Village of Beverly Hills **Municipal Building**
Regular Village Council Meeting **18500 W. 13 Mile Road**
Tuesday, May 20, 2025 **7:00 p.m.**

Zoom link: https://us02web.zoom.us/j/83818096628
Meeting ID: 838 1809 6628
Dial in: 1-646-876-9923 (US)

AGENDA

Roll Call/Call to Order

Pledge of Allegiance

Amendments to Agenda/Approve Agenda

Community Announcements

Public Comments on items not on the published agenda

Consent Agenda
1. Review and consider approval of minutes of a regular Council meeting held May 6, 2025.
2. Review and file bills recapped as of Monday, May 19, 2025.
3. Review and consider approval of revised capitalization policy.
4. Review and consider request to waive pavilion fees for Village Woman's Club.
5. Review and consider adding two additional members to the Parks & Recreation Board.

Business Agenda
1. Review and consider resolution to join Michigan CLASS Investment Pool.
2. Review and consider resolution to award a contract for Professional Auditing Services.
3. Review and consider purchase of Building Department, Code Enforcement, and Public Service Vehicles.
4. Award bid for 2025/2026 Road Improvement Program.
5. Public hearing for sidewalk special assessment.
6. Review and consider resolution to proceed with sidewalk special assessment.
7. Review and consider purchase of Flock Safety Cameras.
8. Review and consider purchase of Civic Clerk Agenda Software.
9. Second Announcement of Various Board/Commission Vacancies.

Public Comments

Manager's report

Council comments

Adjournment

This will be a hybrid meeting held in person in the Village Council Chambers with a remote participation option available. The Village of Beverly Hills will provide necessary reasonable auxiliary aids and services, such as signers for the hearing impaired and audiotapes of printed materials being considered at the meeting, to individuals with disabilities attending the meeting upon three working days' notice to the Village. Individuals with disabilities requiring auxiliary aids or services should contact the Village by writing or phone, 18500 W. Thirteen Mile Beverly Hills, MI 48025 (248) 646-6404.

Present: President George, President Pro Tem Drummond, Members: Abboud, Hrydziuszko, Kecskemeti, and Mercer

Absent: O'Gorman

Also Present: Village Manager, Rothe
Village Attorney, Ryan
Village Clerk, Brown
Finance Director, Kutey
Planning & Economic Development Director, Stec

ROLL CALL/CALL TO ORDER/ PLEDGE OF ALLEGIANCE

President Geroge called the regular Village Council meeting to order at 7:00 p.m. in the Village Council Chambers located at 18500 W. Thirteen Mile Road, Beverly Hills, MI 48025. Brown called the roll. The Pledge of Allegiance was recited by those in attendance.

AMENDMENTS TO AGENDA/APPROVE AGENDA

Motion by Drummond, second by Kecskemeti, to amend the agenda to remove Business Agenda item #10 and replace it with Formation of subcommittee to draft new animal ordinance (Business Agenda item 10) and Discussion on Council direction to animal ordinance subcommittee (Business Agenda item 11).

Motion passed.

Motion by Abboud, seconded by Hrydziuszko to approve agenda as modified.

Motion passed.

COMMUNITY ANNOUNCEMENT

Janice Hausman, from the Parks & Recreation Board gave a presentation regarding the 2025 Sculptures in the Park & the DIA Inside/Out program. The art pieces from these two programs are slated to be installed in May, around Beverly Hills' parks.

PUBLIC COMMENTS ON ITEMS NOT ON PUBLISHED AGENDA

none

CONSENT AGENDA

Motion by Hrydziuszko, second by Kecskemeti, be it resolved, the consent agenda is approved.

1. Review and consider approval of minutes of a closed session Council meeting held March 31, 2025.
2. Review and consider approval of minutes of a regular Council meeting held April 15, 2025.
3. Review and consider approval of minutes of a Special Budget Session held April 22, 2025.
4. Review and file bills recapped as of Monday, May 5, 2025.
5. Review and consider resolution recognizing May 2025 as Mental Health Awareness Month.

6. Review and consider approval for Oakland County IT Services.

Roll Call:
Motion passed (6-0)

BUSINESS AGENDA

REVIEW AND CONSIDER DONATION OF SCULPTURE FOR BEVERLY PARK

Rothe gave an overview. Council and artist Dennis Cook discussed Cook's background in art, his sculpture and reason for donating it to Beverly Park.

Motion by Hrydziuszko, second by Abboud:

WHEREAS, the Village of Beverly Hills is generally authorized to accept donations for the benefit of its residents and;

WHEREAS, Dennis Cook offered to contribute the sculpture Composition in Three Colors #1 to Beverly Park and;

WHEREAS, Village Council finds it appropriate to accept the donation offered;

NOW, THEREFORE BE IT RESOLVED, that, the Village of Beverly Hills accepts the sculpture donation from Dennis Cook and be it further; RESOLVED, that the Village of Beverly Hills gratefully acknowledges the generosity of Mr. Cook and hereby conveys gratitude for this donation.

Roll Call:
Motion passed (6-0)

REVIEW AND CONSIDER BEVERLY HILLS GRILL REQUEST FOR FLEXIBILITY WITHIN THE VCOD

Stec gave an overview. Council asked questions regarding the dumpster enclosure, decorative lighting, lot reconfiguration, and the existing sign.

Motion by Hrydziuszko, second by Kecskemeti, be it resolved, Council approves the use of the flexibility provisions, as requested, for the site plans submitted for Beverly Hills Grill, located at 31471 Southfield Road, for the proposed building addition and request that the owners work with Administration to make the lighting consistent.

Roll Call:
Motion passed (6-0)

PUBLIC HEARING TO RECEIVE COMMENTS ON SPECIAL ASSESSMENTS TO BE ADDED TO THE TAX ROLL

Rothe gave an overview of the special assessments to be added to the tax roll.

Description	No. of Properties	Amount
Delinquent Water	120	$151,718.19
Dust Control*	62	$749.98

Southfield Rd. Maintenance**	4	$2,678.66
Total	186	$155,146.83

*Dust Control is a single lot assessment, based on front footage, for residents living on gravel roads. **Maintaining Right of Way, landscaping, water and elecficity for Southfield Rd. frontage. The public hearing was opened at 7:48 p.m.

Karen Gilbert, Amherst, informed the board that residents are having a hard time accessing the zoom link and inquired about the delinquent water bills and how they compared to last year.

George closed the public hearing at 7:50 p.m.

REVIEW AND CONSIDER SPECIAL ASSESSMENTS TO BE ADDED TO THE TAX ROLL

The Council asked Administration questions on the assessments.

Motion by Mercer, second by Abboud:

Be it resolved, the Beverly Hills Village Council approves the unpaid assessments and billings to be added to the tax roll as outlined above and discussed.

Roll Call:
Motion passed (6-0)

PUBLIC HEARING TO RECEIVE COMMENTS ON PROPOSED 2025/2026 BUDGETS FOR THE GENERAL FUND, MAJOR LOCAL ROADS, WATER & SEWER OPERATING, AND OTHER SPECIAL REVENUE FUNDS

Rothe gave an overview.

The public hearing was opened at 8:06 p.m.

David Tobaben, Orchard Way Court, spoke on the Village ending to be cautious on using grants and donations to fund the park.

Karen Gilbert, Amherst, had concerns about an item presented in the budget and would like to bring it to the attention of the Village.

George closed the public hearing at 8:14 p.m.

REVIEW AND CONSIDER ADOPTION OF THE FISCAL YEAR 2025/2026 VILLAGE OF BEVERLY HILLS BUDGET

Council discussed the proposed Budget.

Motion by Drummond, second by Hrydziuszko:

NOW, THEREFORE, BE IT RESOLVED:

1. That estimates of anticipated revenues and proposed appropriations are hereby adopted as contained in the accompanying summary documents as follows; and,
2. That estimates of revenues are adopted in total by fund and appropriations are hereby authorized at the department function level (lump sum); and,
3. That estimates of revenues are adopted in total by fund and appropriations are hereby authorized to be cancelled or reallocated at the department function level (lump sum); and,
4. That estimates of revenues are adopted in total and appropriations for remaining governmental funds are approved in total for each fund (lump sum) for the General Fund, all the Special Revenue Funds, and all Proprietary Funds; and,
5. The Village of Beverly Hills Village Council does hereby approve this Resolution authorizing the adoption of the FY2025-2026 Budgets as outlined and attached for all funds in accordance with the terms and conditions contained herein.

Roll Call:
Motion passed (6-0)

REVIEW AND CONSIDER RESOLUTION TO ADOPT THE 2025/2026 MILLAGE RATE

Motion by Kecskemeti, second by Abboud:

WHEREAS, the Village Council of Beverly Hills has adopted its annual budget for its fiscal year beginning July 1, 2025 in accordance with State law and the Village Charter;

WHEREAS, the Village Council must also adopt a millage rate to be levied on the Village tax roll for 2025;

WHEREAS, Act 298 of 1917 allows cities and villages to levy a tax not to exceed 3 mills for the purposes of garbage collection and disposal. The annual rubbish tax shall be in addition to the amount authorized to be levied for general purposes; and

WHEREAS, Public Act 5 of 1982 does not apply to levying for Debt Service.

NOW, THEREFORE, BE IT RESOLVED, that the Village Council does hereby approve the total 2025 millage rate for the Village at 13.6064 mills and the 13.6064 millage rate is to be distributed as follows:

GeneralFund.....1.7763 mills
Public Safety Fund..... 9.3548 mills
Library Fund..... 0.7731 mills
Park Improvement.....0.3022 mills
Rubbish Fund.....1.4000 mills
Total Millage Rate..... 13.6064 mills

Roll Call:
Motion passed (6-0)

REVIEW AND CONSIDER RESOLUTION TO ADOPT THE 2025/2026 RATE SCHEDULE FOR WATER CONSUMPTION AND SEWAGE DISPOSAL

Motion by Mercer, second by Kecskemeti:

WHEREAS, each premises within the Village of Beverly Hills connected to the water and/or sanitary sewer system shall pay a consumption charge based upon the amount of water used as shown by the water meter installed in each premises.

NOW, THEREFORE, BE IT RESOLVED that the Beverly Hills Village Council hereby approve the water and/or sanitary consumption charges as follows:

Water & Sewer	
Water Consumption	$ 3.76 per 100 cu ft
Sanitary Sewer Operation, Maintenance & Repair	$ 11.14 per 100 cu ft
Total	$ 14.90
Debt Service	
Debt Service	$ 45.00 per bill
Ready to Serve	
Ready to Serve	$ 116.00 per bill
Water Only	
	$ 3.76 per 100 cu ft
Sewer Only	
All sewer-only customers per quarter	$ 270.38 Infrastructure/ $ 49.08 Debt Service Total $ 319.46

Effective with all water and sewer usage after July 1, 2025 and thereafter until changed.

Roll Call:
Motion passed (6-0)

FIRST ANNOUNCEMENT OF VARIOUS BOARD/COMMISSION VACANCIES
Brown announced various Board/Commission vacancies. Appointments are scheduled to take place at the June 17, 2025 regular Village Council Meeting

FORMATION OF SUBCOMMITTEE TO DRAFT NEW ANIMAL ORDINANCE
Council discussed forming a subcommittee to draft a new animal ordinance.

Motion by Drummond, second by Kecskemeti, to appoint Hrydziuszko and Mercer to the subcommittee on the new animal ordinance.

Roll Call Vote:

Abboud	no
Drummond	yes
George	yes
Hrydziuszko	yes
Kecskemeti	yes

Mercer yes

Motion passed (5-1)

Council recessed at 9:10 p.m. and resumed the meeting at 9:15 p.m.

DISCUSSION ON COUNCIL DIRECTION TO ANIMAL ORDINANCE SUBCOMMITTEE.

Stec and Council discussed the direction for the subcommittee, including researching and understanding how other communities draft this type of ordinance.

David Tobaben, Orchard Way Court, doesn't think anyone has issues with rewriting ordinance. He believes the issue is chickens.

Karen Gilbert, Amherst, believes the decision has already been made and doesn't understand why this issue can't go on the ballot.

MANAGER'S REPORT

Rothe went over the Manager's report as provided in the regular Village Council meeting packet.

COUNCIL COMMENTS

Mercer mentioned that he prefers the subcommittee to work in public and gave his support to Robbins and Michael.

Kecskemeti thanked Robbins and Michael and all of the Board members whose terms are expiring and encourages residents to apply.

Hrydziuszko thanked everyone who attended the Park Clean Up and mentioned the Parks and Recreation Board has been discussing adding two additional members to the board.

Abboud gave updates on SEMCOG, MML, Next and Cable Board. Abboud thanked Dennis Cook and welcomed Kutey.

George mentioned he received a memo from Tom Trice listing the Village's accomplishments over the last year. George thanked everyone for their hard work on the budget this year. George gave an update on Paddle & Par ribbon cutting.

Motion passed.

ADJOURNMENT

Motion by Abboud second by Hrydziuszko to adjourn the meeting at 10:08 p.m.

John George
Council President

Carissa Brown
Village Clerk

TO PRESIDENT GEORGE & MEMBERS OF THE VILLAGE COUNCIL. THE FOLLOWING IS A LIST OF EXPENDITURES FOR APPROVAL. ACCOUNTS PAYABLE RUN FROM 05/06/2025 THROUGH 05/06/2025. Manual Check Run.

ACCOUNT TOTALS:

101	GENERAL FUND		$4,444.14
202	MAJOR ROAD FUND		$0.00
203	LOCAL STREET FUND		$0.00
205	PUBLIC SAFETY DEPARTMENT FUND		$6,892.48
208	PARK IMPROVEMENT FUND		$0.00
271	LIBRARY FUND		$0.00
401	CAPITAL PROJECTS FUND		$0.00
592	WATER/SEWER OPERATION FUND		$2,685.47
701	TRUST & AGENCY FUND		$0.00
730	RETIREE HEATLTH CARE FUND		$0.00
		TOTAL	$14,022.09
	MANUAL CHECKS- COMERICA		$0.00
	MANUAL CHECKS- INDEPENDENT		$0.00
	ACCOUNTS PAYABLE		$14,022.09
		GRAND TOTAL	$14,022.09

CHECK REGISTER FOR VILLAGE OF BEVERLY HILLS
CHECK DATE FROM 05/06/2025 - 05/06/2025

Check Date	Bank	Check	Vendor	Vendor Name	Amount
Bank COM COMERICA					
05/06/2025	COM	90334	61175	ADAM LANDIS	102.88
05/06/2025	COM	90335	51385	DTE ENERGY	11,895.09
05/06/2025	COM	90336	33083	JAX KAR WASH	1,348.20
05/06/2025	COM	90337	53572	WOW! BUSINESS	675.92

COM TOTALS:

Total of 4 Checks:	14,022.09
Less 0 Void Checks:	0.00
Total of 4 Disbursements:	14,022.09

TO PRESIDENT GEORGE & MEMBERS OF THE VILLAGE COUNCIL. THE FOLLOWING IS A LIST OF EXPENDITURES FOR APPROVAL. ACCOUNTS PAYABLE RUN FROM 05/05/2025 THROUGH 05/19/2025.

