49203</i>	Phone: <i>(517) 740-8444</i>
Tax ID#: <i>42-165480</i>	Website: <i>TogetherDifference.org</i>
Contact Name: <i>Wendy Wright</i>	Phone: <i>517-740-8444</i> Email: <i>difference.makers@</i>
Contact Name:	Phone: Email: <i>gmail.com</i>
Contact Name During Event: <i>Same</i>	Phone: () <i>Same</i>

Event Information

Event Name: <i>National Day of Prayer</i>				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
<i>May 5, 2022</i>	<i>11 Am</i>	<i>Noon</i>	<i>1Pm</i>	<i>2Pm</i>

City Resources Requests

Not all resources may be available at your requested site.

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

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

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

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

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

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

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

Other: _____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|---|--|---|
| <input type="checkbox"/> Route Plan | <input type="checkbox"/> Emergency Vehicle Access | <input type="checkbox"/> Restroom Locations |
| <input type="checkbox"/> Vendor Locations | <input type="checkbox"/> Dispersal Locations | <input type="checkbox"/> Tables |
| <input type="checkbox"/> Tent Locations | <input type="checkbox"/> Trash Receptacles | <input type="checkbox"/> Requested Reserved Parking |
| <input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Electrical Wires & Outlets |

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


Special Event Application

Certification & Signature

1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
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13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: Wendy Wright

Date: 3-17-22

Office Use ONLY	
Application Received:	
Date:	3/18/22
Time:	2 PM
By:	
Application Fee Received:	\$50 ✓

Application Requirements

Application **MUST** be submitted 60 days **PRIOR** to event
*****NO EXCEPTIONS*****

Application **MUST** be submitted along with all required attachments to:

City of Jackson Downtown Development Authority
Office

161 W Michigan Ave, 5th Floor
Jackson Michigan, MI 49201 or cmays@cityofjackson.org
(517) 768-6410

Prohibited Items

Additional fees may apply if policies are not followed

No ground stakes
No confetti or glitter
No use of outlets without prior approval



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
03/17/2022

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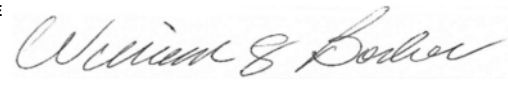
PRODUCER Barker Weber Insurance Agency, Inc. 2501 Spring Arbor Rd. Jackson, MI 49203	CONTACT NAME: Kelly Bunch PHONE (A/C No, Ext): 517-783-2608 FAX (A/C, No): 517-783-4674 E-MAIL ADDRESS: Kelly@barkerweber.com
	INSURER(S) AFFORDING COVERAGE INSURER A : Auto Owners Insurance Co INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :
INSURED Together We Can Make a Difference 224 W Wilkins Jackson, MI 49203	

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

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		06119126	01/20/2022	01/20/20232	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000
							MED EXP (Any one person)	\$ 1,000
							PERSONAL & ADV INJURY	\$ 10,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below		N / A				PER STATUTE	OTHER
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Certificate Holder is named as Additional Insured re: Big Seed Garden Party 5/21/2022 and National Day of Prayer 05/05/2022.

CERTIFICATE HOLDER Fax #: (877) 509-5874 City of Jackson & Downtown Development Authority 161 W. Michigan Ave. Jackson, MI 49201	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the "Together We Can Make a Difference" Garden Contest

Recommendation:

Approve a request from the Together We Can Make a Difference to host their Garden Contest on May 21, 2022 in the City of Jackson.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the Together We Can Make a Difference Garden Contest.

I recommend approval of the special event application for the Together We Can Make a Difference Garden Contest. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Together We Can Make a Difference to host their Garden Contest on May 21, 2022 in the City of Jackson.

SUMMARY: Gathering of youth from across Jackson featuring a corn-growing contest. Seed and plant giveaways and the kick-off for a community garden project.

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
<u>Public Works</u>	X		\$0.00
	<i>TOTAL</i>		<i>\$0.00</i>

CONDITIONS & CONSIDERATIONS

None

INSURANCE STATUS

Approved and on-file with the DDA and City Attorney's office

ATTACHMENTS: Special Event Application: Together We Can Make a Difference Garden Contest



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|---|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input type="checkbox"/> Event Map —Please indicate the location of all items | |

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: <i>Together We Can Make a Difference</i>	
Address: <i>224 W. Wilkms St. Jackson MI 49203</i>	Phone: <i>(517) 740-8444</i>
Tax ID#: <i>42-165480</i>	Website: <i>togetherdifference.org</i>
Contact Name: <i>Wendy Wight</i>	Phone: <i>(517) 740-8444</i> Email: <i>difference makers 16 @ gmail.com</i>
Contact Name:	Phone: Email:
Contact Name During Event:	Phone: ()

Event Information

Event Name:				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
<i>May 21, 2022</i>	<i>8AM</i>	<i>10AM</i>	<i>Noon</i>	<i>1 pm</i>

City Resources Requests

Not all resources may be available at your requested site.

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

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

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

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

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

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

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

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

Other: _____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

<input type="checkbox"/> Route Plan	<input type="checkbox"/> Emergency Vehicle Access	<input type="checkbox"/> Restroom Locations
<input type="checkbox"/> Vendor Locations	<input type="checkbox"/> Dispersal Locations	<input type="checkbox"/> Tables
<input type="checkbox"/> Tent Locations	<input type="checkbox"/> Trash Receptacles	<input type="checkbox"/> Requested Reserved Parking
<input type="checkbox"/> Assembly Locations	<input type="checkbox"/> Requested Street Closures	<input type="checkbox"/> Electrical Wires & Outlets

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


Special Event Application

Certification & Signature

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

Signature: Wendy Wright

Date: 3-17-22

Office Use ONLY	
Application Received:	
Date:	3/18/22
Time:	2pm
By:	
Application Fee Received:	\$500

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



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
03/17/2022

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

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

PRODUCER Barker Weber Insurance Agency, Inc. 2501 Spring Arbor Rd. Jackson, MI 49203	CONTACT NAME: Kelly Bunch	FAX (A/C, No): 517-783-4674
	PHONE (A/C, No, Ext): 517-783-2608	E-MAIL ADDRESS: Kelly@barkerweber.com
INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A : Auto Owners Insurance Co		18988
INSURED Together We Can Make a Difference 224 W Wilkins Jackson, MI 49203	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		06119126	01/20/2022	01/20/20232	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000
							MED EXP (Any one person)	\$ 1,000
							PERSONAL & ADV INJURY	\$ 10,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE	OTHER
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Certificate Holder is named as Additional Insured re: Big Seed Garden Party 5/21/2022 and National Day of Prayer 05/05/2022.

CERTIFICATE HOLDER Fax #: (877) 509-5874 City of Jackson & Downtown Development Authority 161 W. Michigan Ave. Jackson, MI 49201	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the World Vision Inc. Walk/Run

Recommendation:

Approve a request from World Vision Inc. to host their Walk/Run on May 7, 2022 in/around the Sparks Foundation ("Cascades") Park.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the World Vision Inc. Walk/Run.

I recommend approval of the special event application for the World Vision Inc. Walk/Run. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from World Vision Inc. to host their Walk/Run on May 7, 2022 in/around the Sparks Foundation (“Cascades”) Park.

SUMMARY: A walk/run to raise awareness regarding the need for clean water for children in Africa.

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$240.00
<u>Public Works</u>	<u>X</u>		<u>\$0.00</u>
	<i>TOTAL</i>		<i>\$240.00</i>

CONDITIONS & CONSIDERATIONS

Police assistance

INSURANCE STATUS

Pending receipt and approval of necessary insurance documentation

ATTACHMENTS: Special Event Application: World Vision Inc. Walk/Run



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|---|--|
| <input type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input type="checkbox"/> Event Map —Please indicate the location of all items | |

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: World Vision Inc.	
Address: PO Box 2925 Tacoma, WA 98401-2925	Phone: (888) 511-6548
Tax ID#: 95-1922279	Website: Worldvision.org
Contact Name: Rick Danks	Phone: 517-990-4170 Email: rcdanks@comcast.net
Contact Name:	Phone: Email:
Contact Name During Event: Rick Danks	Phone: (517) 990-4170

Event Information

Event Name:				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
5/7/2022	7AM	9AM	10 30AM	11AM

Has this event occurred before? Yes, (if yes, how many previous years? 6) No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? 10 to 50

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: _____

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

- Horace Blackman Park GrandRiver Farmers Market Pavilion
- Bucky Harris Park CP Federal City Square (Stage)
- Ella Sharp Park (requires Ella Sharp Board approval) MLK Equality Trail
- Other Location: Mostly in Cascades Park but crossing Randolph St. near Brown St. to Morrell St. and back to park.
- Streets: _____
- Other Park: _____

Brief description of Event

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

World Vision Global 6K for Water, a walk / run to provide clean water to children in Africa.

Application fee will provide clean water for the child pictured on the participants race bib.

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

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

City Resources Requests

Not all resources may be available at your requested site.

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

- Electrical Power:** Indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****
- Water Needs:** Indicate water requirements: _____
 Amount of water needed: _____ Locations of where water is needed: _____
- Food/Vendors:** Indicate vendors requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____ Number of vendors: _____
- Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
 Start Time: _____ End Time: _____
- Amusement or Carnival Rides:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Fireworks:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Traffic Cones Mobile Stage (please circle 15-foot or 25-foot version)
- Other: _____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Route Plan
<input type="checkbox"/> Vendor Locations
<input type="checkbox"/> Tent Locations
<input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Emergency Vehicle Access
<input type="checkbox"/> Dispersal Locations
<input checked="" type="checkbox"/> Trash Receptacles
<input type="checkbox"/> Requested Street Closures | <input checked="" type="checkbox"/> Restroom Locations
<input type="checkbox"/> Tables
<input type="checkbox"/> Requested Reserved Parking
<input type="checkbox"/> Electrical Wires & Outlets |
|---|--|---|

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

Special Event Application

Certification & Signature

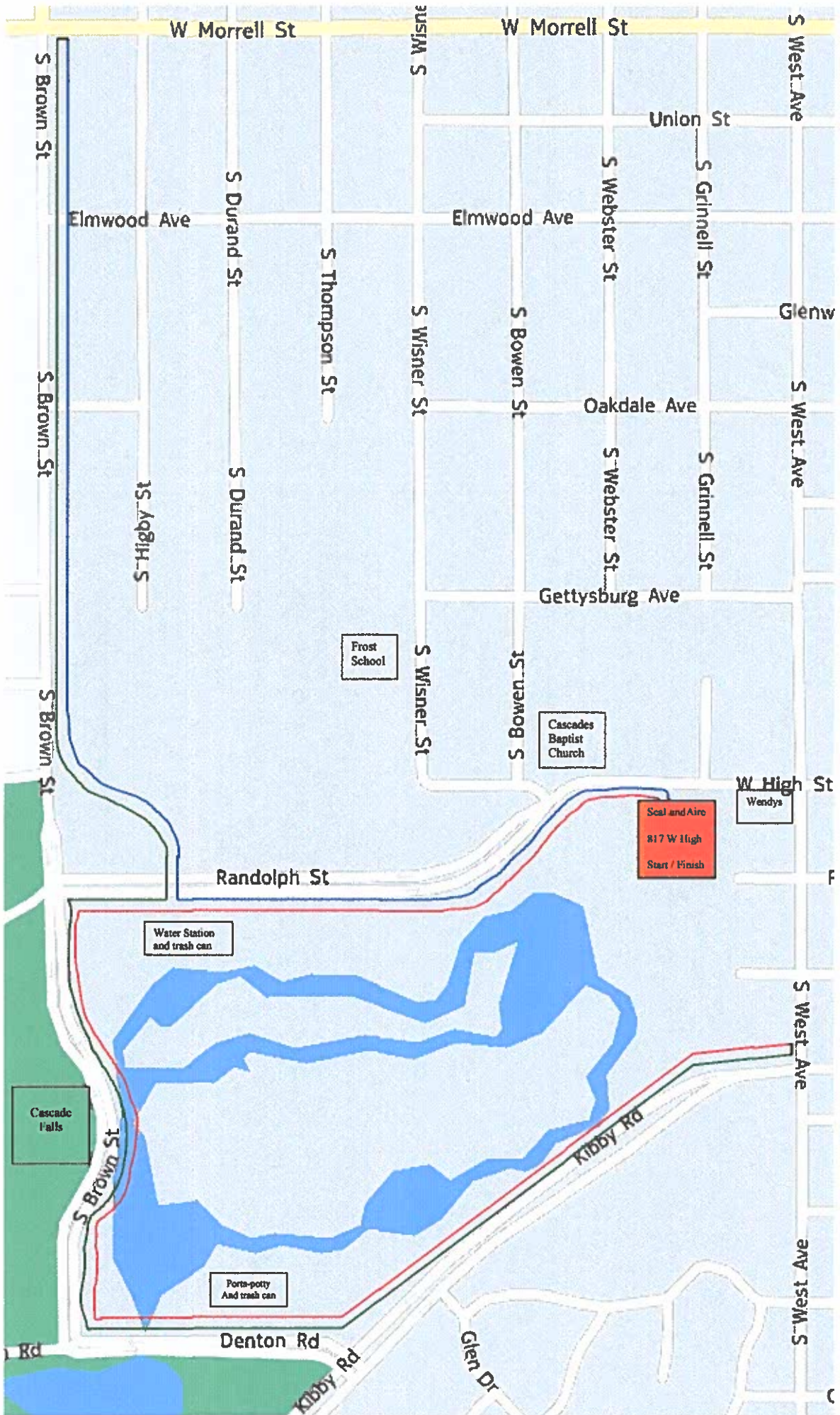
1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will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

Signature: _____

Date: _____

Office Use ONLY
Application Received:
Date:
Time:
By:
Application Fee Received:

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



MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Jackson Interfaith Shelter Summer Block Party

Recommendation:

Approve a request from the Jackson Interfaith Shelter to host their Summer Block Party on August 6, 2022 on the streets of Jackson.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the Jackson Interfaith Shelter Summer Block Party.

I recommend approval of the Jackson Interfaith Shelter Summer Block Party. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Jackson Interfaith Shelter to host their Summer Block Party on August 6, 2022 on the streets of Jackson.

.SUMMARY: A celebration of the community, its people, and the transformative experience that takes place at the Interfaith Shelter. Everyone is welcome at this free event!

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
<u>Public Works</u>	X		<u>\$700.00</u>
	<i>TOTAL</i>		<i>\$700.00</i>

CONDITIONS & CONSIDERATIONS

Road closures, stage on wheels

INSURANCE STATUS

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

ATTACHMENTS: Special Event Application: Jackson Interfaith Shelter Summer Block Party



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|--|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) N/A |
| <input type="checkbox"/> \$25 Late/Rush Fee N/A | <input type="checkbox"/> Carnival Ride Permit (if applicable) N/A |
| <input checked="" type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) N/A |
| <input checked="" type="checkbox"/> Event Map -Please indicate the location of all items | |

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: Jackson Interfaith Shelter	
Address: 414 S. Blackstone St. Jackson MI 49201	Phone: (517) 789-8735
Tax ID#: 38-2117378	Website: www.interfaithshelter.com
Contact Name: Bekah Zraik	Phone: 517-789-8735 x8 Email: bekah@interfaithshelter.com
Contact Name: Steve Castle	Phone: 517-789-8735 x9 Email: steve@interfaithshelter.com
Contact Name During Event: Bekah Zraik	Phone: (810) 348-4896

Event Information

Event Name: Jackson Interfaith Shelter Summer Event				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
8/6/2022	8:00 AM	11:00 AM	3:00 PM	3:00 PM

Has this event occurred before? Yes, (if yes, how many previous years? 1) No

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

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: _____

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

Horace Blackman Park GrandRiver Farmers Market Pavilion

Bucky Harris Park CP Federal City Square (Stage)

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

Other Location: Jackson Interfaith Shelter parking lot

Streets: Franklin St. from Blackstone to the first alley after our parking lot

Other Park: _____

Brief description of Event

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

See attached

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

Street Name: Franklin St. Cross Streets Blackstone/alley - see map

Closure Start Date: 8/6/22 Time: 9:00 AM Closure End Date: 8/6/22 Time: 3:00 PM

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

City Resources Requests

Not all resources may be available at your requested site.

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

- Electrical Power:** Indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****
- Water Needs:** Indicate water requirements: _____
 Amount of water needed: _____ Locations of where water is needed: _____
- Food/Vendors:** Indicate vendors requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____ Number of vendors: _____
- Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
 Start Time: _____ End Time: _____
- Amusement or Carnival Rides:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Fireworks:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Traffic Cones Mobile Stage (please circle 15-foot or **25-foot** version)
- Other: _____ *Maybe*

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|---|--|---|
| <input type="checkbox"/> Route Plan | <input type="checkbox"/> Emergency Vehicle Access | <input type="checkbox"/> Restroom Locations |
| <input type="checkbox"/> Vendor Locations | <input type="checkbox"/> Dispersal Locations | <input type="checkbox"/> Tables |
| <input type="checkbox"/> Tent Locations | <input type="checkbox"/> Trash Receptacles | <input type="checkbox"/> Requested Reserved Parking |
| <input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Electrical Wires & Outlets |

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

Special Event Application

Certification & Signature

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

Signature: Rebekah Miller

Date: 3/15/2022

Office Use ONLY	
Application Received:	
Date:	<u>3/16/22</u>
Time:	<u>11AM</u>
By:	<u>[Signature]</u>
Application Fee Received:	<u>\$50</u> ✓

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

**JACKSON
INTERFAITH
SHELTER
SUMMER EVENT**

SATURDAY,
AUGUST 6

EVENT TIME
11AM - 3PM

VOLUNTEER ARRIVAL
10AM

414 S. BLACKSTONE ST.
JACKSON, MI 49201

W Wesley St

W Wesley St

W Wesley St

S Blackstone St

S Blackstone St

In St

S Bla

W Wesley St

W Wesley St

W Wesley St

W Franklin St

W Franklin St

W Franklin St

EMERGENCY VEHICLE ACCESS

EMERGENCY VEHICLE ACCESS

Jackson Interfaith Shelter

PUBLIC
RESTROOM

FOOD/MUSIC
TENT

WELCOME
TENT

EVENT
LOCATION

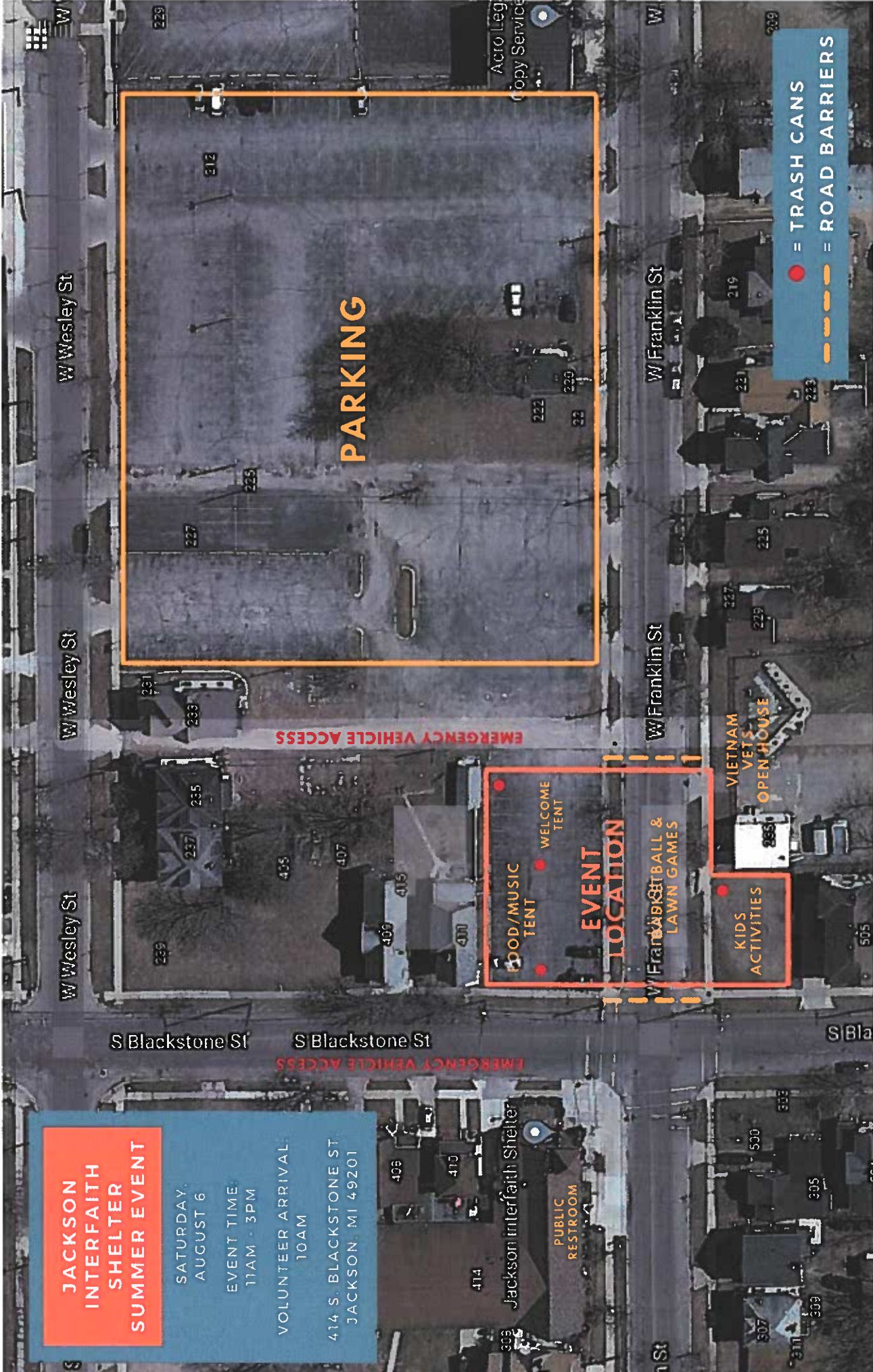
SOFTBALL &
LAWN GAMES

VIETNAM
VETS
OPEN HOUSE

KIDS
ACTIVITIES

PARKING

● = TRASH CANS
- - - = ROAD BARRIERS



Event Description:

The Jackson Interfaith Shelter is hosting its second-annual Summer Event on Saturday, August 6 from 11am – 3pm, as a way to celebrate this community, its people and the transformative experience that takes place at the shelter. This free event includes lunch, live music, lawn games, inflatables, and other family fun. Everyone is invited – we hope you'll join us!

Street Barricade Information:

- We would be happy to pick up/drop off the barricades and place them ourselves, like was done last year.
- The requested barrier location is on Franklin St., from Blackstone St. to the alley at the end of our parking lot. However, last year the barricade was extended down to Jackson St. If that was allowed again this year, it would be helpful in increasing safety for the hundreds of families who will be attending this event.
- Jackson Police Department is on board to once again to be present with police vehicles, converse with the community, partake in the lawn games, etc.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

03/11/2022

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

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

PRODUCER Richmond Agency, Inc. 833 Laurence Ave Jackson MI 49202		CONTACT NAME: Angela S Hawkins PHONE (A/C, No, Ext): 517-788-9130 E-MAIL ADDRESS: ahawkins@richmondagency.com FAX (A/C, No): 517-788-8036																						
INSURED Jackson Inter Faith Shelter Inc. 414 S. Blackstone Jackson MI 49203		<table border="1"> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A: West Bend Ins. Co.</td> <td></td> <td>15350</td> </tr> <tr> <td>INSURER B: Service American Indemnity Co.</td> <td></td> <td>39152</td> </tr> <tr> <td>INSURER C:</td> <td></td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> <td></td> </tr> </table>		INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A: West Bend Ins. Co.		15350	INSURER B: Service American Indemnity Co.		39152	INSURER C:			INSURER D:			INSURER E:			INSURER F:		
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COVERAGES

CERTIFICATE NUMBER: 20220311165205741

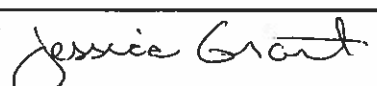
REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		Y	A699472	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000 \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			A699472	01/01/2022	01/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			A699472	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	SATIS0381001	01/01/2022	01/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 500,000 E.L. DISEASE - EA EMPLOYEE \$ 500,000 E.L. DISEASE - POLICY LIMIT \$ 500,000

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

CERTIFICATE HOLDER**CANCELLATION**

City of Jackson Downtown Development Authority 161 W. Michigan Ave Jackson MI 49201	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
--	--

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MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Jackson Civil War Muster

Recommendation:

Approve a request from the Jackson Civil War Society to host their Civil War Muster on August 27 & 28, 2022 in/around the Sparks Foundation ("Cascades") Park.

Attached is a memo and supporting paperwork from Cory Mays regarding the Special Event Application for the Jackson Civil War Muster.

I recommend approval of the Jackson Civil War Muster. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Jackson Civil War Society to host their Civil War Muster on August 27 & 28, 2022 in/around the Sparks Foundation (“Cascades”) Park.

.SUMMARY: A celebration of the community, its people, and the transformative experience that takes place at the Interfaith Shelter. Everyone is welcome at this free event!

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
Public Works	X		\$600.00
	<i>TOTAL</i>		<i>\$600.00</i>

CONDITIONS & CONSIDERATIONS

Road closures

INSURANCE STATUS

Approval pending receipt of necessary insurance documentation

ATTACHMENTS: Special Event Application: Jackson Civil War Muster



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|--|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input checked="" type="checkbox"/> Event Map –Please indicate the location of all items | |

Make checks payable to “Downtown Development Authority”

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: Jackson Civil War Society	
Address: 3771 Hitching Post Rd Jackson, Michigan 49201	Phone: () 517-740-1168
Tax ID#: 32-0207058	Website: 32-0207058
Contact Name: Maurice Imhoff	Phone: 517-740-1168 Email: imhoff.maurice@gmail.com
Contact Name: Bill Adams	Phone: 734-417-8906 Email: wadams7222@aol.com
Contact Name During Event: Maurice Imhoff	Phone: () 517-740-1168

Event Information

Event Name:				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
August 27 & 28	7:00am	9:00am	4:00pm	4:00pm

Has this event occurred before? Yes, (if yes, how many previous years? 34) No

Do you expect this event to occur again next year? Yes No What is the expected attendance for this event? 15,000

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: _____

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

- | | |
|---|---|
| <input type="checkbox"/> Horace Blackman Park | <input type="checkbox"/> GrandRiver Farmers Market Pavilion |
| <input type="checkbox"/> Bucky Harris Park | <input type="checkbox"/> CP Federal City Square (Stage) |
| <input type="checkbox"/> Ella Sharp Park (requires Ella Sharp Board approval) | <input type="checkbox"/> MLK Equality Trail |
| <input type="checkbox"/> Other Location: _____ | |
| <input type="checkbox"/> Streets: _____ | |
| <input type="checkbox"/> Other Park: <u>Cascades Falls Park</u> | |

Brief description of Event

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

The Jackson Civil War Muster its 35th anniversary this year on August 27th and 28th, 2022. This year, the event will be returning to the historic Cascades Park. The Jackson Muster is the largest, longest running Civil War event in the Midwest, welcoming people of all ages. Each year this weekend draws 25,000 to 30,000 from throughout Michigan, Canada, and destinations as far as Sweden.

Cascades Falls Park

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

Street Name: <u>S Brown St</u>	Cross Streets <u>S Brown St. & Randolph St</u>
Closure Start Date: <u>August 26th</u> Time: <u>9am</u>	Closure End Date: <u>August 28th</u> Time: <u>6pm</u>
Street Name: <u>S Brown St</u>	Cross Streets <u>S Brown St. & Splash Pad Turnaround</u>
Closure Start Date: <u>August 26th</u> Time: <u>9am</u>	Closure End Date: <u>August 28th</u> Time: <u>6pm</u>
Street Name: _____	Cross Streets _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____
Street Name: _____	Cross Streets _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____
Street Name: _____	Cross Streets _____
Closure Start Date: _____ Time: _____	Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

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

- Electrical Power:** Indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****
- Water Needs:** Indicate water requirements: _____
 Amount of water needed: _____ Locations of where water is needed: _____
- Food/Vendors:** Indicate vendors requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____ Number of vendors: _____
- Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
 Start Time: _____ End Time: _____
- Amusement or Carnival Rides:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Fireworks:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Traffic Cones Mobile Stage (please circle 15-foot or 25-foot version)
- Other: _____ Selected road closed

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
<p>X Certificate of Liability Insurance (MUST also be provided by all vendors)</p>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority as additional insured
<p>Liquor Liability Insurance (if needed)</p>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
<p>XCU Fireworks Liability Insurance (if needed; required for all fireworks displays)</p>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|--|--|--|
| <input type="checkbox"/> Route Plan
<input checked="" type="checkbox"/> Vendor Locations
<input checked="" type="checkbox"/> Tent Locations
<input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Emergency Vehicle Access
<input type="checkbox"/> Dispersal Locations
<input type="checkbox"/> Trash Receptacles
<input checked="" type="checkbox"/> Requested Street Closures | <input checked="" type="checkbox"/> Restroom Locations
<input type="checkbox"/> Tables
<input checked="" type="checkbox"/> Requested Reserved Parking
<input type="checkbox"/> Electrical Wires & Outlets |
|--|--|--|

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

Special Event Application

Certification & Signature

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

Signature: _____



Date: 3/8/22

Office Use ONLY

Application Received:

Date: 3/9/22

Time: 10 AM

By: (Signature)

Application Fee Received: \$50

Application Requirements

Application **MUST** be submitted 60 days **PRIOR** to event
*****NO EXCEPTIONS*****

Application **MUST** be submitted along with all required attachments to:

City of Jackson Downtown Development Authority
Office

161 W Michigan Ave, 5th Floor
Jackson Michigan, MI 49201 or cmays@cityofjackson.org
(517) 768-6410

Prohibited Items

Additional fees may apply if policies are not followed

No ground stakes
No confetti or glitter
No use of outlets without prior approval



MEMO TO: Mayor and City Council Members
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for the Cascades Cycling Club's Ride of Silence

Recommendation:

Approve a request from the Cascades Cycling Club to host their Ride of Silence on May 18, 2022 on the streets of Jackson.

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

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

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Cascades Cycling Club to host their Ride of Silence on May 18, 2022 on the streets of Jackson.

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

DEPARTMENTAL APPROVAL SUMMARY

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

<u>DEPARTMENT</u>	<u>APPROVAL</u>	<u>DENIAL</u>	<u>ECONOMIC IMPACT</u>
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$150.00
<u>Public Works</u>	X		<u>\$0.00</u>
	<i>TOTAL</i>		<i>\$150.00</i>

CONDITIONS & CONSIDERATIONS

Police assistance

INSURANCE STATUS

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

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



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

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- | | |
|--|--|
| <input checked="" type="checkbox"/> \$50 Application Fee | <input type="checkbox"/> Liquor License & Liquor Liability Insurance (if applicable) |
| <input type="checkbox"/> \$25 Late/Rush Fee | <input type="checkbox"/> Carnival Ride Permit (if applicable) |
| <input checked="" type="checkbox"/> Insurance documentation for sponsoring organization | <input type="checkbox"/> Insurance documentation for all vendors (if applicable) |
| <input checked="" type="checkbox"/> Event Map –Please indicate the location of all items | |

Make checks payable to “Downtown Development Authority”

Special Event Application Policy

Additional charges may occur if policies are broken.

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

Applicant Information

Sponsoring Organization Legal Name: <u>Cascades Cycling Club (CCC)</u>	
Address: <u>PO Box 515 Jackson, Mi. 49204</u>	Phone: <u>(517) 745-9962</u>
Tax ID#: <u>81-4893536</u> <small>501(c)(3) tax exempt</small>	Website: <u>cascadescycling@gmail.com</u>
Contact Name: <u>Cindy Acker</u>	Phone: <u>517-745-9962</u> Email: <u>readventure@gmail.com</u>
Contact Name: <u>Mike Woizeschke</u>	Phone: <u>517-795-6350</u> Email: <u>michwoiz@icloud.com</u>
Contact Name During Event: <u>Cindy Acker</u>	Phone: <u>(517) 745-9962</u>

Event Information

Event Name: <u>Ride of Silence</u>				
Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
<u>May 18, 2022</u>	<u>6:45 pm</u>	<u>7:00 pm</u>	<u>8:30 pm</u>	<u>8:40 pm</u>

City Resources Requests

Not all resources may be available at your requested site.

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

- Electrical Power:** Indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****
- Water Needs:** Indicate water requirements: _____
 Amount of water needed: _____ Locations of where water is needed: _____
- Food/Vendors:** Indicate vendors requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____ Number of vendors: _____
- Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
 Start Time: _____ End Time: _____
- Amusement or Carnival Rides:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Fireworks:** If yes indicate electrical requirements: _____
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____
- Traffic Cones Mobile Stage (please circle 15-foot or 25-foot version)
- Other: _____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

Event Map Details of all event activities MUST be included.

- | | | |
|--|--|---|
| <input checked="" type="checkbox"/> Route Plan | <input type="checkbox"/> Emergency Vehicle Access | <input type="checkbox"/> Restroom Locations |
| <input type="checkbox"/> Vendor Locations | <input type="checkbox"/> Dispersal Locations | <input type="checkbox"/> Tables |
| <input type="checkbox"/> Tent Locations | <input type="checkbox"/> Trash Receptacles | <input type="checkbox"/> Requested Reserved Parking |
| <input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Electrical Wires & Outlets |

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


Special Event Application

Certification & Signature

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

Signature: 

Date: 3/25/22

Office Use ONLY	
Application Received:	
Date:	3/25/22
Time:	1 pm
By:	
Application Fee Received:	✓ \$50

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

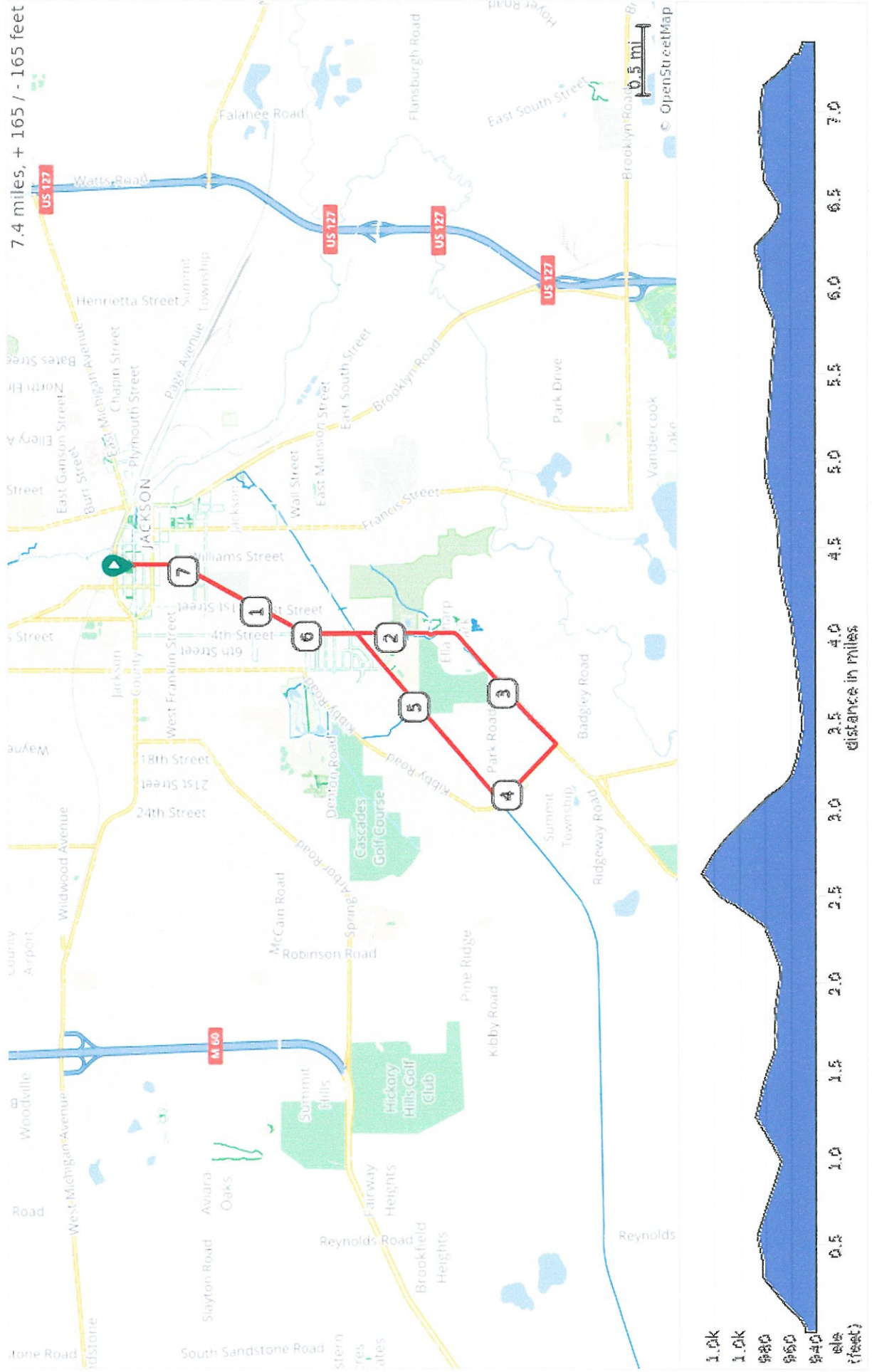
Brief Description:

On May 18, 2022 Cascades Cycling Club will host the annual Ride of Silence.

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

The ride is always held on the third Wednesday of May, which this year is May 18, 7:00 p.m. Riders are directed to assemble at the Horace Blackman Park downtown Jackson. The ride route loop is approximately 7.5 miles. It is conducted in silence, except where communicating for safety is necessary. Helmets are required. The ride will be conducted at no more than 12 m.p.h. This is a free event.

Ride of Silence - Jackson Michigan May 18, 2022



7.4 miles, + 165 / - 165 feet

0.5 mi
© OpenStreetMap

1,000
1,050
1,100
1,150
1,200
1,250
1,300
1,350
1,400
1,450
1,500
1,550
1,600
1,650
elevation (feet)

0.0 0.5 1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0 5.5 6.0 6.5 7.0
distance in miles

Ride of Silence - Jackson Michigan May 18, 2022

Num	Dist	Prev	Type	Note	Next
1.	0.0	0.0	📍	Start of route	0.0
2.	0.0	0.0	➔	R onto North Jackson Street	0.3
3.	0.3	0.3	➔	R onto West Mason Street	0.0
4.	0.4	0.0	➔	L onto Greenwood Place	0.1
5.	0.4	0.1	↗	Slight R onto Greenwood Avenue	1.0
6.	1.4	1.0	↙	Slight L onto 4th Street	0.6

1.4 miles. +52/-19 feet

Num	Dist	Prev	Type	Note	Next
7.	2.0	0.6	↑	At roundabout, take exit 3 onto 4th Street	0.3
8.	2.3	0.3	↗	Keep R onto 4th Street	0.2
9.	2.4	0.2	↗	Keep R onto Horton Road	1.1
10.	3.5	1.1	➔	R onto Weatherwax Drive	0.6
11.	4.1	0.6	➔	R onto Inter-City Trail	0.1

2.7 miles. +64/-73 feet

Num	Dist	Prev	Type	Note	Next
12.	4.2	0.1	↑	Continue onto Inter-City Trail	1.5
13.	5.7	1.5	➔	L onto 4th Street	0.4
14.	6.0	0.4	↗	Keep R onto Greenwood Avenue	1.0
15.	7.0	1.0	➔	R onto West Wilkins Street	0.0
16.	7.0	0.0	➔	L onto South Jackson Street	0.4
17.	7.4	0.4	➔	L	0.0

3.3 miles. +43/-51 feet



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/28/2022

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

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

PRODUCER Hacker-King-Sherry Agency, Inc 2205 Abbot Road East Lansing, MI 48823 Dwayne E Scheidler 517-337-6000	CONTACT NAME: Dwayne E Scheidler PHONE (A/C, No, Ext): 517-337-6000 E-MAIL ADDRESS: FAX (A/C, No): 517-337-0982														
INSURED Casrada Cycling Club Jackson c/o Michael Wojteschke PO Box 515 Jackson, MI 48204	<table border="1"> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A: West Bend Mutual</td> <td></td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: West Bend Mutual		INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER C:															
INSURER D:															
INSURER E:															
INSURER F:															

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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

TYPE	TYPE OF INSURANCE	AGRE. SUBS. (ISO, 10/02)	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Additional Insured	X	A235195-04	03/01/2022	03/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 WED EXP (Any one person) \$ per form PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 200,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Emp Ben. \$ mtd
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO- <input type="checkbox"/> LOC <input type="checkbox"/> OTHER		A235195-04	03/01/2022	03/01/2023	COMBINED SINGLE LIMIT (Ea 500,000) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY					EACH OCCURRENCE \$ AGGREGATE \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION(S)					PER STATUTE <input type="checkbox"/> OTHER <input type="checkbox"/> E & EACH ACCIDENT \$ E & DISEASE - EA EMPLOYEE \$ E & DISEASE - POLICY LIMIT \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in MI) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N				

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Bicycling Club- Additional Insured Liability is afforded to the City of Jackson for use of city parks as bicycle ride assembly and ride starting locations.

CERTIFICATE HOLDER JACKS-2 City of Jackson 151 W Michigan Ave. Jackson, MI 48204	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
---	--

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Special Event Application for Spring Fling

Recommendation:

Approve a request from the Jackson Downtown Development Authority to host their Spring Fling on Sunday, May 1, 2022 from 11 am – 4 pm in downtown Jackson.

Attached is a memo from Cory L. Mays regarding the Special Event Application for the Spring Fling.

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

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Cory L. Mays, Executive Director, DDA

DATE: April 19, 2022

RECOMMENDATION: Approve a request from the Jackson Downtown Development Authority to host their Spring Fling on Sunday, May 1, 2022 from 11 am – 4 pm in downtown Jackson.

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

DEPARTMENTAL APPROVAL SUMMARY

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

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		\$0.00
Engineering	X		\$0.00
Fire	X		\$0.00
Neighborhood & Economic Operations	X		\$0.00
Parks & Recreation	X		\$0.00
Police	X		\$0.00
Public Works	X		\$0.00
	TOTAL		\$0.00

CONDITIONS & CONSIDERATIONS

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

INSURANCE STATUS

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

ATTACHMENTS: Special Event Application: Spring Fling

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

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

Type of Event (please check all that apply)

Walk/Run Festival March/Parade Other: _____

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

Horace Blackman Park GrandRiver Farmers Market Pavilion

Bucky Harris Park CP Federal City Square (Stage)

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

Other Location: Downtown Sidewalks ; parking lot #8 (post office)

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

Other Park: _____

Brief description of Event

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

A downtown shopping and family-friendly event featuring food trucks, pop-up vendors, music on the new speaker system, a fairy app. challenge, petting zoo/pony rides, and a dunk tank.

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

Street Name: _____ Cross Streets _____

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

City Resources Requests

Not all resources may be available at your requested site.

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

Electrical Power: Indicate electrical requirements: Outlets on the side of Lean Rocket Lab
 Amount of electrical wattage needed: _____ Amount of plug ins: _____
 Locations of where plugs are needed: _____

****All electrical lines MUST be covered to limit tripping hazards. ****

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

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

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

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

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

Traffic Cones

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

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

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance <i>(MUST also be provided by all vendors)</i>	<ul style="list-style-type: none"> Showing a liability coverage of at least \$1,000,000 Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance <i>(if needed)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance <i>(if needed; required for all fireworks displays)</i>	<ul style="list-style-type: none"> Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

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

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

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> Route Plan | <input type="checkbox"/> Emergency Vehicle Access | <input checked="" type="checkbox"/> Restroom Locations |
| <input checked="" type="checkbox"/> Vendor Locations | <input type="checkbox"/> Dispersal Locations | <input checked="" type="checkbox"/> Tables |
| <input type="checkbox"/> Tent Locations | <input checked="" type="checkbox"/> Trash Receptacles | <input type="checkbox"/> Requested Reserved Parking |
| <input type="checkbox"/> Assembly Locations | <input type="checkbox"/> Requested Street Closures | <input type="checkbox"/> Electrical Wires & Outlets |

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

Special Event Application

Certification & Signature

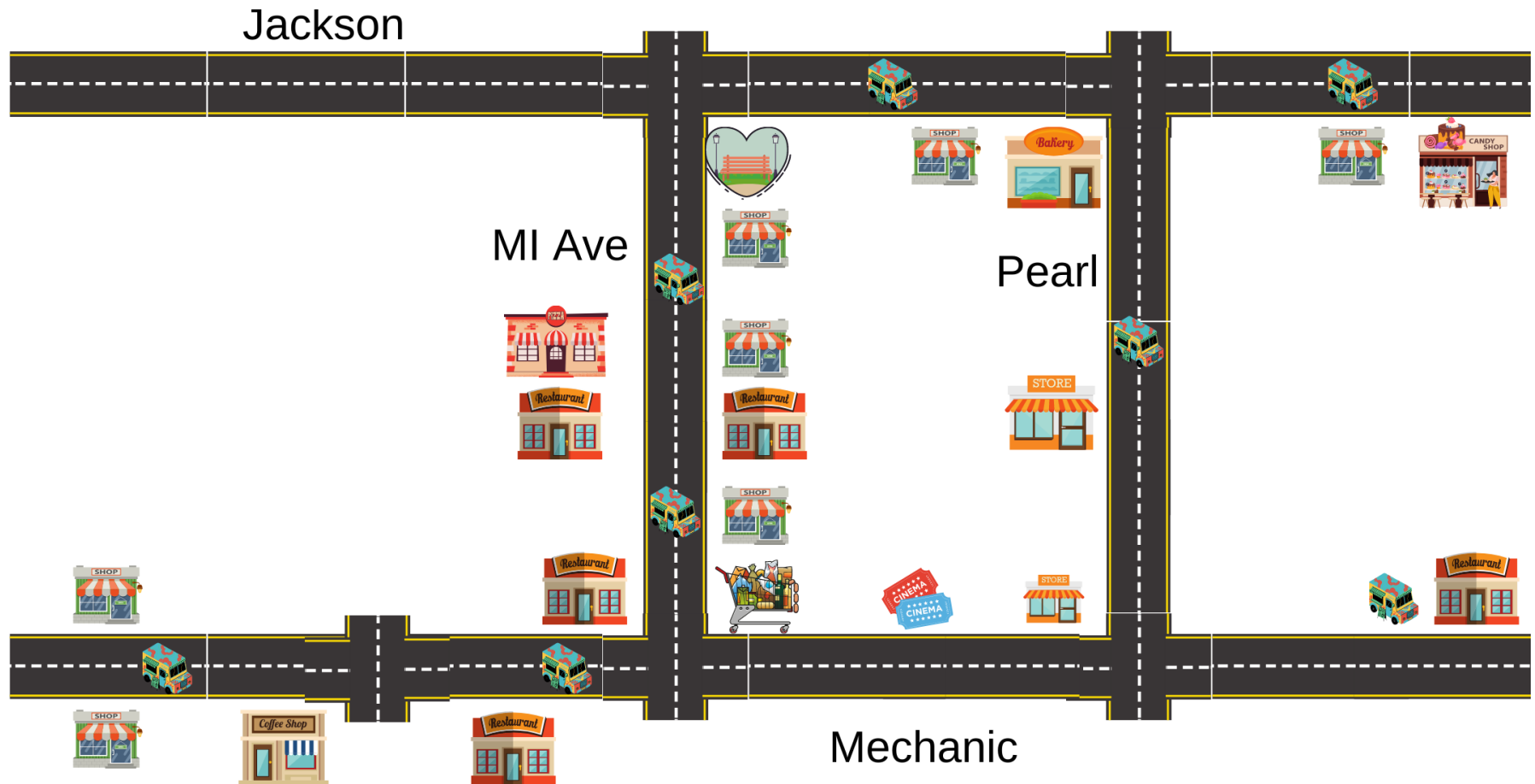
1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will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

Signature: Cory L. Mays

Date: 3/29/2022

Office Use ONLY
Application Received:
Date:
Time:
By:
Application Fee Received:

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



***1 trash can and 1 picnic table should be placed in 2 angled parking spaces where a food truck is pictured on the map above.**

****Portable toilets have been ordered, and will be placed in Bucky Harris Park**

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: **Changes to the Standard Lighting Contract for streetlights with Consumers Energy for the addition of five new streetlights**

Recommendation:

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

Attached is a report from Jon Dowling, City Engineer accompanied by a resolution, contract change authorization form, invoice, and plan sheet from Consumers Energy regarding the addition of five new streetlights.

I recommend adoption of the resolution for the change to the Standard Lighting Contract for streetlights with Consumers Energy to allow for the installation of five streetlights, authorization for associated form execution, and invoice payment. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jon H. Dowling, P.E., City Engineer
DATE: April 19, 2022

RECOMMENDATION: Approve the Resolution for Changes to the Standard Lighting Contract for five streetlights with Consumers Energy and authorize the Mayor and City Clerk to execute the appropriate documents.

SUMMARY

The City has requested that Consumers Energy install five (5) new streetlights which is the second phase of streetlights being installed based on the City Council action on January 25, 2022. Attached is an Authorization for Change in Standard Lighting Contract form, a Resolution for City Council Adoption, an invoice for \$500 and additional information from Consumers.

BUDGETARY CONSIDERATIONS

The estimated installation charge for the new streetlights is \$500.

HISTORY, BACKGROUND and DISCUSSION

On January 25, 2022, City Council authorized the City Engineer to coordinate with Consumers Energy to have streetlights installed. This request was forwarded to Consumers Energy who then provided the attached authorization, resolution and invoice documents as well as the design for the installation of the streetlights.

The first phase of these installations was approved by City Council on April 5, 2022.

DISCUSSION OF THE ISSUE

The City of Jackson is responsible for the streetlight system within the City. The City contracts with Consumers Energy to provide streetlights on their wood utility poles within the City's neighborhoods. The resolutions for changes is the second phase to have streetlights installed.

POSITIONS

I request approval of the attached Resolution for Changes to the Standard Lighting Contract for five streetlights with Consumers Energy and authorization for the Interim City Manager and City Clerk to execute the appropriate documents.

ATTACHMENTS



**AUTHORIZATION FOR CHANGE IN
STANDARD LIGHTING CONTRACT
(COMPANY-OWNED) FORM 547**

Contract Number: 103033105687

Consumers Energy Company is authorized as of _____, by the City of JACKSON, to make changes, as listed below, in the lighting system(s) covered by the existing Standard Lighting Contract between the Company and the City of JACKSON, dated 10/1/2018.

Lighting Type:
General Unmetered Experimental Lighting Rate GU-XL

Notification Number(s):
1061259450

Construction Work Order Number(s):

Except for the changes in the lighting system(s) as herein authorized, all provisions of the aforesaid Standard Lighting Contract dated 10/1/2018 shall remain in full force and effect.

City of JACKSON

By:

(Signature)

(Printed)

Its

(Title)

This Agreement may be executed and delivered in counterparts, including by a facsimile or an electronic transmission thereof, each of which shall be deemed an original. Any document generated by the parties with respect to this Agreement, including this Agreement, may be imaged and stored electronically and introduced as evidence in any proceeding as if original business records. Neither party will object to the admissibility of such images as evidence in any proceeding on account of having been stored electronically.

RESOLUTION

RESOLVED, that it is hereby deemed advisable to authorize Consumers Energy Company to make changes in the lighting service as provided in the Standard Lighting Contract between the Company and the City of JACKSON, dated 10/1/2018, in accordance with the Authorization for Change in Standard Lighting Contract dated _____,

heretofore submitted to and considered by this commission council board ;and

RESOLVED, further, that the _____ Clerk be and are authorized to execute such authorization for change on the behalf of the City.

STATE OF MICHIGAN
COUNTY OF Jackson

I, _____, Clerk of the City of JACKSON, do hereby certify that the foregoing resolution was duly adopted by the commission council board of said municipality, at the meeting held on _____.

Dated:

Municipal Customer Type: City

GENERAL UNMETERED EXPERIMENTAL LIGHTING RATE GU-XL

<i>Number of Luminaires</i>	<i>Nominal Watts</i>	<i>Luminaire Type</i>	<i>Fixture Type</i>	<i>Fixture Style</i>	<i>Install Remove</i>	<i>Location</i>
1					<u>Install</u>	40W LED COBRA - 1902 ESSEX LN
1					<u>Install</u>	40W LED COBRA - 2035 GLEN DR
1					<u>Install</u>	40W LED COBRA - 2111 DALE RD
1					<u>Install</u>	40W LED COBRA - 2043 WILDWOOD LN
1					<u>Install</u>	40W LED COBRA - 2212 AURORA DR



CONSTRUCTION NOTES:
 TOP POLE ABOVE COMMS
 AT LOC 5. POLE TO BE
 REMOVED AT LATER DATE
 PER NJUNS #5041145 &
 PULL POLE NOTIFICATION
 1061491397

INSTALL

6' BRKT
 40W LED COBRAHEAD
 FIGURE 42-103-1
 MOUNT AT 24'
 BOND BRKT
 FIGURE 42-105-1

INSTALL

6' BRKT
 40W LED COBRAHEAD
 FIGURE 42-103-1
 MOUNT AT 25'
 BOND BRKT
 FIGURE 42-105-1

INSTALL

6' BRKT
 40W LED COBRAHEAD
 FIGURE 42-103-1
 MOUNT AT 24'
 BOND BRKT
 FIGURE 42-105-1

INSTALL

12' BRKT
 40W LED COBRAHEAD
 FIGURE 42-103-1
 MOUNT AT 24'
 BOND BRKT
 FIGURE 42-105-1

INSTALL

35-4
 1/OTX DE
 FIGURE 23-302-1
 6' BRKT
 40W LED COBRAHEAD
 FIGURE 42-103-1
 MOUNT AT 24'
 BOND BRKT
 FIGURE 42-105-1
 11K-P-15'-RS
 FIGURE 22-405-1 DETAIL B
 TOP POLE ABOVE COMMS

TRANSFER

SPAN GUY
 OH SERVICE
 6DX DE

REMOVE

1/OTX DE
 11K-P-15'-RS

ONLY
 LOC 5&2
 SUMMIT
 FOURTH STREET

MISS DIG System, Inc.
 1-800-482-7171



SUBSTATION MORRELL		WD NO. Q392	CITY OF JACKSON VARIOUS 2 - ECNC/STL				JOB PURPOSE: CITY OF JACKSON REQUESTING NEW STREETLIGHTS AT MULTIPLE LOCATIONS								
CIRCUIT WEST AVENUE	CKT NO. Q2	LCP NO.	TLM NUMBER 53010941	# OF RODS	OHMS	CM NO. 100006811082	ORDER TYPE ECNC	MAT. TYPE STL	NOTIFICATION NUMBER 1061259450	DESIGN NUMBER 11363419	ORDER NUMBER	UPSTREAM PROTECTIVE DEVICE: VARIOUS			
CE STAKING REQ'D <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			FORESTRY REQ'D <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			LOCATION: SEE PRINT			CONSUMERS ENERGY CONTACTS			DEPARTMENT	NAME	NUMBER	ALTERNATE
SHEET C SHEET 1 OF 1			SCALE 1"=100'			JACKSON CO			TWP T 03S R 01W SEC. 09			COORDINATOR DESIGNER	KRISIEN_GREENWOOD BRENT_MARSHALL	269-986-7352 512-319-7570	



A CMS Energy Company

CEM Support Center

Consumers Energy, CEM Support Center, Lansing Service Center, Rm. 122, 530 W. Willow St., P.O. Box 30162 Lansing, MI 48909-7662

March 30, 2022

NOTIFICATION #:
1061259450

CITY OF JACKSON
908 W WASHINGTON AVE
JACKSON, MI 49203-1628

REFERENCE: CITY OF JACKSON VARIOUS 2, JACKSON

Dear Valued Customer,

Thank you for contacting Consumers Energy for your energy needs. Please note the Notification Number above and include it on any correspondence you send. Please note the Account Number, located above the Account Name on your invoice, when submitting payment.

Enclosed for approval and signature is the original Authorization for Change and Resolution covering the replacement and/or installation of streetlight(s). You are responsible for the final restoration.

The estimated cost for your energy request is as follows:

Non Refundable Agreement for Installation of Electric Facilities:

Winter Construction Costs:

\$ -

Installation Charge:

\$ 500.00

Additional Costs

Total Estimated Cost:

\$ 500.00

Less Prepayment Received:

\$ -

Total Estimated Cost Due:

\$ 500.00

Please sign and return the original Authorization for Change and Resolution in the enclosed self-addressed envelope or email to: POBoxCEServiceRequest@cmsenergy.com. Payment in full is required before the installation can be scheduled for construction.

Please review all attached materials carefully and direct inquiries for your request to:

Kristen Greenwood at (844) 316-9537



CITY OF JACKSON
161 W MICHIGAN AVE
JACKSON MI 49201-1315

Amount Due: \$500.00
Please pay by: April 13, 2022

Invoice Number	9322598106
PO Number	
PO Date	
Bill Date	03/30/22

Account: 3000 1977 4151

CITY OF JACKSON VARIOUS 2 JACKSON - STREETLIGHTING - NOTIFICATION NUMBER (s): 1061259450 -

NONENERGY INVOICE

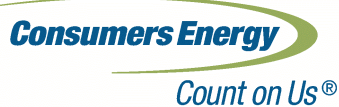
DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
Electric Streetlights-CIAC	5.0 EA	\$100.00	\$500.00
TOTAL DUE:			\$500.00

See Page 2 for Payment Options.

Consumers Energy is regulated by the Michigan Public Service Commission, Lansing, Michigan

INVOICE QUESTIONS - Contact: Kristen Greenwood -(844) 316-9537 -

Fold, detach and mail this stub with your check made payable to Consumers Energy. Please write your account number on your check.



CONSUMERS ENERGY
CEM Support Ctr - Lansing RM 122
PO Box 30162
Lansing, MI 48909-7662

PREPAYMENT REQUEST

Account: 3000 1977 4151

Amount Due: \$500.00
Please pay by: April 13, 2022
Enclosed:

6 330031865796 000000500009 0000 2056 9 300019774151 H

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: **Resolution to Decertify a Street with MDOT**

Recommendation:

Approve a resolution to decertify Cleveland Place with the Michigan Department of Transportation (MDOT) and authorize the Mayor and City Clerk to execute the resolution.

Attached is a memo from Jon H. Dowling, City Engineer, regarding a resolution to decertify a street within the City with MDOT as described in the report.

I recommend approval. Your consideration and concurrence is appreciated.

JG

Attachments

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jon H. Dowling, P.E., City Engineer
DATE: April 19, 2022

RECOMMENDATION: Approve a resolution to decertify Cleveland Place with the Michigan Department of Transportation (MDOT) and authorize the Mayor and City Clerk to execute the resolution.

SUMMARY

The City of Jackson must certify the street mileage annually with the Michigan Department of Transportation (MDOT) in accord with Public Act 51 of 1951, as amended, along with listing the changes in the system.

BUDGETARY CONSIDERATIONS

The City must certify the street mileage annually to be able to receive the road funding from the state of Michigan.

HISTORY, BACKGROUND and DISCUSSION

The City has complied with the reporting of Public Act 51 of 1951 since its initial adoption.

DISCUSSION OF THE ISSUE

City Council approved a resolution to vacate Cleveland Place at their March 22, 2022 meeting. The attached resolution to decertify Cleveland Place is required by MDOT.

POSITIONS

I request approval of the resolution to decertify the roadway as presented, and for the Mayor and City Clerk to execute the resolution.

JHD/ss

RESOLUTION

BY CITY COUNCIL:

WHEREAS, a street was vacated by City Council on March 22, 2022; and

WHEREAS, the City of Jackson must certify the street mileage annually with the Michigan Department of Transportation in accordance with Public Act 51 of 1951, as amended; and

WHEREAS, the City of Jackson does wish to decertify the following street; and

WHEREAS, the decertification of Cleveland Place is located between Blackstone Street and Ingham Street for a total decertification length of 449 feet.

NOW, THEREFORE, BE IT RESOLVED that the Jackson City Council by this resolution does agree to the decertification of the street as described above.

* * * *

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

I, Andrea Muray, City Clerk in and for the City of Jackson, County and State aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on the 19th day of April, 2022.

IN WITNESS WHEREOF, I have hereto affixed my signature and the Seal of the City of Jackson, Michigan, on this 20th day of April, 2022.

Daniel Mahoney, Mayor

Andrea Muray, City Clerk

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 19, 2022

SUBJECT: Recommendation for approval of the resolution to increase the Department of Public Works fee to \$80.00 per invoiced property to cover the costs incurred by the City to administer and enforce the Noxious Weed Ordinance of the Jackson Code of Ordinances, Chapter 26, Article III, Regulation of Grass, Noxious Weeds, Shrubbery, and Trees on Privately Owned Property

Recommendation:

Approval of the resolution to increase the Department of Public Works fee to \$80.00 per invoiced property to cover the costs incurred by the City to administer and enforce the Noxious Weed Ordinance of the Jackson Code of Ordinances, Chapter 26, Article III, Regulation of Grass, Noxious Weeds, Shrubbery, and Trees on Privately Owned Property.

I recommend approval of the Department of Public Works fee resolution as presented. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Chandra Willinger, Public Works/Utilities Fiscal Supervisor *cmw*

DATE: April 19, 2022

RECOMMENDATION: Approval of the resolution to increase the Department of Public Works fee to \$80.00 per invoiced property to cover the costs incurred by the City to administer and enforce the Noxious Weed Ordinance of the Jackson Code of Ordinances, Chapter 26, Article III, Regulation of Grass, Noxious Weeds, Shrubbery, and Trees on Privately Owned Property.

SUMMARY

Due to the rising costs for the administration and enforcement of the City's Noxious Weed Ordinance sections 26-75 and 26-76 of the Jackson Code of Ordinances, a resolution has been prepared to increase the Department of Public Works fee to \$80.00.

BUDGETARY CONSIDERATIONS

The costs incurred for the administration and enforcement of the Noxious Weed Ordinance is budgeted in the General Fund, Weed Control Fund. For the 2021 season, this program operated at a loss of \$(16,736). This was due to an increase in the wages and fringe benefits of City staff and the increase of invoice write-offs approved by City Council. In an effort for this program to operate without a deficit, it is recommended the Department of Public Works fee be increased to \$80.00 per invoiced property. The last time there was an increase in this fee was over five years ago in 2017.

HISTORY, BACKGROUND and DISCUSSION

The Public Works Department has been responsible for the administration and enforcement of the City's Noxious Weed Ordinance, sections 26-75 and 26-76 of the Jackson Code of Ordinances since the adoption by City Council. Per the ordinances if a property is in violation, the Director of Public Works, or his or her designee, will cause the weeds, brush, leaves, rank vegetation, trees, branches, or grass to be cut, removed, sprayed, or destroyed. The costs incurred by the City shall be billed to the owner. The City costs billed to the owner include the fees from the private contractor as well as the costs incurred for the City to administer and enforce this ordinance. This fee is reviewed annually to ensure it is set a rate to cover the costs incurred by the City for the administration and enforcement of the Noxious Weed Ordinance. The Department of Public Works fee from 2017 through 2021 was \$70.00, during the 2021 season, this program operated at a deficit and therefore requires the fee to be increased to \$80.00 per invoice property.

The City costs incurred for this program include the staff time to receive calls and emails from the public and other City staff of the properties in violation of this ordinance, prepare the weekly list of properties in violation for the contractor to complete, research property records for parcel identification, square footage and generate property line and aerial maps. Once work has been completed at the property in violation, City staff must review all documentation including the review of all before and after photos of the property and in some cases go to the property in violation to ensure there is sufficient evidence to generate an invoice to the property owner. If it is determined the property owner is in violation of this ordinance, City staff must

then research ownership of each property and prepare an invoice to the property owner(s). Once an invoice has been sent to the property owner, the City staff will take care of any questions or concerns from property owner(s), other City staff and/or elected officials concerning the violation of the Noxious Weed Ordinance.

DISCUSSION OF THE ISSUE

This resolution will increase the Department of Public Works fee to \$80.00, per invoiced property if it is determined through the process above that the property is in violation of City's Noxious Weed Ordinance sections 26-75 and 26-76 of the Jackson Code of Ordinances.

POSITIONS

Approve the resolution to increase the Department of Public Works fee to \$80.00 per invoiced property to cover the costs incurred by the City for the administration and enforcement of the Noxious Weed Ordinance of the Jackson Code of Ordinances, Chapter 26, Article III, Regulation of Grass, Noxious Weeds, Shrubbery, and Trees on Privately Owned Property.

ATTACHMENTS

RESOLUTION

BY THE CITY COUNCIL:

WHEREAS, the City has a Noxious Weed Ordinance, being Chapter 26, Article III, Sections 26-66 through 26-83, of the Jackson Code of Ordinances; and

WHEREAS, the Noxious Weed Ordinance permits the director of public works, or his or her designee, to cause weeds, brush, leaves, rank vegetation, trees, branches, or grass to be cut, removed, sprayed, or destroyed on private lots if the occupant or owner fails or refuses to do so after the City provides notice that the property is not in compliance with provisions of section 26-75 and section 26-76 of the Jackson Code of Ordinances; and,

WHEREAS, the City utilizes a private contractor to enforce the Noxious Weed Ordinance pursuant to a contract which establishes fees based on the size of parcel, and that all work performed is charged back to the property owners; and,

WHEREAS, the Department of Public Works incurs an administrative cost in connection with enforcement of the Noxious Weed Ordinance, and this administrative cost is added to each invoice sent to the property owner; and,

WHEREAS, the Department of Public Works has determined that the administrative cost will need to be increased to \$80.00 to fully cover budget expenses; and,

NOW, THEREFORE, BE IT RESOLVED that the City may assess a Department of Public Works fee in the amount of \$80.00 on all invoices generated in connection with enforcement of the Noxious Weed Ordinance under Chapter 26, Article III of the Jackson Code of Ordinances,

* * * * *

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

I, Andrea Muray, City Clerk in and for the City of Jackson, County and State of Michigan, do hereby certify that the foregoing is a true and complete copy of a Resolution adopted by the Jackson City Council on the 19th day of April, 2022.

IN WITNESS WHEREOF, I have hereto affixed my signature and the seal of the City of Jackson, Michigan, on this 20th day of April, 2022.

Andrea Muray, City Clerk

MEMO TO: Honorable Mayor and City Councilmembers

FROM: Matthew M. Hagerty, City Attorney

DATE: Council Meeting – April 19, 2022

SUBJECT: Accounts Receivable Write-Off Request

Recommendation: **APPROVE the Accounts Receivable Write-Off Request.**

Your consideration and concurrence is appreciated.

DEPARTMENT REPORT

MEMO TO: Honorable Mayor and City Councilmembers
FROM: Matthew M. Hagerty, City Attorney
DATE: Council Meeting – April 19, 2022
RECOMMENDATION: **APPROVE the Accounts Receivable Write-Off Request.**

SUMMARY

Attached is a memorandum from Finance Director Phil Hones requesting a write-off for the list of debts attached to his memorandum.

HISTORY, BACKGROUND and DISCUSSION

The City Attorney's Office reviewed the attached Invoice Write Off List and concurs with Mr. Hones' request. The debt will still be owed by the debtors; however, the City will no longer send monthly invoice statements to the debtors.

POSITION

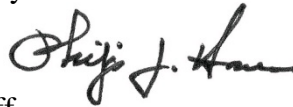
It is the recommendation of the City Attorney's Office that Council approve the debts listed for write-off as bad debts.

ATTACHMENTS: Memorandum from Phil Hones, dated March 16, 2022
A spreadsheet containing a list of the debts to be written off

March 16, 2022

TO: Matthew Hagerty, City Attorney

FROM: Phil Hones, Finance Director



RE: Accounts Receivable Write-Off

Attached for your review is a listing of the City's accounts receivable prepared by the Finance Department. These invoices are comprised of:

- 1) Amounts where the invoiced party has had their debts discharged through bankruptcy,
- 2) Amounts that have been turned over to the City's collection agency and remain unpaid after two years or longer,
- 3) Amounts where the invoiced party is no longer in business, and
- 4) Amounts where the invoiced party is deceased and there is no estate.

I do not believe that collection efforts should be continued with regards to invoices on this listing due to impracticality and the unlikelihood of collection. Therefore, in accordance with the City's current policy, I am forwarding this listing to your office for your review and your subsequent recommendation to the City Council that they be approved for write-off.

Please let me know if you have any questions regarding this issue.

Thank you in advance.

Invoice Date	Invoice #	Code	Invoiced To	Total Due	Date to Collection/Reason
08/25/2016	1400016563	DPWM	Hasbrouck, Charlotte	\$361.26	03/11/2019
08/25/2016	1500018265	DPWM	Hasbrouck, Charlotte	\$361.26	03/11/2019
02/12/2016	1600018543	DPWM	Brown, Jerry	\$381.54	03/11/2019
02/12/2016	1600018547	DPWM	Dettman Properties LLC	\$381.54	03/11/2019
03/03/2016	1600018573	Water	Schnell, Ruth Ann	\$3,256.08	03/18/2019
03/30/2016	1600018625	DPWM	Sasser, Stephen/Jennifer	\$378.16	03/11/2019
03/30/2016	1600018635	DPWM	Beddoes, William a	\$378.16	03/11/2019
05/24/2016	1600018728	Weed	Rider, Kristina	\$199.60	03/11/2019
05/24/2016	1600018729	Weed	Austin, Andre	\$199.60	03/11/2019
05/31/2016	1600018801	DPWM	Harbour Portfolio VII LP	\$440.30	03/11/2019
05/31/2016	1600018808	Weed	Dougherty, Mary L	\$265.60	03/11/2019
05/31/2016	1600018809	Weed	McGuire, Bartholomew/Jessica	\$247.80	03/11/2019
05/31/2016	1600018811	Weed	King, James	\$247.80	03/11/2019
05/31/2016	1600018812	Weed	Hall & King Properties LLc	\$247.80	03/11/2019
05/31/2016	1600018813	Weed	Beddoes, William A	\$265.60	03/11/2019
06/01/2016	1600018814	Weed	Beddoes, William A	\$245.54	03/11/2019
06/01/2016	1600018815	Weed	Beddoes, William A	\$245.54	03/11/2019
06/01/2016	1600018816	Weed	Beddoes, William A	\$245.54	03/11/2019
06/08/2016	1600018822	Weed	Brown, Jerry	\$197.78	03/11/2019
06/08/2016	1600018823	Weed	Mays, Virgil E/Linda M	\$218.29	03/11/2019
06/08/2016	1600018832	Weed	Freitag, Brent	\$242.67	03/11/2019
06/08/2016	1600018844	Weed	Taylor, Dale W	\$218.29	03/11/2019
06/08/2016	1600018846	Weed	Luna, Mary L	\$195.96	03/11/2019
06/09/2016	1600018855	Weed	Mays, Virgil/Linda	\$197.78	03/11/2019
06/09/2016	1600018856	Weed	McKinch, Elisabeth	\$224.32	06/13/2019
06/09/2016	1600018864	Weed	Culbert, Susan	\$218.29	03/11/2019
06/14/2016	1600018908	Weed	Leon, Ronald S/Henrietta	\$265.76	03/11/2019
06/14/2016	1600018909	Weed	Entrust Great Lakes LLC	\$259.02	03/11/2019
06/16/2016	1600018925	DPWM	Harbour Portfolio VII LP	\$1,015.28	03/18/2019
06/23/2016	1600018948	Weed	Harbour Portfolio VII LP	\$215.42	03/11/2019
06/23/2016	1600018954	Weed	Dettman Properties LLC	\$197.78	03/11/2019
06/24/2016	1600018970	Weed	Derby, Ronald F	\$225.03	03/11/2019
06/24/2016	1600018971	Weed	MI Seven LLC	\$204.52	03/11/2019
06/24/2016	1600018972	Weed	Austin, Andre	\$197.78	03/11/2019
06/24/2016	1600018977	Weed	Thomas, Pamala	\$283.64	03/11/2019
06/24/2016	1600018982	Weed	Rider, Kristina	\$197.78	03/11/2019
06/24/2016	1600018983	Weed	Cooks, James E	\$259.02	03/11/2019
09/07/2016	1600019378	Code	Entrust Great Lakes LLC	\$16,496.12	05/09/2019
10/19/2016	1600019597	Water	Medina, Caleb Scott	\$86.85	03/26/2018
10/27/2016	1600019776	Police	ACM Vision V LLC	\$137.50	08/23/2019
07/07/2017	1700021088	Weed	ACM Vision V LLC	\$166.64	03/23/2018
02/02/2018	1800022274	Police	135 W Prospect St LLC	\$113.75	03/11/2019

02/02/2018	1800022275	Police	135 W Prospect St LLC	\$113.75	03/11/2019
03/19/2018	1800022414	TRMS	Fitzgerald, Daniel Robert	\$176.18	03/11/2019
03/20/2018	1800022417	DPWM	Anderson, Deborah	\$303.80	03/18/2019
03/20/2018	1800022418	DPWM	IN Seven LLC	\$303.80	03/18/2019
03/20/2018	1800022419	DPWM	Boocher, Robert/Brenda	\$313.94	06/13/2019
03/20/2018	1800022422	DPWM	Brown, Antrana L	\$313.94	06/13/2019
03/20/2018	1800022425	DPWM	Williams, Nathaniel	\$303.80	03/18/2019
03/20/2018	1800022434	DPWM	Williams Estate, Phyllis M	\$313.94	06/13/2019
03/20/2018	1800022451	DPWM	Frisby, Jewel A	\$303.80	03/18/2019
04/19/2018	1800022504	Police	Cass, Nicholas/Melissa	\$111.25	03/11/2019
05/11/2018	1800022540	Police	Hamilton, Raynar L	\$110.00	03/11/2019
06/11/2018	1800022587	ENGBI2	Tyronce, Marsena Laurice	\$4,662.68	03/18/2019
06/12/2018	1800022609	DPWM	Williams, Nathaniel	\$293.66	03/18/2019
06/12/2018	1800022612	DPWM	Grace Haven Inc	\$293.66	03/18/2019
06/15/2018	1800022643	Weed	Odell, Roy LLC	\$211.60	06/13/2019
06/15/2018	1800022646	Weed	Lloyd, Harold	\$174.40	06/13/2019
06/15/2018	1800022653	Weed	Brenner, Edward O	\$174.40	06/13/2019
06/15/2018	1800022659	Weed	Ghuman LLC	\$208.20	06/13/2019
06/19/2018	1800022676	Weed	Helping other People Everywhere	\$208.20	06/13/2019
06/28/2018	1800022695	Police	Community AME Church	\$108.75	03/11/2019
06/28/2018	1800022702	Police	Hamilton, Raynar L	\$108.75	03/11/2019
06/28/2018	1800022704	Police	Campbell, Ernestine	\$108.75	03/11/2019
06/28/2018	1800022708	Police	Lowder Estate, Thomas/Amanda	\$108.75	03/11/2019
06/29/2018	1800022721	Weed	Harsh, Danny L	\$168.58	03/18/2019
06/29/2018	1800022730	Weed	McKinch, Elisabeth	\$208.20	06/13/2019
06/29/2018	1800022777	DPWM	Barber, Jody	\$303.80	06/13/2019
06/29/2018	1800022787	Weed	321 W Mason LLC	\$211.60	06/13/2019
06/29/2018	1800022788	Weed	Gittens, Anthony	\$201.24	03/18/2019
06/29/2018	1800022803	DPWM	Gillespie, William E	\$293.66	03/18/2019
06/29/2018	1800022806	DPWM	Henn Jr, Russell D	\$293.66	03/18/2019
06/29/2018	1800022817	DPWM	Snyder, Donna	\$198.79	06/13/2019
06/29/2018	1800022820	Weed	Becker Estate, Beverly A	\$225.10	06/13/2019
06/29/2018	1800022829	Weed	Arnold Family Trust	\$191.30	06/13/2019
06/29/2018	1800022834	Weed	Snyder, Donna	\$138.79	06/13/2019
06/29/2018	1800022846	Weed	Equity First Funding LLC	\$201.24	03/18/2019
06/29/2018	1800022853	DPWM	Helping other People Everywhere	\$303.80	06/13/2019
06/29/2018	1800022854	Weed	Lenski, Carrie	\$217.57	03/18/2019
06/29/2018	1800022855	Weed	King Estate, Linda M	\$174.40	06/13/2019
09/12/2018	1800022887	DPWMI	Finch, Jessica Nicole	\$184.79	03/18/2019
07/19/2018	1800022958	Police	Hamilton, Raynar L	\$107.50	03/11/2019
07/19/2018	1800022971	Weed	McCarville, Roger	\$189.17	06/13/2019

07/19/2018	1800022983	Weed	US Bank Trust NA	\$198.92	03/18/2019
07/19/2018	1800022985	Weed	Lloyd, Harold	\$172.46	06/13/2019
07/19/2018	1800022993	DPWM	Booher, Robert/Brenda	\$300.42	06/13/2019
07/19/2018	1800022995	Weed	Cobern, David/Morine	\$189.17	06/13/2019
07/19/2018	1800022998	Weed	Dunlap, Logan	\$209.24	06/13/2019
07/24/2018	1800023009	Weed	Hoang, Huong Thi-Thu	\$166.64	03/18/2019
07/26/2018	1800023018	Weed	Becker Estate, Beverly A	\$189.17	06/13/2019
07/26/2018	1800023019	Weed	Odell, Roy Llc	\$242.57	06/13/2019
08/10/2018	1800023050	Weed	Jones, Megan R	\$180.22	11/07/2019
08/16/2018	1800023081	DPWM	Boughton, Sally A/Richard E	\$313.94	11/07/2019
08/23/2018	1800023102	Weed	IRA Trust Services	\$180.22	11/07/2019
08/23/2018	1800023107	Weed	Ryan, Oren	\$197.69	11/07/2019
08/23/2018	1800023108	Weed	Gallegos, Lalo	\$249.97	11/07/2019
08/23/2018	1800023116	Weed	Ghuman LLC	\$249.97	11/07/2019
08/23/2018	1800023124	Weed	Huffman, Bruce	\$232.63	11/07/2019
08/30/2018	1800023130	Weed	Williams Estate, Phyllis	\$215.16	11/07/2019
08/30/2018	1800023141	Weed	321 W Mason LLC	\$218.68	11/07/2019
08/30/2018	1800023142	Weed	McCarville, Roger	\$197.69	11/07/2019
09/07/2018	1800023170	Police	Parker, Dennis/Anna	\$115.00	11/07/2019
09/20/2018	1800023185	DPWM	Ghuman LLC	\$310.56	11/07/2019
09/20/2018	1800023194	DPWM	Taylor II, Robert J	\$828.12	11/07/2019
09/20/2018	1800023197	DPWM	Tims Investment Mgmt Llc	\$310.56	11/07/2019
09/21/2018	1800023214	Weed	Brenner, Edward O	\$178.28	11/07/2019
09/21/2018	1800023215	Weed	Williams Estate, Phyllis	\$178.28	11/07/2019
09/21/2018	1800023234	Weed	IRA Trust Services	\$178.28	11/07/2019
09/21/2018	1800023240	Weed	Gittens, Anthony	\$230.12	11/07/2019
09/26/2018	1800023251	Weed	Helping Other People Everywhere	\$230.12	11/07/2019
10/09/2018	1800023256	DPWM	Enos, Stephanie A	\$307.18	11/07/2019
10/09/2018	1800023258	DPWM	Patterson, Lazeigh	\$307.18	11/07/2019
10/09/2018	1800023260	DPWM	Henn Jr, Russell D	\$307.18	11/07/2019
10/10/2018	1800023303	Police	Goodwin, Kayla	\$113.75	11/07/2019
11/19/2018	1800023378	Weed	Arnold Family Trust	\$360.10	11/07/2019
12/10/2018	1800023431	Police	Cass, Nicholas/Melissa	\$111.25	11/07/2019
12/13/2018	18000234317	Police	Glaspie, Christopher	\$111.25	11/07/2019
12/17/2018	1800023470	DPWM	IRA Trust Services	\$300.42	11/07/2019
12/17/2018	1800023472	DPWM	Pifer, Wendy D	\$912.34	11/07/2019
12/17/2018	1800023480	DPWM	Patterson, Lazeigh	\$300.42	11/07/2019
01/01/2019	1800023492	Fire	El Compa	\$55.04	11/07/2019
01/01/2019	1800023496	Fire	Taco Bell	\$55.04	11/07/2019
01/01/2019	1800023501	Fire	Body Works Reconditioning	\$55.04	11/07/2019
01/01/2019	1800023554	Fire	Tripp, Valerie	\$55.04	11/07/2019
01/01/2019	1800023556	Fire	McThirsty's Pub	\$55.04	11/07/2019

01/01/2019	1800023587	Fire	Woodbridge Auto Repair	\$55.04	11/07/2019
01/01/2019	1800023590	Fire	Simple Petroleum Inc	\$55.04	11/07/2019
01/01/2019	1800023592	Fire	Auto Hobby Shop	\$55.04	11/07/2019
01/01/2019	1800023644	Fire	Ryder Truck Rental	\$110.00	11/07/2019
01/01/2019	1800023663	Fire	MAK Properties LLC	\$275.04	11/07/2019
12/04/2020	2000026532	DPWM	Weatherford, Bridjess J	\$313.94	Per M.Porterfield
04/21/2021	2100026800	Code	Weatherford, Bridjess J	\$762.28	Per M. Porterfield
06/30/2021	2100027100	Weed	Weatherford, Bridjess J	\$247.28	Per M. Porterfield
09/14/2021	2100027471	Weed	Weatherford, Bridjess J	\$162.76	Per M. Porterfield

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: **Amendment 1 to the 20-005 E. High Street Bridge Rehabilitation Engineering Contract**

Recommendation:

Approval of Amendment 1 to the 20-005 E. High Street Bridge Rehabilitation Engineering contract with Hubbell, Roth & Clark, Inc. (HRC) of Bloomfield Hills, MI, at a not-to-exceed cost of \$65,550.00, and authorization for the City Manager and City Engineer to sign the appropriate document.

Attached is a report from Jon H. Dowling, City Engineer, regarding an amendment to the above referenced contract.

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

JG

Attachments

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jon H. Dowling, P.E., City Engineer
DATE: April 19, 2022

RECOMMENDATION: Approval of Amendment 1 to the 20-005 E. High Street Bridge Rehabilitation Engineering contract with Hubbell, Roth & Clark, Inc. (HRC) of Bloomfield Hills, MI, at a not-to-exceed cost of \$65,550.00, and authorization for the City Manager and City Engineer to sign the appropriate document.

SUMMARY

On March 31, 2020, City Council awarded the 20-005 E. High Street Bridge Rehabilitation Engineering contract to Hubbell, Roth & Clark, Inc (HRC) of Bloomfield Hills, MI. The subject Contract Amendment is to provide steel fabrication inspection in accordance with the Michigan Department of Transportation (MDOT) Materials Quality Assurance and Procedures Manual.

BUDGETARY CONSIDERATIONS

The current amount for the 20-005 E. High Street Bridge Rehabilitation Engineering contract with HRC is \$435,778.57. The amount of proposed Amendment 1 is \$65,550.00, bringing the revised contract amount to \$501,328.57.

This work will be paid for with Major Street Funds.

HISTORY, BACKGROUND and DISCUSSION

On March 31, 2020, the City Council awarded the 20-005 E. High Street Bridge Rehabilitation Engineering contract to HRC for the superstructure replacement of the E. High Street bridge over the Grand River.

DISCUSSION OF THE ISSUE

This proposed Contract Amendment 1 is for having SME-USA perform the steel fabrication inspection in accordance with the MDOT Materials Quality Assurance and Procedures Manual as described in the attached letter dated April 4, 2022. This inspection work is not in the cost of the original scope of work since the cost of this inspection work is not known until the project has a construction contractor and the location of steel fabrication is determined.

POSITIONS

Engineering recommends that Amendment 1 to the 20-005 E. High Street Bridge Rehabilitation Engineering contract with HRC be approved for the not-to-exceed cost of \$65,550.00. I also request that the City Manager and City Engineer be authorized to sign the contract documents.

JHD/ss

ATTACHMENT

April 4, 2022

City of Jackson
161 W. Michigan Avenue
Jackson, Michigan 49201

Attn: Jon Dowling, P.E, City Engineer

Re: 2020 E. High Street Bridge Rehabilitation Engineering
Amendment 1

HRC Job No. 20191193

Dear Mr. Dowling:

Per our discussions, we are pleased to submit this amendment to provide shop review of the structural steel fabrication related to the rehabilitation of the easternmost East High Street Bridge. We understand fabrication will occur in Hammond, Indiana with an anticipated duration of six weeks. The fabrication review will be conducted in general accordance with the MDOT Materials Quality Assurance and Procedures (MQAP) Manual. In addition, testing of bolts is required. A total of five bolt tests have been included. Based on the scope of work, we estimate the total costs for the items above to be \$65,550. We will invoice the City in accordance with the terms of our existing contract, and the final invoice amount will be based on actual time spent.

If you have any questions or require any additional information, please contact the undersigned.

Very truly yours,

HUBBELL, ROTH & CLARK, INC.



Todd Sneathen, P.E.
Vice President

Attachment

pc: HRC; M. Romkema, File

**AMENDMENT NO. 1
To Contract for
20-005 E. High Street Bridge Rehabilitation Engineering Contract
City of Jackson, Michigan**

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

ORIGINAL CONTRACT AMOUNT	\$ 435,778.57
AMENDMENT NO. 1	\$ 65,550.00
NEW CONTRACT AMOUNT AS SET BY AMENDMENT NO.1	\$ 501,328.57

REASON FOR AMENDMENT:

To add shop review of the structural steel fabrication related to the rehabilitation of the East High Street Bridge as described in the letter from Hubbell, Roth & Clark, Inc. dated April 4, 2022.