ACCOUNT TOTALS:

101	GENERAL FUND		$105,056.29
202	MAJOR ROAD FUND		$10,777.80
203	LOCAL STREET FUND		$9,118.41
205	PUBLIC SAFETY DEPARTMENT FUND		$36,786.35
208	PARK IMPROVEMENT FUND		$0.00
271	LIBRARY FUND		$154,565.00
401	CAPITAL PROJECTS FUND		$0.00
592	WATER/SEWER OPERATION FUND		$317,915.57
701	TRUST & AGENCY FUND		$0.00
730	RETIREE HEATLTH CARE FUND		$0.00
		TOTAL	$634,219.42
	MANUAL CHECKS- COMERICA		$0.00
	MANUAL CHECKS- INDEPENDENT		$0.00
	ACCOUNTS PAYABLE		$634,219.42
		GRAND TOTAL	$634,219.42

CHECK REGISTER FOR VILLAGE OF BEVERLY HILLS
CHECK DATE FROM 05/19/2025 - 05/19/2025

Bank COM COMERICA

Check Date	Bank	Check	Vendor	Vendor Name	Amount
05/19/2025	COM	90338	60785	21ST CENTURY MEDIA - MICHIGAN	316.50
05/19/2025	COM	90339	61135	AJAX MATERIALS CORPORATION	799.20
05/19/2025	COM	90340	60217	AMAZON CAPITAL SERVICES	2,626.73
05/19/2025	COM	90341	31164	APOLLO FIRE APPARATUS	222.50
05/19/2025	COM	90342	53284	APPLIED INNOVATION	225.25
05/19/2025	COM	90343	02000	BADGER METER INC	593.67
05/19/2025	COM	90344	02100	BALDWIN PUBLIC LIBRARY	154,565.00
05/19/2025	COM	90345	51409	BEVERLY HILLS ACE	94.40
05/19/2025	COM	90346	50822	BS&A SOFTWARE	4,020.00
05/19/2025	COM	90347	49980	C&G PUBLISHING	731.25
05/19/2025	COM	90348	61181	CHET FRIESEN	200.00
05/19/2025	COM	90349	59347	CINTAS CORPORATION #31	84.49
05/19/2025	COM	90350	60781	CIRQUE AMONGUS	1,000.00
05/19/2025	COM	90351	61186	COCM	45.00
05/19/2025	COM	90352	61141	COMCAST	198.80
05/19/2025	COM	90353	04500	COMEAU EQUIPMENT CO INC.	43,182.03
05/19/2025	COM	90354	50826	CONSUMERS ENERGY	1,348.90
05/19/2025	COM	90355	58648	CTS-COMPANIES	510.53
05/19/2025	COM	90356	61184	D.V.M. UTILITIES, INC.	22,499.10
05/19/2025	COM	90357	61160	DEER SOLUTIONS OF OAKLAND COUNTY	0.70
05/19/2025	COM	90358	52025	DETROIT SALT COMPANY	8,698.77
05/19/2025	COM	90359	60053	DINGES FIRE COMPANY	9,010.80
05/19/2025	COM	90360	60372	EAGLE LANDSCAPING & SUPPLY	1,812.64
05/19/2025	COM	90361	53356	EJ USA, INC.	1,754.54
05/19/2025	COM	90362	31830	ENTERPRISE COMPUTER	1,679.00
05/19/2025	COM	90363	49646	GUNNERS METERS & PARTS INC.	455.00
05/19/2025	COM	90364	58625	HALT FIRE	4,069.32
05/19/2025	COM	90365	31202	HOME DEPOT CREDIT SERVICES	2,734.85
05/19/2025	COM	90366	59010	HUNT SIGN COMPANY	430.00
05/19/2025	COM	90367	60750	HURON VALLEY GUNS	859.42
05/19/2025	COM	90368	58950	HYDROCORP	346.00
05/19/2025	COM	90369	59582	JOHNSON THERMOL-TEMP INC.	375.00
05/19/2025	COM	90370	61006	JOSEPH ORLANDO	4,680.00
05/19/2025	COM	90371	61187	KATHLEEN LORENC	388.00
05/19/2025	COM	90372	60497	KONE CHICAGO	270.42
05/19/2025	COM	90373	53316	LANG'S ON-SITE SERVICES	300.00
05/19/2025	COM	90374	51792	LEXISNEXIS RISK SOLUTIONS	200.00
05/19/2025	COM	90375	61182	LITA ZEMMOL	49.68
05/19/2025	COM	90376	60620	MACQUEEN EMERGENCY	2,331.31
05/19/2025	COM	90377	51484	MARC BOURASSA	200.00
05/19/2025	COM	90378	61157	MATTHEW PRANGE	1,400.00
05/19/2025	COM	90379	58953	MICHIGAN ASSOCIATION OF PLANNING	835.00
05/19/2025	COM	90380	50813	MICHIGAN DEPT. OF STATE	39.00
05/19/2025	COM	90381	52030	MICHIGAN GRAPHICS & AWARDS	89.00
05/19/2025	COM	90382	51620	MICHIGAN MUNICIPAL RISK	131.00
05/19/2025	COM	90383	59045	MICRO CENTER	379.96
05/19/2025	COM	90384	51799	NYE UNIFORM EAST	1,792.00
05/19/2025	COM	90385	51540	O'REILLY AUTO PARTS	137.76
05/19/2025	COM	90386	59735	OAKLAND COMMUNITY COLLEGE/CREST	700.00
05/19/2025	COM	90387	13600	OAKLAND COUNTY TREASURER	28,526.91
05/19/2025	COM	90388	50830	OAKLAND COUNTY TREASURER'S	200,305.92
05/19/2025	COM	90389	61178	OAKLAND COUNTY TREASURERS ASSC.	20.00
05/19/2025	COM	90390	30035	PLANTE & MORAN, PLLC	6,922.50
05/19/2025	COM	90391	15300	PRINTING SYSTEMS	778.59
05/19/2025	COM	90392	61179	ROMANA CONSTRUCTION INC	500.00
05/19/2025	COM	90393	61176	RONALD KUHN	16.54
05/19/2025	COM	90394	16500	S.O.C.R.R.A.	39,516.00
05/19/2025	COM	90395	16600	S.O.C.W.A.	53,061.03
05/19/2025	COM	90396	59282	SAFEBUILT INC.	2,402.50
05/19/2025	COM	90397	61008	SCOTT GLOWINSKI	4,860.00
05/19/2025	COM	90398	60926	STAPLES	248.10
05/19/2025	COM	90399	17700	SUNSET MAINTENANCE SERVICE	3,341.29
05/19/2025	COM	90400	61128	TERMINIX EHRLICH	73.91
05/19/2025	COM	90401	31043	THOMAS J RYAN PC.	9,500.00
05/19/2025	COM	90402	61183	WEATHERGARD WINDOW	65.00
05/19/2025	COM	90403	53564	WEX BANK	3,935.55
05/19/2025	COM	90404	53572	WOW! BUSINESS	658.06
05/19/2025	COM	90405	20900	ZIP ETC INC	75.00

COM TOTALS:

Total of 68 Checks:	634,219.42
Less 0 Void Checks:	0.00
Total of 68 Disbursements:	634,219.42

To: Honorable President George, Village Council Members

From: Warren Rothe, Village Manager

CC: Elizabeth Kutey, Finance Director

Subject: Review and Consider updated Fixed Asset/Capitalization Policy

Date: May 20, 2025

Background:

Our fixed asset/capitalization policy currently in place was adopted in 1997, effective with the 1997/1998 fiscal year. As it stands now, the current policy is not overly detailed, and the capitalization threshold is relatively low ($500.00), which results in a much larger number of purchases being capitalized than is practical.

In recent years, with materiality in mind, audit firms have begun recommending that clients review their capitalization policy and consider increasing the capitalization threshold, which will result in fewer purchases being capitalized. The benefits of raising the capitalization threshold are: a reduced administrative burden due to less assets being tracked and depreciated, simpler accounting, and a shift in focus to larger, more significant assets.

The proposed updated policy has a capitalization threshold of $10,000.00 and language related to the threshold for a purchase of multiple items.

Although increasing the capitalization threshold will change how certain assets are recorded, it will not significantly affect the overall accuracy or usefulness of the Village's financial statements. A $10,000 threshold is generally considered reasonable and is widely accepted by most audit firms. Even with a $10,000 threshold, virtually all major purchases with significant lifespans will continue to be capitalized as they have been.

The updated capitalization policy includes more detail than before about the definition of a capital asset and how to determine if an item is a capital item or an expense item. The additional information in the updated policy is also intended to help staff know who is responsible for tasks related to tracking the asset and also what recordkeeping is required to be done for the asset.

Recommended Action:

BE IT RESOLVED, *the Village Council adopts the revised capitalization policy as presented effective immediately.*

1. Purpose:
This policy establishes criteria for determining which purchases are capitalized (recorded as assets) and which purchases are expensed as incurred. The purpose of this policy is to ensure consistency in the accounting treatment of capital assets. This policy is the single governing authority for the treatment of items purchased or acquired by the Village that are determined to be capital assets as defined in Section 2. This policy supersedes any previous fixed asset policies previously established.

2. Definition of Capital Assets:
A capital asset is defined as property, plant, and equipment (PP&E) that:

- Has a useful life of more than 3 years.
- Is acquired for use in the operations of the Village and is not for resale.
- Has a cost or value that meets or exceeds the capitalization threshold (see section 3).

3. Capitalization Threshold:
The capitalization threshold is the dollar amount below which costs are expensed rather than capitalized. All single items with an acquisition cost of $10,000.00 or higher will be capitalized. If several items are purchased as a group and the total exceeds $10,000.00, the individual items must have a unit cost of $5,000.00 or more to be capitalized. If the individual item cost is less than $5,000.00, the purchase will be considered an expensed item rather than a capital item.

4. Determination of capital asset vs. expense item:

- **Items that would be capitalized:** Land, Buildings, Equipment (including machinery and software), Furniture and Fixtures, Leasehold Improvements, Land Improvements, Infrastructure and construction in process, and/or any other assets with a useful life exceeding 3 years. If warranty costs are not separately identifiable from the item(s), these should be capitalized along with the asset(s).

- **Items that would be Expensed:** Warranty costs that are separate and clearly identifiable, maintenance and repair costs, routine maintenance, small tools and equipment, and assets whose cost or value falls below the capitalization threshold.

- **Components:** Asset components refer to the individual parts, pieces, or elements that make up a larger asset. A component must be obtained with the original purchase or outfitting of the parent asset with the intent to remain with the parent asset. Conversely, a component purchased with a single asset to be used with

multiple assets is not a component and may not qualify as a capital expenditure. The decision to record a parent asset with components or one single asset is at the discretion of the Financial Director.

5. Donated Items: An item that is donated to the Village is capitalized if it meets the capitalization threshold outlined in Section 3. The item will be recorded in the Fixed Asset system at the fair market value determined at the time the Village receives the asset.

6. Capitalization Procedures:

- All costs associated with preparing an asset ready for its intended use should be capitalized.
- This includes purchase price, shipping, installation, and auxiliary items purchased at the same time along with the item(s) that contribute to the full functionality of the item(s), along with any other costs needed to prepare the asset to be operational.
- Training costs, travel, warranty and service plan costs for the item may not be capitalized.

7. Record-Keeping:

The Financial Director is responsible for keeping the books and records of assets, liabilities, receipts and expenditures of the Village, which includes fixed assets, pursuant to Chapter 2.03 of the Municipal Code (Ord. 278, 7-10-96).

- The Village must maintain a comprehensive record of all capital assets, including:
    - Description of the asset.
    - Date of acquisition.
    - Acquisition cost.
    - Location of the asset.
    - Photos of the asset.
    - Depreciation method.
    - Useful life.
    - Accumulated depreciation.

Finance will consult with the audit firm if any question arises as to the depreciation method and/or useful life of the asset

- The department head is responsible for obtaining documentation for proof of ownership, if applicable, at the time of procurement.
- The original vehicle/equipment title and insurance documentation should be forwarded to the Village Clerk for safekeeping.

8. Transfer of Asset(s) to other locations/departments:

- If an asset is moved to a different location and/or department, an Asset Transfer/Disposal form must be completed and returned to the Financial Director when the transfer is complete.

9. Asset retirements, trade-ins and disposals:

- If an asset is sold, donated to an external party, auctioned off, traded in for a newer version, or scrapped, an Asset Transfer/Disposal form must be completed and returned to the Financial Director within 10 days of disposal.

10. Physical inventories:

- The Financial Director may, each year, request each department head to complete a physical inventory of the assets in their department - this helps ensure that the financial statements contain the most accurate fixed asset costs and accumulated depreciation.

11. Review and Modification:

- This policy should be reviewed periodically by the Financial Director to ensure its continued relevance and appropriateness.
- The capitalization threshold may need to be adjusted based on changing economic conditions or business needs.

*This policy was approved on (date) with Resolution # xxxxxxxx.

MEMO

To: Honorable President George; Village Council Members

From: Carissa Brown, Village Clerk

Re: Review and Consider Request to Waive Pavilion Fees for Village Woman's Club

Date: May 16, 2025

The Village of Beverly Hills Administration received a request from the Village Woman's Club to waive the pavilion rental fees on Wednesday, June 4 from 6:00 p.m. to 9:00 p.m. for their club meeting. There are not any conflicting events scheduled at Beverly Park on this date/time.

At the May 15, 2025 Parks & Recreation Board meeting, the Board recommended that Council approves the Village Woman's Club request. The waiver request form is attached to this memorandum.

Recommended Motion:

Be it resolved, the Village Council approves the request from the Village Woman's Club to waive the pavilion rental fees on Wednesday, June 4 from 6:00 p.m. to 9:00 p.m.

Attachment

Beverly Park Pavilion Rental Fee
Waiver Request Form

Organization Village Woman's Club Contact Name Janet Mooney

Address 19111 Devonshire

City, State, Zip Beverly Hills MI 48025

Phone Number (248)320-0021 Email Address jmooney1214@gmail.com

Select one:

☒ Non-Profit ☐ Public School ☐ Other _____

Tax ID Number _____

Date of Event 6/4/25

Time of event 6:00 a.m./(p.m.) to 9:00 a.m./(p.m.)

Reservations are accepted between April 1 and November 30 between the hours of 9:00 a.m. and 9:00 p.m. Please note, reservations cannot be made on major holidays such as Memorial Day, Mother's Day, Father's Day, Independence Day, Labor Day, or during Village sponsored events such as the Halloween Hoot.

Number of attendees 15-25 (maximum 150)

Tell us about your event and how it benefits the community:
meeting of the Club

Is your event open to the public? (Yes) No

Please attach any supporting documents, such as a 5K route.

MEMO

To: Council President George; Village Council Members

From: Carissa Brown, Village Clerk

CC: Warren Rothe, Village Manager

Re: Review and consider adding two additional members to the Parks and Recreation Board

Date: May 16, 2025

The Parks & Recreation Board has been discussing adding two additional members to their Board to assist them with the growing number of recreation events occurring in the Village. Currently the board has seven members. At the May15, 2025 meeting, Parks and Recreation Board voted to request that Village Council add two additional members to their Board.

Attorney Ryan has prepared the attached resolution.

Attachment

VILLAGE OF BEVERLY HILLS, MICHIGAN

RESOLUTION TO EXPAND PARKS AND RECREATION BOARD

At a regular meeting of the Village Council of the Village of Beverly Hills, Oakland County, Michigan, held in the Council Chambers at 18500 W. Thirteen Mile Road, Beverly Hills, Michigan 48025, at 7:00 p.m. on the _____ day of _____, 2025, the following resolution was offered by Councilperson _____ and supported by Councilperson _____:

WHEREAS, the Parks and Recreation Board makes recommendations to Village Council and administration as to the maintenance, major improvements and future development of Village parks. Evaluates parks and recreational facilities, advises administration as to park functions and usage, and recommends fees and regulation with the concurrence of Village Council; and

WHEREAS, the Parks and Recreation Board currently consists of seven (7) persons who are qualified voters within the Village of Beverly Hills. The members of the Board are appointed by the Village Council.