Prepared by Jon H. Dowling, P.E.
City Engineer

ACCEPTED BY:

Todd Sneathen, P.E.
Hubbell, Roth & Clark, Inc.

Date:

ACCEPTED BY:

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

Date:

ACCEPTED BY:

Jonathan Greene, City Manager

Date:

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: **Contract Award for the Martin Luther King Equality Trail
Lighting Improvements Project**

Recommendation:

Approval of an award of the contract for the Martin Luther King Equality Trail Lighting Improvements project from Weatherwax Road to Prospect Street to Cochran Electric of Jackson, Michigan at a cost of \$606,195.49 and authorization for the Mayor and City Clerk to execute the appropriate document(s) in accordance with the Purchasing Agent.

Attached is a report from Jon Dowling, City Engineer requesting approval of the contract award above.

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

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jon H. Dowling, P.E., City Engineer
DATE: April 19, 2022

RECOMMENDATION: Approval of an award of the contract for the Martin Luther King Equality Trail Lighting Improvements project from Weatherwax Road to Prospect Street to Cochran Electric of Jackson, Michigan at a cost of \$606,195.49 and authorization for the Mayor and City Clerk to execute the appropriate document(s) in accordance with the Purchasing Agent.

SUMMARY

On March 12, 2019 bids were opened in the Purchasing Department for the contract for the Martin Luther King Equality Trail Lighting Improvements project. The project consists of installation of pole-mounted lights along 1.9 miles of the Martin Luther King Equality Trail, which is a mixed-use non-motorized trail between Weatherwax Road and Prospect Street.

BUDGETARY CONSIDERATIONS

The Engineer's estimate for this project was \$585,278.00. Bids were as follows:

Company	Bid
Cochran Electric, Jackson, MI	\$ 606,195.49
J. Ranck Electric, Mt. Pleasant, MI	\$ 711,517.00
Corby Energy, Belleville, MI	\$ 849,868.00
Rauhorn Electric, Bruce Township, MI	\$1,148,566.00

This project will be paid out of a MDNR Trust Fund Grant for \$300,000 and Major Street Funds.

Bid evaluation criteria is part of the Responsible Contractor Ordinance which consists of the following components. Attached is the summary sheets of the bidders' responses.

- A) Price (25%)
- B) Corporate Accountability (25%)
- C) Workplace Safety (25%)
- D) Workforce Development (15%)
- E) Social Equity (10%)

Company	A	B	C	D	E	Total
Cochran Electric	25	25	25	15	10	100
J. Ranck Electric	20.6	25	25	15	10	95.6
Corby Energy	14.9	25	25	15	10	89.9
Rauhorn Electric	2.6	20	25	15	10	72.6

HISTORY, BACKGROUND and DISCUSSION

In 2018 lighting was placed along the MLK Equality Trail from Prospect Street to Morrell Street.

DISCUSSION OF THE ISSUE

The proposed project will install new LED shoebox light fixtures mounted on 20-foot tall steel street light poles that match the lights installed along the Martin Luther King Jr. Equality Trail. The project is to install 62 poles and light fixtures from Weatherwax Road to Prospect Street. The electricity from Consumers Energy will be metered and billed accordingly.

POSITIONS

In concurrence with the Purchasing Agent, it is the recommendation of Engineering that the Martin Luther King Equality Trail Lighting Improvements project contract be awarded to Cochran Electric of Jackson, Michigan at a cost of \$606,195.49. We also request that the Mayor and City Clerk be authorized to execute the appropriate documents.

JHD/ss

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
1. General information about the bidder's company, its principals, and its history, including all former business names, and an explanation of any business name changes.	X			X			X			X		
2. If the submitting firm has ever operated under another name or is controlled by another company or business entity or in the past five years controlled or was controlled by another company or business entity, whether as a parent company, subsidiary or in any other business relation, it must attach a separate statement to its bid packet that explains in detail the nature of any such relationship. Additional information may be required from such an entity if the relationship in question could potentially impact contract performance.		Cochran Electric has never operated under any other name.	X			X	X					X
3. Information regarding the state and local licenses and license numbers held by the bidder.	Michigan Department of Licensing and Regulatory Affairs Bureau of Construction Codes. Electrical Contractor License #6107095 and Master Electrician License #6208771			X			X			X		
4. A confirmation that all subcontractors, employees and other individuals working on the construction project will maintain current applicable licenses required by law for all licensed occupations and professions.		We keep current copies of all licensing on all our employees. The subcontractors we hire for this job also have their current licenses and to operate in their construction field.		X			X			X		
5. Verification that the bidder is in compliance with all applicable state and federal laws and visa requirements regarding the hiring of non-US citizens, and disclosure of any work visas sought or obtained by the bidder, any of the bidder's subcontractors, or any of the bidder's employees or independent contractors, in order to perform any portion of the project.	We have current I-9 forms on all employees verifying their employment eligibility. We will verify with all subcontractor's that they have I-9 verification on all of their employees working on this job.				X		X					X
6. Evidence of experience with construction techniques, trade standards, quality workmanship, project scheduling, cost control, management of projects of comparable size/complexity, and building codes by documenting the bidder's ability and capacity to perform the project. The bidder must identify those portions of the project it reasonably believes will be subcontracted and the names of the subcontractors.		SEE WORK HISTORY (attached)., Also note our completion of other previous jobs with the City of Jackson for reference.		X			X			X		
7. Evidence of bonding capacity within the past twelve (12) months, that the applicant has financial resources to start up and follow through on the project(s) and to respond to damages in case of default as shown by written verification of bonding capacity equal to or exceeding the amount of the bidder's scope of work on the project. The written verification must be submitted by a licensed surety company rated "B+" (or better) in the current A.M. Best Guide and qualified to do business within the State of Michigan.	X			X			X				Rauhorn has a plenty of bonding capacity from an "A" rated surety and is qualified to work in Michigan. We have the financial resources and equipment wo complete the work as well.	
8. A list of all litigation and arbitrations currently pending and within the past five (5) years, including an explanation of each (parties, court/forum, legal claims, damages sought, and resolution).			No current litigations pending	X			X					X

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
9. Disclosure of any violations of state, federal or local laws or regulations, including OSHA or MIOSHA violations, state or federal prevailing wage laws, wage and hour laws, worker's compensation or unemployment compensation laws, rules or regulations, issued to or against the bidder within the past five years.	One citation was issued from MIOSHA on 1/19/22 for not having accident prevention program on site. The penalty was corrected on site and no fee was issued. Summary of penalties for inspection number: 1573188		X	X			X					X
10. Disclosure of any debarment by any federal, state or local governmental unit and/or findings of non-responsibility or non-compliance with respect to any public or private construction project performed by the bidder.						X	X					X
11. Proof of insurance, including certificates of insurance, confirming existence and amount of coverage for liability, property damage, workers compensation, and any other insurances required by the proposed contract documents.	Attached			X			X			X		
12. A statement regarding the bidder's staffing capabilities and labor sources including subcontractors and a verification from the bidder that construction workers will not be misclassified as independent contractors in violation of state or federal law.		Staffing by Cochran Electric will be members of IBEW Local Union 252. Staffing by sub and independent contractors will be verified by Cochran Electric		X			X			X		
13. Verification of an existing Fitness for Duty Program (drugs and alcohol) of each employee working on the proposed jobsite.		All union employees are subject to random drug and alcohol testing at any time.		X			X					X
14. A warranty statement regarding labor, equipment and materials.		This included in your bonding requirements, see bonding information from J. Ryan Bonding.		X			X			X		
15. A statement affirming that the firm will pay all craft employees that it employs on the project the current wage rates and fringe benefits as required under applicable federal, state, or local wage laws.		We will pay our employees the current prevailing wage rates and fringe benefits as required by law. Cochran Electric pay employee's union rates and benefits that are above state requirements.		X			X			X		
16. A statement from the contractor or subcontractor acknowledging their obligation to comply with this Ordinance in each contract and subcontract.		We will ensure our sub-contractors obligation to comply with this handbook of ordinances.		X			X				Yes	

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
17. A statement identifying what possible change orders could be necessary and what their approximate subsequent total costs would be	X				X		X					X
18. Qualifications of management and supervisory personnel to be assigned by the bidder.		state licensed foreman and years of electrical services.		X			X				Assigned upon award	
19. References from individuals or entities the bidder has worked for within the last five (5) years including information regarding records of performance and job site cooperation.	Attached				X		X				Provided upon award	
20. Evidence of any quality assurance program used by the bidder and the results of any such program on the bidder's previous projects		Quality checks are performed throughout the project and verified with blue print specs and weekly meetings.		X			X			X		
21. Assurance that all construction work for this project must proceed economically, efficiently, continuously and without interruption.		Rest assured we will do our best. Delivery times are unpredictable at this time due to economy and availability of materials.			X		X				To the best of our ability	
22. A list of projects completed within the past five (5) years of comparable size/complexity, including dates, clients, approximately dollar value, and size. Documentation from these previous projects including but not limited to all extra costs relating to the bidder's timeliness, performance, quality of work, extension requests, contractual fines and penalties imposed, liens filed, history of claims for extra work and any contract defaults with an explanation of the reason for the default and how the default was resolved.	X	Cochran electric has completed at least five (5) projects with the City of Jackson similar to this project. See attached.		X			X				Can be provided upon award.	
23. The ratio of masters or journeypersons to apprentices proposed to be used on the construction project job site, if apprentices are to be used on the project.		The ratio of Masters or journeyman to apprentices is dictated by the State of Michigan. Simply, the law requires a ratio of one apprentice to one journeyman or master on all projects excluding residential.		X			X				1:03	
24. Evidence of the bidder's worker's compensation Experience Modification Rating ("EMR"). Preference will be given to contractors and subcontractors who exhibit an EMR of 1.0 or less based on a three-year average.	See attached letter from Federated Insurance Co. regarding the last three year of "EMR"	X		X			X				0.89	
25. All craft labor that will be employed by the firm for the project has completed at least the OSHA 10 hour training course of safety established by the U.S. Department of Labor, Occupational Safety & Health Administration.		Cochran Electric electricians are trained by the LU 252 on safety and we have a safety manual and safety meetings.		X			X					Yes
26. Documentation of master or journeyperson certification or status for masters and journeypersons to be used on the project, and the source of such certification or status		Documentation of journeyperson certification can be provided for each project upon award of contract.		X			X				Can be provided upon award.	

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
27. A statement from the bidder as to what percentage of its workforce can be drawn significantly from area residents because a goal of the City is to utilize, it is construction activities, local residents as much as is economically feasible while retaining the high quality of construction required for its construction activities, consistent with applicable law. The City will consider in evaluating which bids best serve its interests, the extent to which responsible and qualified bidders are able to achieve this goal.		Cochran Electric will draw from our existing work force which are all local residents. If we need to call for additional man power they will be provided by the LU 252.		X			X					X
28. Evidence of Equal Employment Opportunity Programs for minorities, women, veterans, returning citizens, and small businesses.		IBEW LU 252 is an equal employment opportunity employer, which is where w pull our workforce from.		X			X			x		
29. Assurance that the bidder is an equal opportunity employer and does not discriminate on the basis of race, sex, pregnancy, age, religion, national origin, marital status, sexual orientation, gender identity of expression, height, weight, or disability.		As stated above.		X			X					Yes it is.
PRICE												
Submitted Bid		\$ 606,239.89		\$ 711,517.00						\$ 1,257,397.50		
Labor Costs		\$ 160,000.00		\$ 191,517.00						\$ 504,089.00		
Materials Costs:		\$ 391,240.00		\$ 46,000.00						\$ 613,498.00		
Equipment Costs:		\$ 55,000.00		\$ 60,000.00						\$ 139,810.50		
Possible Change Orders		If light pole bases are encroaching on Consumers right-of-way at hi-pressure gas line a vacuum truck will have to be used to excavate pole bases.		We do not foresee the need for any change orders.			None anticipated			N/A		
Company Name:	Cochran Electric Co.			J. Ranck Electric Inc.			Corby Energy Services, Inc.			Rauhorn Electric Inc.		
Street Address:	2103 S. Jackson St.			1993 Gover Parkway			6001 Schooner Dr.			14140 33 Mile Rd.		
Telephone:	517-784-7106			989-775-7393			734-547-9237			586-992-0400		
Officers:												
President/Email Address:	Ronald Cochran	ronec@icloud.com		Adam Ranck	airanck@iranck.com		Mark Helsel, Jr.	mhelseljr@corbyenergy.com		Anthony Rau	arau@rauhornelec.com	
Vice President/Email Address:	Robyn Steffen	office@chcranelectricco.com		Angela Wood	awood@iranck.com		M. Scott Wilfong	swilfong@corbyenergy.com		Scott Finkbeiner	sfinkbeiner@rauhornelec.com	
Secretary/Email Address:				Angela Wood	awood@iranck.com		James Moskal	jmoskal@corbyenergy.com		Scott Finkbeiner	sfinkbeiner@rauhornelec.com	
Treasurer/Email Address:				JoLinda Pnacek	jpnacek@iranck.com		Jason Newton	jnewton@corbyenergy.com				
How many years has your organization been in business under your present firm name?	96 years			36 years			40 years			42 years		
Parent Company Name:												
Street Address:												
City, State, Zip Code												
Under Current Management Since (Date)	1994			2011			2017					
Contact for Insurance Information:												
Name:	Federated Insurance Company			Jordan Wilcox			Steven Brandon			Klara Corcoran		
Type of Coverage:	General Liability, Auto, Umbrella, Worker's Comp.			General Liability, Auto, Umbrella Liability, Worker's Comp.			Liability			Commercial general, automobile, umbrella, worker's comp and employee liability, contractors equipment		
Telephone:	888-333-4949			989-775-7393			248-888-0379			248-519-1430		
Are you self-insured for Worker's Compensation Insurance? Yes____ No____	No			Yes			No			Yes		
Contacts for Requesting Bids (list two)												
Name/Title	Ronald Cochran, President			Adam Ranck	President		Mark McVicar, Master Electrician			Scott Finkbeiner	Vice President	

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
Telephone:	517-784-7106			989-775-7393			313-350-2441			586-992-2404		
Email Address:	Ronec@icloud.com			airanck@jranck.com			mmcvicar@corbyenergy.com			sfinkbeiner@rauhornelec.com		
Name/Title	Matt Hill			Janice LaRose	Estimating Assistant		Jeff Corby, Project Manager			Craig Merritt	Estimator	
Telephone:	517-784-7106			989-775-7393			313-350-3469			586-992-2402		
Email Address:	md.hill@hotmail.com			jarose@jranck.com			jcorby@corbyenergy.com			cmeritt@rauhornelec.com		
Prequalification Form completed by:												
Name/Title:	Robyn Steffen			Janice Larose	Estimating Assistant		Jeff Corby, Project Manager			Alexandria Locke	Administrative Assistant	
Telephone:	517-784-7106			989-775-7393			313-350-3469			586-992-2405		
Email Address:	officed@cochranelectricco.com			jarose@jranck.com			jcorby@corbyenergy.com			alocke@rauhornelec.com		
ORGANIZATION												
Form of Business:												
Sole Owner										X		
Partnership												
Corporation	X			X			X			X		
Describe Service Performed:				Electrical Construction and Service			Inside/Outside plant utility construction, including electric, gas, telecomm, etc.			Full scope electrical and utility construction		
Construction	X			X			X					Electrical and gas construction
Construction Design							X					
Original Equipment Manufacturer & Installer							Manufacturer & Installer					
Project Maintenance							Yes					
Maintenance				X			Yes			X		
Service Work (janitorial, clerical, etc.)												
Other												
Describe Additional Services Performed:				Directional Boring, Concrete, Excavation, Solar PV						Foundation, concrete, ITS, wire work, substation,		
List other types of work within the services you normally perform that you subcontract to others:	Digging			Mechanical								
Annual Dollar Volume For the Past Three Years												
20____	2019	4.75 mil		2019	\$ 74,714,899.00		2019	99,000,000		2019	56430653	
20____	2020	3.9 mil		2020	\$ 109,770,069.00		2020	85,000,000		2020	52741641	
20____	2021	3.4 mil		2021	\$ 64,574,832.00		2021	150,000,000		2021	75914471	
Largest Job During the Last Three Years							21,400,000			\$12,000,000		
Your Firm's Desired Project Size:												
Maximum				30,000,000			30,000,000					
Minimum				3,000.00			5,000					
Bonding Company:	J. Ryan Bonding			Cincinnati Insurance			Travelers Casualty and Surety Company of America			Guy Hurley		
Bonding Capacity:	\$2,000,000 within a \$4,000,000 aggregate			\$30 Million Single Project/\$120 Million aggregate			\$50,000,000			Single: \$15,000,000 Aggregate: \$40,000,000		
State and local licenses and license numbers held by your organization:	Licensed journeyman and apprentice			Michigan Electrical Contractor 6104713						Electrical contractor license 6109210 Master electrical license 6209457		
What are your formal training programs: a) apprentice/journeyman, b) other comparable formal training programs?	IBAW LU 252			Joint apprentice training committee			Corby Energy has an electrical apprentice program			Training programs can be provided upon award.		
WORK HISTORY												
Largest dollar valued jobs in progress:										CAN BE PROVIDED UPON AWARD		
Customer/Location	JC Athletic Field			Windsor Detroit Bridge			Burns & McDonnell/ITC/Detroit			CAN BE PROVIDED UPON AWARD		
Type of Work	Electrical			Lighting			Electrical Trans Conduit			CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 944,509.00			\$15,228,337			\$16,500,000			CAN BE PROVIDED UPON AWARD		
Contact				Kevin Kingston			Charles Sun			CAN BE PROVIDED UPON AWARD		
Telephone				313-432-7092			816-822-3874			CAN BE PROVIDED UPON AWARD		
Customer/Location	FV Operations/Leoni WWTP			Enbridge, Portage			Black & Veatch/ITC/Detroit			CAN BE PROVIDED UPON AWARD		
Type of Work	Electrical			Solar			Electrical Trans Conduit			CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 814,044.00			\$12,089,425			\$6,200,000			CAN BE PROVIDED UPON AWARD		
Contact				Phil LaFlame			Chris Nagarah			CAN BE PROVIDED UPON AWARD		
Telephone				218-355-1256			734-622-8905			CAN BE PROVIDED UPON AWARD		
Customer/Location	City of Jackson/MLK			Enbridge/Vesper			DTE Energy/Shelby Township			CAN BE PROVIDED UPON AWARD		


Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
Type of Work	Electrical			Solar			Elec Dist Conduit			CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 217,277.21			\$9,711,425			\$2,300,000			CAN BE PROVIDED UPON AWARD		
Contact				Phil LaFlame			Fakhri Muwakkil			CAN BE PROVIDED UPON AWARD		
Telephone				218-355-1256			313-999-0761			CAN BE PROVIDED UPON AWARD		
Customer/Location	Bailey/JCC			Enbridge/Flanagan			Ann Arbor			CAN BE PROVIDED UPON AWARD		
Type of Work	Fitness Trail			Solar			Street Light Replacement			CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 967,981.00			\$8,823,825			\$1,200,000			CAN BE PROVIDED UPON AWARD		
Contact				Phil LaFlame			Cyrus Naheedy			CAN BE PROVIDED UPON AWARD		
Telephone				218-355-1256			734-794-6410			CAN BE PROVIDED UPON AWARD		
Largest dollar valued jobs in the past three years:										CAN BE PROVIDED UPON AWARD		
Customer/Location	JC Athletic Field			Arauco/Grayling			DTE Energy/Ann Arbor			CAN BE PROVIDED UPON AWARD		
Type of Work	Electrical			Electrical			Elec Dist Conduit			CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 944,509.00			\$20,680,833			\$21,400,000			CAN BE PROVIDED UPON AWARD		
Contact				Mike Battisti			Premkumar Kavalath			CAN BE PROVIDED UPON AWARD		
Telephone				705-255-2286			734-709-4022			CAN BE PROVIDED UPON AWARD		
Customer/Location	FV Operations/Leoni WWTP			Vectren Volkman						CAN BE PROVIDED UPON AWARD		
Type of Work	Electrical			Solar						CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 814,044.00			\$7,116,166						CAN BE PROVIDED UPON AWARD		
Contact				David Jackson						CAN BE PROVIDED UPON AWARD		
Telephone				812-491-5544						CAN BE PROVIDED UPON AWARD		
Customer/Location	Bailey/JCC			Laker Line Rapid Transit						CAN BE PROVIDED UPON AWARD		
Type of Work	Fitness Trail			Lighting						CAN BE PROVIDED UPON AWARD		
Size - \$M	\$ 967,981.00			\$5,108,408						CAN BE PROVIDED UPON AWARD		
Contact				Nick Monoyois						CAN BE PROVIDED UPON AWARD		
Telephone				616-774-1153						CAN BE PROVIDED UPON AWARD		
Are there any judgements, claims or suits pending or outstanding against your company? Yes_____ No_____	no			No			No			NO		
Are you or have you ever been involved in any bankruptcy or reorganization proceedings? Yes_____ No_____ If yes, please attach details.	no			No			No			NO		
Has your organization ever failed to complete any work awarded to it?	no			No			No			NO		
Has your organization been involved in any lawsuits or arbitration with regard to construction contracts within the last five years? Yes_____ No_____	no			No			No			NO		
Provide the following information on five owners that have used your services. Governmental owners preferred.												
Firm Name:	Alro Steel Corp.			State of Michigan DOT			City of Ann Arbor			Macomb County Department of Roads		
Contact Name:	Randy Glick			Christopher VanNorwick, PE			Cyrus Naheedy, PE			Bill Westrick		
Project	All Jackson, Charlotte, Pottersville, Electrical Work			Sensor Install			Ann Arbor Street Light Replacement			Macomb Backplates MDOT: 50031-207428		
Address:				Various Locations Grand Region			301 E. Huron			117 S. Groesbeck Hwy. Mt. Clemens, MI 48043		
Telephone:	517-787-5500			616-451-3519			734-794-641x43645			586-292-9771		
Email Address:				vannorwick@michigan.gov			cnaheedy@a2gov.org			wwestrick@rcmcweb.com		
Firm Name:	Bailey Excavating			City of Walker			Public Lighting Authority of Detroit			Oakland County Road Commission		
Contact Name:	Jacob Bailey			Scott Connors, PE			Mukesh Patel, PE			Jerry Jehle		
Project				Singal Mast Arm RTL			Survey and Lighting contract for Re-Lighting Detroit			TS Mod on M3 and US12		
Address:	1073 Toro Dr.			Fruit Ridge @ Northridge, Walker			400 Monroe, Suite #485			31001 Lahser Rd. Beverly Hills, MI 48025		
Telephone:	517-750-3030			616-791-6792			313-324-8290			248-763-9550		
Email Address:				sconnors@walker.city			mpatel@pladetroit.org			jiehle@rcoc.org		
Firm Name:	Lester Brothers			Kentucky DOT			DTE Energy			Macomb County Department of Roads		
Contact Name:	Bill Lester			Tyler Johnson			Christ Hartley			Joe Pacella		
Project				Bridge Lighting Various Locations			System Maintenance and New Build (Multiple Years)			Joseph A Koss Bldg. TS		

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
Address:	5405 E. Michigan Ave.			Kenton County KY			8001 Haggerty Rd., VanBuren			117 S. Groesbeck Hwy. Mt. Clemens, MI 48043		
Telephone:	517-784-7888			859-356-5300			734-397-4316			586-840-3096		
Email Address:				tyler.johnson@ky.gov			christphoner.hartley@dteenergy.com			jpacella2rcmcweb.org		
Firm Name:	Mercer Construction			Village of Birch Run			City of Pontiac			OHM-Advisors		
Contact Name:	Rob Harris			Paul Moore			John Balint, PE			Mitchell Master		
Project				Traffic Signal Maintenance			LED Lighting Project			Birmingham Maple Rd. TS		
Address:	2324 Brooklyn Rd.			Birch Run, MI						2365 Pontiac Rd., Suite 201		
Telephone:	517-787-2960			989-624-5711			248-758-3615			248-751-3115		
Email Address:	rob.harris@rwmercer.com			pmoore@villageofbirchrun.com						mitchell.master@ohm-advisors.com		
Firm Name:	HB Fuller Company			City of Port Huron			Redford Township			Tyme Engineering		
Contact Name:	Eric Weidner			Diana Seifert			Mike			Ryan Nowinski		
Project				Generators			dennis			Over Height Warning Systems		
Address:	4401 Page Ave.			Port Huron, MI			Interior and Exterior LED Replacement			32121 Schoolcraft Livonia, MI 48150		
Telephone:				810-984-9775			12200 Beach Daly			734-838-7641		
Email Address:				seifertd@porthuron.org			313-387-2785			ryann@tymeengineering.com		
Provide the following information on five architects that you have worked with in the past five years. Governmental projects preferred.												
Firm Name:	Mannik Smith Group			Triangle Associates			OHN			N/A		
Contact Name:				Matt Novak			Kyle Selter			N/A		
Project	City of Jackson			Northwood University Site Utility Upgrades			Ann Arbor St. Light Replacement			N/A		
Address:				3769 Three Mile Rd. NW						N/A		
Telephone:				616-885-8569			734-466-4562			N/A		
Email Address:				mattn@triangle-inc.com			kyle.selter@ohm-advisors.com			N/A		
Firm Name:	City of Jackson			TMP Architecture			Metro Engineering			N/A		
Contact Name:				Peter Basso			Marte Neumeyer			N/A		
Project	MLK Equality Trail			U of M Sports Lighting			Public Lighting Authority			N/A		
Address:				259 E. Michigan Ave., Suite 107 Kalamazoo, MI 49007			33900 Schoolcraft, Livonia, MI			N/A		
Telephone:				248-879-5666						N/A		
Email Address:							mneumeyer@metroes.net			N/A		
Firm Name:	ForeSite Design			Prein & Newhof			Stantec			N/A		
Contact Name:	Bruce Lemons			Bob Nelesen, PE, MBA			Chris Elenbaas			N/A		
Project	JC Athletic Field			Multiple Airport Projects			Kerrytown Lighting Project			N/A		
Address:				3355 Evergreen Dr. NE Shelby Township, MI 48315-2733			3754 Rancho Dr., Ann Arbor, MI			N/A		
Telephone:	248-547-7757			586-726-+1234			734-761-1010			N/A		
Email Address:				msmith@aewinc.com			celenbaas@stantec.com			N/A		
Firm Name:	Tower Pinkster			Burns & McDonnell						N/A		
Contact Name:				Anthony Gaskill						N/A		
Project	JC Entrance			Multiple Projects						N/A		
Address:				2111 Woodward Ave., Suite 202 Detroit, MI 48201						N/A		
Telephone:				918-327-9887						N/A		
Email Address:				aigaskill@burnsmcd.com						N/A		

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.			
	CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
Firm Name:													N/A
Contact Name:													N/A
Project													N/A
Address:													N/A
Telephone:													N/A
Email Address:													N/A
SAFETY AND HEALTH PERFORMANCE													
Worker's Compensation Experience Modification Rate (EMR) Data:													
EMR is _____ Interstate Rate													X
_____ Intra-state Rate		x			x								
_____ Monopolistic State Rate													
_____ Dual Rate								x					
EMR for the last three years:													
_____ 20		2019	0.78		2019	0.99		2020	0.8		2022	0.85	
_____ 20		2020	0.78		2020	0.92		2021	0.85		2021	0.92	
_____ 20		2021	0.78		2021	0.82		2022	0.86		2020	0.75	
State or Origin:		Michigan			Michigan			Michigan			Michigan		
EMR Anniversary Date:		March 1			1-Jul			1-Jan			April 1		
Injury and Illness Data:													
Employee hours worked last three years (excluding subcontractors)								2021					
Year: 20 _____					2021			623593			2021		
Hours:					452714			2020			461189		
Year: 20 _____					2020			605344			2020		
Hours:					727570			2019			367326		
Year: 20 _____					2019			698880			2019		
Hours:					600586						360406		
Provide the following data (excluding subcontractor) using your OSHA 300 and 300A Forms for the past three (3) years: (Notes: Data should be the best available data applicable to the work in this region or area. If your company is not required to maintain OSHA 300 and 300A forms, please provide information from your Worker's Compensation Insurance carrier itemizing all claims for the last three years).													
Injury related fatality		None									None		
20 _____		None			21			2021			None		
Number		None			0			0			None		
Rate		None			0			0			None		
20 _____		None			20			2020			None		
Number		None			0			0			None		
Rate		None			0			0			None		
20 _____		None			19			2019			None		
Number		None			0			0			None		
Rate		None			0			0			None		
Lost workday case injuries involving days away from work, or days of restricted work activity or both		None											
20 _____		None			21			2021			2021		
Number		None			0			0			7		
Rate		None			0			0					
20 _____		None			20			2020			2020		
Number		None			1			3			7		
Rate		None			0.27			0.99					
20 _____		None			19			2019			2019		
Number		None			1			3			4		
Rate		None			0.33			0.86					
Lost workday case injuries involving days away from work:		None											
20 _____		None			21			2021			2021		
Number		None			0			0			4		
Rate		None			0			0					
20 _____		None			20			2020			2020		
Number		None			1			0			3		
Rate		None			0.27			0					
20 _____		None			19			2019			2019		
Number		None			1			0			2		
Rate		None			0.33			0					

Responsible Contractor Ordinance	Cochran Electric			J. Ranck Electric			Corby Energy Services			Rauhorn Electric, Inc.		
CRITERIA	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A	Document Attached	Brief Response	N/A
Total OSH Recordable Injury Rate:												
20____				21			2021			2021		
Number				1			0			8		
Rate				0.44			0					
20____				20			2020			2020		
Number				6			3			9		
Rate				1.65			0.99					
20____				19			2019			2019		
Number				2			3			8		
Rate				0.67			0.86					
Have you received any regulatory (EPA, OSHA, etc.) citations in the last three years? Yes____ No____	Yes, see #9						Yes			No		
SAFETY AND HEALTH PROGRAMS AND PROCEDURES												
Highest ranking safety/health professional in the company:	Robyn Steffen			Chris Brown			Aaron Cox			Jim Macksey		
Title:	Secretary			Safety Director			Director Health and Safety			Safety Manager		
Telephone:	517-784-7106			989-621-1915			313-468-2451			586-388-2518		
Email Address:	office@cochranelectricco.com			cbrown@jranck.com			acox@corbyenergy.com			jmacksey@rauhornel.com		
Do you have or provide the following:												
Full time Safety/Health Director Yes____ No____	No			Yes			Yes			Yes		
Full time Safety/Health Supervisor Yes____ No____	Yes			No			Yes			Yes		
Full time job Safety/Health Coordinator Yes____ No____	No			No			Yes			Yes		
Do you have or provide the following:												
Safety/Health incentive program: Yes____ No____	No			Yes			No			Yes		
Company paid safety/health training: Yes____ No____	Yes			Yes			Yes			Yes		
Do you have a written Safety & Health Program? Yes____ No____ If yes, please submit	Yes			Yes			Yes			Yes		
Do you have a substance abuse program including testing? Yes____ No____	No			Yes			Yes			Yes		
Do your employees read, write and understand English such that they can perform their job tasks safely without interpreter? Yes____ No____	Yes			Yes			Yes			Yes		
If no, provide a description of your plan to assure that they can safety perform their jobs.							Yes					

MEMOTO: Mayor and City Councilmembers

FROM: Jason Yoakam, City Assessor 

DATE: April 11, 2022


SUBJECT: Professional Services Agreement for Assessing Services

Recommendation: Approve Professional Services Agreement in the total amount of \$99,600 to Quality Assessing Services LLC for assessment services starting May 1, 2022 through April 30, 2023.

I recommend approval of the Professional Services Agreement. Your consideration is appreciated.

Attachments

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jason Yoakam, City Assessor 
DATE: April 19, 2022
RECOMMENDATION: Recommend Adoption Professional Services Agreement

SUMMARY

Attached is a Professional Service Agreement that, if adopted, would allow my company, Quality Assessing Services LLC, to provide assessing services in place of having me as an individual full time employee. It is my intention that this be a seamless transition with no interruption to the assessor's office staff or the services provided. This arrangement would allow me to grow as a professional, while continuing the same service at a discount to the city.

BUDGETARY CONSIDERATIONS

In comparison to the currently requested 2022-2023 budget of \$552,012 this change would reduce the Assessor's budget to \$484,757; an annual savings of \$67,255.

HISTORY, BACKGROUND and DISCUSSION

When I was appointed as the Assessor for the City of Jackson in 2016 I remember specifically mentioning that I would continue to find more efficient ways of operating the assessor's office. Efficiency has been a cornerstone of my tenure and something that I continue to pursue. The principle in pursuing efficiency is the idea that assessing services should be held to a high professional standard at a value to the taxpayers. This is why I am excited to offer the city this cost savings opportunity.

POSITIONS

Recommend adoption of Professional Service Agreement.

ATTACHMENTS: Professional Services Agreement

AGREEMENT FOR PROFESSIONAL CONTRACTOR SERVICES

THIS AGREEMENT (“Agreement”), made and entered into this 19 day of April, 2022, by and between the CITY OF JACKSON, 161 W Michigan Ave, Jackson MI 49201, hereinafter referred to as “City,” and Quality Assessing Services LLC, 5912 S Rickfield Rd, Jackson MI 49201, hereinafter referred to as “CONTRACTOR.”

WITNESSETH:

WHEREAS, it is the intent of the City to retain Contractor to perform the duties as its certified assessor as an independent contractor.

WHEREAS, Contractor retains qualified personnel with the proper State certification to act in that capacity for and on behalf of the City; and

WHEREAS, the parties wish, by this Agreement, to define their respective rights and responsibilities during the term of this Agreement.

NOW, THEREFORE, for and in consideration of the mutual covenants herein expressed, **IT IS HEREBY AGREED** by and between the parties hereto as follows:

SECTION I: BASIC SERVICES OF THE CONTRACTOR

The following are deemed services or requirements included in the compensation of the Contractor under Section III - Payment unless otherwise stated:

1.1 Performance By Appointed Assessor:

By approving this Agreement, City Council is appointing Jason Yoakam as the City Assessor. It is the parties’ intent that Mr. Yoakam be employed solely by Contractor. The Contractor shall ensure that Mr. Yoakam has and maintains his assessor certification level of Michigan Master Assessing Officer (MMAO) during the term of this Agreement.

1.2 General Duties:

The Contractor shall be required to perform all duties of an assessor pursuant to Michigan statutes and laws, as are required by City Charter and ordinance, and all other rules and guidelines established for the proper performance of said position, and as same may be from time to time amended, while this Agreement is in effect, and shall conduct and perform same in accordance with all applicable standards of professional conduct required of such assessors. Said duties shall include, but not be limited to, any and all requirements made effective or promulgated under Michigan Public Act 415 of 1994. Jason Yoakam, as appointed City Assessor, shall further assume all duties as required of a City department head. In the event material changes in the laws, statutes, rules, ordinances, guidelines during the term of this Agreement result in a substantial additional work burden on the Contractor, then the Contractor and City shall renegotiate the compensation paid pursuant to the terms and provisions of this Agreement. For purposes of this paragraph, the term “substantial additional work burden” shall be determined to exist by mutual agreement of the parties to this Agreement, provided, in the event the parties cannot agree as to whether a substantial additional work burden has been imposed upon the Contractor, then the parties shall select a

mutually agreeable mediator who shall make such determination and whose determination shall be final, however, said mediator shall not have authority to establish the amount of additional compensation, if any.

1.3 Office Hours:

During the term hereof, the Contractor shall maintain eight (8) office hours every two weeks at City Hall at the above address, as follows:

- A. The Contractor shall devote eight (8) hours every two weeks to maintaining office hours at the City office for public appointments.
- B. If specified office days of the Contractor fall on a day recognized as a holiday to City employees, then it will be recognized as a holiday by the Contractor, however, an alternate day may be substituted.

1.4 Public Relations/Customer Service:

The Contractor shall work with and advise property owners in the ad valorem taxation system in an attempt to eliminate adversarial situations and establish positive public relations. The parties acknowledge that holding specific office hours for the public is valuable in the process of providing high quality customer service. The City wants to ensure that members of the public and City staff that need information from the Contractor, or wish to speak to Contractor, are able to do so on a relatively convenient basis. In that regard, in addition to the hours specified in Paragraph 1.3, the Contractor agrees to meet with or contact residents and City staff members beyond normal office hours as appropriate to address their tax assessment-related concerns. Phone calls and answers to e-mails and faxes will be responded to in a timely manner, expected within 24 hours of receipt by the Contractor.

1.5 New Construction/Loss Adjustment:

During the term of this Agreement, the Contractor shall ensure all new construction and real estate improvements are physically observed through cooperation with the Zoning Administrator and will review all building permits. The Contractor shall obtain copies of the building permits from the Building Department. Likewise, the Contractor shall ensure that damaged or destroyed properties are physically observe with respect to the making of any loss adjustments as shall be necessary in the performance of contractor duties. To assist with this requirement, the City shall also supply the Contractor with a copy of all fire calls involving improved properties with permanent parcel number attached.

1.6 Economic Condition Factors (ECF):

During the term hereof, the Contractor shall review and prepare new land values and economic condition factors (ECF) by areas and apply these factors to property records so that the current assessment is reflected as 50% of true cash value on the assessment record.

1.7 “Proposal A” Requirements:

The requirements of Michigan Public Act 415 of 1994 and all related property tax reform legislation amendments and updates shall be followed and monitored as required. This includes by example, but is not limited to, the filing of all associated reports and forms to fulfill the following requirements:

- A. Approve or deny homestead exemptions;

- B. Track property transfer affidavits, matching them with deeds within 45 days of being filed;
- C. Apportion the homestead portion of a combination-use building;
- D. Determine the homestead status of parcels resulting when homestead parcels are split or combined; and
- E. Calculate both assessed and tentative taxable values for all parcels, taking into consideration losses, new construction and replacement in any given year.

1.8 Assessment Roll Preparation and Records:

The Contractor shall enter the assessments onto the Ad Valorem assessment roll, specific tax rolls (IFTs, OPRAs, PILTs, TIFs, Tool & Die Renaissance Recovery Zone, etc.), and special assessment rolls and prepare the warrant authorizing the collection of taxes by the City Treasurer. Contractor shall prepare, obtain and maintain, as necessary or desirable, such property cards, photographs, measurements, sketches, records and documents to meet all requirements set by the City and/or the State of Michigan regarding such assessment rolls and shall organize same on a basis that will provide easy access and comprehension of the information contained in each respective file and regarding each respective roll.

1.9 Annual Reports:

The Contractor shall prepare a report annually summarizing the entire year that shall advise the City of the overall activities, progress, problems and corrective measures regarding the various aspects of the duties of the Contractor under this Agreement. The City shall have the right at any time to require the Contractor to make available to the City, within 48 hours of notice being provided, all records and documents developed and maintained by the Contractor under the terms of this Agreement for review and audit. All time spent in the preparation and presentation of such reports or in gathering and making information available to City by the Contractor shall be deemed a part of the services contracted under the terms and provisions of this Agreement.

1.10 Board of Review:

The Contractor shall have staff available for each of the two (2) March Board of Review sessions. (In the event the City chooses to hold additional meetings, the Contractor may choose to have a certified staff member in attendance in their absence.) March Board of Review sessions shall be scheduled as provided in the City Charter, within the time limits prescribed by law.

The Contractor shall provide adequate information to the Board of Review members as to how the assessments, capped and taxable values were determined to allow them to determine how best to decide a taxpayer's appeal.

The Contractor shall also attend and serve as secretary at the March, July and December Boards of Review. If the Contractor is unable to attend these sessions, however, the Contractor must supply the City Clerk with a written agenda for the Board of Review that contains the reasons for all recommended adjustments.

1.11 Sales and Appraisal Studies:

The Contractor shall prepare sales studies using available data and evaluate all equalization and/or appraisal studies and respond as appropriate.

1.12 Forms:

The Contractor shall file all forms fully completed with the Jackson County Equalization Department, State Tax Commission and other agencies and entities, as required, in a timely manner.

1.13 Defense of Appeals:

This Section shall apply to real and personal, IFT and ad valorem property tax appeals.

The City shall retain ultimate control of all litigation and settlement negotiations and Contractor shall operate under the direction of the City in any litigation regarding a tax appeal, including appeals to the Small Claims Division.

Any appeal to the Tax Tribunal will be referred to the City Attorney. If counsel shall desire the assistance of the Contractor in the defense of such appeals, additional fees for preparing necessary appraisals and/or consultation shall be reviewed in advance by the City and agreed upon on a case-by-case basis. The City may choose to retain the Contractor to prepare this report or may employ another firm to prepare a supportable and defensible report for an additional fee.

The Contractor shall defend all appeals to the Small Claims Division of the Michigan Tax Tribunal. This shall include, but not be limited to, filing necessary petitions, preparing and submitting such material, statistics and other information as is necessary to properly defend any such appeal, and appearing at all hearings and meetings as are required for the purpose of defending said appeal. City hereby authorizes Contractor, subject to approval by City Attorney, to settle where Contractor deems it appropriate or advisable any appeal. All the foregoing regarding appeals to the Small Claims Division is deemed to be included the services compensated pursuant to the terms and provisions of this Agreement.

In all other potential appeals to the Michigan Tax Tribunal or State Tax Commission, Contractor shall provide as part of the services included under the terms and provisions of this Agreement such time and effort as is necessary to properly provide to City information, documents, analysis and advice as may be required in the determination of the Contractor or the City to forestall the formal filing of an appeal or to settle a disputed case up to the date of the filing of a petition appealing a decision of the City or any of its agencies or boards to the Michigan Tax Tribunal or State Tax Commission. After the filing of said petition, the Contractor shall make the appointed assessor available to the City for such further assistance as is required by the City in the defense of such appeal. The Contractor shall make the appointed assessor available as an expert witness on behalf of the City in any proceedings. Mileage expenses for out-of-city travel required for appearance at Tax Tribunal hearings or State Tax Commission hearings shall be reimbursed at the rate per mile recognized by the Internal Revenue Service's allowance for business use of an automobile. In the event of the termination of this Agreement and the necessity for the services of the Contractor for purposes of consulting, review of information, analysis or expert testimony after the date of termination, the Contractor shall make the appointed assessor available, notwithstanding the termination of this Agreement, for assistance in the defense of such appeals, provided, same shall not apply to appeals filed in the Small Claims Division of the Michigan Tax Tribunal. Contractor shall keep the City Attorney informed of appeals and provide the City Attorney with any

recommendation regarding said proceedings, the manner in which the same are to be handled, any proposed settlement and like advice if needed.

The provisions of Paragraph 1.13 regarding appeals shall be and are hereby incorporated regarding any appeal of a personal property tax assessment.

1.14 Reappraisal Program:

This contractor shall oversee the annual inspection of 20% (+/-) of the properties in each class. Physical inspection and pricing of the same shall be completed by the City employees at the direction of the Contractor. Should the City desire all properties to be re-inspected in less than a 5 year timeframe, there may be additional charges as well as a contract addendum pursuant to Section 5.1.

1.15 Personal Property Statements, Canvas and Audits:

The Contractor shall prepare and maintain the mailing list for personal property tax statements and maintain records for personal property including data entry and calculation of depreciated values and their extension within each statement. The Contractor shall conduct a personal property canvas to ensure equity among business owners within the City. The Contractor is required to perform random personal property audits when warranted by questionable data or lack of submitted data.

1.16 Equalization Increases:

The Contractor shall strive to eliminate across-the-board increases in property values by applying any increases received through the Jackson County Equalization Department to appropriate areas by using the economic condition factors hereinabove described, by adjustment of individual property assessments to 50% of true cash value, or as required by the State Tax Commission, in order to achieve maximum equity by class, and in accordance with the latest laws and regulations then in force. The Contractor shall represent the City when requested by the City Manager by attending any annual Jackson County equalization meetings.

1.17 Land Division Applications:

The Contractor shall assist City staff in reviewing land division applications.

1.18 Transportation and Equipment:

The Contractor shall provide all necessary transportation for contractor staff and field equipment to perform the services and meet the requirements of this Agreement.

1.19 Indemnification/Employment:

The parties hereto acknowledge that all personnel, except any current employees of the City, that may or might be utilized by the Contractor in the performance of its duties hereunder shall, for all purposes, be considered employees of the Contractor and not employees of the City. The Contractor shall be responsible for Workers' Compensation, Unemployment Compensation, state and federal withholding and payment of personnel. The Contractor shall indemnify the City and hold the City harmless from any claim, cause of action or other liability that may or might arise by virtue of any claim of any employee of the Contractor relating to his/her employment by Contractor.

1.20 Tax Increment Finance Authority:

The Contractor shall be responsible for the recording of any property value changes, new or loss, on the ad valorem assessment roll, specific tax rolls (IFTs, Commercial Rehab. District OPRAs, PILTs, TIFs, Tool & Die Renaissance Recovery Zone, etc.) and special assessment rolls relating to the designation of properties as within the Downtown Development Authority (DDA) District boundaries.

1.21 Contractor's Recommendations:

On or before December 31, 2023, at the City Manager's request, the Contractor shall prepare written recommendations and conclusions regarding the current state of the City's assessment rolls, by class, together with specific recommendations concerning actions which, in the opinion of the Contractor, should be taken in order to achieve maximum equity in the assessment rolls and compliance with all State Tax Commission rules, regulations and guidelines. Such report shall be submitted to the City manager for his review. Preparation and submission of such recommendations shall be a part of the Basic Services to be performed by the Contractor under this Agreement.

1.22 Security of Information:

If any documents, data, drawings, specifications, photographs, property cards, summaries, accounts, reports, software applications or other products or materials are held in the possession of the Contractor outside of the City offices, then Contractor shall be under an affirmative duty to provide adequate security to safeguard said materials from fire, theft and other hazards of a like nature or type, while same are in possession of the Contractor. This may include, but not be limited to, providing for a fire proof safe or vault in which to store same, preparing and holding duplicates of same in the possession of the Contractor, but separately or providing same to the City for possession. Said security measures shall be deemed a part of the Basic Services to be provided hereunder as part of the costs to be borne by the Contractor.

1.23 Special Assessments:

The Contractor is responsible for determination and conducting the preparation of special assessment rolls for City projects such as streets and meterless parking. The Contractor shall work with City departments and staff in the gathering and preparation of special assessments, and same shall be deemed part of the services required by this Agreement.

SECTION II: TERM OF AGREEMENT

2.1 Contract Period:

The Contractor shall commence performance of the services herein required on May 1, 2022. Unless sooner terminated, this Agreement shall, by its terms, expire April 30, 2023.

2.2 Mutual Right of Termination:

Either party may terminate this Agreement upon ninety (90) days written notice to the other. This right of termination is specifically exercisable at the sole discretion of either party, and requires no just cause or other reason or justification for the exercise thereof. The effective date of such termination shall be ninety (90) days from the date of mailing of such notice by certified mail/return receipt requested.

2.3 Termination for Cause or Breach:

Notwithstanding anything to the contrary on this Agreement, either party may immediately terminate this Agreement in the event of material breach by the other. In such case, either party may seek such remedies as shall be available, at law or equity.

2.4 Notice of Termination:

Upon receipt of notice of termination or upon termination of this Agreement by expiration of its term, the Contractor shall immediately deliver to the City copies of all data, paper and computer files, drawings, specifications, reports, value estimates, summaries and other information and materials as may have been accumulated by the Contractor in performing the Agreement, whether completed or in process and same shall be in unaltered form, readable by the City. In the event of the failure or refusal of the Contractor to forthwith deliver the above referenced materials, documents and files, City may seek a Circuit Court order compelling the production of same forthwith, and the Contractor herein expressly waives notice of hearing thereon agreeing that a mandatory injunction may immediately issue due to the fact that the failure to receive the stated materials, documents and files will result in irreparable harm to the City without leaving the City an adequate remedy at law, thereby entitling the City to an immediate judgment in its favor in this regard. City shall be entitled to damages from Contractor for any information, materials or documents which are turned over to City in unusable or altered form.

2.5 Amendment/Renegotiation:

Nothing herein contained shall be construed to limit or abrogate the rights of the parties to modify or amend this Agreement at any time hereafter, provided however, that no such amendment or modification shall be effective unless in writing and duly executed by both parties hereto, through their authorized representatives.

If the Agreement is not renewed or extended prior to its expiration date, and the City desires to have the Contractor continue on a month-to-month basis, the fee will be that which existed for the final month of the previous term, being April 1, 2023.

SECTION III: PAYMENT

3.1 Compensation for Basic Services:

During the term of this Agreement, which shall be from May 1, 2022 - April 30, 2023, unless sooner canceled or terminated under the provisions of Section II herein, the City agrees to pay to the Contractor for performance of the Basic Services set forth in Section I of this Agreement as follows:

During the period May 1, 2022 through April 30, 2023, the sum of \$99,600 at a rate of \$8,300 per month.

3.2 Proration of Payments on 90-Day Termination:

In the event this Agreement is terminated pursuant to Paragraph 2.2, City shall pay Contractor to the date of termination on a prorated daily basis for any part of a month for which services have been rendered by Contractor and for which no compensation has been received.

SECTION IV: CITY RESPONSIBILITIES

4.1 Basic Data:

The City shall provide access to Contractor to property description files as currently exist as of the date of execution of this Agreement, containing initial information such as property number, legal description, owner and address information, as well as all data that the City may possess concerning such properties (i.e. measurements, sketches, photographs, etc.).

4.2 Office Equipment:

The City shall provide the Contractor with appropriate tax parcel maps, office space and furniture, telephone, personal computer, printers, copying machine, fax machine, and office supplies (as defined in Paragraph 4.5) as reasonably needed during the duration of this Agreement. Contractor acknowledges that some of the equipment (i.e. fax, printers, copying machine) is shared among all administrative office personnel, and the Contractor will not have exclusive use of such equipment.

The Contractor shall have access, including remote access, to the City's computer network for the use of the following software products: BS&A, Microsoft Office, ARC Gis, and other applications already in use by the City Assessor's office. The City's Internet website will also have available on-line to the Contractor and the public the property record cards, digital photographs and tax payment information. The Contractor shall not download or upload any software to the City's network, except with the City's prior written approval. The Contractor shall be liable for any adverse consequence upon the City's computer network or function caused by any software introduced in the network by the Contractor without prior written consent of the City. Further, Contractor shall be liable for any act of negligence on the part of the Contractor in creating or causing an adverse consequence to the City's computer network.

The Contractor agrees that City equipment shall be used only for the purposes of fulfilling Contractor's obligations under this Agreement and shall not be used for personal reasons or to conduct other business not authorized under this Agreement.

4.3 Computer:

The City shall supply computer hardware, software and peripherals necessary to fulfill the Contractor's duties under this Agreement. The City will maintain the hardware, software and peripheral equipment through a regular maintenance program. The City will back up the system on a daily basis with alternate tapes, disks or any other generally accepted medium of methods that ensure the recovery of data. Any data loss not due to the negligence of the Contractor as a result of hardware or software malfunction will be replaced at the City's expense.

4.4 Map Maintenance/Tax Roll Printing:

The City shall continue the maintenance of tax maps through their GIS office and cooperation with Jackson County GIS in the maintenance of the parcel layer. Contractor will, when applicable, request approval from the Michigan Department of Treasury for continuation of computerized tax roll system.

4.5 Office Supplies:

The City shall provide the Contractor with office supplies, including computer paper, file folders, hanging folders, assessment notices and forms, postage and such other supplies as shall be necessary for the performance of Contractor's responsibilities hereunder.

4.6 Legal Counsel:

The City shall supply legal counsel, at its expense, for Small Claims, full Tax Tribunal hearings, and all other legal matters that are of proper concern to the City, should the need arise.

4.7 Staffing Levels:

The City shall maintain a staffing level at a minimum of 4 FTE's to ensure the assessing office has adequate staff to complete the 20% reappraisal program and daily processing of documents, permit-s and special assessments.

SECTION V: REAPPRAISAL AND OTHER NON-BASIC SERVICES

5.1 Additional Services (Pricing/Reappraisal):

In the event that the City desires to implement some or all of the recommendations made by the Contractor as herein contemplated, the City may request and the Contractor shall provide such services as are desired by the City, provided however, an addendum to this Agreement, reduced to writing and executed by both parties, shall set forth the terms and provision under which the additional services shall be rendered. Such addendum shall specify the nature, extent and timetable for the performance of such additional services and establish the rate of compensation therefor.

5.2 Implementation/Responsibility:

The parties acknowledge that it shall be the sole responsibility of the City to determine the nature and extent of implementation of the Contractor's recommendations under this Section or any other additional, non-basic services. To that end, the City assumes responsibility for defense of any claim, cause of action or other proceeding that may or might be instituted by the Michigan State Tax Commission, or other entity, arising from any failure, or alleged failure, to implement such recommendations.

SECTION VI: MISCELLANEOUS PROVISIONS

6.1 Relationship Between City and Contractor:

In the fulfillment of the services provided herein the Contractor and its employees, agents and officers shall be at all times be deemed in a relationship of independent contractor to the City.

6.2 Indemnification/Insurance:

The Contractor shall secure and maintain general liability and property damage, unemployment, errors and omissions, workers' disability compensation, automobile liability and any other insurance required by law for the Contractor, or its employees, agents or officers as will protect him and the City from claims (including claims under the Workers' Compensation Acts) for bodily injury, death or property damage that may arise from its negligence or that of its employees in the performance of services under this Agreement or failure to properly perform its duties as described herein. The Contractor shall save the City harmless and defend and indemnify the City from any claims for bodily injury, death or property damage that may arise due to its acts or negligence or that of its employees in the performance of services under this Agreement or that arise from his error or omission to properly perform its duties as described herein. Contractor shall, however, have no liability arising out of adjustments to assessments or other actions by Contractor, the City's Board of Review and/or the Michigan Tax Tribunal if such adjustments or actions result from honest differences of opinion regarding the value of the subject property and if the Contractor established the assessment pursuant to professional assessment standards. The insurance policies shall be in such minimum amounts as shall from time to time be acceptable to the City or as set by the City.

A Certificate of Insurance incorporating such requirements and naming the City (and its officers and employees) as an Additional Insured Party and Certificate Holder along with a certificate showing its premium has been paid and a copy of the policy shall be filed each year with the City Clerk. Any such insurance policy shall provide that the City will be given at least thirty (30) days advance notice before cancellation of the policy. The coverages provided by the General Liability and Automobile Liability policies of the Contractor shall be primary to any insurance maintained by the City.

6.3 Non-Assignability:

The parties to this Agreement acknowledge that, inasmuch as the Agreement is in the nature of a Personal Services Contract, and as the City's decision to contract with the Contractor is based in part on the perceived expertise and ability of the Contractor, it is agreed that the Contractor's duties and obligations hereunder may not be assigned, transferred nor conveyed without the advance written approval of the City. Nothing in this Agreement shall prevent the Contractor from employing such employees or agents, as Contractor shall deem reasonably necessary to assist it in the performance of its obligations under this Agreement. Also, in the event that vacation, illness, injury or incapacity in any form, whether elective or imposed, should cause the appointed assessor to be unable to personally fulfill the terms and obligations of this Agreement for a period exceeding three (3) calendar weeks (21 days), Contractor shall provide the City, at its expense, a certified Level II Contractor to perform any and all such functions as required by this Agreement for the complete term of the appointed assessor's absence or incapacity. The City reserves the right to approve or reject, without cause and at its sole discretion, any Contractor designee named to "fill-in" for the contracted assessor for a period exceeding two (2) calendar months (60 days)..

6.4 Professional Standards:

The Contractor shall be responsible, to the highest levels of competency presently maintained by other practicing professional assessors and appraisers, for the professional and technical soundness, accuracy and adequacy of property valuations, drawings, property inspection data and all other work and materials furnished under this Agreement. At the time of commencement of performance, Contractor shall be properly certified, equipped, organized and financed to perform the services required by this Agreement. Subject to compliance with the requirements of this Agreement, the Contractor shall work independently.

6.5 Ownership of Documents:

All documents, data, drawings, specifications, photographs, property cards, summaries, accounts, reports, software applications and other information, products or materials produced or held by the Contractor, of whatsoever nature or type, in connection with this Agreement shall be the sole property of the City with the City having sole and exclusive right, title and interest in any and all records, compilation, documents, papers, maps or manuscripts pertaining to or prepared pursuant to this Agreement. All of the foregoing shall be forwarded to the City at its request and may be used by the City as it sees fit. The City agrees that if any of the foregoing prepared by the Contractor are used for purposes other than those intended by this Agreement, the City does so at its sole risk and agrees to hold Contractor harmless for such use. All services performed under this Agreement shall be conducted solely for the benefit of the City and will not be used for any other purpose by Contractor without written consent of the City. Any information relating to the services shall not be released without the written permission of the City. The Contractor shall act and preserve the confidentiality of all City documents and data accessed for use in Contractor's work products to the extent allowed or required by law. Any requests for information under the Freedom of Information Act shall be immediately forwarded to the City Attorney's office for a proper determination of the response to be provided.

6.6 Attorney's Fees:

In the event of material breach of this Agreement by either party, it is agreed that the non-defaulting party shall be permitted to recover, in addition to any other remedies as may be available to it, at law or at equity, all reasonable attorney's fees and costs incurred as a direct result or consequence of such breach.

6.7 Validity:

If any paragraph or provision of this Agreement shall be determined to be unenforceable or invalid by any court of competent jurisdiction, such provision shall be severed and the remainder of this contract shall remain in force.

6.8 Survival:

All express representations, indemnifications or limitations of liability made in or given in this Agreement shall survive the completion of all services of Contractor under this Agreement or the termination of the Agreement for any reason.

6.9 Controlling Law/Venue:

This Agreement is to be governed by the laws of the State of Michigan. It is mutually agreed that, in the event of any proceeding, at law or at equity, arising under this Agreement or breach thereof, that the venue of any such action shall be in the County of Jackson and the State of Michigan.

6.10 Authorization:

The respective signatories hereto expressly acknowledge that this Agreement is made and entered into with full authority of the City of Jackson's City Council and Quality Assessing Services LLC. and that the persons executing this Agreement on behalf of the respective parties have been duly authorized and empowered to make and enter into this Agreement by said City Council and said Contractor.

6.11 Covenant Not To Discriminate:

Contractor agrees not to discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight, or marital status and to comply with all other State and Federal laws, including but not limited to the Americans with Disabilities Act. Contractor further agrees that any services, programs and activities delivered pursuant to this Agreement shall be delivered without discrimination on the basis of disability, in accordance with the Americans with Disabilities Act and Rules promulgated pursuant thereto.

6.12 Entire Agreement:

This Agreement constitutes the entire agreement for professional assessing services by and between the City, Contractor, and Jason Yoakam, as appointed City Assessor. This Agreement supersedes and any all prior employment agreements by and between the City and Jason Yoakam, whether written or oral, as of the date executed.

IN WITNESS WHEREOF, the parties hereto have set their hands and seals the day and year first above written.

City of Jackson:

By: _____
_____, City Manager

By: _____
_____, City Clerk

Quality Assessing Services LLC.

By: _____
Jason Yoakam Owner

AGREEMENT FOR PROFESSIONAL CONTRACTOR SERVICES

THIS AGREEMENT (“Agreement”), made and entered into this 19 day of April, 2022, by and between the **CITY OF JACKSON**, 161 W Michigan Ave, Jackson MI 49201, hereinafter referred to as “City,” and Quality Assessing Services LLC, 5912 S Rickfield Rd, Jackson MI 49201, hereinafter referred to as “**CONTRACTOR.**”

WITNESSETH:

WHEREAS, it is the intent of the City to retain Contractor to perform the duties as its certified assessor as an independent contractor.

WHEREAS, Contractor retains qualified personnel with the proper State certification to act in that capacity for and on behalf of the City; and

WHEREAS, the parties wish, by this Agreement, to define their respective rights and responsibilities during the term of this Agreement.

NOW, THEREFORE, for and in consideration of the mutual covenants herein expressed, **IT IS HEREBY AGREED** by and between the parties hereto as follows:

SECTION I: BASIC SERVICES OF THE CONTRACTOR

The following are deemed services or requirements included in the compensation of the Contractor under Section III - Payment unless otherwise stated:

1.1 Performance By Appointed Assessor:

By approving this Agreement, City Council is appointing Jason Yoakam as the City Assessor. It is the parties’ intent that Mr. Yoakam be employed solely by Contractor. The Contractor shall ensure that Mr. Yoakam has and maintains his assessor certification level of Michigan Master Assessing Officer (MMAO) during the term of this Agreement.

1.2 General Duties:

The Contractor shall be required to perform all duties of an assessor pursuant to Michigan statutes and laws, as are required by City Charter and ordinance, and all other rules and guidelines established for the proper performance of said position, and as same may be from time to time amended, while this Agreement is in effect, and shall conduct and perform same in accordance with all applicable standards of professional conduct required of such assessors. Said duties shall include, but not be limited to, any and all requirements made effective or promulgated under Michigan Public Act 415 of 1994. Jason Yoakam, as appointed City Assessor, shall further assume all duties as required of a City department head. In the event material changes in the laws, statutes, rules, ordinances, guidelines during the term of this Agreement result in a substantial additional work burden on the Contractor, then the Contractor and City shall renegotiate the compensation paid pursuant to the terms and provisions of this Agreement. For purposes of this paragraph, the term “substantial additional work burden” shall be determined to exist by mutual agreement of the parties to this Agreement, provided, in the event the parties cannot agree as to whether a substantial additional work burden has been imposed upon the Contractor, then the parties shall select a

mutually agreeable mediator who shall make such determination and whose determination shall be final, however, said mediator shall not have authority to establish the amount of additional compensation, if any.

1.3 Office Hours:

During the term hereof, the Contractor shall maintain eight (8) office hours every two weeks at City Hall at the above address, as follows:

- A. The Contractor shall devote eight (8) hours every two weeks to maintaining office hours at the City office for public appointments.
- B. If specified office days of the Contractor fall on a day recognized as a holiday to City employees, then it will be recognized as a holiday by the Contractor, however, an alternate day may be substituted.

1.4 Public Relations/Customer Service:

The Contractor shall work with and advise property owners in the ad valorem taxation system in an attempt to eliminate adversarial situations and establish positive public relations. The parties acknowledge that holding specific office hours for the public is valuable in the process of providing high quality customer service. The City wants to ensure that members of the public and City staff that need information from the Contractor, or wish to speak to Contractor, are able to do so on a relatively convenient basis. In that regard, in addition to the hours specified in Paragraph 1.3, the Contractor agrees to meet with or contact residents and City staff members beyond normal office hours as appropriate to address their tax assessment-related concerns. Phone calls and answers to e-mails and faxes will be responded to in a timely manner, expected within 24 hours of receipt by the Contractor.

1.5 New Construction/Loss Adjustment:

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1.6 Economic Condition Factors (ECF):

During the term hereof, the Contractor shall review and prepare new land values and economic condition factors (ECF) by areas and apply these factors to property records so that the current assessment is reflected as 50% of true cash value on the assessment record.

1.7 “Proposal A” Requirements:

The requirements of Michigan Public Act 415 of 1994 and all related property tax reform legislation amendments and updates shall be followed and monitored as required. This includes by example, but is not limited to, the filing of all associated reports and forms to fulfill the following requirements:

- A. Approve or deny homestead exemptions;

- B. Track property transfer affidavits, matching them with deeds within 45 days of being filed;
- C. Apportion the homestead portion of a combination-use building;
- D. Determine the homestead status of parcels resulting when homestead parcels are split or combined; and
- E. Calculate both assessed and tentative taxable values for all parcels, taking into consideration losses, new construction and replacement in any given year.

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1.9 Annual Reports:

The Contractor shall prepare a report annually summarizing the entire year that shall advise the City of the overall activities, progress, problems and corrective measures regarding the various aspects of the duties of the Contractor under this Agreement. The City shall have the right at any time to require the Contractor to make available to the City, within 48 hours of notice being provided, all records and documents developed and maintained by the Contractor under the terms of this Agreement for review and audit. All time spent in the preparation and presentation of such reports or in gathering and making information available to City by the Contractor shall be deemed a part of the services contracted under the terms and provisions of this Agreement.

1.10 Board of Review:

The Contractor shall have staff available for each of the two (2) March Board of Review sessions. (In the event the City chooses to hold additional meetings, the Contractor may choose to have a certified staff member in attendance in their absence.) March Board of Review sessions shall be scheduled as provided in the City Charter, within the time limits prescribed by law.

The Contractor shall provide adequate information to the Board of Review members as to how the assessments, capped and taxable values were determined to allow them to determine how best to decide a taxpayer's appeal.

The Contractor shall also attend and serve as secretary at the March, July and December Boards of Review. If the Contractor is unable to attend these sessions, however, the Contractor must supply the City Clerk with a written agenda for the Board of Review that contains the reasons for all recommended adjustments.

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The Contractor shall prepare sales studies using available data and evaluate all equalization and/or appraisal studies and respond as appropriate.

1.12 Forms:

The Contractor shall file all forms fully completed with the Jackson County Equalization Department, State Tax Commission and other agencies and entities, as required, in a timely manner.

1.13 Defense of Appeals:

This Section shall apply to real and personal, IFT and ad valorem property tax appeals.

The City shall retain ultimate control of all litigation and settlement negotiations and Contractor shall operate under the direction of the City in any litigation regarding a tax appeal, including appeals to the Small Claims Division.

Any appeal to the Tax Tribunal will be referred to the City Attorney. If counsel shall desire the assistance of the Contractor in the defense of such appeals, additional fees for preparing necessary appraisals and/or consultation shall be reviewed in advance by the City and agreed upon on a case-by-case basis. The City may choose to retain the Contractor to prepare this report or may employ another firm to prepare a supportable and defensible report for an additional fee.

The Contractor shall defend all appeals to the Small Claims Division of the Michigan Tax Tribunal. This shall include, but not be limited to, filing necessary petitions, preparing and submitting such material, statistics and other information as is necessary to properly defend any such appeal, and appearing at all hearings and meetings as are required for the purpose of defending said appeal. City hereby authorizes Contractor, subject to approval by City Attorney, to settle where Contractor deems it appropriate or advisable any appeal. All the foregoing regarding appeals to the Small Claims Division is deemed to be included the services compensated pursuant to the terms and provisions of this Agreement.

In all other potential appeals to the Michigan Tax Tribunal or State Tax Commission, Contractor shall provide as part of the services included under the terms and provisions of this Agreement such time and effort as is necessary to properly provide to City information, documents, analysis and advice as may be required in the determination of the Contractor or the City to forestall the formal filing of an appeal or to settle a disputed case up to the date of the filing of a petition appealing a decision of the City or any of its agencies or boards to the Michigan Tax Tribunal or State Tax Commission. After the filing of said petition, the Contractor shall make the appointed assessor available to the City for such further assistance as is required by the City in the defense of such appeal. The Contractor shall make the appointed assessor available as an expert witness on behalf of the City in any proceedings. Mileage expenses for out-of-city travel required for appearance at Tax Tribunal hearings or State Tax Commission hearings shall be reimbursed at the rate per mile recognized by the Internal Revenue Service's allowance for business use of an automobile. In the event of the termination of this Agreement and the necessity for the services of the Contractor for purposes of consulting, review of information, analysis or expert testimony after the date of termination, the Contractor shall make the appointed assessor available, notwithstanding the termination of this Agreement, for assistance in the defense of such appeals, provided, same shall not apply to appeals filed in the Small Claims Division of the Michigan Tax Tribunal. Contractor shall keep the City Attorney informed of appeals and provide the City Attorney with any

recommendation regarding said proceedings, the manner in which the same are to be handled, any proposed settlement and like advice if needed.

The provisions of Paragraph 1.13 regarding appeals shall be and are hereby incorporated regarding any appeal of a personal property tax assessment.

1.14 Reappraisal Program:

This contractor shall oversee the annual inspection of 20% (+/-) of the properties in each class. Physical inspection and pricing of the same shall be completed by the City employees at the direction of the Contractor. Should the City desire all properties to be re-inspected in less than a 5 year timeframe, there may be additional charges as well as a contract addendum pursuant to Section 5.1.

1.15 Personal Property Statements, Canvas and Audits:

The Contractor shall prepare and maintain the mailing list for personal property tax statements and maintain records for personal property including data entry and calculation of depreciated values and their extension within each statement. The Contractor shall conduct a personal property canvas to ensure equity among business owners within the City. The Contractor is required to perform random personal property audits when warranted by questionable data or lack of submitted data.

1.16 Equalization Increases:

The Contractor shall strive to eliminate across-the-board increases in property values by applying any increases received through the Jackson County Equalization Department to appropriate areas by using the economic condition factors hereinabove described, by adjustment of individual property assessments to 50% of true cash value, or as required by the State Tax Commission, in order to achieve maximum equity by class, and in accordance with the latest laws and regulations then in force. The Contractor shall represent the City when requested by the City Manager by attending any annual Jackson County equalization meetings.

1.17 Land Division Applications:

The Contractor shall assist City staff in reviewing land division applications.

1.18 Transportation and Equipment:

The Contractor shall provide all necessary transportation for contractor staff and field equipment to perform the services and meet the requirements of this Agreement.

1.19 Indemnification/Employment:

The parties hereto acknowledge that all personnel, except any current employees of the City, that may or might be utilized by the Contractor in the performance of its duties hereunder shall, for all purposes, be considered employees of the Contractor and not employees of the City. The Contractor shall be responsible for Workers' Compensation, Unemployment Compensation, state and federal withholding and payment of personnel. The Contractor shall indemnify the City and hold the City harmless from any claim, cause of action or other liability that may or might arise by virtue of any claim of any employee of the Contractor relating to his/her employment by Contractor.

1.20 Tax Increment Finance Authority:

The Contractor shall be responsible for the recording of any property value changes, new or loss, on the ad valorem assessment roll, specific tax rolls (IFTs, Commercial Rehab. District OPRAs, PILTs, TIFs, Tool & Die Renaissance Recovery Zone, etc.) and special assessment rolls relating to the designation of properties as within the Downtown Development Authority (DDA) District boundaries.

1.21 Contractor's Recommendations:

On or before December 31, 2023, at the City Manager's request, the Contractor shall prepare written recommendations and conclusions regarding the current state of the City's assessment rolls, by class, together with specific recommendations concerning actions which, in the opinion of the Contractor, should be taken in order to achieve maximum equity in the assessment rolls and compliance with all State Tax Commission rules, regulations and guidelines. Such report shall be submitted to the City manager for his review. Preparation and submission of such recommendations shall be a part of the Basic Services to be performed by the Contractor under this Agreement.

1.22 Security of Information:

If any documents, data, drawings, specifications, photographs, property cards, summaries, accounts, reports, software applications or other products or materials are held in the possession of the Contractor outside of the City offices, then Contractor shall be under an affirmative duty to provide adequate security to safeguard said materials from fire, theft and other hazards of a like nature or type, while same are in possession of the Contractor. This may include, but not be limited to, providing for a fire proof safe or vault in which to store same, preparing and holding duplicates of same in the possession of the Contractor, but separately or providing same to the City for possession. Said security measures shall be deemed a part of the Basic Services to be provided hereunder as part of the costs to be borne by the Contractor.

1.23 Special Assessments:

The Contractor is responsible for determination and conducting the preparation of special assessment rolls for City projects such as streets and meterless parking. The Contractor shall work with City departments and staff in the gathering and preparation of special assessments, and same shall be deemed part of the services required by this Agreement.

SECTION II: TERM OF AGREEMENT

2.1 Contract Period:

The Contractor shall commence performance of the services herein required on May 1, 2022. Unless sooner terminated, this Agreement shall, by its terms, expire April 30, 2023.

2.2 Mutual Right of Termination:

Either party may terminate this Agreement upon ninety (90) days written notice to the other. This right of termination is specifically exercisable at the sole discretion of either party, and requires no just cause or other reason or justification for the exercise thereof. The effective date of such termination shall be ninety (90) days from the date of mailing of such notice by certified mail/return receipt requested.

2.3 Termination for Cause or Breach:

Notwithstanding anything to the contrary on this Agreement, either party may immediately terminate this Agreement in the event of material breach by the other. In such case, either party may seek such remedies as shall be available, at law or equity.

2.4 Notice of Termination:

Upon receipt of notice of termination or upon termination of this Agreement by expiration of its term, the Contractor shall immediately deliver to the City copies of all data, paper and computer files, drawings, specifications, reports, value estimates, summaries and other information and materials as may have been accumulated by the Contractor in performing the Agreement, whether completed or in process and same shall be in unaltered form, readable by the City. In the event of the failure or refusal of the Contractor to forthwith deliver the above referenced materials, documents and files, City may seek a Circuit Court order compelling the production of same forthwith, and the Contractor herein expressly waives notice of hearing thereon agreeing that a mandatory injunction may immediately issue due to the fact that the failure to receive the stated materials, documents and files will result in irreparable harm to the City without leaving the City an adequate remedy at law, thereby entitling the City to an immediate judgment in its favor in this regard. City shall be entitled to damages from Contractor for any information, materials or documents which are turned over to City in unusable or altered form.

2.5 Amendment/Renegotiation:

Nothing herein contained shall be construed to limit or abrogate the rights of the parties to modify or amend this Agreement at any time hereafter, provided however, that no such amendment or modification shall be effective unless in writing and duly executed by both parties hereto, through their authorized representatives.

If the Agreement is not renewed or extended prior to its expiration date, and the City desires to have the Contractor continue on a month-to-month basis, the fee will be that which existed for the final month of the previous term, being April 1, 2023.

SECTION III: PAYMENT

3.1 Compensation for Basic Services:

During the term of this Agreement, which shall be from May 1, 2022 - April 30, 2023, unless sooner canceled or terminated under the provisions of Section II herein, the City agrees to pay to the Contractor for performance of the Basic Services set forth in Section I of this Agreement as follows:

During the period May 1, 2022 through April 30, 2023, the sum of \$99,600 at a rate of \$8,300 per month.

3.2 Proration of Payments on 90-Day Termination:

In the event this Agreement is terminated pursuant to Paragraph 2.2, City shall pay Contractor to the date of termination on a prorated daily basis for any part of a month for which services have been rendered by Contractor and for which no compensation has been received.

SECTION IV: CITY RESPONSIBILITIES

4.1 Basic Data:

The City shall provide access to Contractor to property description files as currently exist as of the date of execution of this Agreement, containing initial information such as property number, legal description, owner and address information, as well as all data that the City may possess concerning such properties (i.e. measurements, sketches, photographs, etc.).

4.2 Office Equipment:

The City shall provide the Contractor with appropriate tax parcel maps, office space and furniture, telephone, personal computer, printers, copying machine, fax machine, and office supplies (as defined in Paragraph 4.5) as reasonably needed during the duration of this Agreement. Contractor acknowledges that some of the equipment (i.e. fax, printers, copying machine) is shared among all administrative office personnel, and the Contractor will not have exclusive use of such equipment.

The Contractor shall have access, including remote access, to the City's computer network for the use of the following software products: BS&A, Microsoft Office, ARC Gis, and other applications already in use by the City Assessor's office. The City's Internet website will also have available on-line to the Contractor and the public the property record cards, digital photographs and tax payment information. The Contractor shall not download or upload any software to the City's network, except with the City's prior written approval. The Contractor shall be liable for any adverse consequence upon the City's computer network or function caused by any software introduced in the network by the Contractor without prior written consent of the City. Further, Contractor shall be liable for any act of negligence on the part of the Contractor in creating or causing an adverse consequence to the City's computer network.

The Contractor agrees that City equipment shall be used only for the purposes of fulfilling Contractor's obligations under this Agreement and shall not be used for personal reasons or to conduct other business not authorized under this Agreement.

4.3 Computer:

The City shall supply computer hardware, software and peripherals necessary to fulfill the Contractor's duties under this Agreement. The City will maintain the hardware, software and peripheral equipment through a regular maintenance program. The City will back up the system on a daily basis with alternate tapes, disks or any other generally accepted medium of methods that ensure the recovery of data. Any data loss not due to the negligence of the Contractor as a result of hardware or software malfunction will be replaced at the City's expense.

4.4 Map Maintenance/Tax Roll Printing:

The City shall continue the maintenance of tax maps through their GIS office and cooperation with Jackson County GIS in the maintenance of the parcel layer. Contractor will, when applicable, request approval from the Michigan Department of Treasury for continuation of computerized tax roll system.

4.5 Office Supplies:

The City shall provide the Contractor with office supplies, including computer paper, file folders, hanging folders, assessment notices and forms, postage and such other supplies as shall be necessary for the performance of Contractor's responsibilities hereunder.

4.6 Legal Counsel:

The City shall supply legal counsel, at its expense, for Small Claims, full Tax Tribunal hearings, and all other legal matters that are of proper concern to the City, should the need arise.

4.7 Staffing Levels:

The City shall maintain a staffing level at a minimum of 4 FTE's to ensure the assessing office has adequate staff to complete the 20% reappraisal program and daily processing of documents, permits and special assessments.

SECTION V: REAPPRAISAL AND OTHER NON-BASIC SERVICES

5.1 Additional Services (Pricing/Reappraisal):

In the event that the City desires to implement some or all of the recommendations made by the Contractor as herein contemplated, the City may request and the Contractor shall provide such services as are desired by the City, provided however, an addendum to this Agreement, reduced to writing and executed by both parties, shall set forth the terms and provision under which the additional services shall be rendered. Such addendum shall specify the nature, extent and timetable for the performance of such additional services and establish the rate of compensation therefor.

5.2 Implementation/Responsibility:

The parties acknowledge that it shall be the sole responsibility of the City to determine the nature and extent of implementation of the Contractor's recommendations under this Section or any other additional, non-basic services. To that end, the City assumes responsibility for defense of any claim, cause of action or other proceeding that may or might be instituted by the Michigan State Tax Commission, or other entity, arising from any failure, or alleged failure, to implement such recommendations.

SECTION VI: MISCELLANEOUS PROVISIONS

6.1 Relationship Between City and Contractor:

In the fulfillment of the services provided herein the Contractor and its employees, agents and officers shall be at all times be deemed in a relationship of independent contractor to the City.

6.2 Indemnification/Insurance:

The Contractor shall secure and maintain general liability and property damage, unemployment, errors and omissions, workers' disability compensation, automobile liability and any other insurance required by law for the Contractor, or its employees, agents or officers as will protect him and the City from claims (including claims under the Workers' Compensation Acts) for bodily injury, death or property damage that may arise from its negligence or that of its employees in the performance of services under this Agreement or failure to properly perform its duties as described herein. The Contractor shall save the City harmless and defend and indemnify the City from any claims for bodily injury, death or property damage that may arise due to its acts or negligence or that of its employees in the performance of services under this Agreement or that arise from his error or omission to properly perform its duties as described herein. Contractor shall, however, have no liability arising out of adjustments to assessments or other actions by Contractor, the City's Board of Review and/or the Michigan Tax Tribunal if such adjustments or actions result from honest differences of opinion regarding the value of the subject property and if the Contractor established the assessment pursuant to professional assessment standards. The insurance policies shall be in such minimum amounts as shall from time to time be acceptable to the City or as set by the City.

A Certificate of Insurance incorporating such requirements and naming the City (and its officers and employees) as an Additional Insured Party and Certificate Holder along with a certificate showing its premium has been paid and a copy of the policy shall be filed each year with the City Clerk. Any such insurance policy shall provide that the City will be given at least thirty (30) days advance notice before cancellation of the policy. The coverages provided by the General Liability and Automobile Liability policies of the Contractor shall be primary to any insurance maintained by the City.

6.3 Non-Assignability:

The parties to this Agreement acknowledge that, inasmuch as the Agreement is in the nature of a Personal Services Contract, and as the City's decision to contract with the Contractor is based in part on the perceived expertise and ability of the Contractor, it is agreed that the Contractor's duties and obligations hereunder may not be assigned, transferred nor conveyed without the advance written approval of the City. Nothing in this Agreement shall prevent the Contractor from employing such employees or agents, as Contractor shall deem reasonably necessary to assist it in the performance of its obligations under this Agreement. Also, in the event that vacation, illness, injury or incapacity in any form, whether elective or imposed, should cause the appointed assessor to be unable to personally fulfill the terms and obligations of this Agreement for a period exceeding three (3) calendar weeks (21 days), Contractor shall provide the City, at its expense, a certified Level II Contractor to perform any and all such functions as required by this Agreement for the complete term of the appointed assessor's absence or incapacity. The City reserves the right to approve or reject, without cause and at its sole discretion, any Contractor designee named to "fill-in" for the contracted assessor for a period exceeding two (2) calendar months (60 days)..

6.4 Professional Standards:

The Contractor shall be responsible, to the highest levels of competency presently maintained by other practicing professional assessors and appraisers, for the professional and technical soundness, accuracy and adequacy of property valuations, drawings, property inspection data and all other work and materials furnished under this Agreement. At the time of commencement of performance, Contractor shall be properly certified, equipped, organized and financed to perform the services required by this Agreement. Subject to compliance with the requirements of this Agreement, the Contractor shall work independently.

6.5 Ownership of Documents:

All documents, data, drawings, specifications, photographs, property cards, summaries, accounts, reports, software applications and other information, products or materials produced or held by the Contractor, of whatsoever nature or type, in connection with this Agreement shall be the sole property of the City with the City having sole and exclusive right, title and interest in any and all records, compilation, documents, papers, maps or manuscripts pertaining to or prepared pursuant to this Agreement. All of the foregoing shall be forwarded to the City at its request and may be used by the City as it sees fit. The City agrees that if any of the foregoing prepared by the Contractor are used for purposes other than those intended by this Agreement, the City does so at its sole risk and agrees to hold Contractor harmless for such use. All services performed under this Agreement shall be conducted solely for the benefit of the City and will not be used for any other purpose by Contractor without written consent of the City. Any information relating to the services shall not be released without the written permission of the City. The Contractor shall act and preserve the confidentiality of all City documents and data accessed for use in Contractor's work products to the extent allowed or required by law. Any requests for information under the Freedom of Information Act shall be immediately forwarded to the City Attorney's office for a proper determination of the response to be provided.

6.6 Attorney's Fees:

In the event of material breach of this Agreement by either party, it is agreed that the non-defaulting party shall be permitted to recover, in addition to any other remedies as may be available to it, at law or at equity, all reasonable attorney's fees and costs incurred as a direct result or consequence of such breach.

6.7 Validity:

If any paragraph or provision of this Agreement shall be determined to be unenforceable or invalid by any court of competent jurisdiction, such provision shall be severed and the remainder of this contract shall remain in force.

6.8 Survival:

All express representations, indemnifications or limitations of liability made in or given in this Agreement shall survive the completion of all services of Contractor under this Agreement or the termination of the Agreement for any reason.

6.9 Controlling Law/Venue:

This Agreement is to be governed by the laws of the State of Michigan. It is mutually agreed that, in the event of any proceeding, at law or at equity, arising under this Agreement or breach thereof, that the venue of any such action shall be in the County of Jackson and the State of Michigan.

6.10 Authorization:

The respective signatories hereto expressly acknowledge that this Agreement is made and entered into with full authority of the City of Jackson's City Council and Quality Assessing Services LLC. and that the persons executing this Agreement on behalf of the respective parties have been duly authorized and empowered to make and enter into this Agreement by said City Council and said Contractor.

6.11 Covenant Not To Discriminate:

Contractor agrees not to discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight, or marital status and to comply with all other State and Federal laws, including but not limited to the Americans with Disabilities Act. Contractor further agrees that any services, programs and activities delivered pursuant to this Agreement shall be delivered without discrimination on the basis of disability, in accordance with the Americans with Disabilities Act and Rules promulgated pursuant thereto.

6.12 Entire Agreement:

This Agreement constitutes the entire agreement for professional assessing services by and between the City, Contractor, and Jason Yoakam, as appointed City Assessor. This Agreement supersedes and any all prior employment agreements by and between the City and Jason Yoakam, whether written or oral, as of the date executed.

IN WITNESS WHEREOF, the parties hereto have set their hands and seals the day and year first above written.

City of Jackson:

By: _____
_____, City Manager

By: _____
_____, City Clerk

Quality Assessing Services LLC.

By: _____
Jason Yoakam Owner

MEMOTO: Mayor and City Councilmembers

FROM: Jason Yoakam, City Assessor 

DATE: April 11, 2022

SUBJECT: Recommend Adoption of Revised Special Assessment Policy

Recommendation: Adopt the proposed Revised Special Assessment policy.


The Revised Special Assessment policy addresses the current complexity of the Special Assessment policy by switching from a front-foot calculation to a per-unit calculation.

This change would eliminate many of the cumbersome calculations required for the front-foot calculations.

The above action will allow the policy to be applied uniformly for all infrastructure improvements.

Attachments

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jason Yoakam 
DATE: April 11, 2022
RECOMMENDATION: Recommend Adoption of Revised Special Assessment Policy

SUMMARY

Special assessments must follow a guiding principle that *the amount specially assessed must be reasonably proportionate to the benefit received*. Benefit, for the purposes of special assessments, is an increase in the market value of the land as a result of the improvement. I propose a per-unit calculation to replace the front-foot calculation for infrastructure improvements. Although both methods have merit, the per-unit method is a valid approach that is far more efficient to administer.

BUDGETARY CONSIDERATIONS

Special assessments are an important part of municipal finance which includes a portion of the funding necessary to provide for infrastructure improvements. Through the Special Assessment policy, City Council defines what is reasonably proportionate to the benefit received. The per-unit method will yield different results than the front-foot method, however, an analysis of previously confirmed special assessments shows variation in both increased and decreased assessments.

HISTORY, BACKGROUND and DISCUSSION

The special assessment policy was established on September 8, 1987 and has been revised several times since; this would be the ninth revision. Revisions have included street lists, installment years, amounts specially assessed, and many other details of how to facilitate the assessment process. The requested revision on this agenda item addresses simplifying how individual assessment are calculated.