WHEREAS, the Village Council desires to expand the Parks and Recreation Board from seven (7) persons to nine (9) persons; and

WHEREAS, the Park and Recreation Board terms that currently exist shall be confirmed and the two (2) new members shall serve for three years when appointed.

THEREFORE, IT IS RESOLVED the Beverly Hills Village Council hereby expands the board members from seven (7) members to nine (9) members.

AYES: _____

NAYS: _____

RESOLUTION DECLARED ADOPTED.

CERTIFICATION

I, Carissa Brown, being the duly appointed and qualified Clerk of the Village of Beverly Hills, Oakland County, Michigan, do hereby certify and declare that the foregoing is a true and correct copy of a Resolution adopted by the Village Council of the Village of Beverly Hills at a regular meeting thereof held on _____, 2025.

_____

Carissa Brown, Village Clerk

Memorandum

To: Honorable President George, Village Council Members

From: Warren Rothe, Village Manager

CC: Elizabeth Kutey, Finance Director

Re: Review and Consider Resolution to join Michigan CLASS Investment Pool

Date: May 20, 2025

Michigan CLASS is a local government investment pool that emphasizes safety, liquidity, convenience, and competitive yield. Since 1991, Michigan CLASS has provided Michigan public agencies with a safe and competitive investment option.

Michigan CLASS invests only in instruments applicable to Michigan state laws governing investment options for local agencies.

Michigan CLASS is established pursuant to a Participation Agreement and is governed by a 13-member Board of Trustees elected by the program participants. Oakland County is well represented on the Board with members from Rochester Hills, West Bloomfield, and the County Treasurer.

Other Facts:

- Michigan CLASS has reviewed the Village's investment policy and determined their program complies with the policy.
- Michigan CLASS has over 950 participants and over $5 billion in assets.
- Michigan CLASS invests in safe assets, primarily commercial paper, U.S. Treasuries, and money market accounts, all of which comply with the State of Michigan's regulations on local government investments and in accordance with the Village's investment policy.
- There are no fees for participating in Michigan CLASS. A small expense ratio is applied from the daily yield. There is no minimum investment requirement or on the number of transactions.

- Withdrawals from Michigan CLASS are available the next business day for all requests submitted by 3:00 p.m.
- Michigan CLASS pays interest **daily,** which allows for additional compounding and a higher return than with a traditional bank account.
- Michigan CLASS's yield 30-day in March 2025 was 4.41%. The bank account interest earned on our Sweep account with Comerica was 4.12%. With a cash balance of $14.2 million, Michigan CLASS's yield for the month would have been about $3,400 higher than the Sweep account.
- The Village is about to enter tax collection season, when its cash balances are highest. This makes now the appropriate time to seek higher yielding investments.

Participation in Michigan CLASS requires a Village Council resolution.

WHEREAS, the Michigan Cooperative Liquid Assets Securities System (Michigan CLASS) is compliant with Public Act 20; and,

WHEREAS, the Michigan CLASS Board of Trustees oversees the pool and directs the pool administrator, Public Trust Advisors, to emphasize safety, liquidity, and convenience while providing diversification of investments and the advantage of a competitive return; and,

WHEREAS, Michigan CLASS investments are fully compliant with all appropriate Michigan investment laws; and,

WHEREAS, Michigan CLASS has over 900 funded participants ranging from the very large to the very small, with over $5 billion in assets; and,

WHEREAS, this investment has no restrictions regarding withdrawals or contributions, affording the city the ability to use Michigan CLASS as it best suits our individual needs

NOW THEREFORE BE IT RESOLVED, the Village of Beverly Hills approves the Michigan CLASS Investment Pool as an authorized investment institution and authorizes the Finance Director to complete the necessary paperwork to enroll in the pool.

Michigan CLASS®

Information Statement

March 2023

Michigan CLASS Rated S&P 'AAAm'

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Section 28 of Article 7 of the Michigan Constitution of 1963 provides, among other things, that the legislature may authorize two or more local governmental entities to enter into contractual agreements to provide for the joint administration of functions which each entity would have the power to perform independently and to share the related costs and responsibilities with each other.

In accordance with this constitutional provision and certain statutory provisions incorporated in the Urban Cooperation Act of 1967 of the state of Michigan, the Agreement constitutes an interlocal trust agreement creating a legal entity established for the purpose of facilitating the joint investment of public sector surplus funds. Authority for the investment of public funds is included in Public Act 20 of 1943, Public Act 451 of 1976, Public Act 331 of 1966 and Public Act 94 of 1933, each as amended.

PART 1: PROGRAM OVERVIEW

A. General Information

Michigan Cooperative Liquid Assets Securities System (Michigan CLASS) is a product trade name used to designate a Michigan public sector joint investment program. It was established pursuant to a Participation Agreement (the Agreement) dated October 1, 1991, as most recently amended November 1, 2021, and as may be amended from time-to-time, by and among certain public sector entities having joined as Participants.

The program's Investment Advisor and Administrator is Public Trust Advisors, LLC (Public Trust), and the program's Custodian is Fifth Third Bank.

Upon execution of the appropriate governmental resolution authorizing a public entity to enter into the Agreement, Participants shall have the right to open, at no initial cost, as many Michigan CLASS accounts as they wish. They shall also have the right to deposit eligible surplus funds into any of their accounts on any business day without limitation as to the dollar amount or number of such transactions. Participants may also withdraw funds from their respective accounts on any business day up to an amount equal to the account balance and any accrued interest and/or realized capital gains thereon.

B. Board of Trustees

Investments made on behalf of the Participants are subject to the overall direction of the program's Board of Trustees that consists of up to 13 Trustees serving staggered terms on behalf of the Participants. The Board of Trustees approves the program's investment parameters that must also fall within the investment stipulations mandated under

Michigan statutes for the investment of surplus funds of the Participants. The Board of Trustees (the Board) has entered into an investment advisory administrative services agreement with Public Trust, who is responsible to the Board for all of the program's investments, administrative activities, and marketing services provided on behalf of the Participants.

C. Board Member Guiding Values

- Represent and serve the interests of all Participants
- Maintain the standard of safety
- Operate in a professional and ethical manner
- Work in unison with the Administrator to grow and improve the pool
- Ensure that Michigan CLASS is safe, liquid, and offers a competitive return
- Demand openness and accountability

D. Mission Statement

Michigan CLASS strives to offer public agencies in Michigan a safe, liquid, and competitive investment option. Michigan CLASS welcomes all legal public entities without favor to one type. The Board membership represents the diversity of such agencies and works to maintain a product that services the needs of all Michigan public agencies.

E. Vision Statement

Michigan CLASS strives to be the leading local government investment pool in the state offering investment services that serve the needs of all public entities.

F. Participation Eligibility

Participation in Michigan CLASS is available to any county, city, village, township, school district, authority, or any other political subdivision organized under the laws of the state of Michigan. To join, such public agencies need only to become party to the Participation Agreement by adopting the necessary authorizing resolution and by providing a certified copy of such resolution to the Administrator. The Administrator will then notify the Custodian and the other Participants in writing and commence the procedures necessary for the new Participant to begin using the program. Pursuant to applicable state law, Public Trust will review each entity's investment policy and return the appropriate acknowledgment.

PART 2: PROGRAM OBJECTIVES

The objectives of the Michigan CLASS program are to provide Participants with an investment alternative that emphasizes safety, liquidity, convenience, and competitive rates of return. The program is designed specifically to accommodate the needs of Michigan public sector investors. In addition, periodic meetings with and surveys of the Participants assure user input in the design and administration of program features.

A. Safety

The objective of safety in the deployment of Michigan CLASS funds is sought through the direct purchase (or through repurchase agreements) of short-term, high-quality investments permissible as investments for surplus public funds in the state of Michigan. An overall program objective is to manage investment quality and maturity to maintain a stable portfolio net asset value. Investments are also managed conservatively to accommodate cash flow expectations and to mitigate market timing risk.

Administrative elements of the Michigan CLASS program are designed to prevent incidence of fraud or error. Many safeguards further protect Michigan CLASS funds under management including daily verification of transactions; assignment of credentials for online transactions; and the use of only pre-designated bank accounts, listed in the name of respective Participants, to which Michigan CLASS funds withdrawals may be done via wire or ACH.

Besides investing Michigan CLASS funds only in securities legally permitted by Michigan Law, Michigan CLASS has achieved a 'AAAm' rating by S&P Global Ratings and offers the benefit of an annual audit by an independent auditing firm.

B. Liquidity

Liquidity is a key element of the program. Portfolio maturity and duration parameters are established to provide for the liquidity needs of the Participants since they may deposit or withdraw funds on any business day up to the amount of their balances on deposit (including accrued interest and/or capital gains realized thereon).

All funds are fully invested each night, and securities that constitute the program's investments and/or securities that are subject to repurchase agreement are fully delivered to the Custodian to be held for the exclusive benefit of the Participants until maturity or sale. In the case of repurchase agreement transactions, securities subject to repurchase must equal in current market value at least 102% of the amount of the investment. Such collateral is marked-to-market daily with a deficiency make-up provision enforced if necessary.

In addition, the use of only the highest quality investments with a maximum maturity of two years or less assures the added benefit of underlying asset marketability. The net result of these liquidity features is that Participant cash is available in the amount necessary when needed.

C. Convenience

Many program features ensure convenient account access and ease of recordkeeping. For example, Participants may make account transactions on any business day via the Michigan CLASS online transaction system. All contribution and withdrawal forms are designed for ease of use and are also available via the online transaction system.

Any number of Participant accounts may be established to track and parallel internal fund accounting practices. Monthly statements are comprehensive and provide daily account activity and transaction numbers. Michigan CLASS statements establish a clear accounting and audit trail for Participant investment records. Monthly statements and investment holdings are available within the first three business days of the month via the online transaction system.

Account information or assistance is available every business day from Michigan CLASS Client Services. Transactions can be prepared in advance in anticipation of important dates, avoiding unfortunate timing problems or cash access emergencies.

Optional features include direct deposit of school state aid payments, state revenue sharing warrant lock box, and ACH service. All program features have been designed in cooperation with professionals who have public sector financial experience to facilitate the maximum level of cash management efficiency and simplicity.

D. Market Returns

Competitive portfolio yield is sought by utilizing the services of the investment advisor's seasoned professional investment managers and credit researchers for the Michigan CLASS program.

Michigan CLASS seeks to promote maximization of account performance in a dynamic market environment while avoiding unnecessary risk or portfolio timing problems. By investing together, Participants can take advantage of possible economies of scale relative to transaction and clearance costs, custody arrangements, and valuation costs.

In addition, overall portfolio performance should be enhanced as a result of the effect of differences in cash flow cycles from one Participant to another; this allows for slightly longer average investment maturities than would be the case if Participants invested alone, thereby increasing aggregate portfolio yields.

PART 3: INVESTING THROUGH MICHIGAN CLASS

A. Permitted Investments

Pursuant to direction by the Board and in conformance with applicable Michigan Laws

governing investment options for Participants, funds of the Participants are invested in high-quality, short-term fixed-income instruments selected to provide for program safety, liquidity, and competitive rates of return. Eligible instruments include:

- U.S. Treasury obligations,
- Federal agency obligations of the U.S. government,
- High-grade commercial paper (at least A1/P1 rated),
- Bankers' acceptances issued by FDIC-member U.S. banks,
- Repurchase agreement transactions executed with highly rated counterparties (collateralized at 102% of the face amount of the agreement),
- Certificates of deposit issued in accordance with all applicable Michigan Statutes, and
- Approved money market mutual funds for eligible Participants

B. Investment Risks

Participants should specifically consider the following risks before deciding to invest in the Michigan CLASS fund. The following summary does not purport to be comprehensive or definitive of all risk factors.

Investing involves risks including the possible loss of principal.

Interest Rate Risks

The prices of the fixed-income securities in Michigan CLASS will rise and fall in response to changes in the interest rates paid by similar securities. Generally, when interest rates rise, prices of fixed-income securities fall. However, market factors, such as demand for particular fixed-income securities, may cause the price of certain fixed-income securities to fall while the price of other securities rise or remain unchanged. Interest rate changes have a greater effect on the price of fixed-income securities with longer maturities. The Investment Advisor will seek to manage this risk by purchasing short-term securities.

Credit Risks

Credit risk is the possibility that an issuer of a fixed-income security held in Michigan CLASS will default on the security by failing to pay interest or principal when due. If an issuer defaults, Participants in Michigan CLASS may incur losses. The Investment Advisor will seek to manage this risk by purchasing high quality. securities as determined by one or more Nationally Recognized Statistical Ratings Organizations and/or the Investment Advisor’s credit research team.

Stable Net Asset Value Risks

Although Michigan CLASS is managed to maintain a stable NAV of $1.00 per Share,

there is no guarantee that it will be able to do so.

Investment Not Insured or Guaranteed

An investment in Michigan CLASS is neither insured nor guaranteed by the Federal Deposit Insurance Corporation or any other government agency.

Liquidity Risk

Michigan CLASS is subject to certain liquidity risks in which the size of a bond's market, the frequency of trades, the ease of valuation, and/or issue size may impact the Investment Advisor's ability to sell investments in a timely fashion or at or near fair value in order to fulfill a Participant's redemption request.

Market Risk

Market risk is the risk that the value of securities owned goes up or down, sometimes rapidly and/or unpredictably, due to factors affecting securities markets generally or within particular industries.

Issuer Risk

The risk that the value of a security declines for a reason directly related to the issuer such as management performance, financial leverage, and reduced demand for the issuer's goods or services.

Default Risk

The risk that a bond issuer (or counterparty) will default by failing to repay principal and interest in a timely manner.

C. Program Vendors

Public Trust Advisors, LLC, an SEC registered investment advisor, serves as the Michigan CLASS program Investment Advisor and Administrator. In addition to rendering investment and advisory services on a discretionary basis to the Participants, Public Trust also provides a full range of administrative services in conjunction with the program. All Michigan CLASS recordkeeping, portfolio accounting, Participant account reporting, securities valuation services, and general organizational and marketing activities are coordinated and managed on behalf of the Participants by Public Trust.

Public Trust Advisors, LLC is headquartered at 717 17th Street, Suite 1850, Denver, CO 80202. Its phone number is (855) 395-3954. Public Trust provides investment advisory and/or administrative services for similar public sector cooperative investment programs in a number of states across the country including Colorado, Florida, New York, Texas, and Michigan.

The Michigan CLASS Custodian is Fifth Third Bank. All investment securities and securities transacted on behalf of the participants are maintained in a segregated account with the Custodian and held for the exclusive benefit of the Participants. No

other Michigan CLASS vendor has access to the assets managed under the program. Participants maintaining separate Fifth Third Bank depository accounts in their own names are eligible to transfer funds between such accounts and their Michigan CLASS accounts without incurring wire charges, subject to advance notification to Public Trust.

Barnes & Thornburg, LLP serves as legal counsel to Michigan CLASS. The firm is located at 11 South Meridian Street, Indianapolis, IN 46204, and its phone number is (317) 231-6425.

An independent certified public accounting firm, Cohen & Co., has been engaged to audit the annual financial statements of Michigan CLASS. The audit contains statements of assets and liabilities, of operations, and of changes in net assets. The opinion of the independent certified public accountant on such financial statements is based on an examination of the books and records of Michigan CLASS made in accordance with generally accepted accounting principles (GAAP).

D. Program Fees

Pursuant to its agreement with the Board of Trustees, Public Trust charges a management fee for its services that covers all costs related to Michigan CLASS. This management fee is a charge from the Investment Property Value (the daily fee). This daily fee accrues on a daily basis and is paid monthly in arrears and prorated for any portion of the month in which the agreement is in effect. The daily fee shall be calculated as follows: The Investment Property Value is multiplied by the Applicable Fee Rate and is divided by 365, or 366 days in the event of a leap year, to equal the daily fee accrual. The Investment Property Value shall be based on the prior day's net assets. For weekend days and holidays, the net assets for the previous business day will be utilized for the calculation of fees. The Applicable Fee Rate shall be determined monthly on the first business day of each month and shall be based on the following sliding scale:

$0 - $3 billion	0.13% (13 bps)
> $3 billion	0.12% (12 bps)

E. Additional Information

This Information Statement is designed to provide a general overview of the Michigan CLASS program. Reference should be made to the Participation Agreement for a complete description of the rights and obligations of the Participants. To obtain further information and a copy of the Participation Agreement, please visit www.michiganclass.org/document-center.

Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial

developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. Michigan CLASS is not a bank. An investment in Michigan CLASS is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Although Michigan CLASS seeks to preserve the value of your investment at $1.00 per share, it cannot guarantee it will do so. A 'AAAm' rating by S&P Global Ratings is obtained after S&P evaluates a number of factors including credit quality, market price exposure, and management. Ratings are subject to change and do not remove market risk. Registration with the SEC does not imply a certain level of skill or training. External audits may not catch all instances of accounting errors and do not provide an absolute guarantee of accuracy.

03/23 Managed by Public Trust Advisors, LLC

CONTACT INFORMATION

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clientservices@michiganclass.org
www.michiganclass.org

S&P Global Ratings

POOL PROFILE *September 24, 2024*

Michigan Cooperative Liquid Assets Securities System (MI CLASS)

Principal Stability Fund Ratings Definitions

AAAm A fund rated 'AAAm' demonstrates extremely strong capacity to maintain principal stability and to limit exposure to principal losses due to credit risk. 'AAAm' is the highest principal stability fund rating assigned by S&P Global Ratings

AAm A fund rated 'AAm' demonstrates very strong capacity to maintain principal stability and to limit exposure to principal losses due to credit risk. It differs from the highest-rated funds only to a small degree.

Am A fund rated 'Am' demonstrates strong capacity to maintain principal stability and to limit exposure to principal losses due to credit risk, but is somewhat more susceptible to the adverse effects of changes in circumstances and economic conditions than funds in higher-rated categories

BBBm A fund rated 'BBBm' demonstrates adequate capacity to maintain principal stability and to limit exposure to principal losses due to credit risk. However, adverse economic conditions or changing circumstances are more likely to lead to a reduced capacity to maintain principal stability.

BBm A fund rated 'BBm' demonstrates speculative characteristics and uncertain capacity to maintain principal stability. It is vulnerable to principal losses due to credit risk. While such funds will likely have some quality and protective characteristics, these may be outweighed by large uncertainties or major exposures to adverse conditions.

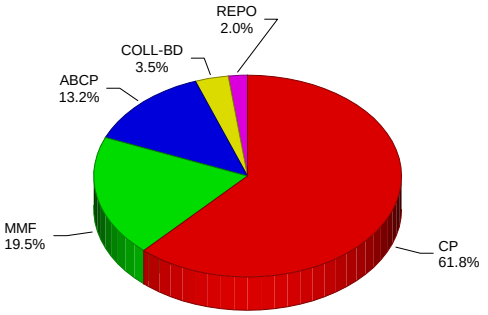
Dm A fund rated 'Dm' has failed to maintain principal stability resulting in a realized or unrealized loss of principal.

Plus (+) or Minus (-) The ratings may be modified by the addition of a plus (+) or minus (-) sign to show relative standing within the rating categories.

About the Pool

Pool Rating	**AAAm**
Pool Type	Stable NAV Government Investment Pool
Investment Adviser	Public Trust Advisors, LLC
Portfolio Manager	Neil Waud, CFA
Pool Rated Since	March 2009
Custodian	Fifth Third Bank, NA
Distributor	Public Trust Advisors, LLC (Public Trust)

Portfolio Composition as of September 24, 2024



CP - Commercial Paper; MMF - Money Market Fund; ABCP - Asset-backed commercial paper; COLL-BD - Collateralized Bank Deposits; REPO -Repurchase Agreement

Rationale

Michigan Cooperative Liquid Assets Securities System (Michigan CLASS) is rated 'AAAm' by S&P Global. The rating signifies our forward-looking opinion about a fixed-income fund's ability to maintain principal value (i.e., stable net asset value, or 'NAV'). This is accomplished through conservative investment practices and strict internal controls. S&P Global monitors the portfolio on a weekly basis.

Overview

Michigan CLASS seeks to provide safety, liquidity, convenience, and competitive rates of return. The program is designed to meet the needs of Michigan public sector investors. It purchases securities that are legally permissible under state statutes and are available for investment by Michigan counties, cities, townships, school districts, authorities, and other public agencies. Michigan CLASS is a full-service cash management and investment program designed specifically to make the function of managing public funds safe and simple while providing competitive returns. Michigan CLASS has been in operation since 1991.

Management

Public Trust Advisors, LLC serves as the pool's administrator and investment adviser. The marketing and operation functions of the portfolio are also performed by Public Trust Advisors, LLC. The pool is subject to the general supervision of the Board of Trustees which is duly elected by the Michigan CLASS Participants. Fifth Third Bank serves as custodian for the pool.

Portfolio Assets

The pool invests in U.S. Treasury obligations, federal agency obligations of the U.S. government, high-grade commercial paper (rated 'A-1' or better), collateralized bank deposits, repurchase agreements (collateralized at 102% by Treasuries and agencies), and approved money-market funds. The credit quality of the pool is excellent, with greater than 50% of the portfolio invested in securities rated 'A-1+' and the remainder in 'A-1' rated securities. The portfolio's weighted average maturity to reset (WAM(R)) is kept under 60 days, which further helps to enhance liquidity and limits market price exposure. Portfolio securities are priced to market on a daily basis.

S&P Global Ratings Analyst: Kara Wachsmann - 303 721 4547 www.spratings.com

Participants should consider the investment objectives, risks and charges and expenses of the pool before investing. The investment guidelines which can be obtained from your broker-dealer, contain this and other information about the pool and should be read carefully before investing.

Michigan Cooperative Liquid Assets Securities System (MI CLASS) *AAAm*

Principal Stability Rating Approach and Criteria

A S&P Global Ratings principal stability fund rating, also known as a "money market fund rating", is a forward-looking opinion about a fixed income fund's capacity to maintain stable principal (net asset value). When assigning a principal stability rating to a fund, S&P Global Ratings analysis focuses primarily on the creditworthiness of the fund's investments and counterparties, and also its investments' maturity structure and management's ability and policies to maintain the fund's stable net asset value. Principal stability fund ratings are assigned to funds that seek to maintain a stable or an accumulating net asset value.

Generally, when faced with an unanticipated level of redemption requests during periods of high market stress, the manager of any fund may suspend redemptions for up to five business days or meet redemption requests with payments in-kind in lieu of cash. A temporary suspension of redemptions or meeting redemption requests with distributions in-kind does not constitute a failure to maintain stable net asset values. However, higher rated funds are expected to have stronger capacities to pay investor redemptions in cash during times of high market stress because they generally comprise shorter maturity and higher quality investments.

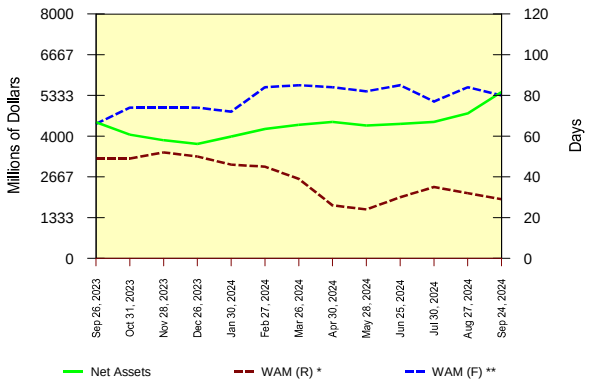
Principal stability fund ratings, or money market fund ratings, are identified by the 'm' suffix (e.g., 'AAAm') to distinguish the principal stability rating from a S&P Global Ratings traditional issue or issuer credit rating. A traditional issue or issuer credit rating reflects S&P Global Ratings view of a borrower's ability to meet its financial obligations. Principal stability fund ratings are not commentaries on yield levels.

Data Bank as of September 24, 2024

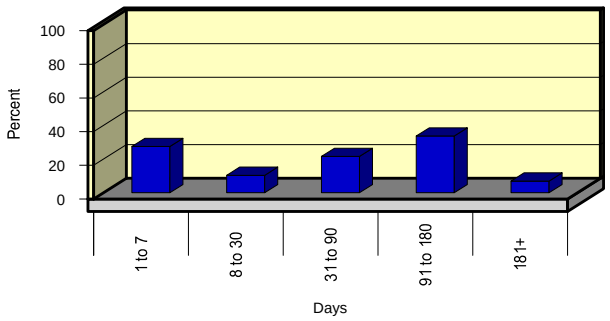
Net Asset Value per Share.....	$1.00037	Net Assets (millions).....	$5,443.79	Inception Date.....	October 1991
WAM (R) *	29 days	WAM (F) **.....	80 days	7 Day Yield.....	5.13%

* Weighted Average Maturity (Reset) ** Weighted Average Maturity (Final)

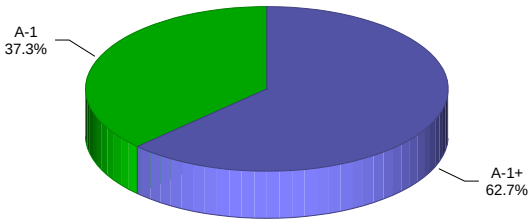
Net Assets, WAM (R) and WAM (F)



Portfolio Maturity Distribution as of September 24, 2024

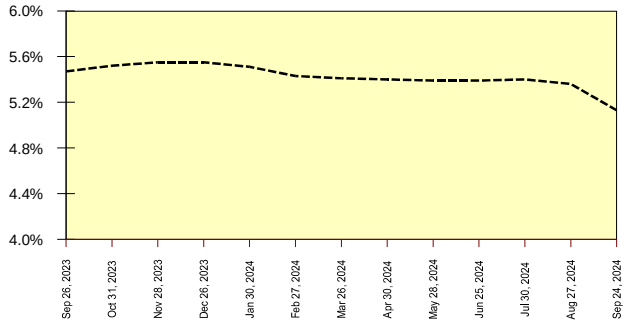


Portfolio Credit Quality as of September 24, 2024 *



*As assessed by S&P Global Ratings

Portfolio 7 Day Net-Yield



The yield quoted represents past performance. Past performance does not guarantee future results. Current yield may be lower or higher than the yield quoted.

Pool portfolios are monitored weekly for developments that could cause changes in the ratings. Rating decisions are based on periodic meetings with senior pool executives and public information.

S&P Global Ratings is neither associated nor affiliated with the fund.

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Memorandum

To: Honorable President George, Village Council Members

From: Elizabeth Kutey, Finance Director

CC: Warren Rothe, Village Manager

Re: Resolution to award a contract for Professional Auditing Services

Date: May 20, 2025

The Village prepared a request for Proposal (RFP) for Professional Audit Services. The RFP was published on the Michigan Inter-Governmental Trade Network (MITN) for the purpose of soliciting professional audit services over the next five years. The Village received seven proposals for services.

Of the seven proposals, six are based in Michigan and have experience working with Michigan municipalities and compliance with the various laws governing audits and municipal finance in Michigan.

The Finance Director and Village Manager have reviewed the proposals and have identified the following top three:

1. **Yeo & Yeo** – Village Manager Rothe has worked with Yeo and Yeo for the past three audits with Grosse Pointe Park. Finance Director Kutey has additionally worked with Yeo and Yeo on two audits with Plymouth Township. Ali Barnes, the proposed audit principal, served as principal auditor on all these audits. *As a result, they are our recommended auditor.*
2. **Manor Costerisan** – Village Manager Rothe has worked with Manor Costerisan on three audits with the City of St. Clair.
3. **AHP** – While neither the Finance Director and Village Manager have experience with this firm, they do have experience working with local communities.

A complete breakdown of the proposal costs accompanies this memo along with the proposals from the identified top three firms. For reference, the Village will see savings with whatever auditor is selected, as Plante & Moran's audit fees for FY 2024 were $59,245.

Suggested Resolution:

NOW THEREFORE BE IT RESOLVED, the Village of Beverly Hills approves the award for Professional Auditing Services to _____ for a five-year contract term.

Company	Location of Firm	2025	2026	2027	2028	2029	Local Clients on List of References
AHP	Bloomfield Hills, MI	$ 31,000.00	$ 32,000.00	$ 33,000.00	$ 34,000.00	$ 35,000.00	Oakland Twp; City of Berkley; Village of Lake Orion
Manor Costerisan	Lansing, MI	$ 34,600.00	$ 36,300.00	$ 38,100.00	$ 39,900.00	$ 41,700.00	City of Lathrup Village; Grosse Pointe Shores; City of Lansing
Mauldin & Jenkins	Atlanta, GA	$ 37,500.00	$ 39,900.00	$ 42,500.00	$ 45,000.00	$ 47,500.00	none
Clark Schaefer Hackett	East Lansing, MI	$ 40,000.00	$ 42,500.00	$ 45,000.00	$ 48,000.00	$ 51,000.00	City of Adrian; City of Ypsilanti
Gabridge & Co.	Grand Rapids, MI	$ 41,510.00	$ 42,750.00	$ 44,000.00	$ 45,250.00	$ 46,500.00	none
Rehmann	Jackson, MI	$ 42,000.00	$ 43,500.00	$ 45,000.00	$ 46,500.00	$ 48,000.00	City of Royal Oak; City of Novi; Oakland County
Yeo & Yeo	Saginaw, MI	$ 43,500.00	$ 45,500.00	$ 47,500.00	$ 49,500.00	$ 51,500.00	City of Howell; City of Clawson; Grosse Pointe Park

***sorted in order of lowest price to highest price for 2025**

(Comparison only)

Plante & Moran FY2024 audit fees - $ 59,245.00 (fees without a single audit)

YEO & YEO

CPAS & ADVISORS

Village of Beverly Hills

April 18, 2025

Let's thrive.

Yeo & Yeo is a business success partner using the power of listening, perspective, and connected purpose to help our clients, communities, and colleagues thrive. We are grateful for the opportunity to be considered for this initiative, providing guidance on your unique path.

The following pages outline our company, our differences, our proposed relationship, and our commitment to you. If you have any questions, concerns, or clarifications, we're here to help. We appreciate your time and attention.

Thank you.

April 18, 2025

Village of Beverly Hills
Warren Rothe, Village Manager
18500 W. 13 Mile Rd.
Beverly Hills, MI 48025

Dear Mr. Rothe:

Thank you for considering Yeo & Yeo for your auditing needs. We are pleased to provide this proposal for your audit work for the fiscal years ending June 30, 2025, through 2029.