POSITIONS

Recommend adoption of Revised Special Assessment Policy.

ATTACHMENTS:

Mark-up page from current Special Assessment policy illustrating requested changes.
Revised Special Assessment Policy.
Memo of Explanation to City Manager.

MEMOTO: Jonathan Greene, City Manager

FROM: Jason Yoakam, City Assessor 

DATE: April 11, 2022

SUBJECT: Special assessment policy

Manager Greene,

I would like to request your review of proposed changes to the Special Assessment Policy Resolution, the most recent version of which was passed by City Council on December 17, 2019. To present my case for policy change I will follow the Issue Reason Analysis and Conclusion (IRAC) method in hopes that my position is clearly conveyed. If any of the information presented needs further explanation please do not hesitate to contact me.

Issue: In my fifteen plus years with the City of Jackson I have watched, sometimes at my own hand, a policy evolve that has become ever more complicated and administratively cumbersome. The current policy takes a significant amount of staff time to prepare and is difficult to explain to those that have to pay it.

Reason: To have a policy that is rooted in the meaning of the term special assessment. For explanation of this reason we need look no further than *City Charter Section 15.1 (excerpt) ...The council shall so declare by resolution and shall provide that all special assessments levied shall be based upon or be in proportion to the benefits derived or to be derived*. This position of proportionality to benefit is the crux of all special assessments. Benefit, in the context of special assessments, means an increase in the market value of property. The Michigan Supreme Court explains: *"In order for an improvement to be considered to have conferred a special benefit, it must cause an increase in the market value of the land."* (*Ahern v Bloomfield Twp, 493*).

Analysis: Traditionally the thought of benefit has been placed in use. As I recall a discussion with the city engineer when I first proposed a policy change of this nature he questioned the functionality of the policy when considering the hospital and the power plant as examples of inequity that the proposed changes would create. I'm thankful for his constructive criticism as these issues cannot go unchecked or unchallenged. I know it is difficult to detach the use of a heavily trafficked property like the hospital from the idea of receiving a benefit from the road that its customer use, and indeed he is correct that the hospital does benefit from the road in greater proportion to the surrounding properties in regards to traffic. Traffic, however, is not how the Michigan Supreme Court has defined benefit and that is the paradigm shift that may be the most difficult to accept.

Current policy changes the amount to be specially assessed based on street classification, type of property, type of road, construction type, value of property, use of the property in conjunction with surrounding lots, irregular shaped lots, corner lots, type of development and size of assessment to calculate installments. Although each of the items I mentioned in the current policy have merit, the matter before council is simple; the assessment is

either deemed reasonably proportionate to benefit, or it is not. Building a policy based on the root of the meaning of a special assessment can yield a much simpler and easy to understand policy that, in the end, council must still decide is either deemed reasonably proportionate to benefit or it is not. Over the last three years the Assessor's office worked on 26 special assessment rolls for street construction and street lighting (2019 -2021), with over 1,250 hours dedicated to administering the current policy. This equals out to just over 48 hours of staff time per roll. The lion's share of time is spent verifying the front feet of ownership. As a single foot can equate to hundreds of dollars in someone's assessment, this is a critical step to get right.

I propose a per-unit method and here is why. The front foot method allocates a different value based on the amount of frontage. As assessments are reasonably proportionate to benefit, the front foot method allocates assessments with the idea that more road frontage confers a greater benefit, or increase in market value, to a property. Although this method may have application from a cost allocation perspective, it is a more challenging approach when increase in market value is the charge. Roads are used to gain access to property and in that there is a benefit, however, I do not see homeowners paying more for their home because it had "x" number of front feet on a particular road, or realtors listing residential properties boasting of the home's road frontage. In a per-unit method, allocation is divided among property owners. I propose this method as it is, in my opinion, a more true method to the root of what a special assessment is. The proposed policy changes also remove many other components in order to create an easy to understand and functional policy that will accomplish the same task with much greater efficiency.

Street classification is an engineering function based on traffic count and is currently used to create a percentage based grid to allocate costs labeled as "Specially Assessable Benefit". I propose a simpler concept that requires little explanation; "we'll split it with you." Easy to understand; the city will pick up half and half will be split between the property owners. The city would also pick up the extra for exempt or SEV capped parcels.

Also eliminated from this proposed policy is the integrated site section. A difficult to administer section that requires research to understand how different parcels may be used in conjunction with each other. For example, if I own a house and also own a separate but contiguous vacant lot, the portion of the special assessment not collected due to SEV cap from the vacant lot would be transferred to the house parcel to the extent that it too then becomes SEV capped. This section of the policy comes at an administrative expense that sees little to no change in special assessments.

The irregular shape of lots would no longer be a concern. On a per-unit basis you are either in the special assessment district or you are not. Current corner lot policy would see a change as well. Currently the longest side of a parcel gets a 33% reduction with the other side paying full rate. I propose changing this to a percent reduction based on number of streets where the property holds non frivolous frontage, with a denominator no greater than 4 (25% or 4 sides).

Lastly, this proposal reimagines the approach for non-residential properties. The current policy addresses this in bullet point 10 where, with the assistance of engineering staff, a Residential Equivalent Unit (REU) was developed that was used as a percentage of the front foot rate in conjunction with the minimum front foot allowed under zoning code 28-73 for single family dwellings (60 feet) to develop an amount to spread per unit of commercial multi-unit properties. To address these issues I have approached proportionality by looking at the per-unit rate as shares where each residential property is 1 share, multi-unit properties with more than 4 units is .5 shares per unit multiplied by the number of units, non-residential properties as 2 shares for properties up to two acres and properties greater than two acres will have shares equal to the acreage (5.26 acres = 5.26 shares). It is also my recommendation that we cap the contributory value of non-residential special assessment to \$30,000, twice the cap of residential.

The parts of the policy that remain unchanged include the categorizing of property as residential, non-residential and exempt. Also remaining is the 25% SEV cap and \$15,000 ceiling on residential property.

Conclusion: As mentioned, this is a paradigm shift in the way special assessments have traditionally been thought of in the city, however, I believe this policy is better seated in the intent of its purpose. I also believe that it empowers the city council to take more ownership as to the decision of being reasonably proportionate to the benefit derived, or to be derived, as the calculation is much easier to understand and explain.

I understand that special assessments are an important part of municipal finance, your concurrence, disagreement and constructive criticism are important for the policy making process and I welcome any feedback you have or may receive. I have attached a red-lined version of the current policy and a clean version of the proposed policy. Below you will find a brief analysis of the difference this policy would have made on previous rolls.

Street	Current Policy Special Assessment	Proposed Policy Special Assessment	Difference
Greenwood	\$276,842.29	\$306,388.96	\$29,546.67
Michigan	\$495,308.32	\$476,552.51	\$(18,755.81)
Kibby	\$67,868.11	\$82,030.86	\$14,162.75
Franklin	\$502,994.67	\$483,963.19	\$(19,031.48)
Crescent	\$193,736.80	\$172,414.44	\$(21,322.36)
Thompson	\$178,329.10	\$159,930.32	\$(18,398.78)

RESOLUTION

REVISED SPECIAL ASSESSMENT POLICY ~~NOVEMBER 2019~~ APRIL 2022

BY THE CITY COUNCIL:

WHEREAS, the special assessment policy is in need of revision; and

WHEREAS, it has been determined that certain revisions should be made in this policy to streamline and clarify the policy; and

WHEREAS, it is recommended the policy be changed to reflect same;

NOW, THEREFORE, BE IT RESOLVED that the special assessment policy shall be revised to read as follows:

1. Special assessment calculations shall begin by computing assessment rates in accordance with the City's Special Assessment Ordinance, allocating costs for infrastructure improvements to all assessable property within a special assessment district.

~~2. Streets within the City of Jackson shall be classified as "local streets", except those street segments herein specifically listed as "principal arterial streets", "minor arterial streets", or "collector streets". A list of non-local streets and their classifications is provided as an attachment to this policy, see "Attachment A".~~

~~3. Alleys within the City of Jackson shall be as defined by applicable plats and/or surveys.~~

4.2. For the purpose of special assessments, properties shall be categorized as:

a. Non-Residential

b. Residential (parcels containing four dwelling units or less)

c. Exempt (parcels that are owned by a governmental unit or public school that chooses to opt out of paying a special assessment)

~~e.~~

5.—The Assessor shall then apportion those allocated costs between non-assessable general City benefit and specially assessable benefit as a 50% 50% split. in accordance with the following chart:

Construction Type	Property Category	Street Classification	Non-Assessable	Specially Assessable Benefit
New	All	All	0%	100%
Street	Non-Residential	All	40%	60%
Street	Residential	Principal	85%	15%
Street	Residential	Minor	75%	25%
Street	Residential	Collector	50%	50%
Street	Residential	Local	40%	60%
All	All	Alley	20%	80%

3. Special assessments for infrastructure improvements shall not exceed 12.525% of the true-cash state equalized value of the assessed property. For residential property, no special assessment shall exceed \$ 15,000. For commercial properties, no special assessment shall exceed \$ 30,000.

6.4. Assessments will be divided on a per unit basis. Each residential parcel shall be 1 unit, all other parcels within the district will be counted as two units for properties up to two acres and properties greater than two acres will have shares equal to their acreage with the exception of apartment complexes and condominiums. Apartment complexes and condominiums with more than 4 units shall be calculated as 0.5 units times the number of units.

7. ~~At locations where multiple parcels are used and operated as a single integrated site, front footage assessment rate shall be applied equally to all parcels that comprise that integrated site as a whole regardless of the values of each individual parcel contained therein.~~

~~An integrated site shall be defined as one or more parcels that are integral to their common use (i.e. a primary building or structure with associated secondary structures, driveways, parking lots, loading zones, storage facilities, lawns, landscaping, storm water management features or appurtenances). The front footage assessment rate for all parcels within the integrated site shall be equal to that of the most improved parcel therein.~~

~~A special assessment to an integrated site for infrastructure improvements shall not exceed 12.5% of the composite value of the parcels that comprise the integrated site.~~

8. ~~The front footage assessment rate for parcel(s) of irregular shape and/or size may be adjusted to place an equitable assessment that corresponds to the benefit realized from the infrastructure improvement.~~

9.5. For residential properties with more than one, non-frivolous, street front the assessment shall be divisible by the number of street frontages, not to exceed 4. on corner lots, pursuant to City

~~ordinance Section 22-5, an adjustment will be applied to the frontage that is greater. The adjustment will be made as a factor of 0.67 to the frontage assessment rate. No adjustment will be applied to the lesser frontage.~~

- ~~10. The front footage assessment rate for parcel(s) that, due to its type of development and usage, realize a disproportionately greater benefit from an infrastructure improvement beyond that of the others included on the special assessment roll shall be adjusted correspondingly.~~

11.6. Special assessment rolls shall be prepared by the Assessor as follow:

a. Infrastructure Improvement Assessments: shall be spread over 10 years.

~~Assessments for infrastructure improvements of \$500 or less shall be paid in a single installment. Assessments for infrastructure improvements that exceed \$500 may be made in installments. The number of installments produced by the largest assessment according to the schedule below shall be applied to all properties with assessments in excess of \$500 on a given roll.~~

Assessments Between	Number of Installments
\$501 to \$1,000	2
\$1,001 to \$1,500	3
\$1,501 to \$2,000	4
\$2,001 to \$2,500	5
\$2,501 to \$3,000	6
\$3,001 to \$3,500	7
\$3,501 to \$4,000	8
\$4,001 to \$4,500	9
\$4,501 and above	10

b. Meterless Parking Assessments:

Assessments for Meterless parking shall be made annually. This assessment may be paid in installments at the discretion of City Council.~~the Assessor.~~

~~c. Delinquent Special Assessments:~~

~~Assessments for delinquent accounts receivable shall be paid within two installments.~~

12.7. This resolution shall apply to special assessment rolls that are confirmed after the date of adoption of the resolution.

* * * * *

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

I, Andrea Muray, City Clerk in and for the City of Jackson, county and state aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on December 17, 2019.

IN WITNESS WHEREOF, I have hereunto affixed my signature and the seal of the City of Jackson, Michigan, on the 18th day of December 2019.

Derek Dobies, Mayor

Andrea Muray, City Clerk

ATTACHMENT A

PRINCIPAL ARTERIAL STREETS (9000+ ADT)

~~Brown Street, from Daniel Road to Morrell Street~~
~~Cooper Street, from South Street to north City Limits~~
~~Daniel Road, from Brown Street to Wildwood Avenue~~
~~Fourth Street, from Horton Road to Greenwood Avenue~~
~~Ganson Street, from west City Limits to Elm Avenue~~
~~Kibby Road, from Denton Road to the City Limits~~
~~Louis Glick Highway, from E. Michigan Avenue to W. Michigan Avenue~~
~~Lansing Avenue, from the City Limits to Steward Avenue~~
~~Michigan Avenue, from Brown Street to Wildwood Avenue~~
~~Michigan Avenue, from Cooper Street to the east City Limits~~
~~Morrell Street, from Brown Street to West Avenue~~
~~Page Avenue, from Elm Avenue to the east City Limits~~
~~Washington Avenue, from First Street to Cooper Street~~
~~West Avenue, from the north City Limits to Kibby Road~~
~~Wildwood Avenue, from Daniel Road to Wisner Street~~
~~Wildwood Avenue, from Michigan Avenue to First Street~~
~~Wisner Street, from Boardman Road to Wildwood Avenue~~

MINOR ARTERIAL STREETS (4500-9000 ADT)

~~Argyle Street, from Brown Street to West Avenue~~
~~Blackstone Street, from Washington Avenue to Lansing Avenue~~
~~Brown Street, from Morrell Street to Denton Road~~
~~Denton Road, from Brown Street to Kibby Road~~
~~Elm Avenue, from High Street to the north City Limits~~
~~First Street, from Greenwood Avenue to Morrell Street~~
~~Francis Street, from South Street to Cooper Street~~
~~Ganson Street, from Elm Avenue to east City Limits~~
~~Greenwood Avenue, from Fourth Street to Wilkins Street~~
~~High Street, from Randolph Street to South Street~~
~~Horton Road, from Fourth Street to Park Road~~
~~Jackson Street, from Wilkins Street to Ganson Street~~
~~Kibby Road, from West Avenue to Denton Road~~
~~Lansing Avenue, from Steward Avenue to Blackstone Street~~
~~Monroe Street, from Wisner Street to West Avenue~~
~~Morrell Street, from West Avenue to Elm Avenue~~
~~North Street, from Wisner Street to Elm Avenue~~
~~Page Avenue, from East Michigan Avenue to Elm Avenue~~
~~Prospect Street, from Fourth Street to Cooper Street~~
~~South Street, from Cooper Street to Losey Street~~
~~Steward Avenue, from Lansing Avenue to Wildwood Avenue~~

~~Stonewall Road, from Horton Road to Park Road~~

~~Waterloo Avenue, from Michigan Avenue to Ganson Street~~

~~West Avenue, from Kibby Road to Fourth Street~~

MINOR ARTERIAL STREETS (4500-9000 ADT) continued

~~Wildwood Avenue, from west City Limits to Daniel Road
Wildwood Avenue, from Wisner Street to Michigan Avenue
Wilkins Street, from Greenwood Avenue to Jackson Street
Wisner Street, from Michigan Avenue to Wildwood Avenue~~

COLLECTORS (1100-4500 ADT)

~~Blackstone Street, from Lansing Avenue to Monroe Street
Blackstone Street, from Morrell Street to Washington Avenue
Clinton Road, from Monroe Street to Lansing Avenue
Cortland Street, from First Street to Francis Street
East Avenue, from Washington Avenue to Michigan Avenue
Elmdale Drive, from Hickory Street to S. Jackson Street
First Street, from Morrell Street to Wildwood Avenue
First Street, from Prospect Street to Greenwood Avenue
Fourth Street, from Greenwood Avenue to W. Michigan Avenue
Franklin Street, from Brown Street to Cooper Street
Gorham Street, from Page Avenue to Ganson Street
Griswold Street, from West Avenue to Fourth Street
Hickory Street (Ella Sharp Park), from Fourth Street to Elmdale Drive
High Street, from Wisner Street to Randolph Street
Jackson Street, from Elmdale Drive to Wilkins Street
Linden Avenue, from Fourth Street to Prospect Street
Losey Street, from South Street to High Street
Mechanic Street, from Morrell Street to Ganson Street
Michigan Avenue, from Steward Avenue to Francis Street
Monroe Street, from West Avenue to Cooper Street
North Street, from Brown Street to Wisner Street
Pearl Street, from N. Francis Street to Waterloo Avenue
Pearl Street, from Louis Glick Highway to Mechanic Street
Plymouth Street, from Waterloo Avenue to Page Avenue
Porter Street, from Cooper Street to Waterloo Avenue
Randolph Street, from Brown Street to High Street
Trail Street, from Mechanic Street to Cooper Street
Trail Street, from Steward Avenue to Jackson Street
Washington Avenue, from Brown Street to First Street
Washington Avenue, from Cooper Street to Elm Avenue
Waterloo Avenue, from Ganson Street to Porter Street
Waterloo Avenue, from Plymouth Street to Michigan Avenue
Wisner Street, from High Street to Michigan Avenue
Woodbridge Street, from Prospect Street to Greenwood Avenue~~

RESOLUTION
REVISED SPECIAL ASSESSMENT POLICY

BY THE CITY COUNCIL:

WHEREAS, the special assessment policy is in need of revision; and

WHEREAS, it has been determined that certain revisions should be made in this policy to streamline and clarify the policy; and

WHEREAS, it is recommended the policy be changed to reflect same;

NOW, THEREFORE, BE IT RESOLVED that the special assessment policy shall be revised to read as follows:

1. Special assessment calculations shall begin by computing assessment rates in accordance with the City's Special Assessment Ordinance, allocating costs for infrastructure improvements to all assessable property within a special assessment district.
2. For the purpose of special assessments, properties shall be categorized as:
 - a. Non-Residential
 - b. Residential (parcels containing four dwelling units or less)
 - c. Exempt (parcels that are owned by a governmental unit or public school that chooses to opt out of paying a special assessment)

The Assessor shall then apportion those allocated costs between non-assessable general City benefit and specially assessable benefit as a 50% 50% split.

3. Special assessments for infrastructure improvements shall not exceed 25% of the state equalized value of the assessed property. For residential property, no special assessment shall exceed \$ 15,000. For commercial properties, no special assessment shall exceed \$ 30,000.
4. Assessments will be divided on a per unit basis. Each residential parcel shall be 1 unit, all other parcels within the district will be counted as two units for properties up to two acres and properties greater than two acres will have shares equal to their acreage with the exception of apartment complexes and condominiums. Apartment complexes and condominiums with more than 4 units shall be calculated as 0.5 units times the number of units.

5. For residential properties with more than one, non-frivolous, street front the assessment shall be divisible by the number of street frontages, not to exceed 4.
6. Special assessment rolls shall be prepared by the Assessor as follow:
 - a. Infrastructure Improvement Assessments shall be spread over 10 years.
 - b. Meterless Parking Assessments:
 - Assessments for Meterless parking shall be made annually. This assessment may be paid in installments at the discretion of City Council.
7. This resolution shall apply to special assessment rolls that are confirmed after the date of adoption of the resolution.

* * * * *

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

I, Andrea Muray, City Clerk in and for the City of Jackson, county and state aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on April 19, 2022.

IN WITNESS WHEREOF, I have hereunto affixed my signature and the seal of the City of Jackson, Michigan, on the 20th day of April 2022.

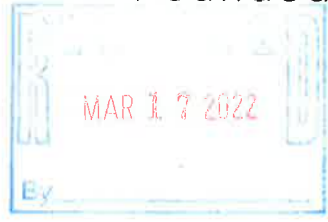
Daniel Mahoney, Mayor

Andrea Muray, City Clerk

MEMO TO: Mayor Mahoney, City Manager Greene, and City Council
FROM: Chris Atkin, Planning Director and Zoning Administrator
DATE: April 12, 2022
SUBJECT: Zoning Map Amendment – W. Ganson St.

At the regularly scheduled April 6, 2022 City of Jackson Planning Commission meeting, Commissioner Mauldin motioned, with support from Commissioner Mahoney, to recommend approval to City Council to rezone 600 Steward Avenue (Parcel # 2-11280) and 506 W. Ganson Street (Parcel # 2-11290) from C-2 Community Commercial to R-3, Multiple family residential.

The motion passed unanimously by a 4-0 vote.



Application for District Change (Rezoning)
Before the City Planning Commission
City of Jackson, Michigan

Case # PDC - _____

1. K & L HUNT Investments, LLC
Name(s)
712 TEFFT AVE, #
Street Address
Jackson, MI 49203 (517) 416-1524
City State Zip Phone Number
kandl.invest7@gmail.com
Email
Owners **Occupants** **Buyers**
Status of the Applicant* (Circle One)

of the property located at: 600 Steward Ave, 49201
Street Address Zip Code

property identification #: 2-112800000

I (we) respectfully request a determination be made by the City Planning Commission on the following change of zoning as provided in §28-183 of the Zoning Ordinance:

2. Current zoning: R-1 R-2 R-3 R-4 R-5 R-6 C-1 C-2 C-3 C-4 I-1 I-2 PUDD
Circle One
Proposed zoning: R-1 R-2 R-3 R-4 R-5 R-6 C-1 C-2 C-3 C-4 I-1 I-2
Circle One

The proposed use is: convert the lower commercial space into residential space

3. I certify that the information provided above is correct to the best of my belief and knowledge.

Karl Hunt member
Name & Title
[Signature]
Signature

*If the applicant is not the owner of the property, a letter of consent from the property owner must accompany this application.

Office Use Only
Date Filed: 3/17/22 Fee: \$ 500 - Receipt #: 91347306

March 28, 2022

**Map Amendment Review (Rezone)
600 Steward Avenue & 506 W. Ganson Street
City of Jackson, Michigan**

GENERAL INFORMATION

Applicant:	K&L Hunt Investments, LLC 712 Tefft Avenue Jackson, MI 49203
Subject Location:	600 Steward Avenue (Parcel # 2-11280) 506 W. Ganson Street (Parcel # 2-11290)
Received Date:	March 17, 2022
Current Zoning:	C-2, Community Commercial
Proposed Zoning:	R-3, Multiple Family Residential
Action Required:	<i>Procedure following public hearing.</i> After the public hearing on such amendment, supplement or change, the city planning commission shall make its report. Such report shall be by resolution of the city planning commission carried by the affirmative votes of the majority of members in attendance. Such amendment, supplement or change, with report, shall then be certified in writing to the city council and to the county register of deeds.

SITE/PROPERTY DESCRIPTION

The applicant is requesting the zoning reclassification of two (2) contiguous properties at the northwest corner of the intersection of W Ganson Street and Steward Avenue. The larger of the two properties is 600 Steward Ave., a 0.15 acre improved lot containing a 2,042 square-foot, two-story structure built in 1940; the first/ground floor has historically been commercial use whereas the second story is contains two (2) rental units. The second lot, 506 W. Ganson Street, is a 0.05 acre unimproved lot adjacent to, and located west of 600 Steward Avenue. Both lots are accessible from W. Ganson Street and Steward Avenue.

The current zoning classification of the subject address is C-2, Community Commercial; the proposed new zoning classification is R-3, Multiple Family Residential.

The applicant's intent is to combine the two (2) lots, bring the parking area into compliance with the zoning ordinance and create additional residential units on the first/ground floor.

All uses, listed by the applicant or otherwise, are subject to review and approval by the City of Jackson. The process of rezoning does not grant any specific use. Any new use will be subject to the appropriate review process of the City of Jackson and will require a separate application.



From Intersection



W. Ganson St.



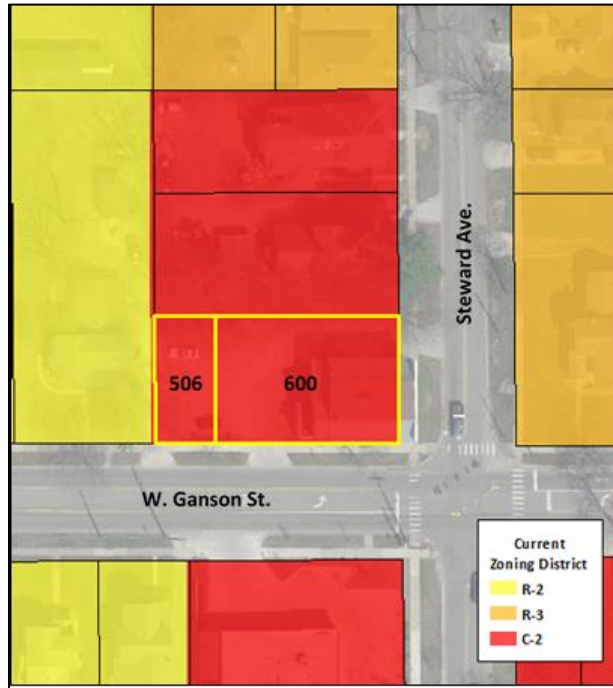
Steward St.



NEIGHBORING ZONING AND LAND USE

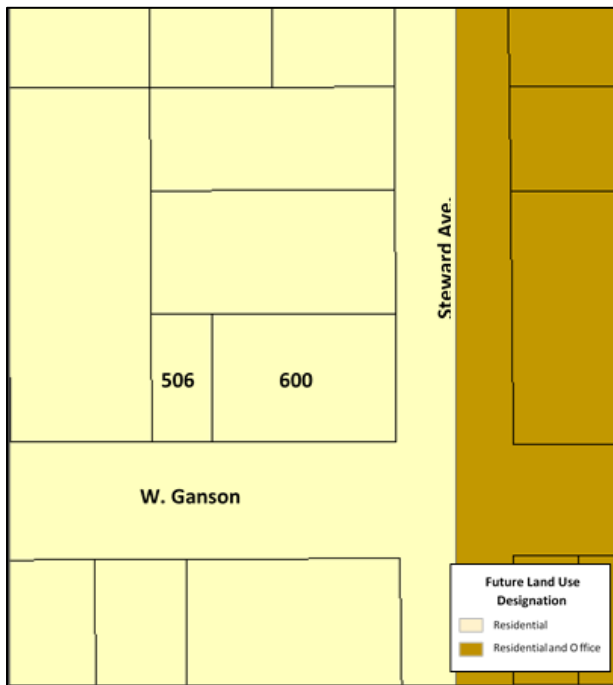
The table below identifies the surrounding zoning designations and current land uses.

	North	South	East	West
Current Zoning	C-2, Community Commercial	C-2, Community Commercial	R-3, Multiple Family	R-2, One & Two Family
Current Land Use	Single Family Residential	Commercial	Two Unit Residential	Two Unit Residential



FUTURE LAND USE/MASTER PLAN

The Future Land Use map contained within the 2016 Master Plan demonstrates use designation of the subject properties "Residential".



The “Residential” land use is described as:

This classification describes the areas of the City devoted specifically to residential development that is low-density and detached. The category is intended to stabilize, protect, and encourage residential character while separating the land use from all activities of a commercial nature. Development is limited to single-family dwellings and home occupations, plus certain conditional uses that are compatible with and convenient to the residents in the district.

While the future land use description is more consistent with the R-1, One Family Residential zoning district, the proposed R-3, Multiple Family Residential zoning district is more characteristic with the surrounding uses and zoning designations.

Similar to the two (2) commercially zoned properties immediately north of the subject addresses, both residential use, staff is compiling a list of properties for rezoning with the intent of being consistent with the future land use map, surrounding zoning designations, and current and potential use.

Furthermore, the proposed R-3, Multiple Family Residential is more consistent with the zoning transition and density characteristics.

DEVELOPMENT POTENTIAL

Suggested uses in the “Residential” designation include residential, institutional, and parks.

The Planning Commission should consider all permitted and conditional uses in the R-3, Multiple Family Residential zoning district. The following is a list of those uses:

- Churches, synagogues, temples and associated buildings, but not including elementary or secondary school buildings
- Family day care home
- Group day care home (must be located in a single-family dwelling with a minimum lot size of seven thousand five hundred (7,500) square feet)
- Child care center
- One-family detached
- Two-family
- Multiple-family
- Conversion of one- and/or two-family residences into multiple-family dwelling units, provided these conform with the lot area and yard requirements prescribed for multiple-family dwellings in this chapter
- Home occupations, provided all the conditions in the supplemental regulations are met
- Library, public
- Registered primary caregiver in accordance with MMMA and Chapter 16.
- Museum, public
- Park and/or playground, public
- Parking lots and/or structures either public or privately owned or operated, subject to provisions of sections 28-100 and 28-145(d)(12)
- Planned unit residential development (see supplemental regulations)
- Resource centers providing services for the betterment of family relationships, neighborhood quality, occupational skills and educational development and similar uses, but excluding alcohol and drug therapy or counseling centers, crime rehabilitation or counseling centers, halfway houses and similar

uses

- Rooming house, boarding house

ESSENTIAL FACILITIES AND SERVICES

The subject property is currently served, or has access to, essential city facilities and services.

TRAFFIC IMPACT AND SITE ACCESS

The proposed use, as well as other permitted and conditional uses in the R-3, Multiple Family Residential zoning district, contribute minimal traffic volume and should have little impact.

As previously stated, both lots are accessible from W. Ganson Street and Steward Avenue.

Per the Master Plan, the desired circulation within the “Residential” use designation is described as:

Most streets should be residential, characterized by very low speeds, frequent curb cuts, and on-street parking. Non-motorized access must be provided, preferably on sidewalks but also on shared use paths and the street right-of-way. Transit should be available to every neighborhood.

W. Ganson St. is classified as a principle arterial road and Steward Ave. is classified as a minor arterial road; neither provide on-street parking.

CONCLUSION/FINDINGS

For the planning commissions consideration, provided below is a summary of findings as they apply to the proposed rezoning of 600 Steward Avenue (Parcel # 2-11280) and 506 W. Ganson Street (Parcel # 2-11290) from C-2, Community Commercial to R-3, Multiple Family Residential.

Upon review of the subject properties, the R-3, Multiple Family Residential zoning district is more characteristic with the surrounding uses and current/future zoning designations, and the R-3, Multiple Family Residential is more consistent with the zoning transition and density characteristics. Therefore, we believe the request to amend the zoning map should be recommended for approval to City Council.

Respectfully,



Christopher M. Atkin
Planning Director, City of Jackson

cc: Applicant

Notice of Public Hearing

The City of Jackson Planning Commission will hold a public hearing to hear a request for zoning classification changes to the properties listed below and pursuant to Section 28-183 of the City of Jackson Zoning Ordinance.

Applicant:

K&L Hunt Investments, LLC
712 Tefft Avenue
Jackson, MI 49203

Subject property location:

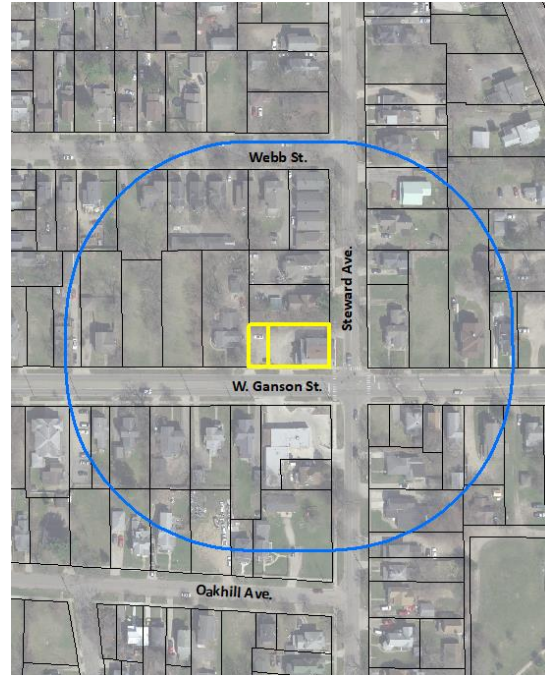
600 Steward Avenue (Parcel # 2-11280)
506 W. Ganson Street (Parcel # 2-11290)

Requested actions:

The applicant is requesting the zoning classification of two (2) properties be rezoned to R-3, Multiple Family Residential from C-2, Community Commercial.

Effect of request:

The change of zoning classification for the subject properties will allow the applicant to convert the ground level into living space.



YOU ARE FURTHER NOTIFIED that the City of Jackson will hear all oral and written comments regarding the proposed zoning classification changes and requests at:

**6:00PM on Wednesday, April 6, 2022 in
City Hall Council Chambers, 2nd Floor
161 W. Michigan Avenue
Jackson, MI 49201**

You received this notice because you own property or reside within three hundred (300) feet of the property shown above. Unless you are the applicant, you are not required to attend the public hearing or respond to this notice.

Reasonable accommodations for individuals with disabilities will be made if notification is received ten (10) days prior to the public hearing.

If you are interested in this request you may attend the public hearing or contact Chris Atkin at 517-768-6433 or catkin@cityofjackson.org with comments. Written comments may be mail to 161 W. Michigan Avenue, Jackson, MI c/o Chris Atkin. All comments and/or questions must be received no later than 5:00PM on April 6, 2022.

MEMO TO: Mayor Mahoney, City Manager Greene, and City Council
FROM: Chris Atkin, Planning Director and Zoning Administrator
DATE: April 12, 2022
SUBJECT: Zoning Map Amendment – Greenwood Ave.

At the regularly scheduled April 6, 2022 City of Jackson Planning Commission meeting, Commissioner Greene motioned, with support from Commissioner Mahoney, to recommend approval to City Council to rezone 223 W. Wilkins St. (Parcel # 4-04620), 227 W. Wilkins St. (Parcel # 4-04630), and 229 W. Wilkins St. (Parcel # 4-04600) from R-2, One and two family residential to R-4, High density apartment and office, and to rezone 222 W. Biddle St. (Parcel # 4-04570), 702 Greenwood Ave. (Parcel # 4-04510), 714 Greenwood Ave. (Parcel # 4-04550), and 718 Greenwood Ave. (Parcel # 4-04560) from C-2 Community Commercial to R-4, High density apartment and office.

The motion passed unanimously by a 4-0 vote.



Application for District Change (Rezoning)
Before the City Planning Commission
City of Jackson, Michigan

1. Application	PDC _____	Date Filed: _____ / _____ / _____
	<small>To be filled out by N&EO Staff</small>	<small>To be filled out by N&EO Staff</small>

2. MVAH Partners. Contact: Pete Schwiegeraht

Name(s)

9100 Centre Pointe Drive, Suite 210 Email
pete.s@mvahpartners.com

Street Address

West Chester, OH 45069 (513) 259 - 7657 **Owners** **Occupants** **Buyers**

City State Zip Phone Number Status of the Applicant* (Circle One)

of the property located at: Several parcels - see attached, _____
Street Address Zip Code

property identification #: _____

I (we) respectfully request a determination be made by the City Planning Commission on the following change of zoning as provided in §28-183 of the Zoning Ordinance:

3. Current zoning: R-1 **R-2** R-3 R-4 R-5 R-6 C-1 **C-2** C-3 C-4 I-1 I-2 PUDD
Circle One
- Proposed zoning: R-1 R-2 R-3 **R-4** R-5 R-6 C-1 C-2 C-3 C-4 I-1 I-2
Circle One

The proposed use is: MVAH proposes to construct a 50+/- unit development
The development called "The Greenwood" will be constructed to highly energy-efficient standards, feature a myriad of modern, desirable amenities, and the development will rent to those earning between 30% to 60% of AMI.

5. I certify that the information provided above is correct to the best of my belief and knowledge.

Pete Schwiegeraht - Senior VP of Development

<small>Name & Title</small>	<small>Name & Title</small>

<small>Signature</small>	<small>Signature</small>

6. City Clerk Use Only:		
Date: _____ / _____ / _____	Fee: \$ _____	Receipt #: _____

* If the applicant is not the owner of the property, a letter of consent from the property owner must accompany this application.



The Greenwood Rezoning:

Addresses and Parcel numbers:

We intend on using 7 parcels for The Greenwood Development. This includes 227 and 229 W. Wilkins Street and 223 W. Wilkins Street, 702, 714, and 718 Greenwood and 222. W. Biddle Street.

229 W Wilkins St, Jackson, Michigan 49203 – Parcel ID: 4-046400000.

227 W Wilkins St, Jackson, Michigan 49203 – Parcel ID: 4-046300000.

223 W Wilkins St, Jackson, Michigan 49203 – Parcel ID: 4-046200000.

702 Greenwood Ave, Jackson, Michigan 49203 – Parcel ID: 4-045100000.

714 Greenwood Ave, Jackson, Michigan 49203 – Parcel ID: 4-045500000.

718 Greenwood Ave, Jackson, Michigan 49203 – Parcel ID: 4-045600000.

222 W Biddle St, Jackson, Michigan 49203 – Parcel ID: 4-045700000.

JACKSON COUNTY, MI PARCEL VIEWER

Parcel ID: 4-046400000

WILKINS ST



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION

NAME	CITY OF JACKSON
ADDRESS	161 W MICHIGAN AVE JACKSON, MI 49201
HOMESTEAD %	0

PARCEL INFORMATION

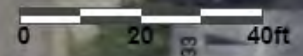
PARCEL ID	4-046400000
ADDRESS	229 W WILKINS ST JACKSON, MI 49203
PROP CLASS	703 - CHURCHES
STATUS	Active
ACREAGE	0.15
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	2090-478
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION

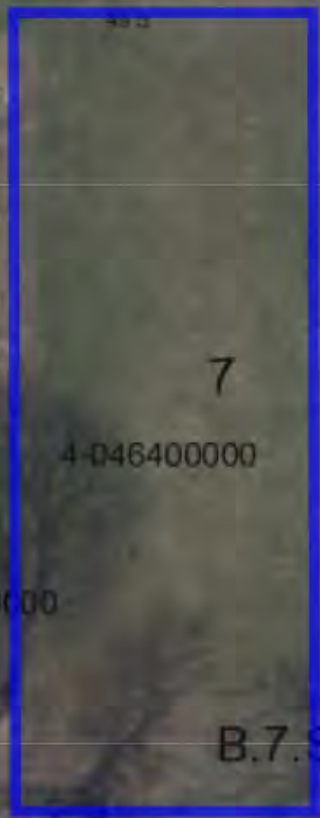
Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

W 1/2 OF LOT 7 BLK 7 AN EXT OF VILLAGE OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W (W OF GREENWOOD AVE)



42.24216, -84.41075



JACKSON COUNTY, MI PARCEL VIEWER



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION	
NAME	CITY OF JACKSON
ADDRESS	161 W MICHIGAN AVE JACKSON, MI 49201
HOMESTEAD %	0

PARCEL INFORMATION	
PARCEL ID	4-046300000
ADDRESS	227 W WILKINS ST JACKSON, MI 49203
PROP CLASS	703 - CHURCHES
STATUS	Active
ACREAGE	0.15
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	2195-0477
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION		
Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

E 1/2 OF LOT 7 BLK 7 AN EXT OF VILLAGE OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W (W OF GREENWOOD AVE)

Parcel ID: 4-046300000



0 20 40ft

42.24223, -84.41066

JACKSON COUNTY, MI PARCEL VIEWER



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION	
NAME	COMMUNITY ACTION AGENCY
ADDRESS	1214 GREENWOOD AVE JACKSON, MI 49203
HOMESTEAD %	0

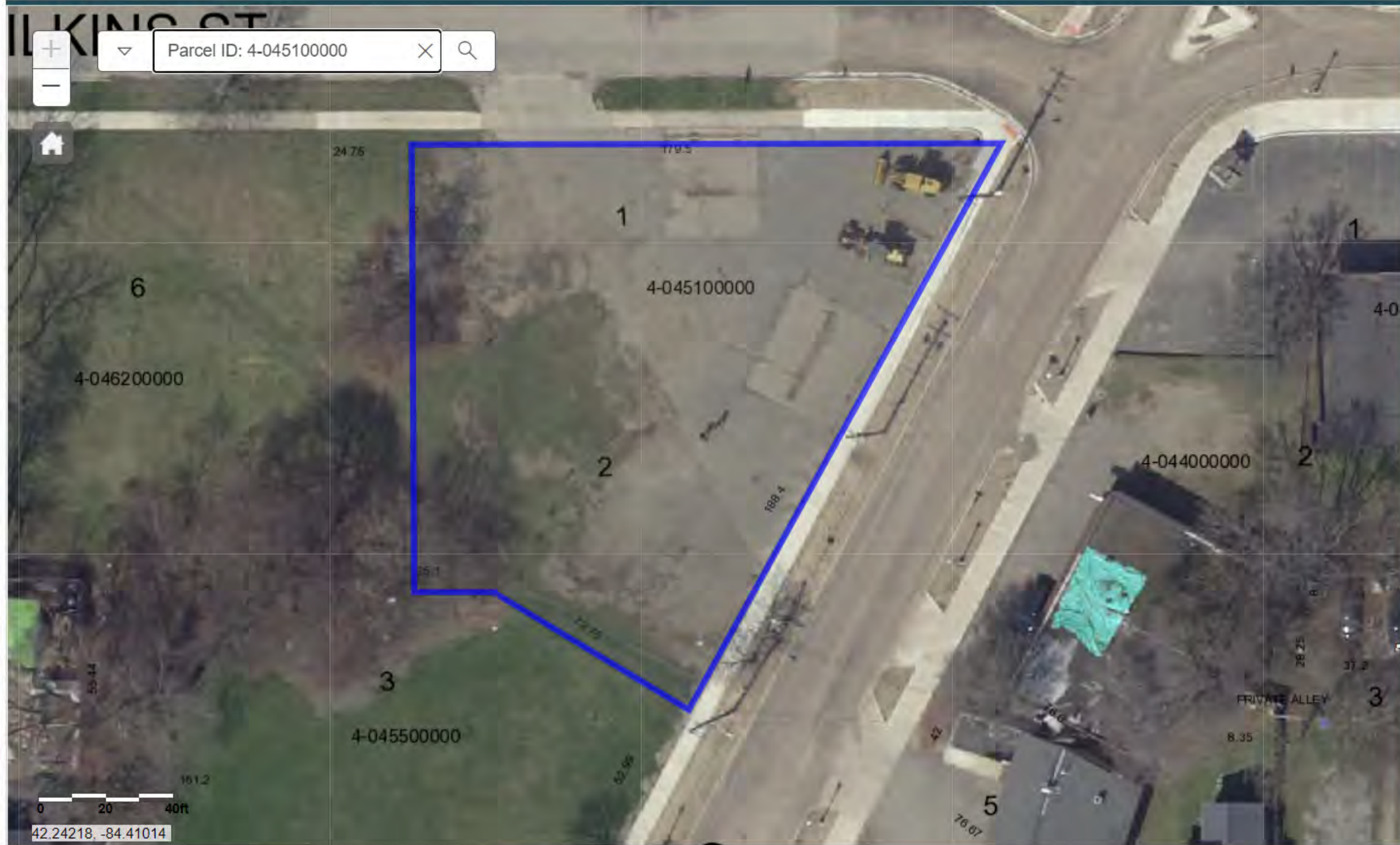
PARCEL INFORMATION	
PARCEL ID	4-046200000
ADDRESS	223 W WILKINS ST JACKSON, MI 49203
PROP CLASS	705 - PARKS
STATUS	Active
ACREAGE	0.36
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	1845-0605
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION		
Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

LOT 6 & W 24.75 FT OF LOTS 1 & 2 BLK 7 AN EXT OF VILLAGE OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W (W OF GREENWOOD AVE)

JACKSON COUNTY, MI PARCEL VIEWER



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION	
NAME	COMMUNITY ACTION AGENCY
ADDRESS	1214 GREENWOOD AVE JACKSON, MI 49203
HOMESTEAD %	0

PARCEL INFORMATION	
PARCEL ID	4-045100000
ADDRESS	702 GREENWOOD AVE JACKSON, MI 49203
PROP CLASS	705 - PARKS
STATUS	Active
ACREAGE	0.42
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	1845-0605
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION		
Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

0452, 0453, 0454 LAND COM AT INTERS OF WLY LN OF GREENWOOD AVE & S LN OF WILKINS ST TH W 179.5 FT TH S 132.55 FT TH E 25.1 FT TH SELY 72.75 FT TO A PT ON W LN OF GREENWOOD AVE 188.4 FT SWLY FROM INTERS OF WLY LN OF GREENWOOD AVE & S LN OF WILKINS ST TH NELY 188.4 FT TO BEG BEING PARTS OF LOT 1, 2 & 3 AN EXT OF VILLAGE OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W (W OF GREENWOOD AVE)

JACKSON COUNTY, MI PARCEL VIEWER



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION

NAME	COMMUNITY ACTION AGENCY
ADDRESS	1214 GREENWOOD AVE JACKSON, MI 49203
HOMESTEAD %	0

PARCEL INFORMATION

PARCEL ID	4-045500000
ADDRESS	714 GREENWOOD AVE JACKSON, MI 49203
PROP CLASS	705 - PARKS
STATUS	Active
ACREAGE	0.2
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	1845-0605
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION

Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

LAND COM AT A PT ON WLY LN OF GREENWOOD AVE
 188.4 FT SWLY FROM S LN OF WILKINS ST TH N 65.25 DEG
 W 72.75 FT TH W 119.65 FT TH S 55.44 FT TH S 83.5 DEG E
 161.23 FT TH NELY 2.99 FT TO BEG AN EXT OF VILLAGE
 OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W
 (W OF GREENWOOD AVE)

JACKSON COUNTY, MI PARCEL VIEWER



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION	
NAME	COMMUNITY ACTION AGENCY
ADDRESS	1214 GREENWOOD AVE JACKSON, MI 49203
HOMESTEAD %	0

PARCEL INFORMATION	
PARCEL ID	4-045600000
ADDRESS	718 GREENWOOD AVE JACKSON, MI 49203
PROP CLASS	705 - PARKS
STATUS	Active
ACREAGE	0.12
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	1845-0605
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION		
Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

LAND COM AT INTERS OF WLY LN OF GREENWOOD AVE WITH N LN OF BIDDLE ST TH W ON N LN OF BIDDLE ST 72.62 FT TH N 8 DEG W 29 FT TH N 20 DEG 50" W 46.25 FT TO N LN OF LOT 4 TH S 83 DEG 30" E 120 FT TO WLY LN OF GREENWOOD AVE TH SWLY ALG WLY LN OF SD AVE 60.5 FT TO POB AN EXT OF VILLAGE OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W (W OF GREENWOOD AVE)

JACKSON COUNTY, MI PARCEL VIEWER



PRINT (PDF) | BUFFER | MEASURE | CLEAR

INFO | THEMES | LAYERS | HELP

ZOOM TO | PAN TO

OWNER INFORMATION	
NAME	COMMUNITY ACTION AGENCY
ADDRESS	1214 GREENWOOD AVE JACKSON, MI 49203
HOMESTEAD %	0

PARCEL INFORMATION	
PARCEL ID	4-045700000
ADDRESS	222 W BIDDLE ST JACKSON, MI 49203
PROP CLASS	705 - PARKS
STATUS	Active
ACREAGE	0.1
GOV'T UNIT	City of Jackson
TAX UNIT	City of Jackson
SCHOOL DIST	JACKSON PUBLIC SCHOOL
LIBER/PAGE	1845-0605
LAST UPDATED	February 22, 2022

ASSESSMENT INFORMATION		
Year	Assessed	Taxable
2019	\$0	\$0
2020	\$0	\$0
2021	\$0	\$0

TAX DESCRIPTION

LAND DESC AS BEG AT PT OF INTERS OF WLY LN OF GREENWOOD AVE WITH N LN OF BIDDLE ST TH NLY ALG WLY LN OF GREENWOOD AVE 60.5 FT TH N 83 DEG 30' W 120 FT FOR POB OF THIS DESC TH CONTINUING N 83 DEG 30' W 41.37 FT TH S PARA WITH E LN OF BLACKSTONE ST 79.25 FT TO N LN OF BIDDLE ST TH E ALG N LN OF BIDDLE ST 59.98 FT TH N 8 DEG W 29 FT TH NWLY IN STRAIGHT LN 46.25 FT TO POB BEING PARTS OF LOTS 3 & 4 BLK 7 AN EXT OF VILLAGE OF JACKSONBURG KNOWN AS MOODY'S EXT B7S R1W (W OF GREENWOOD AVE)

All uses, listed by the applicant or otherwise, are subject to review and approval by the City of Jackson. The process of rezoning does not grant any specific use. Any new use will be subject to the appropriate review process of the City of Jackson and will require a separate application.