Yeo & Yeo is an innovative firm that is among the leading certified public accounting and consulting firms in the country. The following key points highlight our qualifications:

- A commitment to performing quality governmental audit, tax and consulting services. The firm currently provides services for more than 180 governmental audits.
- Members of the firm's Government Services Group are active in several associations, foundations, boards and committees.
- With our award-winning Audit process, our clients recognize greater efficiency, timely turnaround, and overall ease in the audit.
- A clear position of leadership among regional providers of auditing, accounting, business consulting, employee benefits, technology and tax services.
- Members of the firm's Government Services Group are frequent presenters at state and local conferences and trainings.

Yeo & Yeo has the knowledge and experience to furnish the auditing services that you are requesting. We adhere to the highest quality standards and are committed to serving timely and efficiently.

We appreciate the opportunity. Thank you for your consideration.

Sincerely,

Ali N Barnes

Ali N Barnes, CPA, CGFM
Principal, Yeo & Yeo
ali.barnes@yeoandyeo.com

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Firm Qualifications.

Independence

Yeo & Yeo is independent of the Village of Beverly Hills as defined by generally accepted auditing standards and the U.S. General Accounting Office's *Government Auditing Standards.*

We are not aware of any conflicts of interest related to the Village of Beverly Hills or any of its agencies or component units for the past five (5) years and have quality control procedures in place to address any items or circumstances that may arise.

License to Practice in Michigan

Yeo & Yeo is licensed by the State of Michigan, Department of Licensing and Regulations, to practice public accounting in the State of Michigan. All key professional staff assigned are properly licensed to practice in the State of Michigan.

Debarment, Suspension, Ineligibility, and Voluntary Exclusion

The company or any of its employees is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this contract.

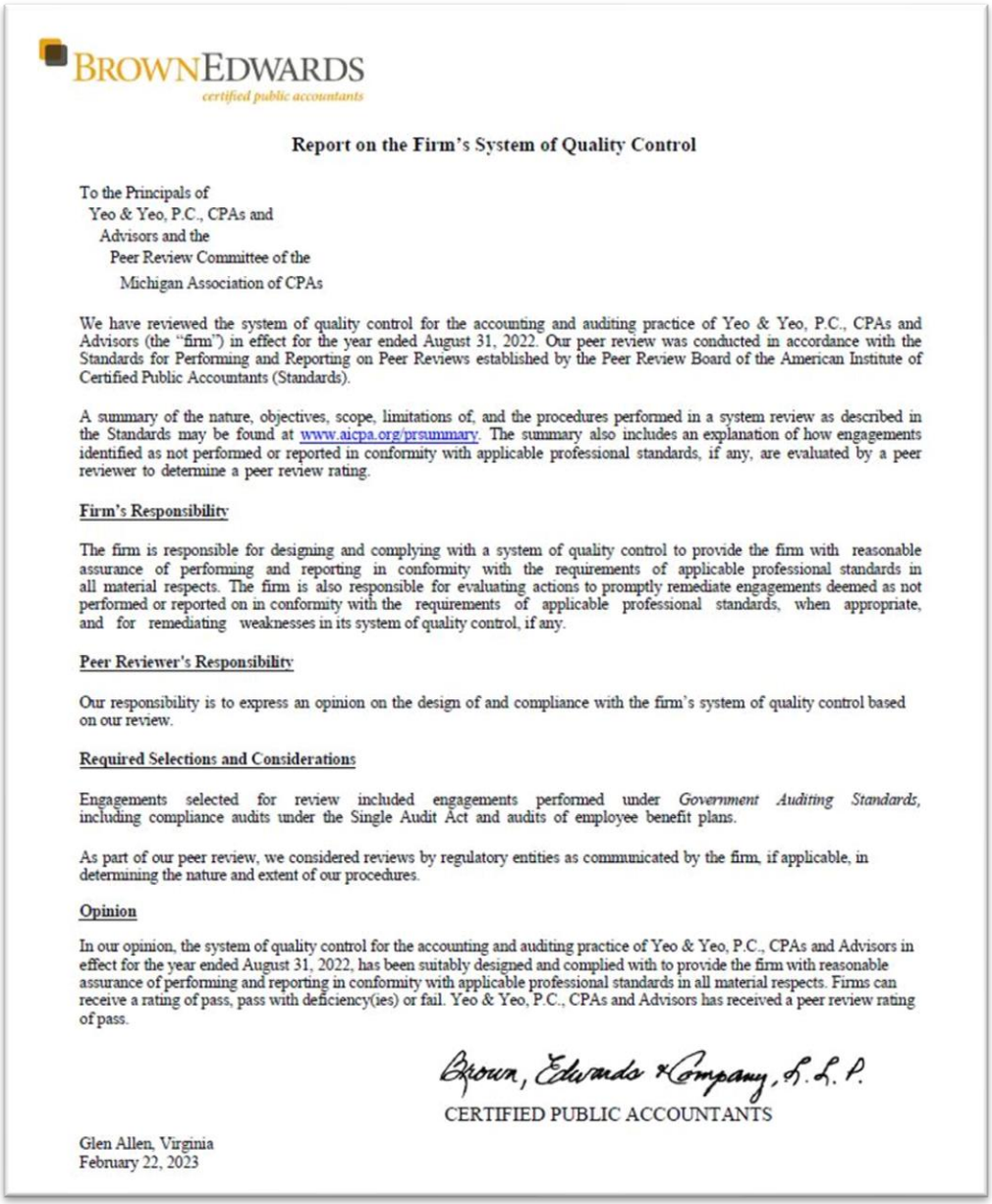
Other Qualifications

- Yeo & Yeo meets the continuing education and external quality control requirements of *Governmental Auditing Standards.*
- Yeo & Yeo does not have a record of substandard audit work.
- We follow the American Institute of Certified Public Accountants' *Interpretation 501-3, Failure to Follow Standards and/or Procedures or Other Requirements in Governmental Audits.*



Peer Review.

Yeo & Yeo's most recent external peer review was for the period ended August 31, 2022. The pass report is the highest possible mark. The peer review letter follows:



BROWNEDWARDS
certified public accountants

Report on the Firm's System of Quality Control

To the Principals of
Yeo & Yeo, P.C., CPAs and
Advisors and the
Peer Review Committee of the
Michigan Association of CPAs

We have reviewed the system of quality control for the accounting and auditing practice of Yeo & Yeo, P.C., CPAs and Advisors (the "firm") in effect for the year ended August 31, 2022. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a system review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act and audits of employee benefit plans.

As part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Yeo & Yeo, P.C., CPAs and Advisors in effect for the year ended August 31, 2022, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of pass, pass with deficiency(ies) or fail. Yeo & Yeo, P.C., CPAs and Advisors has received a peer review rating of pass.

Brown, Edwards & Company, L.L.P.
CERTIFIED PUBLIC ACCOUNTANTS

Glen Allen, Virginia
February 22, 2023

Yeo & Yeo has no issues with any federal or state desk reviews or field reviews of its audits during the past three years. Yeo & Yeo has not had any disciplinary action taken or pending during the past three years with state regulatory bodies or professional organizations.

Accountability. Transparency. Possibility.

Government Industry Experience.

Governmental Audit Quality Center (GAQC) Member

Yeo & Yeo is a member of the AICPA's Governmental Audit Quality Center (GAQC) committed to adhering to the highest standards in performing quality government audits. As a benefit of GAQC membership, our audit professionals have access to the latest notices and advice regarding audit, accounting and regulatory issues. In turn, Yeo & Yeo will keep you informed of important issues and best practices.

GFOA Certificate of Achievement for Excellence in Financial Reporting Experience

Yeo & Yeo supports the Certificate of Achievement for Excellence in Financial Reporting Program (Annual Comprehensive Financial Report program) with audit team members currently active in the certification review process, including Yeo & Yeo's Government Services Group Leader, Jamie Rivette, who serves on the Special Review Committee. The following clients have earned their Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officers Association (GFOA).

- Cass County
- Charter Township of Independence
- City of Alma
- City of Bay City
- City of Farmington Hills
- City of Fenton
- City of Midland
- City of Oak Park
- City of Portage
- City of Saginaw
- City of St. Clair Shores
- City of Troy

Actively Involved

Our audit professionals and members of Yeo & Yeo's Government Services group are actively involved in industry associations that keeps us on the forefront of industry and regulatory issues and also allows us to share our expertise as frequent presenters and trainers.

- Government Finance Officers Association
  - GFOA Certificate of Achievement for Excellence in Financial Reporting Program Special Review Committee member
- Michigan Certified Public Accountants Government Task Force
- Michigan Municipal League
- Michigan Townships Association
- State of Michigan Advisory Committee for Implementation of Uniform Chart of Accounts
- Michigan Government Finance Officers Association
  - Board of Directors
  - Accounting and Auditing Standards Committee
  - Legislative Committee
  - Membership and Mentoring Committee

About Yeo & Yeo.

Yeo & Yeo has grown from a family-owned business to being among the Top 200 certified public accounting and consulting firms in the country. Our team of 33 Principals, 4 Presidents, and more than 275 professionals provides comprehensive solutions for individuals, businesses, school districts, units of government, and not-for-profit entities.

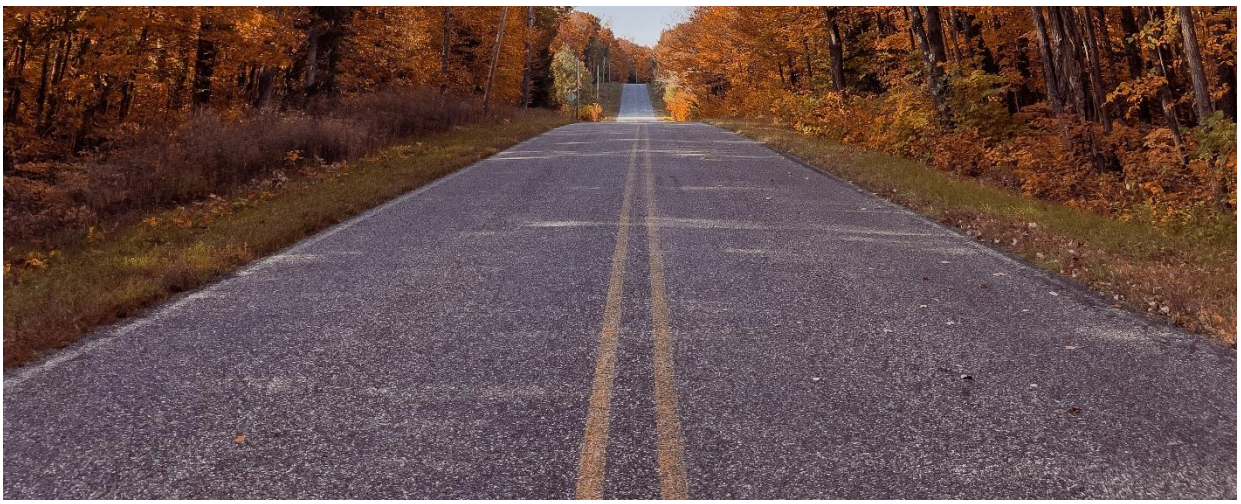
Yeo & Yeo is a full-service firm, providing accounting, auditing, business consulting, and tax services for businesses and organizations throughout Michigan since 1923. With the support of Yeo & Yeo HR Advisory Solutions, Yeo & Yeo Technology, Yeo & Yeo Wealth Management, and Yeo & Yeo Medical Billing & Consulting, we have created a strong network of professionals available to consult and proactively propose solutions for our clients.

The firm has nine offices throughout Michigan that are easily accessible to our clients with multiple locations. With locations in Alma, Ann Arbor, Flint, Kalamazoo, Lansing, Midland, Saginaw, Southgate, and Troy, the firm is positioned to provide local, hands-on service. The firm's audit team consists of 60 auditors. We utilize a team approach to staffing audit engagements based on the required skill sets of the team, rather than where the office is physically located. Because of this, we may draw on governmental professionals who are based in any of our offices.

At Yeo & Yeo, we listen to your vision, we help you fulfill it, and we walk alongside you easing complexities – never adding to them.

Yeo & Yeo's certified public accountants and advisors provide organizations and businesses with forward-thinking, comprehensive solutions in accounting, audit, tax, and business consulting to improve accountability, reduce risk, enhance profitability, and minimize taxes.

Whatever your chosen path, wherever you'd like to go, Yeo & Yeo is here with you. From everyday needs to long-term goals, let's get there. Together.



A Proud Family of Companies.

Through our family of companies, we work with you to achieve your unique goals. It is focused expertise, designed to bring all you need, exactly how you need it.



YEO & YEO

CPAS & ADVISORS

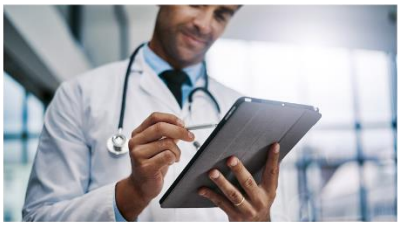
Comprehensive solutions in accounting, audit, tax, and business consulting. Helping you thrive with confidence.



YEO & YEO

HR ADVISORY SOLUTIONS

Helping you build better teams, grow, and succeed. Recruiting, training, compensation, employee handbooks and more.



YEO & YEO

MEDICAL BILLING & CONSULTING

Helping your medical practice thrive. Complete medical billing and practice management consulting solutions.



YEO & YEO

TECHNOLOGY

Helping you stay productive and always ready. Managed IT, cloud, security, network solutions, and more.



YEO & YEO

WEALTH MANAGEMENT

Helping you plan for what's next. Financial planning, asset management, tax-smart investing, and more.

Identification of Anticipated Potential Audit Problems.

This identifies and describes any anticipated potential audit problems, the firm's approach to resolving these problems/issues and any special assistance that will be requested from the Village of Beverly Hills.

Information Not Ready

We will have open communication during the audit to help prevent this but will schedule the audit as planned and we can be flexible with the timing. We will also contact management as soon as any issues arise.

Additional Charges for Services

Should additional services/assistance be necessary, we will discuss with management and get approval prior to charging for any additional services.

Uncooperative Employees

We will discuss this issue with the appropriate level of management.

Surprises

Management will receive draft reports of any comments, recommendations, or findings to make sure facts are correct and corrective action is appropriate.

Timeline

If our timeline for the presentation is ever in jeopardy, we will communicate this to the appropriate level of management immediately.

Staffing/Personality Issues

We ask that if you encounter any issues with our staff, whether it be a new staff member, a manager, or a partner, that you contact the appropriate level of management so that we can make a decision that will benefit the Village of Beverly Hills.

Report Format

Website for examples/reports of our past financial statements:
https://treas-secure.state.mi.us/DocumentSearch

Personal. Knowledgeable. Approachable.

Meet Your Engagement Team.

Partner, Supervisory and Staff Qualifications and Experience

Your project will be staffed with individuals who collectively possess the necessary skills in financial management, accounting and auditing, technology, internal controls, and compliance with laws and regulations, together with knowledge of governmental regulatory requirements. Staffing will come from our Troy, Ann Arbor and Alma offices as deemed necessary as the individuals assigned are active within the government industry.

The following individuals will be assigned to your audit team. No complaints have been leveled by the state board of accountancy or other regulatory authority.



Ali Barnes

CPA, CGFM | Principal
Principal In-Charge



Michael Rolka

CPA, CGFM | Principal
Concurring Reviewer



Daniel Beard

Senior Manager



Mackenzie Doyle

Senior Accountant



Molly Lech

Senior Accountant

Ali N. Barnes CPA, CGFM Principal.



Education
Bachelor of Professional Accountancy from Saginaw Valley State University (2007)

Professional Certifications
Certified Public Accountant (CPA)
Certified Government Financial Manager (CGFM)

Professional Memberships
American Institute of Certified Public Accountants (AICPA)
Michigan Association of Certified Public Accountants (MICPA)
Michigan Government Finance Officers Association (MGFOA)
Board of Directors
Legislative Committee
Government Finance Officers Association
GFOA Certificate of Achievement for Excellence in Financial Reporting Program Special Review Committee
Michigan Municipal Treasurers Association

Specialty Areas
Municipalities
Audits under Government Auditing Standards
Single audits under 2 CFR 200

Experience
Yeo & Yeo (2007 to present)
Principal, Audit and Assurance
Firm Audit & Assurance Service Team Leader
Firm Government Services Group

Community Service
Alma Police Athletic League – board treasurer
Girls on the Run – finance committee member
Gratiot County Community Foundation – Vice President and finance committee member

Presentation/Presenter
SVSU – "NPO Transparency and Accountability"
SVSU – "NPO Financial Management"
Internal client training – "Increase Finance and Accounting Department Efficiency"
Internal client training – "Tips for Government"
MICPA – "Auditing Standards and How to Stay Out Front"
MICPA – "OPEB Reporting: Embracing GASB 74 and 75"
MICPA – "School District Auditing Primer"
MICPA – "Get Ready for Your 401k Audit"
MSBO – "Fund Accounting"
MGFOA – "Enterprise Accounting"
MGFOA – "Internal Controls in Remote Work Environments"

Publications/Articles Published
GASB 74 & 75
Increase Finance and Accounting Department Efficiency
Cybersecurity and Data Backup Best Practices
Career Advocacy for Women

Training
Michigan Township Auditors Institute
MGFOA Spring and Fall Conferences
Government Audit Quality Control Annual Update
Governmental Accounting & Auditing Update
Michigan Municipal League Conference
Super Circular – Federal Grants
GASB 68 Implementation
GASB 74/75 OPEB Implementation: Accounting & Auditing Considerations

Michael L. Rolka CPA, CGFM Principal.



Education
Bachelor of Professional Accountancy from Saginaw Valley State University (2012) with a major in Accounting and minor in Finance

Professional Certifications
Certified Public Accountant (CPA)
Certified Government Financial Manager (CGFM)

Professional Memberships
American Institute of Certified Public Accountants (AICPA)
Michigan Association of Certified Public Accountants (MICPA)
Michigan Government Finance Officers Association (MGFOA)

Experience
Yeo & Yeo (2012 to present)
- Principal
  - Firm Government Services Team Leader
  - Firm Audit Team

Specialty Areas
Audits of Municipalities
Single Audits under the Uniform Grant Guidance
Audits under *Government Auditing Standards*
Audits of local school districts

Community Service
Clinton River Watershed Council Finance Committee
MICPA Governmental Accounting and Auditing Expert Panel
MGFOA Standards Committee
MGFOA Board of Director
Special Olympics

Presentation/Presenter
Government Fraud Case Studies
MICPA – *Model Accounting: Compensated Absences*
MICPA – *Creating Impactful Presentations Delivering Government Audit Results*
MICPA – *An Abundance of Relief: Auditing Coronavirus State and Local Fiscal Recovery Funds (CSLFRF)*

Training
Michigan Government Finance Officers Association Annual Conference
Governmental Accounting & Auditing updates
Uniform Guidance
Michigan Municipal League Conference
MICPA Government & Auditing Conference
School Update

Daniel A. Beard
CPA
Senior Manager.



Education
Master of Science in Accounting from Eastern Michigan University (2015)
Bachelor of Business Administration from Eastern Michigan University (2010)

Professional Certifications
Certified Public Accountant (CPA)

Professional Memberships
American Institute of Certified Public Accountants (AICPA)
Michigan Association of Certified Public Accountants (MICPA)
Michigan Government Finance Officers Association (MGFOA)
- Legislative Committee Member

Experience
Yeo & Yeo (2016-Present)
- Senior Manager
  - Firm Government Team Member
- Manager
- Senior Accountant
- Staff Accountant

University of Michigan (2010-2016)
- Financial Specialist
- Medical School Associate Administrator
- Various Departments

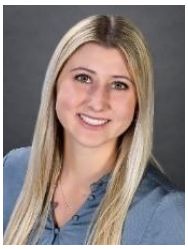
Specialty Areas
Audits of Government
Audits of local school districts
Audits of not-for-profit businesses
Audits of for-profit businesses
Audits of construction contractors
Audits of fraud
Single Audits
Preparation of IRS Form 990 tax returns

Presentation/Presenter
MICPA - Simplifying PTO Under GASB's New Guidance

Community Service
Leadership Ann Arbor
Ann Arbor Chamber of Commerce
Certified Tourism Ambassador – Washtenaw County

Training
School Updates
Accounting Updates
Nonprofit Training
MICPA Applying Uniform Guidance in your Single Audits
IRS Form 990 Training
GASB Updates

Mackenzie Doyle
CPA
Senior Accountant.



Education
Bachelor of Business Administration from
Northwood University (2021)

Professional Certifications
Certified Public Accountant (CPA)

Professional Memberships
American Institute of Certified Public Accountants (AICPA)
Michigan Association of Certified Public Accountants (MICPA)

Specialty Areas
Municipalities
Local School Districts
Audits under *Government Auditing Standards*
Single audits under 2 CFR 200

Experience
Yeo & Yeo (2021 to present)
Senior Accountant
Staff Accountant
Intern

Community Service
Volunteered at Northwood University's Go M.A.D Day

Training
Audit risk assessment trainings
Various trainings on single audit requirements (2 CFR 200)
Annual Yeo & Yeo School Update
Governmental Auditing
Accounting and Auditing Updates
Ethics

Molly Lech
Senior Accountant.



Education
Bachelor of Science in Business Administration,
Accounting Major from Central Michigan University (2018)

Specialty Areas
Audits of municipalities
Audits of not-for-profit organizations
Audits of real estate entities
Single Audits under Uniform Grant Guidance
Audits under *Government Auditing Standards*

Experience
Yeo & Yeo (2020 to present)
Senior Accountant (October 2022-present)
Staff Accountant (2020-2022)

Hungerford Nichols CPAs & Advisors (2019-2020)
Staff Accountant
Intern

Community Service
Greater Lansing Food Bank
Capital Area Humane Society
Making Strides Against Breast Cancer - Lansing

Training
Nonprofit updates
Real estate updates
Government updates
Accounting updates
GAQC Single Audit Fundamental Series (AICPA)

Client References.

Yeo & Yeo brings a depth of experience in your industry. This helps us understand the terminology, the challenges, the processes, the trends, and the potential risks. With this foundation, we create a plan based on the exacting needs of your organization. Knowledge and insight meet personalization and possibilities: a perfect combination.

We have worked with the following organizations and encourage you to reach out to them to help better experience the Yeo & Yeo difference.

Village of New Haven
Sandy Cazel, Accountant/Office Manager
scazel@newhavenmi.org
586.749.5301
57775 Main Street
New Haven, MI 48048

City of Howell
Alyssa Miller, Finance Director
amiller@cityofhowell.org
517.546.3500
611 East Grand River
Howell, MI 48843

City of Clawson
Mark Pollock, Finance Director
mpollock@cityofclawson.com
248.435.4500
425 Main Street
Clawson, MI 48017

City of Grosse Point Park
Ginger Moriarty, Treasurer/Finance Director
moriarty@grossepointepark.org
313.822.4012
15115 E. Jefferson Avenue
Grosse Point Park, MI 48230

City of Mason
Michelle Pietsch, CPFA, MiCPT
michellep@mason.mi.us
517.676.9155
201 West Ash St.
Mason, MI 48854

Five largest clients lost in the past five years and the reason:

City of Rochester Hills – bid process.
City of Ann Arbor – bid process.
County of Sanilac – contract expiration, declined to bid.
City of Center Line – fees.
Charter Township of Mundy – bid process

The Yeo & Yeo Audit Process.

YeoLean is a reimagined, Lean Six Sigma-based audit process, providing greater efficiency and overall ease in the audit engagement. Our professionals come on-site with a purpose of maximizing our immersion while minimizing your time.

Experience quicker turnaround time, thorough communication, and a structured workflow for maximum efficiency. Our award-winning process is more than applying concepts to improve processes, but rather a cultural change of focusing on audit value and continuous improvement. The audit will be performed in accordance with generally accepted auditing standards and the standards applicable to financial audits contained in *Government Auditing Standards*.



Pre-Planning

Pre-planning will assist in determining the information to be gathered during the audit process. Pre-planning includes a meeting with management and the audit committee to determine the logistics of the audit.



Planning

Proper planning assists us in developing an audit plan that focuses on key areas and issues. The planning phase of the audit will include the following to be used in risk assessment:

- Gathering information about the organization and environment
- Reviewing prior year audit results
- Identifying unusual and unexpected financial trends
- Obtaining an understanding of internal controls at both the entity and activity level
- Walking through significant transaction classes
- Consider management override of controls



Risk Assessment

This phase of the audit will include assessing the risk of material misstatement of the financial statements:

- Identifying significant audit areas
- Identifying significant and fraud risks using information gathered during the planning process
- Discussions with employees, management, and the Board
- Assessing risk by audit assertion (existence/occurrence, rights, and obligations, completeness, valuation, allocation, and cutoff) for account balances
- Utilization of data extraction software



Audit Plan

The audit plan will be developed to cover the significant audit areas and the risks identified during the risk assessment process. This is the core of the audit and ensures the audit is tailored to your specific needs. This is not a one-size-fits-all audit.



Single Audit, if required

Evaluation and testing of internal controls and compliance of federal awards will be performed in accordance with the 2 CFR 200 compliance supplement and Government Auditing Standards issued by the Comptroller General of the United States. We provide specific testing and risk assessment for each major program based on the fourteen compliance areas.



Reporting

We will prepare the financial statements and disclosures from the trial balance and the information that you provide to us.

The following reports will be provided:

- Opinions on the financial statements in accordance with generally accepted auditing standards.
- Internal control over financial reporting and on compliance and other matters based on an audit of financial statements performed in accordance with *Government Auditing Standards.*
- Compliance with requirements applicable to each major program and on internal control over compliance in accordance with 2 CFR 200, if required.

We will report to those in charge of governance in accordance with professional standards. Management comments will be prepared to provide management with the opportunity to strengthen internal controls and operating efficiency.

The financial statements and communication letter will be reviewed with management before they are finalized to ensure that information has been appropriately interpreted and recommendations are practical.

Technology

Yeo & Yeo's audit process is 100% paperless. We request all clients provide documents in electronic format by either e-mail or data portal. We utilize an electronic based file storage, trial balance and audit software. We also utilize IDEA data extraction software in the audit process. At the completion of the audit engagement, we will provide you with electronic copies of the journal entries, grouping trial balance, audit report, governance and management letters. In addition, during the entire audit process we utilize a secured terminal server and will need internet access throughout fieldwork. We feel the secured terminal server provides additional security for client information as no client information is housed on our individual computers.

Honoring All Perspectives. Bringing Our Whole Selves.

Commitment to Diversity, Equity, and Inclusion.

Yeo & Yeo is committed to an inclusive, diverse, and equitable workplace where our people can be their authentic selves and our culture supports our clients and communities.

Yeo & Yeo values diversity, and we put emphasis on hiring and supporting a diverse workforce, as well as giving back to the communities in which we live and work with our time, talents, and treasures.

We make a strong effort to annually educate and encourage students early on to go into accounting and professional services, from speaking at high schools with large minority enrollment to having students tour Yeo & Yeo and providing scholarships. We also work closely with colleges throughout Michigan with an emphasis on finding diverse candidates.

Yeo & Yeo is incredibly proud of our family-friendly culture and our ability to attract and retain women. For years, we have provided our professionals with a healthy work-life balance. We support that even more so now, with many of our professionals working remotely and effectively balancing work and home life. Further, our total workforce is more than 54% female, and the number of women in leadership positions exceeds 50%. The average percentage of female partners for CPA firms across the nation is only 15%.

Yeo & Yeo's culture also focuses on supporting our communities by giving back to organizations such as the Boys & Girls Club, food banks, homeless shelters, READ associations, child abuse and neglect organizations, and many others that serve a large proportion of minority groups.



Document Portal: Suralink.

Suralink is a web-based communication platform that adds transparency and efficiency to your audit. The platform provides a secure file transfer portal, dynamic request list, and real-time workflow updates. Suralink keeps all requests in the same place, making it easier to complete your engagement.



Delegate, Assign, and Filter Requests

- Delegate requests to specific team members and filter requests by status or owner
- The status of each request is indicated by a color and automatically changes with progress



Central Dashboard with Real-Time Progress Updates

- Easily view the percentage of progress of requests and engagements
- See the real-time status overview of each request in a quick view bar
- Each request holds files, comments, assignments, and an activity log
- Set preferences to receive notifications of activity relating to your engagement



Improve Efficiency

- Spend your time getting the job done, not reconciling a messy list of outstanding items
- Download all files in a section, edit a group of requests, communicate with your team, or drag and drop multiple files at the same time—all with just a few clicks



Protect Your Sensitive Information

- Integrate your current two-factor authentication provider or start using Google at no cost
- Protect sensitive information with inactivity time-out and SSL AES 256-bit encryption

suralink

Nurturing A Relationship Built on Success.

Educational Content and Resources.

Yeo & Yeo keeps you informed about important issues affecting your organization and provides the training and resources you need to achieve excellence.

eNewsletters

- Up-to-date information
- Delivered to your inbox
- Custom, timely content

Audit Resource Center

- Tips & Tools
- Easy access on yeoandyeo.com
- Timely Updates

Client Training & Webinars

- Key topics
- Client empowerment & education
- Forum for compliance

eAlerts

- Urgent information
- Changes, deadlines & need-to-know information
- Instant notifications

Blog

- Deep insight
- Timely perspectives
- Fresh analysis from thought leaders



A Focus on Government Audits.

The Yeo & Yeo Difference.

At Yeo & Yeo, we understand the complexity of state and federal compliance requirements. We also understand the importance of working with a partner you can trust. Our work in governmental audits goes beyond the technical; we want to maximize efficiency in a very human, very Yeo & Yeo way. The following sets us apart.

Exceptional People.

Expertise. Empathy. Enthusiasm. All of Yeo & Yeo's experts choose their career path through personal experience and interest making them extraordinarily dedicated to their work. Yeo & Yeo is known for its exceptional service, professional staff, and the enjoyable experience you will have while working with them.

Deep Experience.

Our statewide firm has over 60 dedicated governmental auditors that provide services to organizations throughout Michigan. We have the knowledge and insight to recognize opportunities and identify specific areas of your organization that can be strengthened.

Timely Communication.

Our start to finish scheduling process ensures accurate pre-planning for a smooth transition. Our clients know what to expect when we arrive on site. We make it a priority to provide frequent updates and communication throughout the entire engagement.

Partner Involvement.

We maintain the same partners on engagements year after year, creating ongoing continuity and deep situational knowledge. Your dedicated partner-in-charge will be onsite and available to you during the audit. A concurring partner will provide a high-level overview for quality control.

A Passion for Community.

It's our passion to invest time, talent, and resources in the communities where we live, work, and play.