NEIGHBORING ZONING AND LAND USE

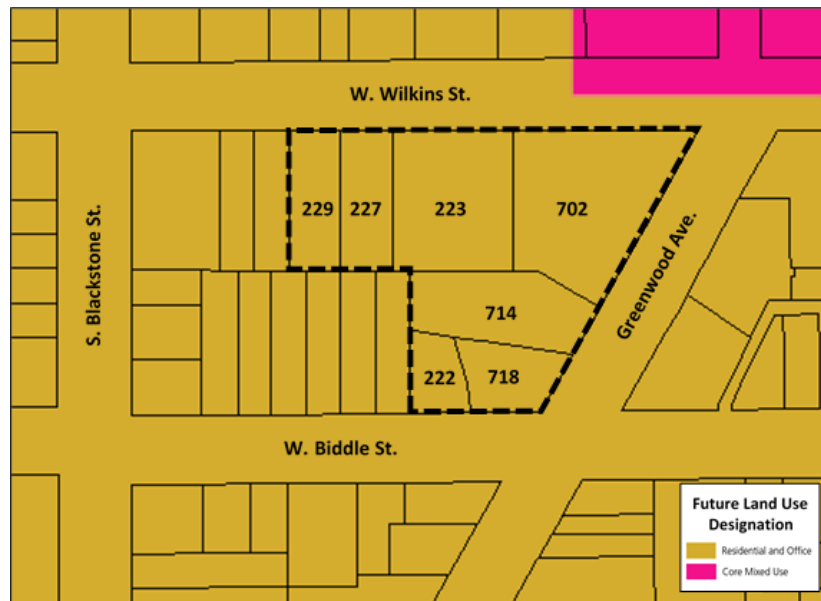
The table below identifies the surrounding zoning designations and current land uses.

Property Address	Current Land Use	North	South	East	West
222 W. Biddle St.	Vacant	C-2	C-2	C-2	R-2
223 W. Wilkins St.	Vacant	R-2	R-2 and C-2	C-2	R-2
227 W. Wilkins St.	Vacant	R-2	R-2	R-2	R-2
229 W. Wilkins St.	Vacant	R-2	R-2	R-2	R-2
702 Greenwood Ave.	Vacant	R-2	C-2	C-2	R-2
714 Greenwood Ave.	Vacant	R-2 and C-2	C-2	C-2	R-2
718 Greenwood Ave.	Vacant	C-2	C-2	C-2	C-2



FUTURE LAND USE/MASTER PLAN

The Future Land Use map contained within the 2016 Master Plan demonstrates use designation of the subject properties “Residential and Office”.



The “Residential and Office” land use is described as:

Surrounding the city’s downtown core are several areas that have a more dense and active character than those which consist purely of detached residential dwellings, but which have no significant concentrations of commercial or industrial uses. These medium (scalable) residential neighborhoods provide a variety of housing types including apartments, townhouses, and conversions of single-family dwellings into multiple units based on a form-based approach to create unique and flexible residential living. This category is designed to protect and promote a more intensive residential character than the single family neighborhoods, within a walkable environment. It also offers professional office areas adjacent to the downtown and along select corridors where properties formerly used as residential homes are converted for small offices. Other select uses such as bed and breakfasts should be conditionally permitted.

This future land use designation is consistent with the proposed R-4, High Density Apartment and Office zoning district.

DEVELOPMENT POTENTIAL

Suggested uses in the “Residential and Office” include Residential, office, institutional, parks.

The Planning Commission should consider all permitted uses in the R-4, High Density Apartment and Office zoning district. The following is a list of those uses:

- Banks, loan and finance offices including drive through facilities
- Barbershops, beauty shops, tanning salons and other similar personal grooming services
- Bed and breakfast, tourist homes
- Churches, synagogues, temples and associated buildings, but not including elementary or secondary school buildings
- Clinic—Dental or medical
- Day care facility

- Family day care home
- Group day care home (must be located in a single-family dwelling with a minimum lot size of seven thousand five hundred (7,500) square feet)
- Child care center
- One-family detached
- Two-family
- Multiple-family
- Conversion of one- and/or two-family residences into multiple-family dwelling units, provided these conform with the lot area and yard requirements prescribed for multiple-family dwellings in this chapter
- Fraternity or sorority house and college-owned dormitories
- Funeral home
- Headquarters for religious, philanthropic and charitable organizations
- Helicopter landing pad
- Home occupations, provided all the conditions in the supplemental regulations are met
- Hospitals, sanitariums and other institutions for human care
- Institution for children or the aged, but not including penal or correctional institution
- Laboratory, dental or medical
- Laundry, custom and self-service
- Library, public
- Medical and adult use marihuana facilities:
- Registered primary caregiver in accordance with MMMA and Chapter 16.
- Museum, public
- Designed to attract and serve customers on the premises;
- Park and/or playground, public
- Parking lots and/or structures either public or privately owned or operated, subject to provisions of sections 28-100 and 28-145(d)(12)
- Pet grooming services
- Pharmacy, as an accessory use located in the same structure as a medical or dental office or clinic
- Planned unit residential development (see supplemental regulations)
- Rehabilitation center for handicapped persons
- Resource centers providing services for the betterment of family relationships, neighborhood quality, occupational skills and educational development and similar uses, but excluding alcohol and drug therapy or counseling centers, crime rehabilitation or counseling centers, halfway houses and similar uses
- Rooming house, boarding house
- Schools (elementary, secondary and college levels for academic instruction)
- Self-service storage facilities (a building or group of buildings used exclusively as a storage facility for residential goods and available for rent with individual leases for portions of the facility)

- Studio, school or similar facility for professional work or instruction of any form of fine arts, ceramics, crafts, music, drama, dance and other similar activities. The incidental provision of such instruction in a single family residence will be considered a home occupation (see subsection (74)).
- Travel agencies
- Any residential accessory use or structure clearly incidental and customary to the operation of the uses by right (such as a garage) when located on the same property

ESSENTIAL FACILITIES AND SERVICES

The subject property is currently served, or has access to, essential city facilities and services.

TRAFFIC IMPACT AND SITE ACCESS

Because the site(s) are and have been vacant, any development of significance will provide an increase to traffic volume, however any increase will be directed toward Greenwood Avenue, a major collector road.

CONCLUSION/FINDINGS

For the planning commissions consideration, provided below is a summary of findings as they apply to the proposed rezoning of:

223 W. Wilkins St. (Parcel # 4-04620)
227 W. Wilkins St. (Parcel # 4-04630)
229 W. Wilkins St. (Parcel # 4-04600)

From R-2, One and Two Family Residential to R-4, High Density Apartment and Office; and the proposed rezoning of:

222 W. Biddle St. (Parcel # 4-04570)
702 Greenwood Ave. (Parcel # 4-04510)
714 Greenwood Ave. (Parcel # 4-04550)
718 Greenwood Ave. (Parcel # 4-04560)

From C-2, Community Commercial to R-4, High Density Apartment and Office.

Upon review of the subject properties, we believe the request to amend the zoning map is consistent with the 2016 Master Plan and the 2016 Future Land Use Map and, therefore, should be recommended for approval to City Council.

Respectfully,



Christopher M. Atkin
Planning Director, City of Jackson

cc: Applicant

Notice of Public Hearing

The City of Jackson Planning Commission will hold a public hearing to hear a request for conditional use permit application pursuant to Section 28-145 of the City of Jackson Zoning Ordinance.

Applicant:

Jackson Self Storage
1700 S. Cooper St.
Jackson, MI 49203

Subject property location:

1700 S. Cooper St. (Parcel # 5-2153.06)

Requested actions:

The applicant is requesting conditional use permit at the subject property.

Effect of request:

Approval of the conditional use permit will allow the applicant to construct/expand the existing self-storage area and include outdoor storage for recreational vehicles.



YOU ARE FURTHER NOTIFIED that the City of Jackson will hear all oral and written comments regarding the proposed zoning classification changes and requests at:

**6:00PM on Wednesday, April 6, 2022 in
City Hall Council Chambers, 2nd Floor
161 W. Michigan Avenue
Jackson, MI 49201**

You received this notice because you own property or reside within three hundred (300) feet of the property shown above. Unless you are the applicant, you are not required to attend the public hearing or respond to this notice.

Reasonable accommodations for individuals with disabilities will be made if notification is received ten (10) days prior to the public hearing.

If you are interested in this request you may attend the public hearing or contact Chris Atkin at 517-768-6433 or catkin@cityofjackson.org with comments. Written comments may be mail to 161 W. Michigan Avenue, Jackson, MI c/o Chris Atkin. All comments and/or questions must be received no later than 5:00PM on April 6, 2022.

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 19, 2022

SUBJECT: **Resolution to Apply for a Transportation Economic Development Fund Category F Grant Intersections of Blackstone Street/Louis Glick Highway and Blackstone Street/Lansing Avenue**

Recommendation:

Approve a resolution for application to the Michigan Department of Transportation (MDOT) for a Transportation Economic Development Fund (TEDF) Category F Grant, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for improvements to the intersections of Blackstone Street with Louis Glick Highway and with Lansing Avenue.

Attached is a memo from Jon H. Dowling, City Engineer, regarding a resolution to apply for a funding grant as outlined above..

I recommend approval. Your consideration and concurrence is appreciated.

JG

Attachments

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager
FROM: Jon H. Dowling, P.E., City Engineer
DATE: April 19, 2022

RECOMMENDATION: Approve a resolution for application to the Michigan Department of Transportation (MDOT) for a Transportation Economic Development Fund (TEDF) Category F Grant, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for improvements to the intersections of Blackstone Street with Louis Glick Highway and with Lansing Avenue.

SUMMARY

The Michigan Department of Transportation (MDOT) is soliciting applications for candidate projects for Transportation Economic Development Fund (TEDF) Category F Grant Funding. Engineering has determined that the intersections of Blackstone Street with Louis Glick Highway and with Lansing Avenue need improvements.

BUDGETARY CONSIDERATIONS

The total construction cost is estimated at \$494,000 with the TEDF Program paying \$375,000 of the construction cost with federal funding. The City is responsible for the remaining cost along with 100% of the engineering costs. The total estimated cost for the City is \$217,800. This cost would be paid from the Major Street Fund.

HISTORY, BACKGROUND and DISCUSSION

Prior to 2013 Blackstone Street was a one-way northbound roadway north of Louis Glick Highway. The two-lane roadway functioned adequately as a one-way street, but as a two-way street motorists that wish to make a left turn from southbound Blackstone onto eastbound Glick Highway hold up the rest of the southbound traffic until they can make the turn. Blackstone on the south side of Glick Highway is three lanes wide to allow for a center left turn lane. Also, Lansing Avenue branches off from Blackstone at approximately 40 degrees.

DISCUSSION OF THE ISSUE

Part of this project is to widen Blackstone north of Glick Highway to add a center left turn lane as shown on the attached sketch. This project will also realign the intersection of Blackstone and Lansing Ave. as shown on the attached sketch. This realignment will allow Blackstone from Lansing Avenue to Ganson Street to become a two-way street.

POSITIONS

I am requesting the attached resolution to apply for Transportation Economic Development Fund (TEDF) Category F Grant Funding through MDOT for improvements to the intersections of Blackstone Street with Louis Glick Highway and with Lansing Avenue be approved, the Mayor and City Clerk be authorized to execute the resolution and the City Engineer be authorized to file an application.

JHD/ss

Att.

RESOLUTION

BY THE CITY COUNCIL:

WHEREAS, Engineering has determined that Blackstone Street from Van Buren Street to Louis Glick Highway is in need of widening for a center left turn lane; and

WHEREAS, the intersection of Blackstone Street and Lansing Avenue is in need of realignment; and

WHEREAS, The Michigan Department of Transportation has called for Transportation Economic Development Fund (TEDF) Category F projects for fiscal year 2023-2024; and

WHEREAS, the maximum amount of each grant is \$375,000; and

WHEREAS, based upon engineering conceptual estimates, the projected construction cost is \$494,000, with the Category F amount of \$375,000; and

WHEREAS, the balance of the conceptual construction cost is \$119,000, and estimated engineering costs are \$98,800, for a total estimated City cost of \$217,800; and

WHEREAS, the City cost will be paid out of the Major Street Fund;

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Jackson hereby certifies its support of the filing by the City Engineer on behalf of the City of Jackson an application for Blackstone Street widening and intersection realignment under the Michigan Department of Transportation TEDF Program.

* * * * *

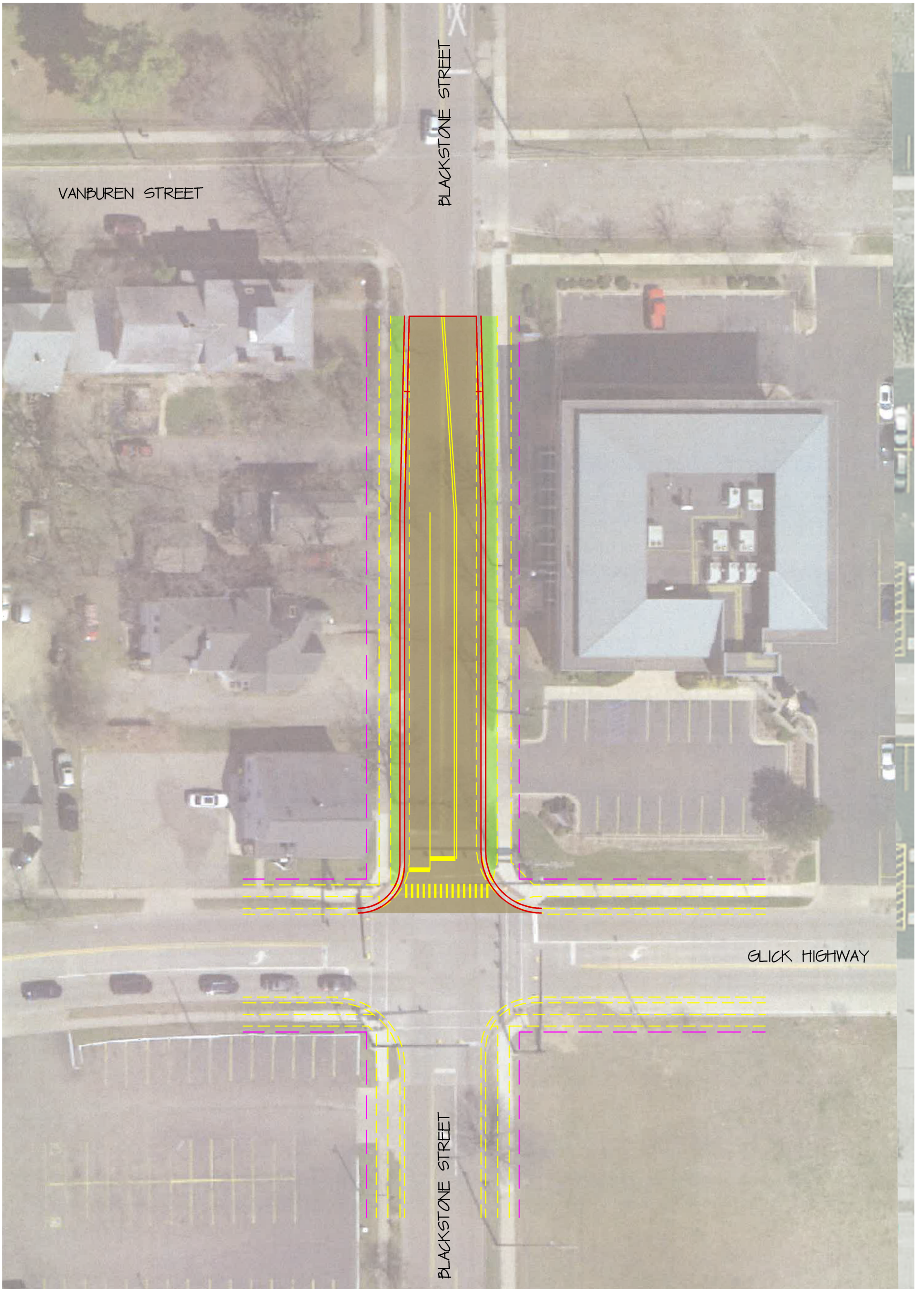
State of Michigan)
County of Jackson)ss
City of Jackson)

I, Andrea Muray, City Clerk, in and for the City of Jackson, County and State aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on the 19th day of April, 2022.

IN WITNESS WHEREOF, I have hereto affixed my signature and the Seal of the City of Jackson, Michigan, on this 20th day of April, 2022.

Daniel Mahoney, Mayor

Andrea Muray, City Clerk



SHEET 1 OF 5

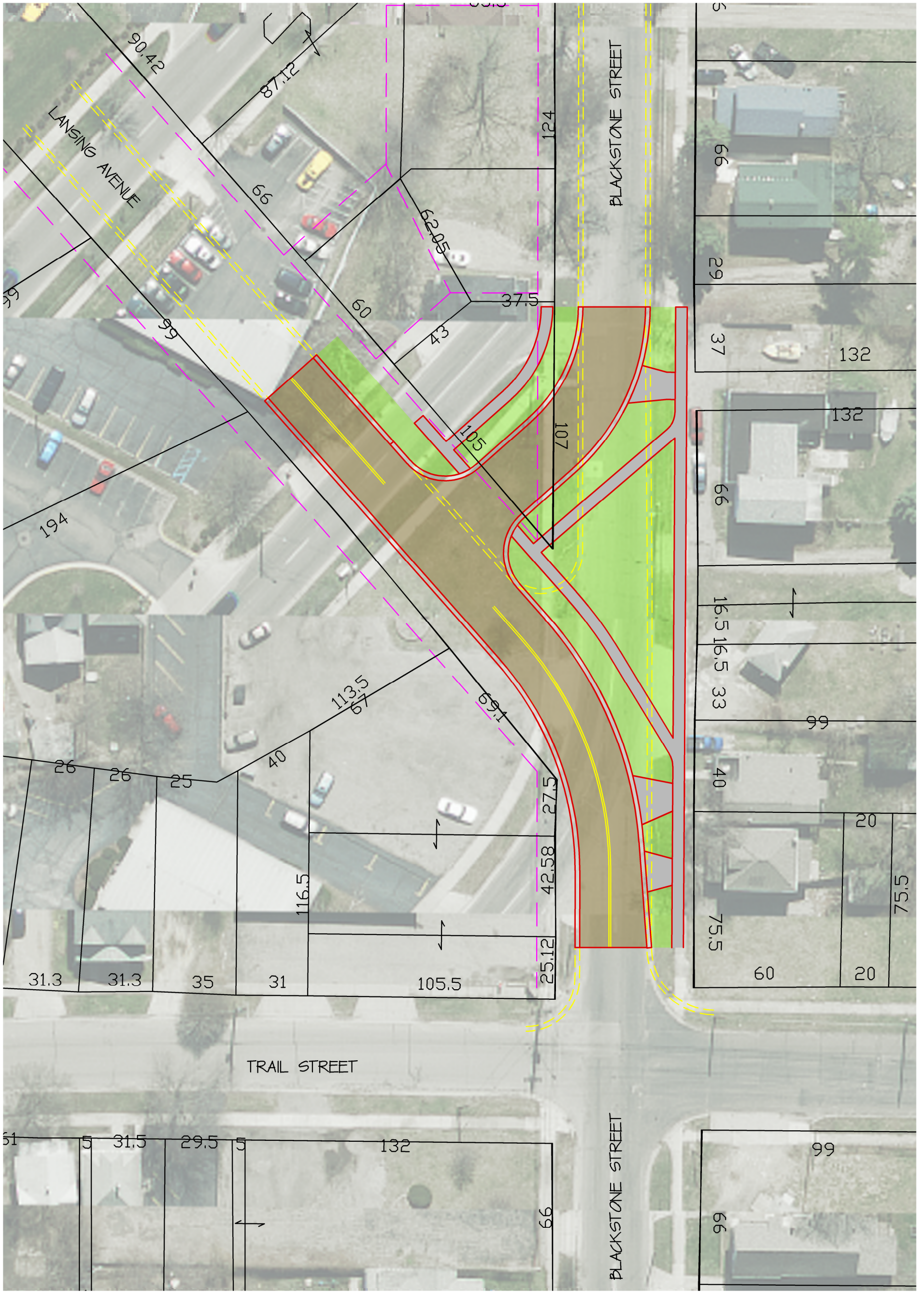
DATE: 04-20-21
HOR SCALE: 1" = 40'

**BLACKSTONE ST INTERSECTION REALIGNMENTS
GLICK HIGHWAY**
**PRELIMINARY CONCEPTUAL
SITE PLAN SKETCH**

**CITY OF JACKSON
ENGINEERING**



NO	DESCRIPTION (REVISIONS)	DATE	BY



BLACKSTONE ST INTERSECTION REALIGNMENTS
LANSING AVENUE
PRELIMINARY CONCEPTUAL
SITE PLAN SKETCH

CITY OF JACKSON
ENGINEERING



NO	DESCRIPTION (REVISIONS)	DATE	BY

SHEET 2 OF 5

DATE: 04-20-21
 HOR SCALE: 1" = 40'

MEMO TO: Mayor and City Councilmembers
FROM: Jonathan Greene, City Manager
DATE: April 19, 2022
SUBJECT: Parking Lot Construction at Jackson Fire Department Station #1

Recommendation:


Accept bid by Isabella Corporation

Attached is a memorandum from Director Elmer Hitt regarding the parking lot at the fire station on N. Jackson St.

I recommend accepting the bid by Isabella Corporation. Your consideration and concurrence is appreciated.

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Elmer J. Hitt, Director of Police and Fire Services 

DATE: April 19, 2022

RECOMMENDATION: Accept Bid by Isabella Corporation

SUMMARY

The parking lot for the Jackson Fire Department's Central Station at 518 N. Jackson St. is in need of much repair. Bids were received by four contractors, the lowest submitted by the Isabella Corporation of Mt. Pleasant, Michigan, for \$537,000.

BUDGETARY CONSIDERATIONS

Funds for this project will come from the current FY 21/22 general fund budget.

HISTORY, BACKGROUND and DISCUSSION

The condition of the parking lot has been in dire need of repair for many years. The current condition of the parking lot is not only an eyesore but it creates risk to both personal injury and increased wear and tear of the City's fire apparatus. In addition, proper drainage of the parking lot will be accomplished through this project.

DISCUSSION OF THE ISSUE

This project will eliminate the major issues in the parking lot and increase the aesthetic around Jackson's Central Fire Station.

POSITION

I recommend accepting the low bid submitted by the Isabella Corporation.

ATTACHMENTS

					ENGINEER'S ESTIMATE		The Isabella Corporation 2201 Commerce Dr. Mt. Pleasant, MI 48858		Bailey Excavating, Inc. 1073 Toro Drive Jackson, MI 49201		ET Mackenize Company 4248 W. Saginaw Hwy. Grand Ledge, MI 48837		Davenport Brothers Construction Co., Inc. 301 Industrial Park Dr. Belleville, MI 48111-2901	
Line	Pay Item	Description	Unit	Total Estimated Quantity	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)
1	1500001	Mobilization, Max (10%)	1	LSUM	\$ 42,000.00	42,000.00	48,570.50	48,570.50	50,000.00	50,000.00	30,975.00	30,975.00	79,441.93	79,441.93
2	2030015	Sewer, Rem, Less than 24 inch	19	Ft	\$ 12.00	228.00	25.00	475.00	31.24	593.56	49.90	948.10	50.00	950.00
3	2040020	Curb and Gutter, Rem	445	Ft	\$ 8.50	3,782.50	10.00	4,450.00	11.31	5,032.95	6.10	2,714.50	25.00	11,125.00
4	2040055	Sidewalk, Rem	21	Syd	\$ 10.00	210.00	12.00	252.00	12.10	254.10	16.95	355.95	35.00	735.00
5	2040080	Exploratory Investigation, Vertical	5	Ft	\$ 25.00	125.00	25.00	125.00	775.00	3,875.00	157.50	787.50	1,000.00	5,000.00
6	2047001	Pavt Sawcut	362	Ft	\$ 2.70	977.40	3.00	1,086.00	4.65	1,683.30	4.50	1,629.00	8.50	3,077.00
7	2047011	Driveway Rem	77	Syd	\$ 10.00	770.00	12.00	924.00	14.21	1,094.17	12.15	935.55	19.00	1,463.00
8	2047011	HMA Surface, Rem, Modified	2568	Syd	\$ 7.00	17,976.00	6.00	15,408.00	14.64	37,595.52	4.80	12,326.40	19.32	49,613.76
9	2047011	Pavt, Rem, Modified	642	Syd	\$ 8.00	5,136.00	12.00	7,704.00	12.49	8,018.58	7.10	4,558.20	16.50	10,593.00
10	2050031	Non Haz Contaminated Material Handling and Disposal, LM	5	Cyd	\$ 80.00	400.00	150.00	750.00	155.00	775.00	844.15	4,220.75	300.00	1,500.00
11	2057011	Subgrade Undercutting, 1 x 3	25	Cyd	\$ 60.00	1,500.00	50.00	1,250.00	75.00	1,875.00	141.80	3,545.00	125.00	3,125.00
12	2057021	Geogrid	50	Syd	\$ 3.00	150.00	7.00	350.00	7.35	367.50	18.55	927.50	10.00	500.00
13	2057051	Site Grading	1	LSUM	\$ 10,000.00	10,000.00	15,000.00	15,000.00	20,000.00	20,000.00	18,300.00	18,300.00	65,000.00	65,000.00
14	2087050	Erosion Control, Inlet Protection, Grate Filter, Round	7	Ea	\$ 100.00	700.00	150.00	1,050.00	75.00	525.00	159.75	1,118.25	125.00	875.00
15	2087050	Erosion Control, Inlet Protection, Sediment Trap	8	Ea	\$ 100.00	800.00	150.00	1,200.00	125.00	1,000.00	159.75	1,278.00	200.00	1,600.00
16	2090001	Project Cleanup	1	LSUM	\$ 2,000.00	2,000.00	3,000.00	3,000.00	5,000.00	5,000.00	11,339.00	11,339.00	9,000.00	9,000.00
17	3027011	Aggregate Base, 8 inch, 21AA, Modified	3315	Syd	\$ 10.00	33,150.00	13.70	45,415.50	14.75	48,896.25	25.30	83,869.50	20.00	66,300.00
18	3060020	Maintenance Gravel	10	Ton	\$ 35.00	350.00	40.00	400.00	27.50	275.00	65.15	651.50	35.00	350.00
19	4021230	Sewer Bulkhead, 12 inch	6	Ea	\$ 250.00	1,500.00	250.00	1,500.00	475.00	2,850.00	169.70	1,018.20	750.00	4,500.00
20	4021260	Trench Undercut and Backfill	20	Cyd	\$ 53.00	1,060.00	45.00	900.00	55.00	1,100.00	189.50	3,790.00	75.00	1,500.00
21	4027001	Sewer Backfill, Class II	154	Ft	\$ 15.50	2,387.00	22.00	3,388.00	34.67	5,339.18	13.70	2,109.80	100.00	15,400.00
22	4027001	Sewer, CI E, 12 inch	154	Ft	\$ 95.00	14,630.00	65.00	10,010.00	74.42	11,460.68	95.10	14,645.40	100.00	15,400.00
23	4027050	Catch Basin, 48 inch dia	3	Ea	\$ 2,000.00	6,000.00	4,000.00	12,000.00	1650.00	4,950.00	2762.00	8,286.00	2350.00	7,050.00
24	4030280	Dr Structure, Adj, Add Depth	1	Ft	\$ 145.00	145.00	200.00	200.00	1250.00	1,250.00	121.85	121.85	2000.00	2,000.00
25	4030312	Dr Structure, Tap, 12 inch	2	Ea	\$ 700.00	1,400.00	500.00	1,000.00	625.00	1,250.00	2248.40	4,496.80	1000.00	2,000.00
26	4037050	Catch Basin Cover, Curb	1	Ea	\$ 675.00	675.00	800.00	800.00	825.00	825.00	1315.85	1,315.85	1500.00	1,500.00
27	4037050	Catch Basin Cover, Drive	5	Ea	\$ 750.00	3,750.00	750.00	3,750.00	625.00	3,125.00	2194.50	10,972.50	950.00	4,750.00
28	4037050	Mh Cover, Std	3	Ea	\$ 540.00	1,620.00	575.00	1,725.00	625.00	1,875.00	1604.50	4,813.50	1000.00	3,000.00
29	4037050	Monitoring Well Cover, Adj, Case 1	7	Ea	\$ 300.00	2,100.00	300.00	2,100.00	625.00	4,375.00	1190.75	8,335.25	1000.00	7,000.00
30	4037050	Utility Structure, Temp Lowering, Modified	7	Ea	\$ 300.00	2,100.00	200.00	1,400.00	525.00	3,675.00	642.40	4,496.80	1000.00	7,000.00
31	4037050	Utility Structure Cover, Adj, Case 1, Modified	10	Ea	\$ 600.00	6,000.00	700.00	7,000.00	775.00	7,750.00	477.85	4,778.50	1200.00	12,000.00

Line	Pay Item	Description	Unit	Total Estimated Quantity	ENGINEER'S ESTIMATE		The Isabella Corporation 2201 Commerce Dr. Mt. Pleasant, MI 48858		Bailey Excavating, Inc. 1073 Toro Drive Jackson, MI 49201		ET Mackenize Company 4248 W. Saginaw Hwy. Grand Ledge, MI 48837		Davenport Brothers Construction Co., Inc. 301 Industrial Park Dr. Belleville, MI 48111-2901	
					Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)
32	5010025	Hand Patching	44	Ton	\$ 180.00	7,920.00	250.00	11,000.00	250.00	11,000.00	259.70	11,426.80	400.00	17,600.00
33	6020019	Conc Base Cse, Nonreinf, 8 inch	23	Syd	\$ 35.00	805.00	58.00	1,334.00	52.80	1,214.40	174.30	4,008.90	95.00	2,185.00
34	6020200	Joint, Contraction, Cp	4482	Ft	\$ 10.00	44,820.00	12.00	53,784.00	22.00	98,604.00	24.35	109,136.70	2.00	8,964.00
35	6020207	Joint, Expansion, E2	272	Ft	\$ 15.00	4,080.00	25.00	6,800.00	19.80	5,385.60	30.00	8,160.00	20.00	5,440.00
36	6020104	Conc Pavt, Nonreinf, 8 inch	3021	Syd	\$ 62.00	187,302.00	58.00	175,218.00	61.82	186,758.22	81.90	247,419.90	100.00	302,100.00
37	8010007	Driveway, Nonreinf Conc, 8 inch	63	Syd	\$ 60.00	3,780.00	58.00	3,654.00	52.80	3,326.40	85.75	5,402.25	95.00	5,985.00
38	8020050	Driveway Opening, Conc, Det M	193	Ft	\$ 22.00	4,246.00	23.00	4,439.00	28.60	5,519.80	37.70	7,276.10	43.75	8,443.75
39	8027001	Curb and Gutter, Conc, Det F4, Modified	380	Ft	\$ 17.00	6,460.00	23.00	8,740.00	26.40	10,032.00	42.55	16,169.00	43.75	16,625.00
40	8027001	Curb and Gutter, Conc, Double Sided	240	Ft	\$ 25.00	6,000.00	43.00	10,320.00	39.60	9,504.00	56.25	13,500.00	62.50	15,000.00
41	8030048	Sidewalk, Conc, 8 inch	184	Sft	\$ 10.00	1,840.00	5.75	1,058.00	6.60	1,214.40	13.50	2,484.00	11.25	2,070.00
42	8110204	Pavt, Mrkg, Preformed Thermopl, Accessible Sym	1	Ea	\$ 400.00	400.00	550.00	550.00	575.00	575.00	427.75	427.75	250.00	250.00
43	8110231	Pavt Mrkg, Waterborne, 4 inch, White	561	Ft	\$ 1.00	561.00	4.00	2,244.00	0.75	420.75	0.45	252.45	1.50	841.50
44	8110293	Pavt Mrkg, Waterborne, for Rest Areas, Parks, and Lots, 4 inch, Blue	18	Ft	\$ 5.00	90.00	4.00	72.00	0.75	13.50	0.50	9.00	1.50	27.00
45	8120012	Barricade, Type III, High Intensity, Double Sided, Lighted, Furn	2	Ea	\$ 95.00	190.00	400.00	800.00	122.50	245.00	71.55	143.10	127.65	255.30
46	8120013	Barricade, Type III, High Intensity, Double Sided, Lighted, Oper	2	Ea	\$ 5.00	10.00	100.00	200.00	3.30	6.60	3.20	6.40	4.00	8.00
47	8120035	Channelizing Device, 42 inch, Fluorescent, Furn	100	Ea	\$ 18.00	1,800.00	35.00	3,500.00	21.12	2,112.00	12.75	1,275.00	22.00	2,200.00
48	8120036	Channelizing Device, 42 inch, Fluorescent, Oper	100	Ea	\$ 1.00	100.00	10.00	1,000.00	1.32	132.00	0.65	65.00	1.38	138.00
49	8120140	Lighted Arrow, Type C, Furn	1	Ea	\$ 350.00	350.00	500.00	500.00	727.00	727.00	477.00	477.00	759.00	759.00
50	8120141	Lighted Arrow, Type C, Oper	1	Ea	\$ 40.00	40.00	100.00	100.00	67.00	67.00	31.80	31.80	69.00	69.00
51	8120170	Minor Traf Devices	1	LSUM	\$ 1,000.00	1,000.00	5,000.00	5,000.00	5000.00	5,000.00	1838.00	1,838.00	10000.00	10,000.00
52	8120350	Sign, Type B, Temp, Prismatic, Furn	112	Sft	\$ 5.25	588.00	4.00	448.00	3.96	443.52	2.95	330.40	4.25	476.00
53	8120351	Sign, Type B, Temp, Prismatic, Oper	112	Sft	\$ 0.75	84.00	1.00	112.00	0.50	56.00	0.30	33.60	0.50	56.00
54	8120370	Traf Regulator Control	1	LSUM	\$ 1,000.00	1,000.00	1,500.00	1,500.00	2500.00	2,500.00	3676.65	3,676.65	6000.00	6,000.00
55	8167011	Turf Establishment, Performance	172	Syd	\$ 8.00	1,376.00	12.00	2,064.00	7.72	1,327.84	38.00	6,536.00	10.00	1,720.00
56	8230391	Gate Box, Adj, Temp, Case 1	2	Ea	\$ 300.00	600.00	300.00	600.00	375.00	750.00	619.00	1,238.00	650.00	1,300.00
57	8237050	Gate Box, Adj, Case 1, Modified	3	Ea	\$ 400.00	1,200.00	470.00	1,410.00	500.00	1,500.00	619.00	1,857.00	800.00	2,400.00
58	8237001	Hydrant Extension	2	Ft	\$ 700.00	1,400.00	625.00	1,250.00	450.00	900.00	780.00	1,560.00	750.00	1,500.00
59	8237001	Water Main Backfill, Class II	80	Ft	\$ 17.50	1,400.00	25.00	2,000.00	30.30	2,424.00	19.25	1,540.00	50.00	4,000.00
60	8237001	Water Main, 6 inch	80	Ft	\$ 80.00	6,400.00	85.00	6,800.00	86.94	6,955.20	106.80	8,544.00	125.00	10,000.00

					ENGINEER'S ESTIMATE		The Isabella Corporation 2201 Commerce Dr. Mt. Pleasant, MI 48858		Bailey Excavating, Inc. 1073 Toro Drive Jackson, MI 49201		ET Mackenize Company 4248 W. Saginaw Hwy. Grand Ledge, MI 48837		Davenport Brothers Construction Co., Inc. 301 Industrial Park Dr. Belleville, MI 48111-2901	
Line	Pay Item	Description	Unit	Total Estimated Quantity	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)	Estimated Unit Price (\$)	Estimated Total Cost (\$)
61	8237001	Water Main, Rem	50	Ft	\$ 20.00	1,000.00	15.00	750.00	34.61	1,730.50	54.55	2,727.50	100.00	5,000.00
62	8237050	Hydrant Assembly	2	Ea	\$ 5,000.00	10,000.00	5,500.00	11,000.00	5862.18	11,724.36	5923.70	11,847.40	8500.00	17,000.00
63	8237050	Hydrant, Rem, Modified	3	Ea	\$ 455.00	1,365.00	800.00	2,400.00	1150.00	3,450.00	495.85	1,487.55	1800.00	5,400.00
64	8237050	Water Main, Connect New 6 inch to Existing 6 inch	2	Ea	\$ 2,500.00	5,000.00	3,000.00	6,000.00	4500.00	9,000.00	2293.30	4,586.60	7000.00	14,000.00
65	8267030	Water Main Fittings, DI	100	Lb	\$ 5.50	550.00	11.70	1,170.00	9.95	995.00	5.38	538.00	30.00	3,000.00
66	8267050	Bollard, Rem	20	Ea	\$ 250.00	5,000.00	50.00	1,000.00	275.00	5,500.00	105.70	2,114.00	425.00	8,500.00
67	8267050	Bollard, Steel, 8 inch, Special	10	Ea	\$ 1,100.00	11,000.00	1,500.00	15,000.00	775.00	7,750.00	1036.00	10,360.00	120.00	1,200.00
						483,378.90		537,000.00		635,549.88		738,146.00		873,861.24

Responsible Contractor Ordinance

Below are twenty-nine (29) Responsibility Criteria that must be answered per the City's Responsible Contractor Ordinance. For each criterion provide a relevant response or attachments as required.

Answers to these criteria will not exclude any bidder from the bid process or ultimate award.