Proposed Schedule.

Upon Notification of the Award

Contact with Management
Planning Meeting

August-September, as mutually agreeable

Field Work (Audit Plan): A combination between remote and onsite work will be used to complete the audit. We coordinate this with those in charge of the audit at the Village to ensure the audit can most efficiently and thoroughly be completed while being mindful of everyone's available resources.

October-November

Exit Conference with Management*
Financial Statements
Single Audit Report, if required
Management Letter

November or December

Presentation

*Audit findings and recommendations will be discussed at this meeting. However, if issues arise prior to this meeting that require immediate communication, a member of our team will reach out to set up a separate meeting.

Professional Fees.

Fees are based on standard hourly rates plus out-of-pocket costs and the time anticipated to complete the audit. Our standard hourly rates vary according to the degree of responsibility involved and the experience level of the personnel assigned to your audit.

The bid is based on our estimate of the time required to audit the Village of Beverly Hills under normal circumstances. Adequate, reconciled supporting data must be readily available to maintain and/or reduce overall cost of a properly conducted financial and compliance audit.

Financial Statement Audit

Staff Level	Estimated Hours	Standard Hourly Rates	Total
Principal	20	475	$9,500
Senior Manager	10	355	$3,550
Senior	70	250	$17,500
Staff	80	180	$14,400
Clerical	2	110	$ 220
			$45,170
Less discount			$ (1,670)
Total			$43,500

Single Audit, if required

Staff Level	Estimated Hours	Standard Hourly Rates	Total
Principal	6	460	$2,850
Senior	8	250	$2,000
Staff	20	175	$3,600
Clerical	1	110	$ 110
			$8,560
Less discount			$(2,560)
Total			$6,000

The maximum fees for the audit engagement are detailed as follows:

Year	2025	2026	2027	2028	2029
Audit Fees	$43,500	$45,500	$47,500	$49,500	$51,500
Single Audit, if required	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000
Total	**$49,500**	**$51,500**	**$53,500**	**$55,500**	**$57,500**

Beyond June 30, 2029, Yeo & Yeo provides Village of Beverly Hills the option for an engagement extension. Upon receiving an extension request, Yeo & Yeo will provide Village of Beverly Hills an updated engagement letter outlining fees for the extended engagement option.

The bid includes advice and answers to questions regarding accounting procedures and/or content of the audit report throughout the year that are brief in nature and do not require research.

We consider the services to be provided as a fixed fee engagement. As such, we consider overruns to be our responsibility. For example, if we incur additional time to gain a better understanding of a program or to satisfy ourselves on an issue, our philosophy is that there should be no additional costs to the client. Our planning process reduces the risk of overruns during the course of the audit.

However, if overruns are a result of our determination that not all information has been provided, the inability of staff to provide us with the necessary information to conduct the audit, delays in the process on your part, or new pronouncements or audit requirements not in effect at the time of the proposed fee, we would discuss these issues with you to consider the need for additional billings. In such a case, any overruns would be discussed with you as soon as discovered and an agreement reached before any additional billings would occur. Any costs incurred as a result of requests by federal overseers would also be absorbed by us unless they were unusual and significant. In such a case, we would discuss them with you and come to an agreement on additional fees prior to undertaking the work. *We assure you that you will have no surprises.*

New Accounting Pronouncements or Standard Updates effective following the date of this document may be subject to additional fees. Our fees may be subject to change if the consumer price index (CPI) exceeds the prevailing rate at the date of the proposal.

This proposal is a statement of interest, not a binding contract.

Client Responsibilities.

To be respectful of your time and ours, we schedule our client work well in advance. When engagements have to be rescheduled it causes a domino effect, as we likely have other clients scheduled in the new requested time slot, and our staff are likely scheduled on another client. As a result, we may have to put your engagement at the end of the line, and/or change staff. When our staff members finishing the work are not the same as those who started it, the audit is less efficient and more disruptive to your and our staff. Our quote is contingent on the following:

- All items on the assistance list being completed by the due dates indicated.
- The audit being performed during the dates scheduled.
- All accounts being adequately reconciled by the beginning of scheduled fieldwork.
- Accurate information provided to us that does not require subsequent rework.
- Suralink is used to provide the assistance list items to us.
- Agreement with due dates for items on Client Assistance List
- Work papers should be in Excel, Word, or PDF format
- Trial balance and budget for each fund as of year-end
- Schedules, reconciliations and supporting documentation for each balance sheet account as of year-end
- Schedules and supporting documents for revenue and expense accounts as determined
- Completion of an "internal control audit organizer"
- Written policies and procedures
- Supporting documents for various walk-throughs, tests of transactions and compliance as specifically requested
- Confirmations as requested
- Copies of notes, leases, and agreements in effect during the year and at year-end
- Required certifications
- Minutes for each board meeting held during the period under the audit and all subsequent minutes to meetings prior to the report date
- Organization chart
- List of all board members, management, and any other known related parties
- Prepare Management Discussion & Analysis
- Schedule of Federal Awards (SEFA), or oversight in preparing of the SEFA
- Oversight in the preparation of the financial statements,Government-wide conversion entries, and data collection form
- Additional information for single audit major program testing

If the above items are not met and the engagement needs to be rescheduled or if additional days need to be scheduled, then an additional price of at least 20% may apply. Beyond this, the time required for rework and posting client requested entries after we have been given the trial balance will be billed at our standard hourly rates.

Thank You for Considering Yeo & Yeo.

We appreciate the opportunity to present this proposal and are committed to helping you achieve your goals. This is more than just a project for us; it's an opportunity to create an important relationship built on success.

Yeo & Yeo's Government Services was created for this exact purpose, and we look forward to the selection process. Beyond your engagement team, you will have access to our full Government audit team of experts. We would love for you to get to know them. Use the link below or scan the QR code to watch a video introducing our team.

Video link: yeoandyeo.com/government-services-engagement-team

If you have any questions or concerns or need clarifications, do not hesitate to contact me.

Let's thrive.

Ali N Barnes, CPA, CGFM
Principal, Yeo & Yeo
ali.barnes@yeoandyeo.com



Professional Auditing Services

Prepared for:

VILLAGE OF BEVERLY HILLS

18500 W 13 MILE ROAD

BEVERLY HILLS, MI 48025

Maner Costerisan

Village of BEVERLY HILLS MI

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Maner Costerisan

2425 E. Grand River Ave.,
Suite 1, Lansing, MI 48912
517.323.7500
517.323.6346

TO

Warren Rothe, Village Manager
Village of Beverly Hills

FROM

William I. Tucker IV, CPA
btucker@manercpa.com
Maner Costerisan

April 18, 2025

Dear Mr. Rothe,

We are very excited about the opportunity to provide you with a proposal for professional auditing services for the Village of Beverly Hills for the fiscal years ending June 30, 2025 through 2029. Our services will include a financial audit of the Village's financial statements and other requested services. Our firm will provide timely audit services and a "big picture" report to the Members of the Village Council reviewing operations, audit conclusions, and recommendations.

We understand the audit will be performed in accordance with generally accepted auditing standards (GAAS) as contained in the Statement on Auditing Standards of AICPA and to the extent applicable, Government Auditing Standards, and the Uniform Guidance. We will plan our audit assuming the Village's financial statements will be prepared in accordance with U.S. generally accepted accounting principles. We will meet the time frames outlined in the request for proposal, assuming the Village provides the required trial balances and schedules by the necessary dates.

Why We Believe We Are the Best Qualified

- The engagement principal assigned to your audit has over 24 years of experience in governmental auditing and accounting, including extensive experience with GASB 34 financial statements.

- Maner Costerisan's experience includes auditing more than 300 governmental entities including cities, villages, counties, townships, school districts, libraries, health departments, road commissions, other local authorities and agencies, and various departments of the State of Michigan.

- The engagement principal currently serves on the Michigan Committee on Governmental Accounting and Auditing. This committee provides guidance that local units of government may use in complying with accounting and auditing requirements in the State of Michigan. As a result, a considerable amount of time is spent working with representatives of the State Treasury Department, Municipal Finance Commission, and the Department of Transportation.

- The engagement principal assigned to your audit serves as the co-chair of the Michigan Government Finance Officers Association-Accounting Standards Committee. This committee supports governmental accounting and financial reporting advancement through active participation in the review and analysis of proposed pronouncements from authoritative accounting standard-setting bodies.

- Our firm is a member of the Governmental Audit Quality Center (GAQC), established by the American Institute of CPA's (AICPA).

We understand the importance of conducting an engagement in a manner that will cause the least disruption to your office. All of our efforts are directed toward achieving the completion of these projects with the highest degree of quality. We have included our most recent peer review report. We again received a "pass" report.

The accompanying proposal is a firm and irrevocable offer for the financial statement audits of fiscal year 2025 through 2029 for the Village. This proposal is effective for 60 days. We pride ourselves on completing our audits in a timely fashion and will perform the audit of the Village's financial statements within applicable deadlines. Our proposal is a written expression of our plan of services and qualifications, but it cannot completely convey the enthusiasm with which Maner Costerisan approaches this opportunity.

I look forward to hearing from you.

Sincerely,

William I. Tucker IV, CPA

William I. Tucker IV, CPA

About Maner Costerisan

Over 115 years in business. That means Maner Costerisan has more than a century of experience in looking toward the future. We've learned a lot over the last 100-plus years, growing from a small, local firm serving mid-Michigan in the early 1900s to one of Accounting Today's Top Regional Firms (2021, 2022, 2023, and 2024).

Our growth and success are directly connected to strong relationships with our clients. We listen to their problems and help solve them.

We begin every business relationship by immersing ourselves in your goals, obstacles, and opportunities. We understand where you are today and learn where you want to go tomorrow. This insight empowers us to develop creative, flexible, cost-effective solutions to get you there. Not some vague, one-size-fits-all plan, but a comprehensive, step-by-step blueprint for success. Designed to keep you compliant and turn today's potential into tomorrow's achievements.

We may work with numbers and figures, but it's people and relationships that drive us. Our mission is to enable others to reach their potential.

Every day, this is how we prove "client first" is both our promise and our passion:

- Proactively using our industry experience and knowledge to stay on top of your ever-changing requirements and the latest legislative changes impacting your industry.
- We're a trusted advisor and sounding board, delivering strategic solutions and hands-on guidance to help put you ahead of obstacles and the competition.
- Ensuring every client works exclusively with senior-level professionals, experienced in your industry - giving you direct access to our partners and managers every step of the way.
- Listening to your needs and challenges. Developing actionable solutions to help you get where you want to be.







Government Expertise

With Great Power Comes Great Scrutiny - Today, more is expected from government entities, so no one is more dedicated to offering smarter, cost-effective solutions than the experts at Maner Costerisan. We're deeply connected with the Michigan government and have hands-on experience working at every level. This experience empowers us to offer proactive solutions, going beyond just compliance maintenance. Our team knows how to help you get the most of tight budgets and manage talent shortages while staying on top of the shifting laws, rules, and regulations. Whether as a long-term partner or short-term resource, we're here to step in and help make any department stronger, so you can give your best to working for the public good.

Expertise in Action:







Over 1.2 billion dollars audited in federal expenditures.

MGFOA
MICHIGAN GOVERNMENT FINANCE OFFICERS ASSOCIATION

What Makes Maner Different?

Our professional staff is highly trained to provide services to governmental and nonprofit organizations and related entities in the areas of accounting, taxation, and consulting. Professional training is maintained by staff members through participation in and presentation of educational programs conducted both in-house by our firm and sponsored by national, state, and local professional societies and associations.

We perform these highly complex and regulatory-heavy audits. We are also certified to provide peer reviews of other CPA firms, reviewing their quality control systems to ensure they perform audits at the highest standards.



Other CPA firms seek our experienced professionals to review and grade their performance.

Client service remains at the heart of everything we do at Maner Costerisan. In June 2024, we received our fifth consecutive "Best of Accounting" Client Satisfaction Award from Clearly Rated.

Meet the Team

The team below will be dedicated to supporting the Village of Beverly Hills:



Bill Tucker, CPA
Principal, Director
Audit

About Bill

Bill brings more than 24 years of experience specializing in government and nonprofit auditing and consulting to Maner Costerisan. A member of the firm's Board of Directors, Bill leads Maner's Government team and is a partner in the Audit department. He has helped spearhead tremendous growth throughout the government division, always looking for innovative solutions to help municipalities and government entities achieve their goals.

Bill consistently provides valuable contributions in the form of thought leadership articles on Maner's website and delivers engaging presentations at industry conferences and committees. Furthermore, he actively takes charge of keeping the entire government team well-informed about the constantly evolving requirements for government entities of various scales.

"Growing up, I was considered a leader due to the hard work and dedication I put into activities. Hard work set up a good foundation of what has driven my success.

When I joined the parenthood rank, it emphasized never knowing what tomorrow can bring and always being 100% prepared for the next day. Making the most out of every day and accomplishing the task at hand changed the way I work every day and drove my success."

Certifications:

- Certified Public Accountant (CPA)

Memberships:

- American Institute of Public Accountants (AICPA)
- Michigan Association of Certified Public Accountants (MICPA)
- Michigan Governmental Finance Officers Association

Meet the Team (cont.)



Tyler Baker, CPA

Senior Manager
Audit

About Tyler

Tyler joined Maner Costerisan in 2014 as an intern. He is now a senior manager in the firm's Audit department, where he specializes in providing audit and advisory services to Maner's governmental clients, including municipalities and school districts.

An active member of the Michigan Association of Certified Public Accountants' Government Accounting and Auditing Expert panel, Tyler is committed to keeping up-to-date on the latest compliance and regulatory changes impacting his clients. In addition, he serves as a regular presenter of Maner's education and government webinars, sharing his knowledge with clients and others throughout the industry.

"My ultimate goal in life is to be the best and most present father, friend, son, brother, co-worker, and accountant I can possibly be."

Certifications:

- Certified Public Accountant (CPA)

Memberships:

- American Institute of Public Accountants (AICPA)
- Michigan Association of Certified Public Accountants (MICPA)
- Michigan Governmental Finance Officers Association

Overview & Engagement Scope

Based on the RFP, we understand your needs consist of the following components for the 2025 calendar year and the future:

- Financial statement audit in accordance with generally accepted auditing standards and *government auditing standards.*
- Single Audit subject to Uniform Guidance, if applicable.