CRITERIA 1:	
COMPANY NAME:	The Isabella Corporation
ADDRESS:	2201 Commerce Drive
CITY, STATE, ZIP:	Mt. Pleasant, Michigan 48858
TELEPHONE:	(989) 772-5890
OFFICERS:	
President: Jeremy Zalud	Email Address: jmzalud@isabellacorporation.com
Vice President: Jon Zalud	Email Address: jwzalud@isabellacorporation.com
Secretary: Jim Zalud	Email Address: jzalud@isabellacorporation.com
Treasurer: Jim Zalud	Email Address: jzalud@isabellacorporation.com
CRITERIA 2:	
How many years has your organization been in business under your present firm name?	
PARENT COMPANY NAME:	The Isabella Corporation
STREET ADDRESS:	2201 Commerce Drive
CITY, STATE, ZIP CODE:	Mt. Pleasant, Michigan
UNDER CURRENT MANAGEMENT SINCE (DATE):	1975

RESPONSIBLE CONTRACTOR ORDINANCE

PAGE 1 OF 12 – THIS DOCUMENT MUST BE SUBMITTED WITH YOUR BID

CONTRACTOR NAME The Isabella Corporation

CRITERIA 3:

State and local licenses and license numbers held by your organization:

MDOT Pre-qualified

What are your formal training programs: a) apprentice/journeyman, b) other comparable formal training programs?

N/A

CRITERIA 4:

Confirmation that all subcontractors, employees and other individuals working on the construction project will maintain current applicable licenses required by law for all licensed occupations and professions.

We confirm, as stated above, that all employees and subcontractors will have all current certifications and licenses required while working on the City of Jackson projects.

CRITERIA 5:

Verification that the bidder is in compliance with all applicable state and federal laws and visa requirements regarding the hiring of non-US citizens, and disclosure of any work visas sought or obtained by the bidder, any of the bidder's subcontractors, or any of the bidder's employees or independent contractors, in order to perform any portion of the project.

The Isabella corporation, all employees and all subcontractors verify to the above.
All the proper paperwork has been collected before employment began.

RESPONSIBLE CONTRACTOR ORDINANCE

CRITERIA 6 (ATTACHMENT REQUIRED)

Attach evidence of experience with construction techniques, trade standards, quality workmanship, project scheduling, cost control, management of projects of comparable size/complexity, and building codes by documenting the bidder's ability and capacity to perform the project. The bidder must identify those portions of the project it reasonably believes will be subcontracted and the names of the subcontractors.

CRITERIA 7 (ATTACHMENT REQUIRED)

Evidence of bonding capacity within the past twelve (12) months, that the applicant has financial resources to start up and follow through on the project(s) and to respond to damages in case of default as shown by written verification of bonding capacity equal to or exceeding the amount of the bidder's scope of work on the project. The written verification must be submitted by a licensed surety company rated "B+" (or better) in the current A.M. Best Guide and qualified to do business within the State of Michigan.

CRITERIA 8:

A list of all litigation and arbitrations currently pending and within the past five (5) years, including an explanation of each (parties, court/forum, legal claims, damages sought, and resolution).

NONE

CRITERIA 9:

Disclosure of any violations of state, federal or local laws or regulations, including OSHA or MIOSHA violations, state or federal prevailing wage laws, wage and hour laws, worker's compensation or unemployment compensation laws, rules or regulations, issued to or against the bidder within the past five years.

NONE



Contractor's Performance Evaluation

Contract: 37000-206362, Hot mix asphalt cold milling and resurfacing, concrete sidew

Report Period 06/29/2021 - 10/07/2021		CPE Number 10	Contractor The Isabella Corporation		
CPE Date 03/21/2022	Report Type Final		Contractor Type Subcontractor	Subcontract Amount \$11,842.50	
Form Version 082307	Route	District 04026	Business Enterprise Type		
Location Mission Road from Baseline Road to Rosebush Road.			Work Type Resurfacing		
Evaluator PJG, Patrick J Gaffney		Current Contract Amount \$720,359.58	Managing Office Isabella CRC		
Entered By TN, Tom Nelson			Revised By	Revision Date	Rev. No.
County(s) Isabella County					
Project(s) 206362A, Hot mix asphalt cold milling and resurfacing, concrete sidew					
Comments					

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
1. To what degree are Contractor's project management personnel available and given the authority to execute the directions of the Engineer?	9	
2. To what degree are the Contractor's management personnel competent and effective in scheduling the work and organizing construction operations, including being punctual in starting and completing the work on the project and meeting critical intermediate phases in accordance with the contract?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
3. To what degree does the Contractor furnish required documentation and reports in a timely manner? This includes, but is not limited to, certification of materials, delivery tickets, invoices, progress schedule, shop drawings, material sampling, requests for extensions of time, contractor staking and Contractor Quality Assurance/Quality Control (QA/QC) plans and documentation.	8	
4. To what degree does the Contractor comply with the direction of the Engineer and follow the project authority as detailed in Division 1 of the Standard Specifications for Construction?	8	
5. To what degree does the Contractor comply timely with all appropriate wage rates, labor, EEO, and D.B.E. laws and regulations, submit accurate certified payrolls and promptly pay all subcontractors?	8	
B. Resources		
6. To what degree does the Contractor have adequate and sufficient equipment to keep the project on schedule? Does the equipment meet the requirements of the specifications and efficiently provide a quality product?	8	
7. To what degree does the Contractor have competent and sufficient personnel to keep the project on schedule?	8	
C. Work Performance		
8. To what degree does the Contractor have good safety practices? Does the Contractor follow their own safety program?	8	
9. To what degree did the Contractor comply with contract requirements for maintaining traffic?	8	
10. If applicable, to what degree does the Contractor meet the contract requirements for Contractor Quality Control (CQC)?	8	
11. To what degree does the Contractor provide a quality product?	9	
12. To what degree does the Contractor properly notify and coordinate work with utility companies, railroads, property owners, local unit of government, and Contractors working on adjacent projects?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
C. Work Performance		
13. To what degree does the Contractor submit the necessary documentation to permit timely closeout and finaling of project?	8	
14. To what degree does the Contractor meet the environmental requirements of the contract?	N/A	
D. Subcontractor Management		
15. To what degree does the Contractor coordinate work with Subcontractor's work, exercise authority over Subcontractors, provide notice of Subcontractor's work schedule and ensure that Subcontractors are in compliance with contract requirements?	N/A	

Evaluator	(Date)
Construction/Project Engineer	(Date)
TSC Manager: William Mayhew, PE	(Date)



Contractor's Performance Evaluation

Contract: 56000-203302, Hot mix asphalt reconstruction, improve drainage and paveme

Report Period 3/22/2019 - 6/12/2019		CPE Number 7		Contractor The Isabella Corporation	
CPE Date 10/10/2019	Report Type Final		Contractor Type Prime	Subcontract Amount	
Form Version 082307	Route	District 04683		Business Enterprise Type	
Location North Coleman Road from the south junction of West School Rc			Work Type		
Evaluator alb, Art L Buck		Current Contract Amount \$411,776.24		Managing Office Mt Pleasant TSC	
Entered By alb, Art L Buck			Revised By	Revision Date	Rev. No.
County(s) Midland County					
Project(s) 203302A, Hot mix asphalt reconstruction, improve drainage and pavemen					
Comments					

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
1. To what degree are Contractor's project management personnel available and given the authority to execute the directions of the Engineer?	8	
2. To what degree are the Contractor's management personnel competent and effective in scheduling the work and organizing construction operations, including being punctual in starting and completing the work on the project and meeting critical intermediate phases in accordance with the contract?	9	contractors management always available and very consciense of schedule related items
3. To what degree does the Contractor furnish required documentation and reports in a timely manner? This includes, but is not limited to, certification of materials, delivery tickets, invoices, progress schedule, shop drawings, material sampling, requests for extensions of time, contractor staking and Contractor Quality Assurance/Quality Control (QA/QC) plans and documentation.	9	supplied all documentation as soon as it became available



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
4. To what degree does the Contractor comply with the direction of the Engineer and follow the project authority as detailed in Division 1 of the Standard Specifications for Construction?	8	
5. To what degree does the Contractor comply timely with all appropriate wage rates, labor, EEO, and D.B.E. laws and regulations, submit accurate certified payrolls and promptly pay all subcontractors?	8	
B. Resources		
6. To what degree does the Contractor have adequate and sufficient equipment to keep the project on schedule? Does the equipment meet the requirements of the specifications and efficiently provide a quality product?	8	
7. To what degree does the Contractor have competent and sufficient personnel to keep the project on schedule?	9	on site foreman very knowledgeable and effective at his role
C. Work Performance		
8. To what degree does the Contractor have good safety practices? Does the Contractor follow their own safety program?	8	
9. To what degree did the Contractor comply with contract requirements for maintaining traffic?	8	
10. If applicable, to what degree does the Contractor meet the contract requirements for Contractor Quality Control (CQC)?	8	
11. To what degree does the Contractor provide a quality product?	8	
12. To what degree does the Contractor properly notify and coordinate work with utility companies, railroads, property owners, local unit of government, and Contractors working on adjacent projects?	8	
13. To what degree does the Contractor submit the necessary documentation to permit timely closeout and finaling of project?	8	
14. To what degree does the Contractor meet the environmental requirements of the contract?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
D. Subcontractor Management		
15. To what degree does the Contractor coordinate work with Subcontractor's work, exercise authority over Subcontractors, provide notice of Subcontractor's work schedule and ensure that Subcontractors are in compliance with contract requirements?	8	

Evaluator	(Date)
Construction/Project Engineer	(Date)
TSC Manager: Bill Mayhew, Mt Pleasant TSC	(Date)



Contractor's Performance Evaluation

Michigan Department of Transportation

12/14/2017 10:40 AM

FieldManager 5.3a

Contract: 56555-119903, Hot mix asphalt overlay and aggregate shoulders.

Report Period 4/20/2017 - 9/22/2017		CPE Number 10		Contractor The Isabella Corporation	
CPE Date 12/14/2017	Report Type Final		Contractor Type Subcontractor		Subcontract Amount
Form Version 082307	Route	District 04683		Business Enterprise Type	
Location Freeland Road from Kane Road to Poseyville Road.			Work Type		
Evaluator alb, Art L Buck		Current Contract Amount \$1,185,790.13		Managing Office Mt Pleasant TSC	
Entered By alb, Art L Buck			Revised By	Revision Date	Rev. No.
County(s) Midland County					
Project(s) 119903A, Hot mix asphalt overlay and aggregate shoulders. 128043A, Hot mix asphalt cold milling and resurfacing and aggregate s 130262A, Hot mix asphalt base crushing, shaping and resurfacing, aggr					
Comments					

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
1. To what degree are Contractor's project management personnel available and given the authority to execute the directions of the Engineer?	8	
2. To what degree are the Contractor's management personnel competent and effective in scheduling the work and organizing construction operations, including being punctual in starting and completing the work on the project and meeting critical intermediate phases in accordance with the contract?	9	coordinated 2 shearer road projects to complete them consecutively



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
3. To what degree does the Contractor furnish required documentation and reports in a timely manner? This includes, but is not limited to, certification of materials, delivery tickets, invoices, progress schedule, shop drawings, material sampling, requests for extensions of time, contractor staking and Contractor Quality Assurance/Quality Control (QA/QC) plans and documentation.	8	
4. To what degree does the Contractor comply with the direction of the Engineer and follow the project authority as detailed in Division 1 of the Standard Specifications for Construction?	8	
5. To what degree does the Contractor comply timely with all appropriate wage rates, labor, EEO, and D.B.E. laws and regulations, submit accurate certified payrolls and promptly pay all subcontractors?	8	
B. Resources		
6. To what degree does the Contractor have adequate and sufficient equipment to keep the project on schedule? Does the equipment meet the requirements of the specifications and efficiently provide a quality product?	8	
7. To what degree does the Contractor have competent and sufficient personnel to keep the project on schedule?	9	coordinated 2 shearer road projects to limit impact to local traffic
C. Work Performance		
8. To what degree does the Contractor have good safety practices? Does the Contractor follow their own safety program?	8	
9. To what degree did the Contractor comply with contract requirements for maintaining traffic?	8	
10. If applicable, to what degree does the Contractor meet the contract requirements for Contractor Quality Control (CQC)?	N/A	
11. To what degree does the Contractor provide a quality product?	8	
12. To what degree does the Contractor properly notify and coordinate work with utility companies, railroads, property owners, local unit of government, and Contractors working on adjacent projects?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
C. Work Performance		
13. To what degree does the Contractor submit the necessary documentation to permit timely closeout and finaling of project?	9	project management always prompt in providing all documentation
14. To what degree does the Contractor meet the environmental requirements of the contract?	8	
D. Subcontractor Management		
15. To what degree does the Contractor coordinate work with Subcontractor's work, exercise authority over Subcontractors, provide notice of Subcontractor's work schedule and ensure that Subcontractors are in compliance with contract requirements?	8	

Evaluator	(Date)
Construction/Project Engineer	(Date)
TSC Manager: Bill Mayhew, Mt Pleasant TSC	(Date)



Contractor's Performance Evaluation

Contract: 56000-203306, Pavement removal, hot mix asphalt surfacing, culvert replace

Report Period 1/1/2020 - 9/23/2020		CPE Number 8		Contractor The Isabella Corporation	
CPE Date 11/18/2020	Report Type Final		Contractor Type Prime	Subcontract Amount	
Form Version 082307	Route	District 04683	Business Enterprise Type		
Location On various routes at 13 locations.			Work Type		
Evaluator NP, Nathan P Pfenninger		Current Contract Amount \$934,022.12		Managing Office Mt Pleasant TSC	
Entered By NP, Nathan P Pfenninger			Revised By	Revision Date	Rev. No.
County(s) Midland County					
Project(s) 203306A, Pavement removal, hot mix asphalt surfacing, culvert replace					
Comments					

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
1. To what degree are Contractor's project management personnel available and given the authority to execute the directions of the Engineer?	8	
2. To what degree are the Contractor's management personnel competent and effective in scheduling the work and organizing construction operations, including being punctual in starting and completing the work on the project and meeting critical intermediate phases in accordance with the contract?	9	The Contractor schedules work operations carefully as well as meeting all contract dates. The Contractor informs the Engineer of his work schedule and usually provides update to the progress schedule and/or critical path as required by the contract.



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
3. To what degree does the Contractor furnish required documentation and reports in a timely manner? This includes, but is not limited to, certification of materials, delivery tickets, invoices, progress schedule, shop drawings, material sampling, requests for extensions of time, contractor staking and Contractor Quality Assurance/Quality Control (QA/QC) plans and documentation.	9	The Contractor furnishes all paperwork, documentation, reports, information, plans, etc., as required on time.
4. To what degree does the Contractor comply with the direction of the Engineer and follow the project authority as detailed in Division 1 of the Standard Specifications for Construction?	8	
5. To what degree does the Contractor comply timely with all appropriate wage rates, labor, EEO, and D.B.E. laws and regulations, submit accurate certified payrolls and promptly pay all subcontractors?	8	
B. Resources		
6. To what degree does the Contractor have adequate and sufficient equipment to keep the project on schedule? Does the equipment meet the requirements of the specifications and efficiently provide a quality product?	8	
7. To what degree does the Contractor have competent and sufficient personnel to keep the project on schedule?	8	
C. Work Performance		
8. To what degree does the Contractor have good safety practices? Does the Contractor follow their own safety program?	8	
9. To what degree did the Contractor comply with contract requirements for maintaining traffic?	9	Traffic control device are in good condition, placed properly, maintained and working effectively. The Contractor monitors and meets all traffic control requirements. Any site condition which affect the traveling public are addressed.
10. If applicable, to what degree does the Contractor meet the contract requirements for Contractor Quality Control (CQC)?	8	
11. To what degree does the Contractor provide a quality product?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
C. Work Performance		
12. To what degree does the Contractor properly notify and coordinate work with utility companies, railroads, property owners, local unit of government, and Contractors working on adjacent projects?	8	
13. To what degree does the Contractor submit the necessary documentation to permit timely closeout and finaling of project?	8	
14. To what degree does the Contractor meet the environmental requirements of the contract?	8	

D. Subcontractor Management

15. To what degree does the Contractor coordinate work with Subcontractor's work, exercise authority over Subcontractors, provide notice of Subcontractor's work schedule and ensure that Subcontractors are in compliance with contract requirements?	9	The Contractor usually exceeds expectations in exercising authority, coordinating and monitoring work operations of their Subcontractors to ensure the schedule and specifications are met and that all documentation is submitted in a timely manner.
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_____ Evaluator	_____ (Date)
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_____ Construction/Project Engineer	_____ (Date)
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_____ TSC Manager: Bill Mayhew, Mt Pleasant TSC	_____ (Date)
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Contractor's Performance Evaluation

Contract: 23081-130052, Hot mix asphalt or concrete pavement reconstruction, rehab

Report Period 3/20/2020 - 1/25/2021		CPE Number 32		Contractor The Isabella Corporation	
CPE Date 1/25/2021	Report Type Final		Contractor Type Subcontractor	Subcontract Amount \$105,850.00	
Form Version 082307	Route	District 06025	Business Enterprise Type		
Location St Joseph/Main Street over I-496. (S15 of 33044)			Work Type Miscellaneous		
Evaluator ZT, Zachary Thelen		Current Contract Amount \$50,837,301.98		Managing Office Lansing TSC	
Entered By KP, Kyle J Pung			Revised By	Revision Date	Rev. No.
County(s) Ingham County					
Project(s) 130052A, Alternate hot mix asphalt or concrete reconstruction, concrete 204532A, Bridge rehabilitation, deck, pin and hanger replacement, parapet 205819A, Bridge rehabilitation, full depth deck patching, epoxy overlay 205827A, Bridge rehabilitation, deck replacement, substructure patching 207419A, Shared use path and a median refuge island. 207615A, Bridge rehabilitation, concrete beam end repairs, bearing reinforcement 208526A, Hot mix asphalt reconstruction, concrete curb, gutter, sidewalk 208608A, Shared use path both hot mix asphalt and concrete, concrete					
Comments					

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
1. To what degree are Contractor's project management personnel available and given the authority to execute the directions of the Engineer?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
A. Organization and Management		
2. To what degree are the Contractor's management personnel competent and effective in scheduling the work and organizing construction operations, including being punctual in starting and completing the work on the project and meeting critical intermediate phases in accordance with the contract?	9	
3. To what degree does the Contractor furnish required documentation and reports in a timely manner? This includes, but is not limited to, certification of materials, delivery tickets, invoices, progress schedule, shop drawings, material sampling, requests for extensions of time, contractor staking and Contractor Quality Assurance/Quality Control (QA/QC) plans and documentation.	8	
4. To what degree does the Contractor comply with the direction of the Engineer and follow the project authority as detailed in Division 1 of the Standard Specifications for Construction?	8	
5. To what degree does the Contractor comply timely with all appropriate wage rates, labor, EEO, and D.B.E. laws and regulations, submit accurate certified payrolls and promptly pay all subcontractors?	8	
B. Resources		
6. To what degree does the Contractor have adequate and sufficient equipment to keep the project on schedule? Does the equipment meet the requirements of the specifications and efficiently provide a quality product?	9	
7. To what degree does the Contractor have competent and sufficient personnel to keep the project on schedule?	9	
C. Work Performance		
8. To what degree does the Contractor have good safety practices? Does the Contractor follow their own safety program?	8	
9. To what degree did the Contractor comply with contract requirements for maintaining traffic?	8	
10. If applicable, to what degree does the Contractor meet the contract requirements for Contractor Quality Control (CQC)?	8	



Contractor's Performance Evaluation

Appraisal of the contractor's (subcontractor's) performance.

	Rating	Rating Remarks
C. Work Performance		
11. To what degree does the Contractor provide a quality product?	8	
12. To what degree does the Contractor properly notify and coordinate work with utility companies, railroads, property owners, local unit of government, and Contractors working on adjacent projects?	8	
13. To what degree does the Contractor submit the necessary documentation to permit timely closeout and finaling of project?	8	
14. To what degree does the Contractor meet the environmental requirements of the contract?	9	

D. Subcontractor Management

15. To what degree does the Contractor coordinate work with Subcontractor's work, exercise authority over Subcontractors, provide notice of Subcontractor's work schedule and ensure that Subcontractors are in compliance with contract requirements?	8
--	---

_____ Evaluator	_____ (Date)
_____ Construction/Project Engineer	_____ (Date)
_____ TSC Manager: Gregory Losch P.E.	_____ (Date)

Criteria 7 attachment



March 25, 2022

RE: The Isabella Corporation.

To Whom It May Concern:

VTC Insurance Group has the distinct privilege of servicing the bond needs of The Isabella Corporation. This organization maintains an enviable reputation for excellence and integrity, and consistently reference well with their suppliers and subcontractors.

We currently run on a day-to-day operating line of \$8,000,000 single with an aggregate program of \$16,000,000. We have issued bid, performance, and payment bonds as needed with Atlantic Specialty Insurance Company. The operating line is by no means a limit of bonding capacity, but is rather a parameter to efficiently handle routine needs. We would favorably consider any reasonable request because The Isabella Corporation's strong reputation.

We appreciate the opportunity to extend our unconditional recommendation for construction or related undertakings this fine firm may entertain. Should you need any further information please do not hesitate to contact our office at 248-828-3377.

ATLANTIC SPECIALTY INSURANCE COMPANY

A handwritten signature in blue ink, appearing to read "Susan L. Small", is written over a horizontal line.

Susan L. Small, Attorney-in-Fact



Confidence. For What's Next.™



Power of Attorney

KNOW ALL MEN BY THESE PRESENTS, that ATLANTIC SPECIALTY INSURANCE COMPANY, a New York corporation with its principal office in Plymouth, Minnesota, does hereby constitute and appoint: **Alan P. Chandler, Robert Trobec, Jeffrey A. Chandler, Kathleen M. Irelan, Ian J. Donald, Wendy L. Hingson, Susan L. Small**, each individually if there be more than one named, its true and lawful Attorney-in-Fact, to make, execute, seal and deliver, for and on its behalf as surety, any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof; provided that no bond or undertaking executed under this authority shall exceed in amount the sum of: **unlimited** and the execution of such bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof in pursuance of these presents, shall be as binding upon said Company as if they had been fully signed by an authorized officer of the Company and sealed with the Company seal. This Power of Attorney is made and executed by authority of the following resolutions adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

Resolved: That the President, any Senior Vice President or Vice-President (each an "Authorized Officer") may execute for and in behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and affix the seal of the Company thereto; and that the Authorized Officer may appoint and authorize an Attorney-in-Fact to execute on behalf of the Company any and all such instruments and to affix the Company seal thereto; and that the Authorized Officer may at any time remove any such Attorney-in-Fact and revoke all power and authority given to any such Attorney-in-Fact.

Resolved: That the Attorney-in-Fact may be given full power and authority to execute for and in the name and on behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and any such instrument executed by any such Attorney-in-Fact shall be as binding upon the Company as if signed and sealed by an Authorized Officer and, further, the Attorney-in-Fact is hereby authorized to verify any affidavit required to be attached to bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof.

This power of attorney is signed and sealed by facsimile under the authority of the following Resolution adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

Resolved: That the signature of an Authorized Officer, the signature of the Secretary or the Assistant Secretary, and the Company seal may be affixed by facsimile to any power of attorney or to any certificate relating thereto appointing an Attorney-in-Fact for purposes only of executing and sealing any bond, undertaking, recognition or other written obligation in the nature thereof, and any such signature and seal where so used, being hereby adopted by the Company as the original signature of such officer and the original seal of the Company, to be valid and binding upon the Company with the same force and effect as though manually affixed.

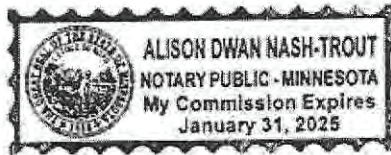
IN WITNESS WHEREOF, ATLANTIC SPECIALTY INSURANCE COMPANY has caused these presents to be signed by an Authorized Officer and the seal of the Company to be affixed this twenty-seventh day of April, 2020.

STATE OF MINNESOTA
HENNEPIN COUNTY



By *Paul J. Brehm*
Paul J. Brehm, Senior Vice President

On this twenty-seventh day of April, 2020, before me personally came Paul J. Brehm, Senior Vice President of ATLANTIC SPECIALTY INSURANCE COMPANY, to me personally known to be the individual and officer described in and who executed the preceding instrument, and he acknowledged the execution of the same, and being by me duly sworn, that he is the said officer of the Company aforesaid, and that the seal affixed to the preceding instrument is the seal of said Company and that the said seal and the signature as such officer was duly affixed and subscribed to the said instrument by the authority and at the direction of the Company.



Alison Nash-Trout
Notary Public

I, the undersigned, Secretary of ATLANTIC SPECIALTY INSURANCE COMPANY, a New York Corporation, do hereby certify that the foregoing power of attorney is in full force and has not been revoked, and the resolutions set forth above are now in force.

Signed and sealed. Dated 25th day of March, 2022

This Power of Attorney expires
January 31, 2025



Kara Barrow
Kara Barrow, Secretary



CRITERIA 10:

Disclosure of any debarment by any federal, state or local governmental unit and/or findings of non-responsibility or non-compliance with respect to any public or private construction project performed by the bidder.

NONE

CRITERIA 11:

Proof of insurance, including certificates of insurance, confirming existence and amount of coverage for liability, property damage, workers compensation, and any other insurances required by the proposed contract documents.

Name:

The Isabella Corporation

Type of Coverage:

: Commercial General Liability, Commercial Auto, Workers' Comp, Commercial Umbrella, Pollution Liability

Telephone:

(989) 772-5890

Are you self-insured for Worker's Compensation Insurance? Yes No

CRITERIA 12 (ATTACHMENT REQUIRED):

A statement regarding the bidder's staffing capabilities and labor sources including subcontractors and a verification from the bidder that construction workers will not be misclassified as independent contractors in violation of state or federal law.

Criteria #12

We employ 20 workers that will be working on the project. No workers on the contract shall be classified as independent contractors.

We will be using subcontractors that will not be employing independent contractors.

RESPONSIBLE CONTRACTOR ORDINANCE

PAGE 4 OF 12 – THIS DOCUMENT MUST BE SUBMITTED WITH YOUR BID

CONTRACTOR NAME The Isabella Corporation



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 04/13/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement.

PRODUCER: The Mayan Agency, 989-643-7207. CONTACT NAME: Thomas J Mayan, 989-643-7207. INSURER(S): Home Owners Insurance Co., Auto Owners Insurance Co., Capitol Specialty Ins Corp.

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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

Table with columns: INSR LTR, TYPE OF INSURANCE, ADDL INSD, SUBR WVD, POLICY NUMBER, POLICY EFF, POLICY EXP, LIMITS. Rows include Commercial General Liability, Automobile Liability, Umbrella Liability, Workers Compensation, and Pollution Liability.

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

CERTIFICATE HOLDER CANCELLATION

Certificate holder: City of Jackson, 161 W Michigan Avenue, Jackson, MI 49201. Cancellation notice: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

CRITERIA 13:

Verification of an existing Fitness for Duty Program (drugs and alcohol) of each employee working on the proposed jobsite.

Yes, we have a Fitness for Duty Program

No, we do not have a Fitness for Duty Program

Additional Information:

CRITERIA 14:

A warranty statement regarding labor, equipment and materials.

The Isabella Corporation shall and hereby does warrant and guarantee that all work executed by said Contractor on the project will be free from defects in material and workmanship for the warranty period stated above. Said Subcontractor agrees that it will promptly, at its own expense, repair and/or replace all defective work upon notice to do so to said Contractor during the term of the Guaranty Warranty.

CRITERIA 15:

A statement affirming that the firm will pay all craft employees that it employs on the project the current wage rates and fringe benefits as required under applicable federal, state, or local wage laws.

All employees working on the project will receive federal, state or local wages on the project.

CRITERIA 16:

A statement from the contractor or subcontractor acknowledging their obligation to comply with this Ordinance in each contract and subcontract.

The Isabella Corporation will comply with this Ordinance in each contract and subcontract.

CRITERIA 17:

A statement identifying what possible change orders could be necessary and what their approximate subsequent total costs would be.

The Isabella Corporation does not anticipate any change orders necessary for the project.

CRITERIA 18:

Qualifications of management and supervisory personnel to be assigned by the bidder.

The project superintendent is a civil engineer and has 20 experience in construction.

The concrete crew employees have worked for the company for 10 years.

The Isabella Corporation along with all of their subcontractors are MDOT pre-qualified.

RESPONSIBLE CONTRACTOR ORDINANCE

CRITERIA 19 (ATTACHMENT REQUIRED):

References from individuals or entities the bidder has worked for within the last five (5) years including information regarding records of performance and job site cooperation.

CRITERIA 20:

Evidence of any quality assurance program used by the bidder and the results of any such program on the bidder's previous projects.

When we work on MDOT projects, we employ a concrete quality assurance agency.

CRITERIA 21:

Assurance that all construction work for this project must proceed economically, efficiently, continuously and without interruption.

Upon the project start up, The Isabella Corporation will work at a steady, uninterrupted pace. We will meet any phasing and completion requirements.

CRITERIA 22 (ATTACHMENT REQUIRED):

A list of projects completed within the past five (5) years of comparable size/complexity, including dates, clients, approximately dollar value, and size. Documentation from these previous projects including but not limited to all extra costs relating to the bidder's timeliness, performance, quality of work, extension requests, contractual fines and penalties imposed, liens filed, history of claims for extra work and any contract defaults with an explanation of the reason for the default and how the default was resolved.

RESPONSIBLE CONTRACTOR ORDINANCE

PAGE 7 OF 12 – THIS DOCUMENT MUST BE SUBMITTED WITH YOUR BID

CONTRACTOR NAME The Isabella Corporation



2201 Commerce Drive
Mt. Pleasant, MI 48858

Ph: (989) 772-5890
Fax: (989) 773-2978

MDOT Contractor Code: 03260

Criteria #19

References

<u>Agency</u>	<u>Contact Name</u>	<u>Phone Number</u>	<u>Email</u>
Central Michigan University	Steve Clark	(989) 774-6550	clark7sm@cmich.edu
City of Mt. Pleasant	Stacie Tewari	(989) 779-5404	stewari@mt-pleasant.org
Isabella County Road Commission	Pat Gaffney	(989) 773-7131 x 115	pgaffney@isabellaroads.com
OHM Advisors	Jason Strong	(989) 393-1701	jason.strong@ohm-advisors.com
Fishbeck	Jeremy McDonald	(616) 464-3963	jpmcdonald@fishbeck.com
TL Contracting	Alex Smith	(517) 669-0600	alex@tlcontractinginc.com
LD Clark Construction	Dave Clark	(517) 285-9910	dclark@ldclarkcompanies.com

Work Completed In The Past 5 Years

2017 Work Completed

Contractor	Project	Self Performed Work		Project Start	Project End
		Total Project Cost	Work		
JIZ Contracting	Union Township - Bypass Manhole	\$ 37,000.00	\$ 37,000.00	7/12/2017	8/10/2017
Isabella Corp.	St. Louis Raw Water Transmission Main Directional Drill	\$ 4,214,098.70	\$ 140,000.00	1-May-17	10/20/2017
Isabella Corp	CMU Lot 53 Storm Sewer	\$ 36,400.00	\$ 28,000.00	6/5/2017	8/11/2017
Isabella Corp.	CMU Rose Pond Control	\$ 24,300.00	\$ 24,300.00	4/15/2017	8/11/2017
Isabella Corp.	CMU Barnes Hall	\$ 150,000.00	\$ 130,000.00	8/1/2017	9/21/2017
Isabella Corp	Clare County - Maintenance Project	\$ 134,000.00	\$ 46,000.00	after award	30 days
Isabella Corp.	Mt. Pleasant - West Intermediate School	\$ 224,000.00	\$ 224,000.00	10/10/2016	8/17/2016
Isabella Corp.	Mt. Pleasant - Meijer Sitenwork	\$ 252,100.00	\$ 216,000.00	1/1/2017	6/29/2017
Isabella Corp.	Midland County - Shearer Road Crush and Shape_56555-128042_3% DBE	\$ 283,753.24	\$ 109,000.00	4/1/2017	7/28/2017
Central Asphalt/Isabella Corp	Midland County - Various Roads_ 56555-119903_4% DBE	\$ 1,181,393.71	\$ 115,000.00	6/12/2017	9/29/2017
Central Asphalt/Isabella Corp	Mt. Pleasant - Three Leaves and Demison Drive	\$ 163,184.00	\$ 17,000.00	6/19/2017	7/7/2017
Isabella Corp.	Isabella County - Valley Road	\$ 39,750.00	\$ 39,750.00	4/15/2017	5/15/2017
Isabella Corp.	Midland - Item #61_E. St. Andrews Rd_56415-133084	\$ 347,664.23	\$ 142,000.00	6/19/2017	8/11/2017
Central Asphalt/Isabella Corp	Item #63 - Gratiot Co. Crush & Shapes_ 29141-123488 (3% DBE, Cb Prime)	\$ 491,196.00	\$ 119,000.00	6/5/2017	8/25/2017
Isabella Corp.	Mt. Pleasant - Menards Addition	\$ 162,155.00	\$ 162,155.00	8/14/2017	11/1/2017
Isabella Corp.	Deerfield Township - Parking Lot	\$ 113,847.00	\$ 94,700.00	8/22/2017	9/28/2017
Isabella Corp.	1308 Gaylord St.	\$ 120,000.00	\$ 90,000.00	8/1/2017	9/10/2017
Central Asphalt/Isabella	Clare County-Farwell Paving_18000-200416	\$ 548,113.18	\$ 24,800.00	4/1/2018	6/29/2017
Isabella Corp.	Midland - Boston St. & Kentwood Water Main/ Street Reconstruction	\$ 371,793.60	\$ 152,000.00	After Award	7/30/2017
Isabella Corp.	Breckenridge - Force Main	\$ 452,105.00	\$ 320,000.00	75 days	
Isabella Corp.	Mt. Pleasant - 1040 Broomfield Road	\$ 125,540.00	\$ 115,000.00	negotiatable	
Isabella Corp.	Ithaca - ZFS Sanitary	\$ 638,380.00	\$ 411,000.00	after award	10/27/2017
Isabella Corp.	Rosebush - Sanitary Sewer System Improvements	\$ 1,158,300.00	\$ 1,000,000.00	after award	120 Days
Isabella Corp / Parrish	Coldwater - Sunset Meadows	\$ 180,000.00	\$ 180,000.00		
Isabella Corp / Isabella Corp	Meridian Township - Mt. Hope Sidewalk	\$ 227,000.00	\$ 92,500.00	after award	5/31/2017
Isabella Corp./Central Asphalt	Mt. Pleasant - Overlay Project	\$ 26,769.00	\$ 26,769.00		
Isabella Corp. / CL Trucking	Howard City - Shaw Street	\$ 58,355.00	\$ 58,355.00		
Isabella Corp. / Clark Foundations	Lansing - Dart Bank	\$ 30,600.00	\$ 30,600.00		
Isabella Corp / Sovo	Midland - Bayliss Street	\$ 61,539.00	\$ 61,539.00	after award	6/30/2017
Isabella Corp / ??	Midland - Lucky's Steakhouse	\$ 34,125.00	\$ 34,125.00		
Isabella Corp / Pat's Gradall	Midland - Woodcrest & Plymouth Schools	\$ 146,130.00	\$ 146,130.00	4/1/2017	9/17/2017
Isabella Corp / Crawford	Owosso - Cargill Access Road	\$ 64,387.00	\$ 64,387.00		
Isabella Corp/ NY Mac Enterprises	MDOT 1701 047 Ingham County Chip Seal Ramps	\$ 47,518.00	\$ 47,518.00		
Isabella Corp	Jackson - PAKA Trail	\$ 833,250.05	\$ 302,000.00		
Isabella Corp					

2018 Work Completed

Contractor	Project	Self Performed Work		Project Start	Project End		
		Total Project Cost	Work				
Isabella Corp	Union Township - Pickard and Summerton Rd Watermain	\$	276,325.00	\$	248,000.00	after award	60 Days
Isabella Corp	Mt. Pleasant - Kmart Demo	\$	412,095.00	\$	307,200.00	9/15/2018	10/14/2018
Isabella Corp	Mt. Pleasant - Hobby Lobby Sitework	\$	475,000.00	\$	475,000.00	8/20/2018	11/11/2018
Isabella Corporation	Big Rapids - N. State St Lift Station	\$	288,000.00	\$	250,000.00	after award	210 days
Isabella Corp							
JJZ Contracting	Union Township Bypass Manhole Project	\$	37,000.00	\$	37,000.00	after award	30 days
Crawford/Isabella corp	Shiawassee County - Oliver Street_76000-133015	\$	1,101,263.03	\$	125,600.00	5/14/2018	10/10/2018
Isabella Corp.	Rosebush - Sanitary Sewer System Improvements	\$	1,158,300.00	\$	1,000,000.00	after award	120 Days
Isabella Corp.	Harbor Springs - Beach Road Force Main	\$	328,300.00	\$	300,000.00	after award	11/1/2018
Miller Development/Isabella	Isabella County - Isabella Rd Bridge_37000-129277	\$	575,714.61	\$	51,520.00	1/15/2018	5/18/2018
Isabella Corp	Mt. Pleasant - Sidewalk Project	\$	153,275.81	\$	62,000.00	4/30/2018	6/22/2018
Central Asphalt/Isabella	Clare County-Farwell Paving_18000-200416	\$	548,113.18	\$	24,800.00	4/1/2018	6/29/2018
Isabella Corp	Mt. Pleasant - SCIT Kitchen Addition	\$	108,670.00	\$	108,670.00	4/10/2018	8/10/2018
Isabella Corp	Mt. Pleasant - Mid Michigan Health Park	\$	210,000.00	\$	210,000.00	4/23/2018	11/1/2018
Isabella Corp	Greenville - Elementary School Playgrounds	\$	874,814.00	\$	451,000.00	6/10/2018	8/10/2018
Central Asphalt/Isabella Corp	Mt. Pleasant - 2018 Street Overlay	\$	498,718.22	\$	44,647.50	6/4/2018	8/3/2018
Central Asphalt/ Isabella Corp	Gladwin County - Lyle Road	\$	687,955.25	\$	119,322.00	7/9/2018	10/21/2018
Ron Miller/ Isabella Corp	Isabella County - Loomis Rd Box Culverts	\$	347,172.00	\$	117,500.00	after award	8/31/2018
Isabella Corp	Mt. Pleasant - Mission St Enterprises	\$	287,000.00	\$	180,000.00	8/15/2018	11/1/2018
Isabella Corp	Edmore - South 10th Street Improvements	\$	164,408.60	\$	54,000.00	after award	35 days
Isabella Corp	Clare - John R and 7th Street	\$	285,720.10	\$	140,875.00	7/1/2018	10/1/2018
Isabella Corp	Gratiot County Drain 106 - Bore & Jack	\$	44,400.00	\$	44,400.00	12/10/2017	1/31/2018
Isabella Corp	Gratiot County Drain 101 - Bore & Jacks	\$	54,000.00	\$	54,000.00	3/4/2018	4/29/2018

2019 Work Completed

Contractor	Project	Total Project Cost	Self Performed		Self Performed dirt Work	Project Start	Project End
			Concrete Work	Work			
Isabella Corp	SCIT - Casino Regrading	\$ 204,600.00	\$ 25,000.00	\$	169,100.00	after award	???
Isabella Corp	Mt. Pleasant - Chipawaters Park and Fisher Lift Stations	\$ 90,300.00	\$	\$	80,000.00	after award	5/24/2019
Isabella Corp	CMU - Barnes Hall Decommissioning - Bid Pack #2 Sitework	\$ 307,000.00	\$ 40,000.00	\$	211,500.00	5/6/2019	8/9/2019
Isabella Corp	CMU - North Quad Infrastructure	\$ 290,000.00	\$ 140,000.00	\$	130,000.00	6/1/2019	8/1/2019
Isabella Corp	Item #71 - Midland County_Coleman Road_56000-203302	\$ 445,879.27	\$	\$	349,000.00	after award	6/28/2019
Central Asphalt/Isabella Corp	Mt. Pleasant - Overlay Project	\$ 227,873.65	\$ 26,500.00	\$	28,000.00	6/1/2019	8/9/2019
Central Asphalt/Isabella Corp	Item #75 - Gratiot Co. Buchanan Rd C&S_29000-205128	\$ 354,506.38	\$	\$	111,324.50	after award	8/2/2019
Isabella Corp	Item #53 - Isabella Co. - Broadway Bridge_37000-203335	\$ 167,663.86	\$	\$	140,000.00	6/1/2019	8/30/2019
Isabella Corp	Harrison - US127 Maintenance Project	\$ 63,500.00	\$ 16,000.00	\$	20,000.00	after award	8/29/2019
Isabella Corp	Mt. Pleasant - CMC/MH Drainage	\$ 407,500.00	\$ 10,000.00	\$	307,000.00	after award	11/15/2019
Isabella Corp	St. Johns Industrial Park Improvements	\$ 2,197,606.12	\$	\$	1,380,000.00	after award	9/15/2020
Isabella Corp	Item #93 - Midland Co - Various Storm Repairs_56000-203306	\$ 916,331.70	\$	\$	350,000.00	after award	2/10 days
Isabella Corporation	Big Rapids - N. State St Lift Station	\$ 280,780.00	\$ 1,500.00	\$	250,000.00	after award	9/13/2019
Crawford/Isabella	Item #06- Shiawassee Co. - Owosso Washington St_76000-203457	\$ 1,121,218.36	\$	\$	32,890.00	6/10/2019	10/31/2019
Isabella Corp	Midland - Bauss Ct and Byrd St	\$ 257,600.99	\$	\$	101,000.00	7/1/2019	
Isabella Corp	1902.060-Jackson with Michigan Paving	\$	\$ 15,000.00	\$			
Isabella Corp	1902.067-Gladwin with Pyramid Paving	\$	\$ 72,000.00	\$		6/2/2019	8/2/2019
Isabella Corp	American One Parking Lot-Michigan Paving	\$	\$ 19,000.00	\$			
Isabella Corp	1807.601-Evertt with J. Ranck	\$	\$ 23,000.00	\$			
Isabella Corp	Haley Street in Midland with Sovo	\$	\$ 112,000.00	\$			
Isabella Corp	Portland Schools Bid Pack 2	\$	\$ 639,000.00	\$			
Isabella Corp	Item #36 - Lenawee Co- Treat Highway Sidewalk_46000-202714	\$ 524,418.95	\$	\$		6/13/2019	9/30/2019
Isabella Corp	Item #14 - Ingham Co - School Sidewalks_33000-202716	\$ 1,047,300.30	\$	\$			

2020 Work Completed

Contractor	Project	Total Project Cost	Self Performed Concrete Work	Self Performed Work	Project Start	Project End
Isabella Corp						
Isabella Corporation	SCIT - WWTF Modifications	\$ 348,900.00	\$	\$ 174,000.00	After award	12/15/2020
Isabella Corp	SCIT Education Complex Road and Trails	\$ 1,699,737.51	\$ 15,750.00	\$ 640,000.00	after award	11/15/2020
Isabella Corporation	Mt. Pleasant - Industrial Park Detention Pond Expansion	\$ 196,750.00	\$	\$ 196,750.00	11/23/2020	12/18/2020
DJ McQuestion/ J&N Construction	Item #901_ Ingham Co - I496 Reconstruction_23081-130052	\$ 49,657,242.22	\$	\$ 105,850.00	4/1/2020	11/15/2020
McGuiRK S&G/Isabella Corp	Big Rapids - 2019 Infrastructure Improvements	\$ 1,792,913.50	\$	\$ 34,250.00	5/28/2019	6/24/2020
Isabella Corporation	Isabella Co - ICRC M20 Drive Improvements	\$ 225,582.00	\$ 29,920.00	\$ 165,000.00	after award	5/29/2020
Isabella Corp	Union Township - Mt. Pleasant Storage	\$ 21,000.00	\$	\$ 21,000.00	3/1/2020	3/21/2020
Central Asphalt/Isabella Corp	Item #87 - Gratiot Co - Luce Rd Paving_29000-206064	\$ 525,760.34	\$	\$	5/18/2020	7/3/2020
Crawford/ Isabella	Gratiot County - #383 Drain	\$ 401,005.00	\$	\$ 50,000.00		
Isabella Corp	Ithaca - W. Newark St. Sidewalk	\$ 93,919.25	\$ 25,000.00	\$ 22,000.00	after award	6/16/2020
Isabella Corp	St. Johns Industrial Park Improvements	\$ 600,000.00	\$	\$ 100,000.00	after award	11/15/2019
Isabella Corp	SCIT - Casino Regrading	\$ 204,600.00	\$ 25,000.00	\$ 169,100.00	after award	???
Isabella Corp	CMU - 2020 Sidewalk Repair Project	\$ 261,000.00	\$	\$	5/20/2010	8/14/2020
Isabella Corp	CMU - WCD Storm Sewer at Motorpool	\$ 20,500.00	\$ 2,000.00	\$ 18,000.00	5/11/2020	8/14/2020
Isabella Corp	CMU - Powers Hall Drainage Improvements	\$ 17,250.00	\$ 2,000.00	\$ 14,000.00	5/11/2020	8/14/2020
Crawford/ Isabella	Owosso - 2020 Street Program Contract 1	\$ 2,372,642.00	\$	\$ 155,700.00	Apr-20	9/19/2020
Isabella Corp	CMU - 2020 SAC Eliminate Court Flooding	\$ 230,000.00	\$	\$ 197,000.00	6/1/2020	8/14/2020
Isabella Corp	SCIT - Water Valve Repairs	\$ 117,950.00	\$	\$ 95,000.00		
Isabella Corporation	Mt. Pleasant - Island Park Fitness Trail	\$ 434,287.32	\$ 9,800.00	\$ 94,000.00	after award	7/18/2020
Isabella Corp	Item #33 - Midland Co - Various Storm Repairs_56000-203306	\$ 796,331.70	\$	\$ 260,000.00	after award	9/15/2020
Central Asphalt/Isabella Corp	Item #15 - Gratiot Co - US127 BR Alma_29031-208861	\$ 836,307.37	\$	\$ 65,346.00	9/9/2020	10/8/2020
Isabella Corp	Mt. Pleasant - 2020 .05 MG Elevated Tank Valve & WWM Replacement	\$ 54,140.00	\$	\$ 54,140.00		
Isabella corp	Item #14 - Ingham Co - School Sidewalks_33000-202716	\$ 1,047,300.30	\$	\$		
Isabella Corporation	Union Township - Well No. 11 Transmission Main	\$ 118,055.00	\$	\$ 118,055.00	after award	45 days
Isabella Corp	Item #21 - Livingston Co - Grand River Sidewalk_47000-208958	\$ 444,417.95	\$	\$	After Award	10/31/2020
Isabella Corp	Clare Streetscape Maintenance	\$ 284,437.50	\$	\$	after award	7/27/2020
Isabella Corp	Mt. Pleasant - CMCMH Drainage	\$ 407,500.00	\$ 10,000.00	\$ 307,000.00	after award	
Isabella Corp	Midland - 2020 Tittabawassee River Crossing	\$ 336,837.00	\$ 336,847.00	\$ 290,000.00	After Award	11/30/2020

2021 Work Completed

Contractor	Project	Total Project Cost	Self Performed Concrete Work	Self Performed Dirt Work	Project Start	Project End
Isabella Corporation	Harrison - Hillside Elementary Demolition Restoration	\$ 151,500.00	\$	\$ 100,000.00	10/15/2021	12/5/2021
Isabella Corp	Midland - Pere Marquette Rail Trail Repairs	\$ 350,000.00	\$	\$ 230,000.00	after award	7/1/2022
Isabella Corp	Merrill - NGL Energy Sitemwork	\$ 500,000.00	\$ 113,000.00	\$ 214,000.00		
Isabella Corporation	SCIT -WWTF Modifications	\$ 348,900.00	\$	\$ 174,000.00	After award	4/30/2021
Isabella Corporation	Mt. Pleasant - Industrial Park Detention Pond Expansion	\$ 196,750.00	\$	\$ 196,750.00	5/20/2021	6/4/2021
Isabella Corporation	Mt. Pleasant - 2021 New Sidewalk and Sidewalk Replacement	\$ 117,206.05	\$ 63,000.00	\$ 42,000.00	4/26/2021	6/4/2021
Isabella Corp	SCIT Education Complex Road and Trails	\$ 499,737.51	\$	\$ 100,000.00	after award	6/1/2021
Morningstar/Isabella Corp	Ferris State - Vandercook Hall Demo_ watermain	\$ 166,750.00	\$	\$ 166,750.00	5/24/2021	6/25/2021
C&R Electric/Isabella Corp	Mt. Pleasant - CMU P2 Duct Bank Upgrade	\$ 98,000.00	\$	\$ 98,000.00	5/1/2020	
Crawford/Isabella Corp	Item #51 - St. Louis - State St_29000-207331	\$ 893,084.30	\$	\$ 70,200.00	6/1/2021	8/20/2021
Central Asphalt/ Isabella Corp	Mt. Pleasant - 2021 Overlay Project	\$ 228,840.18	\$ 70,000.00	\$ 24,500.00	6/28/2021	7/23/2021
Isabella Corp	Mt. Pleasant - Gaylord St Reconstruction	\$ 339,532.00	\$ 62,000.00	\$ 178,000.00	6/7/2021	8/1/2021
Isabella Corporation	CMU - Ronan Hall Sanitary Sewer	\$ 62,250.00	\$ 12,000.00	\$ 46,000.00	6/1/2021	8/6/2021
Isabella Corp	SCIT - Valve Bolt Replacement Project - Phase 2	\$ 117,950.00	\$	\$ 117,950.00	After award	
Isabella Corp	Mt. Pleasant - MMCP Safety Improvements	\$ 279,777.84	\$	\$ 130,000.00	6/1/2021	8/21/2021
Isabella Corp	Mt. Pleasant - Sewer Extension Project	\$ 98,990.00	\$	\$ 98,990.00	7/26/2021	8/13/2021
Isabella Corporation	SCIT - Ogemaw, Otto, Ojibway Reconstruction	\$ 648,560.25	\$	\$ 247,000.00	120 days	
Isabella Corp	Mt. Pleasant - CRBE XSA1 Sitemwork	\$ 175,000.00	\$ 15,000.00	\$ 64,000.00	after award	8/31/2021
Isabella Corp	Alma - Granger Transfer Station	\$ 70,775.00	\$	\$ 70,775.00	after award	10/15/2021
Isabella Corp	Item #45 - Big Rapids Colburn Ave_54000-208217	\$ 697,625.92	\$	\$ 440,000.00	60 days	11/8/2021
Isabella Corp	Alma - Garr Tool Electric Line	\$ 21,750.00	\$	\$ 21,750.00	after award	12/1/2021
Isabella Corporation	Midland - 2021 Greenbelt Water Main	\$ 448,849.30	\$	\$ 360,000.00	4/1/2021	7/30/2021

CRITERIA 23:

The ratio of masters or journeypersons to apprentices proposed to be used on the construction project job site, if apprentices are to be used on the project.

Not applicable to our type of work.

Do you participate in the Registered Apprenticeship Programs that are registered with the United States Department of Labor Office of Apprenticeship or by a State Apprenticeship Agency recognized by the Office of Apprenticeship?

Yes

No

Additional Information:

(ATTACHMENT REQUIRED) Documentation of how the bidder assesses the skills and qualifications of any employees who do not have master or journeyperson certification or status, or are not participants in a Registered Apprenticeship Program. **N/A**

CRITERIA 24 (ATTACHMENT REQUIRED)

Evidence of the bidder’s worker’s compensation Experience Modification Rating (“EMR”). Preference will be given to contractors and subcontractors who exhibit an EMR of 1.0 or less based on a three-year average.

CRITERIA 25:

All craft labor that will be employed by the firm for the project has completed at least the OSHA 10 hour training course of safety established by the U.S. Department of Labor, Occupational Safety & Health Administration.

Yes

No

RESPONSIBLE CONTRACTOR ORDINANCE

THE MAYAN AGENCY

140 W. Saginaw St.
(989)643-7207
P.O. Box 578
Merrill, MI 48637

“Insurance Since 1915”

www.mayanagency.com

Toll Free (800) 64-MAYAN
FAX (989) 643-7482

March 28, 2022

The Isabella Corp.
2201 Commerce Dr.
Mt. Pleasant, MI 48858

To Whom It May Concern:

The following summarizes The Isabella Corp.'s EMR Rating history:

4/1/19 to 4/1/20:	.700
4/1/20 to 4/1/21:	.690
4/1/21 to 4/1/22:	.690
4/1/22 to 4/1/23:	.700

Please contact our agency if any additional information is required:

Sincerely,



Thomas J. Mayan
THE MAYAN AGENCY

CRITERIA 26 (ATTACHMENT REQUIRED):

Documentation of master or journey person certification or status for masters and journeypersons to be used on the project, and the source of such certification or status **N/A**

CRITERIA 27:

A statement from the bidder as to what percentage of its workforce can be drawn significantly from area residents because a goal of the City is to utilize, in its construction activities, local residents as much as is economically feasible while retaining the high quality of construction required for its construction activities, consistent with applicable law. The City will consider in evaluating which bids best serve its interests, the extent to which responsible and qualified bidders are able to achieve this goal.

The Isabella Corporation is always open to hiring any skilled employee that is interested in a job, especially local residents.

CRITERIA 28 (ATTACHMENT REQUIRED):

Evidence of Equal Employment Opportunity Programs for minorities, women, veterans, returning citizens, and small businesses.

CRITERIA 29:

Assurance that the bidder is an equal opportunity employer and does not discriminate on the basis of race, sex, pregnancy, age, religion, national origin, marital status, sexual orientation, gender identity of expression, height, weight, or disability. **COMPANIES EQUAL EMPLOYMENT OPPORTUNITY STATEMENT:**

The Isabella Corporation is an Equal Employment Opportunity and Affirmative Action employer. We do not discriminate based upon race, religion, color, national origin, gender.

The Isabella Corporation, Jeremy Zalud, President

Print Firm Name/Principal

Signature/Principal

April 16, 2022

Date

RESPONSIBLE CONTRACTOR ORDINANCE

Criteria #28

The Isabella Corporation

2201 Commerce Street, Mt. Pleasant, MI 48858

989-772-5890 Fax 989-773-2978

Underground and Road Contractors Since 1975

An Equal Opportunity Employer

Policy Statement

The Isabella Corporation is continuously soliciting cost proposals from qualified Disadvantaged Business Enterprises (DBE), which includes Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and other entities defined as socially and or economically disadvantaged.

Signed,



President

Criteria #28

The Isabella Corporation

2201 Commerce Street, Mt. Pleasant, MI 48858

989-772-5890 Fax 989-773-2978

Underground and Road Contractors Since 1975

An Equal Opportunity Employer

January 1, 2022

To All Employees:

Jeremy Zalud has been appointed the E.E.O. Officer for The Isabella Corporation. He will handle all complaints which allege discrimination because of race, color, religion, sex, age, physical impairment or national origin.

This company is committed to the Civil Rights Act of 1964, Executive Order 11246 and any other laws or regulations relating to equal employment opportunity.

Anyone who believes he or she has been discriminated against should report this fact promptly. Jeremy can be reached at 989-772-5890 or at, 989-330-1055

Signed,



President

The Isabella Corporation
2201 Commerce Street, Mt. Pleasant, MI 48858
989-772-5890 Fax 989-773-2978
Underground and Road Contractors Since 1975
An Equal Opportunity Employer

NOTICE

January 1, 2022

To All Employees:

The Isabella Corporation is committed to nondiscrimination in employment. Any person who applies for a job with this company will not be discriminated against because of race, color, religion, sex, age, physical impairment, weight, height, marital status or national origin.

All qualified applicants are welcome to apply for jobs with this company. There will be no exceptions to this company policy.

Signed,



President

Bid Evaluation Criteria.

Once the City deems a contractor a responsible bidder, having used the process identified above, the City must consider the contractor's bid. The City must consider, at minimum, each of the evaluation criteria listed in this Section in determining the best bid. The City may require contractors or subcontractors to provide additional information by inclusion in bid documents. Additionally, the list set forth below in no way limits any additional criteria that the City may deem relevant for purposes of making a determination of the best bid.

Bid documents must require any contractor or subcontractor bidding on the project to submit written responses and other information and documentation regarding the listed criteria and any other criteria specified by the City through the bid documents. The City may request additional information or explanation from any contractor or subcontractor regarding any particular criteria. The bid documents must provide that the City retains the right in its discretion to reject any and all bids. All required contractor financial and privileged information must be kept from public disclosure unless otherwise required by law.

Submitted bids must break out labor costs from material and equipment costs.

For each separate bid package, the City in its discretion will weigh the information provided by the contractor or subcontractor regarding the evaluating criteria, as a whole, to determine the best bid. Except as otherwise required by law, no single criterion will necessarily be determinative in assessing which bid is the best bid. The Purchasing Department must weigh each of the criteria based on a distribution of percentage points on a 100-point scale. Additionally, The Purchasing Department shall provide space on the bid evaluation form for the prospective bidder to include additional information about themselves and/or their bid – this section would be optional for the prospective bidder to fill out. The criteria to be considered in bid evaluation on construction projects by the City shall be weighed categorically as follows, and shall include:

RESPONSIBLE CONTRACTOR ORDINANCE

PAGE 10 OF 12 – THIS DOCUMENT MUST BE SUBMITTED WITH YOUR BID

CONTRACTOR NAME The Isabella Corporation

Price (25%)

1. A statement identifying what possible change orders could be necessary and what their approximate subsequent total costs would be.

Submitted Bid:	\$537,000.00
Labor Costs:	\$192,000.00
Materials Costs:	\$270,000.00
Equipment Costs:	\$75,000.00
Possible Change Orders:	No change orders that we are aware of.

Corporate Accountability (25%)

1. Qualifications of management and supervisory personnel to be assigned by the bidder.
2. References from individuals or entities the bidder has worked for within the last five (5) years including information regarding records of performance and job site cooperation.
3. Evidence of any quality assurance program used by the bidder and the results of any such program on the bidder's previous projects.
4. Assurance that all construction work for this project must proceed economically, efficiently, continuously and without interruption.
5. A list of projects completed within the past five (5) years of comparable size/complexity, including dates, clients, approximate dollar value, and size. Documentation from these previous projects including but not limited to all extra costs relating to the bidder's timeliness, performance, quality of work, extension requests, contractual fines and penalties imposed, liens filed, history of claims for extra work and any contract defaults with an explanation of the reason for the default and how the default was resolved.

RESPONSIBLE CONTRACTOR ORDINANCE

Workplace Safety (25%)

1. The ratio of masters or journeypersons to apprentices proposed to be used on the construction project job site, if apprentices are to be used on the project.
2. Evidence of the bidder's worker's compensation Experience Modification Rating ("EMR"). Preference will be given to contractors and subcontractors who exhibit an EMR of 1.0 or less based on a three-year average.
3. All craft labor that will be employed by the firm for the project has completed at least the OSHA 10 hour training course for safety established by the U.S. Department of Labor, Occupational Safety & Health Administration.
4. Documentation of master or journeyperson certification or status for masters and journeypersons to be used on the project, and the source of such certification or status.

Workforce Development (15%)

1. Documentation as to pay rates of employees and whether the bidder provides health insurance, pension or other retirement benefits, paid leave, or other benefits to its employees.
2. Documentation if the bidder participates in a Registered Apprenticeship Program that is registered with the United States Department of Labor Office of Apprenticeship or by a State Apprenticeship Agency recognized by the Office of Apprenticeship.
3. Documentation of how the bidder assesses the skills and qualifications of any employees who do not have master or journeyperson certification or status, or are not participants in a Registered Apprenticeship Program.

Social Equity (10%)

1. A statement from the bidder as to what percentage of its workforce can be drawn significantly from area residents because a goal of the City is to utilize, in its construction activities, local residents as much as is economically feasible while retaining the high quality of construction required for its construction activities, consistent with applicable law. The City will consider in evaluating which bids best serve its interests, the extent to which responsible and qualified bidders are able to achieve this goal.
2. Evidence of Equal Employment Opportunity Programs for minorities, women, veterans, returning citizens, and small businesses.
3. Assurance that the bidder is an equal opportunity employer and does not discriminate on the basis of race, sex, pregnancy, age, religion, national origin, marital status, sexual orientation, gender identity or expression, height, weight, or disability.

RESPONSIBLE CONTRACTOR ORDINANCE

PAGE 12 OF 12 – THIS DOCUMENT MUST BE SUBMITTED WITH YOUR BID

CONTRACTOR NAME The Isabella Corporation.com

PROPOSAL

TO: City Manager
c/o Purchasing Agent
City of Jackson, Michigan

Date: 4/6/2022

In compliance with your invitation for bids dated March 10, 2022 to perform
CENTRAL FIRE STATION SITE IMPROVEMENTS

in the City of Jackson, the undersigned, a(n)

1. individual, resident of _____
doing business as _____
at _____
2. partnership, consisting of _____
and _____
under the firm name of _____
3. corporation by the name of The Isabella Corporation
organized and existing under the laws of the State of Michigan
with offices at 2201 Commerce Drive, Mt. Pleasant, Michigan 48858
(strike inapplicable clauses)

hereby proposes to perform said work, strictly as specified in the bid documents at the prices set forth on the attached schedule of bid prices, upon receipt of written notice of acceptance of this bid within ninety (90) calendar days after opening of the bids at the time stated in said Invitation; to execute a properly completed contract in the form provided with the bid documents in accordance with this bid; to give bond with good and sufficient surety or sureties, satisfactory to the City Attorney of Jackson, for the faithful performance of said contract, for payment of labor and materials, and, if required, for maintenance of work; and to give such bond within ten (10) days after notice of award.

FEDERAL ID# 38-2079974

(Corporate Seal, if applicable) Name of Bidder: The Isabella Corporation
Signed By: *Byron Jubeck*
Its: Byron Jubeck, Agent

BID SHEET

DATE:

PROPOSAL FOR: CENTRAL FIRE STATION SITE IMPROVEMENTS

TO: The Mayor and the City Council
City of Jackson, Michigan

Ladies and Gentlemen:

The Undersigned has examined the plans, specifications, and the location of the above described work, and is fully informed as to the conditions relating to its performance, and understands the quantities shown in the estimate and on the plans are accurate to the best belief and knowledge of the Engineer, but are not guaranteed.

The undersigned hereby proposes to furnish all equipment, materials, supplies, labor, and services necessary to commence and complete the project as described in the Contract Documents; and in strict conformity with the requirements of the Specifications and such other special provisions and supplemental specifications as may be a part of this proposal for the above described project at the following unit prices all labor, equipment and materials necessary for completion of the work, but not specifically listed as a pay item, will be deemed to be included in one or more of the pay items listed in the bid sheet.

Bidder has examined and carefully studied the Bidding Documents, other related data identified in the Bidding Documents, and the following Addenda, receipt of which is hereby acknowledged (list addenda by Addendum Number and Date):

Addendum No.	Date
_____	_____
_____	_____
_____	_____

SCHEDULE OF BID PRICES
NOTE: UNIT PRICES MUST BE LISTED AND SHALL GOVERN.

ITEM NUMBER	PAY ITEM	DESCRIPTION	UNIT	ESTIMATED QUANTITY	UNIT PRICE	TOTAL COST
1	1500001	Mobilization, Max (10%)	1	LSUM	\$48,570.50	\$48,570.50
2	2030015	Sewer, Rem, Less than 24 inch	19	Ft	\$25.00	\$475.00
3	2040020	Curb and Gutter, Rem	445	Ft	\$10.00	\$4,450.00

4	2040055	Sidewalk, Rem	21	Syd	\$12.00	\$252.00
5	2040080	Exploratory Investigation, Vertical	5	Ft	\$25.00	\$125.00
6	2047001	Pavt Sawcut	362	Ft	\$3.00	\$1,086.00
7	2047011	Driveway Rem	77	Syd	\$12.00	\$924.00
8	2047011	HMA Surface, Rem, Modified	2568	Syd	\$6.00	\$15,408.00
9	2047011	Pavt, Rem, Modified	642	Syd	\$12.00	\$7,704.00
10	2050031	Non Haz Contaminated Material Handling and Disposal, LM	5	Cyd	\$150.00	\$750.00
11	2057011	Subgrade Undercutting, 1 x 3	25	Cyd	\$50.00	\$1,250.00
12	2057021	Geogrid	50	Syd	\$7.00	\$350.00
13	2057051	Site Grading	1	LSUM	\$15,000.00	\$15,000.00
14	2087050	Erosion Control, Inlet Protection, Grate Filter, Round	7	Ea	\$150.00	\$1,050.00
15	2087050	Erosion Control, Inlet Protection, Sediment Trap	8	Ea	\$150.00	\$1,200.00
16	2090001	Project Cleanup	1	LSUM	\$3,000.00	\$3,000.00
17	3027011	Aggregate Base, 8 inch, 21AA, Modified	3315	Syd	\$13.70	\$45,415.50
18	3060020	Maintenance Gravel	10	Ton	\$40.00	\$400.00
19	4021230	Sewer Bulkhead, 12 inch	6	Ea	\$250.00	\$1,500.00
20	4021260	Trench Undercut and Backfill	20	Cyd	\$45.00	\$900.00
21	4027001	Sewer Backfill, Class II	154	Ft	\$22.00	\$3,388.00

22	4027001	Sewer, CI E, 12 inch	154	Ft	\$65.00	\$10,010.00
23	4027050	Catch Basin, 48 inch dia	3	Ea	\$4,000.00	\$12,000.00
24	4030280	Dr Structure, Adj, Add Depth	1	Ft	\$200.00	\$200.00
25	4030312	Dr Structure, Tap, 12 inch	2	Ea	\$500.00	\$1,000.00
26	4037050	Catch Basin Cover, Curb	1	Ea	\$800.00	\$800.00
27	4037050	Catch Basin Cover, Drive	5	Ea	\$750.00	\$3,750.00
28	4037050	Mh Cover, Std	3	Ea	\$575.00	\$1,725.00
29	4037050	Monitoring Well Cover, Adj, Case 1	7	Ea	\$300.00	\$2,100.00
30	4037050	Utility Structure, Temp Lowering, Modified	7	Ea	\$200.00	\$1,400.00
31	4037050	Utility Structure Cover, Adj, Case 1, Modified	10	Ea	\$700.00	\$7,000.00
32	5010025	Hand Patching	44	Ton	\$250.00	\$11,000.00
33	6020019	Conc Base Cse, Nonreinf, 8 inch	23	Syd	\$58.00	\$1,334.00
34	6020200	Joint, Contraction, Cp	4482	Ft	\$12.00	\$53,784.00
35	6020207	Joint, Expansion, E2	272	Ft	\$25.00	\$6,800.00
36	6020104	Conc Pavt, Nonreinf, 8 inch	3021	Syd	\$58.00	\$175,218.00
37	8010007	Driveway, Nonreinf Conc, 8 inch	63	Syd	\$58.00	\$3,654.00
38	8020050	Driveway Opening, Conc, Det M	193	Ft	\$23.00	\$4,439.00
39	8027001	Curb and Gutter, Conc, Det F4, Modified	380	Ft	\$23.00	\$8,740.00

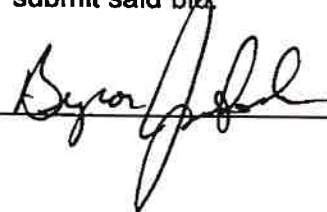
40	8027001	Curb and Gutter, Conc, Double Sided	240	Ft	\$43.00	\$10,320.00
41	8030048	Sidewalk, Conc, 8 inch	184	Sft	\$5.75	\$1,058.00
42	8110204	Pavt, Mrkg, Preformed Thermopl, Accessible Sym	1	Ea	\$550.00	\$550.00
43	8110231	Pavt Mrkg, Waterborne, 4 inch, White	561	Ft	\$4.00	\$2,244.00
44	8110293	Pavt Mrkg, Waterborne, for Rest Areas, Parks, and Lots, 4 inch, Blue	18	Ft	\$4.00	\$72.00
45	8120012	Barricade, Type III, High Intensity, Double Sided, Lighted, Furn	2	Ea	\$400.00	\$800.00
46	8120013	Barricade, Type III, High Intensity, Double Sided, Lighted, Oper	2	Ea	\$100.00	\$200.00
47	8120035	Channelizing Device, 42 inch, Fluorescent, Furn	100	Ea	\$35.00	\$3,500.00
48	8120036	Channelizing Device, 42 inch, Fluorescent, Oper	100	Ea	\$10.00	\$1,000.00
49	8120140	Lighted Arrow, Type C, Furn	1	Ea	\$500.00	\$500.00
50	8120141	Lighted Arrow, Type C, Oper	1	Ea	\$100.00	\$100.00
51	8120170	Minor Traf Devices	1	LSUM	\$5,000.00	\$5,000.00
52	8120350	Sign, Type B, Temp, Prismatic, Furn	112	Sft	\$4.00	\$448.00
53	8120351	Sign, Type B, Temp, Prismatic, Oper	112	Sft	\$1.00	\$112.00
54	8120370	Traf Regulator Control	1	LSUM	\$1,500.00	\$1,500.00
55	8167011	Turf Establishment, Performance	172	Syd	\$12.00	\$2,064.00
56	8230391	Gate Box, Adj, Temp, Case 1	2	Ea	\$300.00	\$600.00
57	8237050	Gate Box, Adj, Case 1, Modified	3	Ea	\$470.00	\$1,410.00

58	8237001	Hydrant Extension	2	Ft	625	1,250
59	8237001	Water Main Backfill, Class II	80	Ft	25	2,000
60	8237001	Water Main, 6 inch	80	Ft	85	6,800
61	8237001	Water Main, Rem	50	Ft	15	750
62	8237050	Hydrant Assembly	2	Ea	5,500	11,000
63	8237050	Hydrant, Rem, Modified	3	Ea	800	2,400
64	8237050	Water Main, Connect New 6 inch to Existing 6 inch	2	Ea	3,000	6,000
65	8267030	Water Main Fittings, DI	100	Lb	11.7	1,170
66	8267050	Bollard, Rem	20	Ea	50	1,000
67	8267050	Bollard, Steel, 8 inch, Special	10	Ea	1,500	15,000
TOTAL BID					\$	537,000
TOTAL BID WRITTEN OUT: Five Hundred Thirty Seven Thousand Dollars and 00/00 cents						

Bidder's Name:	The Isabella Corporation
Address:	2201 Commerce Drive
City, State, Zip:	Mt. Pleasant, Michigan 48858
Telephone:	(989) 772-5890
Fax:	(989) 773-2978

Email Address:	bjubeck@isabellacorporation.com	
Federal ID Number:	38-2079974	
Bid Signed By:	Byron Jubeck	Print or Type
Title:	Agent	

1. I am the person described in and who executed the foregoing bid and that the several matters stated are in all respects true.
2. That I am an employee of the firm or company described in and I am authorized to submit said bid.

By  Agent
 Its _____

CONTRACT COMPLIANCE

DATE: March 10, 2022
TO: All Bidders
FROM: City of Jackson
SUBJECT: CONTRACT COMPLIANCE

The Commission of the City of Jackson, on 12/19/72, passed a resolution committing the City to a policy and procedure regarding compliance to affirmative hiring practices by contracting agencies doing business with the City of Jackson, effective 12/20/72.

The purpose of the policy and procedure is to ensure that all citizens of our community have the opportunity for the equality of treatment in service and employment.

The City requests that all bidders who will be doing business with the City in the amount of \$5,000 or more during any fiscal year, shall comply with the provisions of the Contract Compliance Policy.

Bidders will be required to show an Equal Employment Opportunity Certificate of Compliance or demonstrate compliance with standards for equal employment opportunity established by state and federal statute.

City Council of Jackson, Michigan

CONTRACT COMPLIANCE

CERTIFICATION

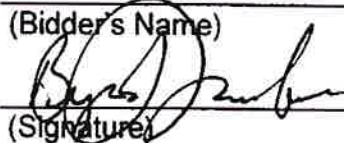
The Isabella Corporation _____ certifies that he/she/it will not discriminate against any employee or applicant for employment with respect to hire, tenure, term, conditions, or privileges or employment because race, religion or national origin, color, age, sex, height, weight, marital status, sexual orientation, gender identity, and physical or mental handicap.

In connection with this commitment The Isabella Corporation understands that he/she/it name will be reviewed by the State of Michigan, Department of Civil Rights for determination of its status as an awardable Bidder.

The undersigned hereby agrees that he/she/it will abide by the terms of any agreements made with the City of Jackson in order to achieve awardable status.

Dated: 4/06/2022

By: The Isabella Corporation
(Bidder's Name)

By: 
(Signature)

By: Agent
(Title)

2201 Commerce Drive
Address

Mt. Pleasant
City

Michigan 48858
State and Zip

NON-DISCRIMINATION CLAUSE FOR ALL CITY OF JACKSON CONTRACTS

In connection with the performance of this contract, the contractor agrees as follows:

1. The contractor will not discriminate against any employee/employer for employment because of race, religion or national origin, color, age, sex, height, weight, marital status, sexual orientation, gender identity, and physical or mental handicap. The contractor will take affirmative action to ensure that minority applicants are employed, and that employees are treated during employment without regard to their race, religion, color, national origin, age, sex, height, weight, marital status or handicap. Such action shall include, but not be limited to, the following: layoff or termination, rates of pay or other forms of compensation, selection for training, upgrading or promotion, transfer or recruitment.
2. The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, religion, color, national origin, age, sex, height, weight, marital status or handicap. As a disclaimer, the contractor may state in the advertisement that he/she is an equal opportunity employer.
3. The contractor will furnish and file compliance reports with the City of Jackson as requested. Such reports shall elicit information as to the practices, policies, program and employment statistics for the contractor and said contractor shall permit access to all books, records and accounts regarding employment practices by agents and representatives of the City duly charged with investigative duties to assure compliance with this clause.
4. Breach of the covenants herein may be regarded as a material breach of the contract, or purchasing agreement.
5. The contractor will include, or incorporate by reference, the provisions of paragraphs (1) through (4) in every subcontract or purchase order unless exempted by the rules, regulations or orders of the Michigan Civil Rights Commission and will provide in every subcontract or purchase order that said provisions will be binding upon each subcontractor or seller.

EQUAL EMPLOYMENT OPPORTUNITY CERTIFICATION

The undersigned understands and agrees that, as a Contractor for services, there shall be no discrimination against any employee or applicant for employment because of race, religion or national origin, color, age, sex, height, weight, marital status, sexual orientation, gender identity, and physical or mental handicap, including but no limited to employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation and selection for training.

The Contractor further agrees to the following:

- (a) It will assist and actively cooperate with the City in obtaining compliance of any subcontractors with the equal opportunity rules, regulations, and relevant orders.
- (2) It will furnish the City such information as might be required for the supervision of its compliance program, and will otherwise assist the City in the discharge of its responsibility for ensuring compliance.
- (3) In the event that the Contractor fails or refuses to comply with the equal opportunity regulations, the City may cause to be canceled, terminated, or suspended in whole or in part the contractual arrangement between the City and the Contractor.

NAME OF BIDDER:

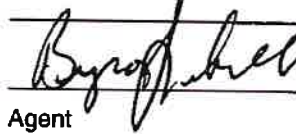
The Isabella Corporation

ADDRESS:

2201 Commerce Drive

Mt. Pleasant, Michigan 48858

SIGNED BY:



Byron Jubeck

TITLE:

Agent

DATE:

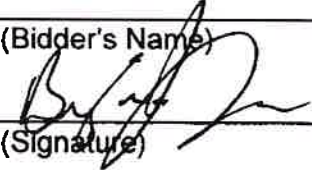
04/06/2022

CERTIFICATION OF NONSEGREGATED FACILITIES

The bidder certifies that he does not maintain or provide for his employees any segregated facilities and do not permit his employees to perform their services at any location, under his control, where segregated facilities are maintained. The bidder certifies further that he will not maintain or provide for his employees any segregated facilities at any of his establishments, and that he will not permit his employees to perform their services at any location under his control where segregated facilities are maintained. The bidder agrees that a breach of this certification will be a violation of the Equal Opportunity clause in any contract resulting from acceptance of this bid. As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, restrooms and washrooms, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, color, religion, or national origin, because of habit, local custom, or otherwise. The bidder agrees that (except where he has obtained identical certification from proposed subcontractors for specific time periods) he will obtain identical certification from proposed subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the Equal Opportunity clause, and that he will retain such certifications in his files.

Dated: 04/06/2022

By: The Isabella Corporation
(Bidder's Name)

By: 
(Signature)

By: Agent
(Title)

2201 Commerce Drive
Address

Mt. Pleasant

City

Michigan 48858

State and Zip

NON-COLLUSION AFFIDAVIT OF PRIME BIDDER

STATE OF Michigan

COUNTY OF Isabella ss

Byron Jubeck

being first duly sworn, deposed and says that:

1. He is the agent of The Isabella Corporation the Bidder that has submitted the attached bid;
2. He is fully informed respecting the preparation and contents of the attached bid and of all pertinent circumstances respected such bid;
3. Such bid is genuine and is not a collusive or sham bid;
4. Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Bidder, firm or person to submit a collusive or sham bid in connection with the contract for which the attached bid has been submitted or to refrain from bidding in connection with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices in the attached bid or of any other Bidder, or to fix any overhead, profit or cost element of the bid price or the bid price of any other Bidder, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the City of Jackson or any person interested in the proposed contract; and
5. The price or prices quoted in the attached bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Dated: 04/06/2022

By: The Isabella Corporation
(Company)

By: [Signature]
(Title)

Subscribed and sworn to before me, a Notary Public, this 5th day of April, 2022.

[Signature]

Notary Public, Gratiot County,
My commission expires: 9/28/24



SECTION C

Subcontractors

Each bidder shall indicate below the name, address, and a complete description of work to be performed by each subcontractor on this project and if they are a minority or woman owned business.

Best Barricading-6919 Millett Hwy, Lansing, MI 48917, Traffic and Pedestrian Control

Concord Excavating, 13000 Home Dr. Drain Work
Scorelles, Wixom, Joint Sealing

**RIGHT TO KNOW
CONTRACTOR RELEASE FORM**

I, Byron Jubeck an authorized representative of The Isabella Corporation
am aware that as a requirement to perform work for the City of Jackson on a contractual basis, I must have provided my employees with the basic training requirements of the HAZARD COMMUNICATION STANDARD as prescribed by the Michigan Right to Know amendments to Act 154 of the Public Acts of 1974 (Act 80, Public Acts 1986), prior to starting any work for the City. While engaged in working for the City, I will continue to comply with Michigan Right to Know Law until completion of the contract.

I am aware that if I bring any hazardous chemical to the City's work place, I must have available the MSDS for these chemicals, in a place accessible to all employees in the work place. If necessary, due to the "special protection information" requirement stated on the MSDS for the chemicals, I will provide all employees with any special training, special protective clothing or equipment necessary to eliminate or lessen the possible exposure to the hazardous chemical or chemicals.

By execution of this Release, the contractor acknowledges that he and all subcontractors and suppliers, will comply with all requirements of the HAZARD COMMUNICATION STANDARD. Further, the contractor shall hold harmless from and indemnify the City against all claims, suits, actions, costs, counsel fees, expenses, damages, judgements or decrees, by reason of his failure, or the failure of any subcontractor, suppliers, or any person employed under said contractor to comply with the requirements of Act 154 of the Public Acts of 1974 as amended.

Dated 04/06/2022


Signature _____



City of Jackson Ethics Disclosure Form Vendors and Contractors

Name Byron Jubeck	Company The Isabella Corporation
Telephone (989) 772-5890	Email Address bjubeck@isabellacorporation.com

Contract or matter pending with the City:

I, Byron Jubeck, being duly sworn, and pursuant to City of Jackson Ordinance No. 2015-18, I hereby disclose and swear to the following (check all that apply and provide details below):

- I, or my company's owners, members, major shareholders, or corporate officers, have a financial interest in a contract or matter pending before Jackson City Council.
- A relative¹ or immediate family member² of myself or my company's owners, members, major shareholders, or corporate officers has a financial interest in a contract or matter pending before a City office, department, board, or commission.
- I, or my company's owners, members, major shareholders, or corporate officers, have an interest in real or personal property that is subject to a decision by the City regarding the purchase, sale, lease, zoning, property improvements, NOORPR or FVA registration, a development agreement, or a special tax designation or abatement.
- Property address: _____
- Property interest: _____
- An immediate family member or relative of myself or my company's owners, members, major shareholders, or corporate officers, has a financial interest in real or personal property that is subject to a decision by the City

¹ Relative means any spouse, domestic partner, great grandparents, step great grandparents, grandparents, step grandparents, sons, stepsons, daughters, step daughters, grandsons, step grandsons, granddaughters, step granddaughters, brothers, step brothers, sisters, step sisters, and in-laws of a Public Employee, the Mayor, an Elected Official, an Appointed Official, a member of a Board or Commission, a Contractor, or an Advisor of the City.

² Immediate family member means a Public Employee, the Mayor, an Elected Official, an Appointed Official, a member of a Board or Commission, a Contractor, or an Advisor's spouse, domestic partner, individual who lives in the Public Employee's household or an individual claimed by a Public Employee or a Public Employee's spouse as a dependent under the United States Internal Revenue Code at 26 USC 1, et seq.

AIA Document A310™ – 2010

Bid Bond

CONTRACTOR:

(Name, legal status and address)

The Isabella Corporation
2201 Commerce Street
Mt. Pleasant, MI 48858

SURETY:

(Name, legal status and principal place of business)

Atlantic Specialty Insurance Company
605 Highway 169 North, Suite 800
Plymouth, MN 55441

OWNER:

(Name, legal status and address)

City of Jackson

161 W. Michigan Avenue, Jackson, Michigan 49201

BOND AMOUNT: Five Percent (5%) of Amount Bid

PROJECT:

(Name, location or address, and Project number, if any)

Central Fire Station Site Improvements

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

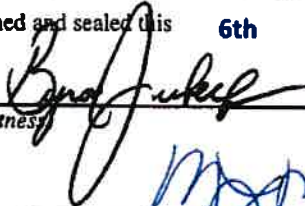
Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.


If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this **6th** day of **April**, 2022



(Witness)



(Witness)

The Isabella Corporation

(Principal)



(Title) **Jeremy Zald - President**

Atlantic Specialty Insurance Company

(Surety)



(Title) **Susan L. Small, Attorney-in-Fact**

Init.

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Power of Attorney

KNOW ALL MEN BY THESE PRESENTS, that ATLANTIC SPECIALTY INSURANCE COMPANY, a New York corporation with its principal office in Plymouth, Minnesota, does hereby constitute and appoint: **Alan P. Chandler, Robert Trobec, Jeffrey A. Chandler, Kathleen M. Irelan, Ian J. Donald, Wendy L. Hingson, Susan L. Small**, each individually if there be more than one named, its true and lawful Attorney-in-Fact, to make, execute, seal and deliver, for and on its behalf as surety, any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof; provided that no bond or undertaking executed under this authority shall exceed in amount the sum of: **unlimited** and the execution of such bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof in pursuance of these presents, shall be as binding upon said Company as if they had been fully signed by an authorized officer of the Company and sealed with the Company seal. This Power of Attorney is made and executed by authority of the following resolutions adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

Resolved: That the President, any Senior Vice President or Vice-President (each an "Authorized Officer") may execute for and in behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and affix the seal of the Company thereto; and that the Authorized Officer may appoint and authorize an Attorney-in-Fact to execute on behalf of the Company any and all such instruments and to affix the Company seal thereto; and that the Authorized Officer may at any time remove any such Attorney-in-Fact and revoke all power and authority given to any such Attorney-in-Fact.

Resolved: That the Attorney-in-Fact may be given full power and authority to execute for and in the name and on behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and any such instrument executed by any such Attorney-in-Fact shall be as binding upon the Company as if signed and sealed by an Authorized Officer and, further, the Attorney-in-Fact is hereby authorized to verify any affidavit required to be attached to bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof.

This power of attorney is signed and sealed by facsimile under the authority of the following Resolution adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

Resolved: That the signature of an Authorized Officer, the signature of the Secretary or the Assistant Secretary, and the Company seal may be affixed by facsimile to any power of attorney or to any certificate relating thereto appointing an Attorney-in-Fact for purposes only of executing and sealing any bond, undertaking, recognizance or other written obligation in the nature thereof, and any such signature and seal where so used, being hereby adopted by the Company as the original signature of such officer and the original seal of the Company, to be valid and binding upon the Company with the same force and effect as though manually affixed.

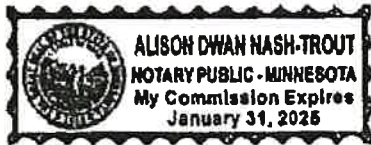
IN WITNESS WHEREOF, ATLANTIC SPECIALTY INSURANCE COMPANY has caused these presents to be signed by an Authorized Officer and the seal of the Company to be affixed this twenty-seventh day of April, 2020.



By *Paul J. Brehm*
Paul J. Brehm, Senior Vice President

STATE OF MINNESOTA
HENNEPIN COUNTY

On this twenty-seventh day of April, 2020, before me personally came Paul J. Brehm, Senior Vice President of ATLANTIC SPECIALTY INSURANCE COMPANY, to me personally known to be the individual and officer described in and who executed the preceding instrument, and he acknowledged the execution of the same, and being by me duly sworn, that he is the said officer of the Company aforesaid, and that the seal affixed to the preceding instrument is the seal of said Company and that the said seal and the signature as such officer was duly affixed and subscribed to the said instrument by the authority and at the direction of the Company.



Alison Nash-Trout
Notary Public

I, the undersigned, Secretary of ATLANTIC SPECIALTY INSURANCE COMPANY, a New York Corporation, do hereby certify that the foregoing power of attorney is in full force and has not been revoked, and the resolutions set forth above are now in force.

Signed and sealed. Dated 6th day of April, 2022



This Power of Attorney expires
January 31, 2025

Kara Barrow
Kara Barrow, Secretary