Mandatory Criteria

Independence

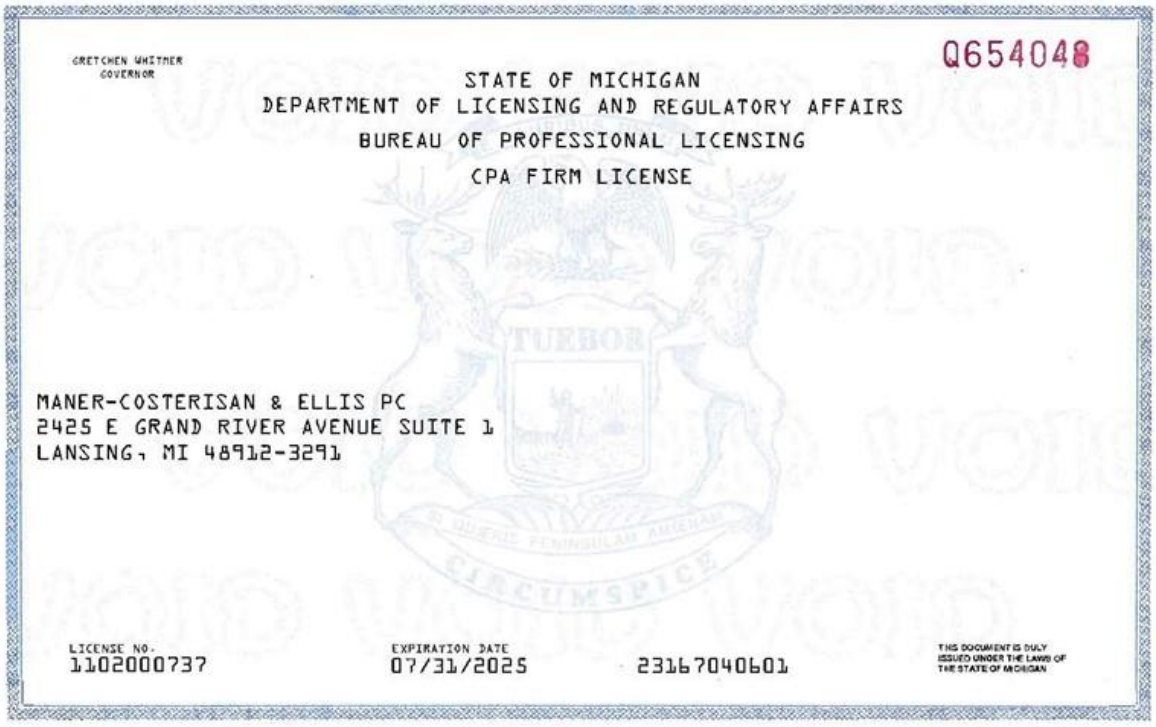
Maner Costerisan is independent with regard to the Village. We meet all the independence requirements of Generally Accepted Auditing Standards and Government Auditing Standards in relation to the Village.

We affirm that we will follow the AICPA Interpretations of 501-3.

The firm will give the Village's management written notice of any professional relationships entered into during the period of this agreement which would impact the independence of, or relationship with, the Village.

License to Practice in Michigan

Maner Costerisan is properly licensed in the State of Michigan.



GRETCHEN WHITMER
GOVERNOR

Q654048

STATE OF MICHIGAN
DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS
BUREAU OF PROFESSIONAL LICENSING
CPA FIRM LICENSE

MANER-COSTERISAN & ELLIS PC
2425 E GRAND RIVER AVENUE SUITE 1
LANSING, MI 48912-3291

LICENSE NO.
1102000737

EXPIRATION DATE
07/31/2025

2316704060l

THIS DOCUMENT IS DULY ISSUED UNDER THE LAWS OF THE STATE OF MICHIGAN

Overview of Firm

Maner Costerisan was founded in the early 1900s. Since that time, we have grown into the largest local accounting firm in mid-Michigan, and we are recognized as a leader in conducting traditional and non-traditional services in the region. Maner Costerisan's main office is located at 2425 E. Grand River Avenue, Suite 1, Lansing, Michigan 48912. The immediate access to our experts and engagement team results in increased efficiencies and faster completion times for our engagements. In addition, our affiliation with BDO Alliance USA provides us easy access to additional professional and technical resources.

The firm consists of approximately 205 individuals, including 31 shareholders (principals), and more than 50 professionals providing audit services to governmental entities. Most staff join our firm immediately after college through a very selective recruitment program. Our professional staff is highly trained to provide services to governmental and nonprofit organizations and related entities in areas of accounting, taxation, and consulting. Professional training is maintained by staff members through participation in and presentation of educational programs conducted both in-house by our firm and sponsored by national, state, and local professional societies and associations.

The audit of the Village's financial statements will be performed by full time professionals from our Lansing office.

Our firm participates in the AICPA Peer Review Program of the National Peer Review Committee (NPRC). We have received a "pass" peer review during every review since the inception of the program, including the most recent review in July 2023. We have received approval as a registered firm under the Public Company Accounting Oversight Board (PCAOB) and are a charter member of the AICPA Government Audit Quality Center. Please refer to Appendix A for our most recent peer review letter. Our most recent peer review included a review of specific governmental engagements.

We have specific governmental experience and have served as the audit firm for local governments for 30 years. The importance of the institutional knowledge we have gained over the years cannot be overemphasized. We have a long history of working with organizations like yours and believe we are the best firm to service your needs. Our clients have come to expect diversity of services and personal attention, our strength stems from a highly professional and dynamic staff.

Overview of Firm (cont.)

Our clients have shown us that they want the resources of a large accounting organization yet prefer to maintain the close, personal interaction only possible with an independent CPA firm. To expand our services, Maner Costerisan participates in BDO Alliance USA. We are an independent member of the BDO Alliance USA, a nationwide association of independently-owned local and regional accounting, consulting, and service firms with similar client service goals. By supplementing our services, the BDO Alliance USA allows us to:

- Enhance our client services and broaden our capabilities overall
- Expand our domestic and international coverage
- Gain greater technical knowledge in specialty areas
- Utilize professionals with experience in a wide range of industries
- Access the most up-to-date technical information
- Participate in the latest training programs
- Provide our clients with key contacts and sophisticated professionals throughout the U.S.

The BDO Alliance USA brings us the necessary tools to help us better serve our clients with greater flexibility, efficiency, and cost-effectiveness.

The BDO Alliance USA is a subsidiary of BDO USA, LLP, a Delaware limited liability partnership. For more than 100 years, BDO has provided quality service through the active involvement of experienced and committed professionals. The firm serves clients through more than 65 offices and over 750 independent alliance firm locations nationwide. As an independent Member Firm of BDO International Limited, BDO serves multi-national clients through a global network of more than 91,000 people working out of more than 1,600 offices across 167 countries.

BDO USA, LLP, a Delaware limited liability partnership, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. BDO is the brand name for the BDO network and for each of the BDO Member Firms.

Members of BDO Alliance USA must undergo a rigorous screening process and are evaluated on professional standards - including a periodic peer review under the auspices of the American Institute of Certified Public Accountants. Maner Costerisan's participation in the Alliance is further assurance that our firm can provide the level of service and resources required to serve effectively and efficiently. We will help you develop solutions that work.

AN INDEPENDENT MEMBER OF BDO ALLIANCE USA

Overview of Firm (cont.)

Single Audits

The "Single Audit" is required to be performed for governmental units that expend $750,000 or more in federal financial assistance in a fiscal year. Starting for year end 2026, the threshold requiring a Single Audit increases to $1,000,000. This type of audit covers compliance with grant regulations and contract provisions, along with financial areas.

We have attained extensive experience with governmental units related to grant funded programs, either by performing Single Audits or providing monitoring and technical assistance services. We have performed Single Audits for numerous governmental units and nonprofit organizations, and currently perform more than 150 Single Audits annually. All team members assigned to the Village's engagement have experience auditing federal programs. This experience would prove beneficial to the Village in assisting in applying for and auditing of grants.

Desk or Field Reviews

Single Audits that have been subjected to desk reviews by Federal and State agencies have always received acceptable results on these reviews. We have also received acceptable results on all Federal or State field reviews on our Single Audits. No disciplinary action has been taken or is pending against our firm during the past three years with state regulatory bodies or professional organizations. Our governmental principals have extensive experience with the Single Audit, which assures that audit coverage and reporting requirements are met.

Summary of Qualifications

Your Audit Team

Choosing the right professionals to serve you is a critical element of success. In selecting your service team, we reviewed carefully our understanding of your needs, as well as your plans, and identified the people whose credentials are ideal for you. The individuals we have selected, have a demonstrated track record with governmental clients, strong technical backgrounds, and outstanding leadership and communication skills.

Client service and satisfaction are among our prime considerations. One of the most important services we provide our clients is monitoring their needs on a continual basis. This begins at the staff level and progresses all the way to the shareholder-in-charge of your account. We believe it is important that our clients have several resources to help them rather than just one. We have found this type of teamwork facilitates the identification of issues in advance and enables us to plan for them accordingly.

We currently have approximately 200 full time staff members. The key professionals you will work with are indicated in the chart below.

	Member(*)	Relevant Experience	Position
William I. Tucker IV, CPA	1, 2, 3	24 years	Engagement Principal
Aaron M. Stevens, CPA, CGMF	1, 2, 3	31 years	Independent Review Principal
Tyler P. Baker, CPA	1, 2, 3	10 Years	Senior Manager

(*) 1) Member of Michigan GFOA 2) American Institute of CPAs 3) Michigan Association of CPAs

The audit team assigned to your engagement has significant experience in governmental accounting and auditing and provides services to governmental units year-round. Our firm and all of our personnel are committed to providing the highest quality of service. We have not had any complaints leveled against the firm or the individuals listed in this proposal by the AICPA, the State Board of Accountancy, or any other regulatory authority. In addition, upon being selected, an appropriate number of staff would be assigned once detailed schedules of dates have been determined. It is in the best interest of the Village as well as Maner Costerisan to maintain continuity of staff on every engagement from year to year and we make every effort to make that possible.

Summary of Qualifications (cont.)

Your Audit Team (continued)

All audit team members obtain continuing professional education through the AICPA and MICPA as required, including the area of governmental accounting and auditing. In addition, we demonstrate our commitment to the governmental industry by participating in the following associations and organizations:

- American Institute of Certified Public Accountants
- Government Finance Officers Association
- Michigan Association of Certified Public Accountants
- Michigan Government Finance Officers Association
- Michigan Municipal Executives
- Michigan Municipal Treasurers Association
- Michigan Townships Association
- Michigan Committee on Governmental Accounting and Auditing
- Michigan Association of Counties
- Michigan School Business Officials
- Michigan Public Transit Association
- Michigan Association of Transportation Systems
- County Road Association of Michigan

Summary of Qualifications (cont.)

Similar Engagements with Other Governmental Entities



20+ CITIES



120+ SCHOOL DISTRICTS



150+ SINGLE AUDITS



50+ VILLAGES & TOWNSHIPS



400+ NONPROFIT ORGANIZATIONS



110+ GOVERNMENT ENTITIES

Summary of Qualifications (cont.)

References

Governmental Entity;	**Lapeer County**
Scope:	Financial Audit and Single Audit
Most Recently Completed:	December 31, 2023
Partner	Aaron M. Stevens, CPA, CGFM
Principal Contact:	Jacky Bennett, Interim Chief Financial Officer
Phone Number:	810-245-4766

Governmental Entity;	**City of Lathrup Village**
Scope:	Financial Audit
Most Recently Completed:	June 30, 2024
Partner	William I. Tucker, IV, CPA
Principal Contact:	Michelle Townsend, Finance Director
Phone Number:	248-557-2600 x227

Governmental Entity;	**Village of Grosse Pointe Shores, A Michigan City**
Scope:	Financial Audit
Most Recently Completed:	June 30, 2024
Partner	Aaron M. Stevens, CPA, CGFM
Principal Contact:	Steve Poloni, City Manager
Phone Number:	313-881-6565

Governmental Entity;	**City of Lansing**
Scope:	Financial Audit and Single Audit
Most Recently Completed:	June 30, 2024
Partner	William I. Tucker, IV, CPA
Principal Contact:	Desiree Kirkland
Phone Number:	517-862-4233

Our Audit Approach

We pride ourselves on understanding our clients and their unique needs. Based on this firm-wide standard, we dive into the audit process by assessing your organization's needs and risks. After digging into the details and getting a better sense of your firm's goals, challenges, and situation, we'll design a tailored audit approach that best fits your circumstances.



Less Stress. More Impact.

While standardizing efficiency can be a profitable strategy, rigid uniformity for its own sake reduces efficiency and creativity. That's why we've adopted a forward-thinking approach that encourages flexibility based on your needs. We're realistic and want to make this process - which can be challenging and overwhelming - as simple as possible for you. Our team constantly brings forward new ideas to make the process easier for our clients while staying true to our professional standards and ethical commitments.

An audit can sometimes feel like one more thing to manage on your already full plate. We schedule our work to minimize the impact on your staff while maximizing the effectiveness of our engagement team and process. Timing can be everything - so we collaborate with you to ensure we're partnering in a way that works for your key stakeholders - on the way to making the audit process less of a headache.

What to Expect

Effective communication, technology, and creative analytical tools are fundamental to our audit process. In addition, we lean into the following key components to ensure our audit process produces an accurate, efficient, and effective audit that follows professional standards. It also provides helpful insight to ensure your plan is doing its best for its participants.

Audit Programs

We utilize PPC for our Governmental audit planning and audit programs as well as take a tailored approach on a client by client basis.

Our Audit Approach (cont.)

Sample Sizes and Extent of Statistical Sampling

Our utilization of sampling in auditing generally centers on compliance and controls testing, rather than substantive testing of account balances. We use quality control materials from PPC in all our audit engagements. These forms guide our staff through a logical process of assessing inherent risk, control risk, and combined audit risk, followed by an assessment of appropriate sample size for testing the following areas:

- Controls over expenditures
- Michigan legal compliance
- Federal compliance under the uniform guidance, as applicable

Sample sizes obtained via the PPC guidance system fall into categories of 25, 40, or 60, depending on circumstances. The most common scenario would be a selection of 40 transactions in the first year of our engagement, followed by a sample size of 25 in subsequent years, assuming no significant problems are discovered in the first year. We are usually able to cover a substantial portion of the two categories of testing with one sample, resulting in a very efficient transaction testing phase.

Analytical Review

In accordance with accounting standards generally accepted in the United States of America, analytical review will be utilized in the planning process and during the final review stage of the audit. Our analytical procedures consist of five components: expectation development, explanation generation, information search and explanation evaluation, decision making and documentation. Specific procedures would include comparison of actual results to prior years and to adopted documentation. Specific procedures would also include comparison of actual results to prior years and to adopted budget (as amended), comparison of expected revenue to actual revenue recognized, and a reasonableness test for return on investments. Other substantive procedures may be supplemented by analytical procedures, depending on our audit risk assessments process.

Understanding of Internal Control

Statements on auditing standards require us to gain an understanding of the control environment and to assess control risk in planning our audit. In order to accomplish this, we will utilize PPC's "government organization planning forms," and by discussion with appropriate Village staff, we will document significant internal control points in the cash and investments, revenue expenditures and expenses, general ledger, payroll, accounts payable, and purchasing systems.

Our Audit Approach (cont.)

Internal Quality Control

Governmental audits conducted are subject to an independent review in accordance with our Quality Control Procedures.

Identification of Potential Audit Problems

We do not foresee any potential audit problems. Should any audit problems arise, we will discuss and address them with management so as to minimize the effect on the timely completion of the fieldwork and resulting report.

Key Components of the Audit Process



PLANNING

- While investing in this step takes time, it leads to a more effective and efficient audit.
- In this stage we develop an understanding of your plan and how it operates.



SCHEDULING

- We'll introduce our team ASAP and begin staffing and scheduling your audit, keeping in mind consistency of staff and increased efficiency in long-term engagements.



FIELD WORK & WRAP UP

- We schedule our fieldwork well in advance with predetermined objectives and requested items.



PROGRESS MEETINGS

- We'll set up regular meetings with stakeholders to discuss our status and any open items or challenges we face in completing the audit - so nothing is a surprise.



TECHNOLOGY

- We utilize technology to optimize the audit process.
- By leveraging paperless documentation, client portals, and software, we work to streamline and create efficiencies throughout the process.



STAKEHOLDER EXPECTATIONS

- We aim to be the ultimate professionals, respecting your team's time and busy workload.
- We'll work together to help document your systems, prep confirmations, and gather source documents as efficiently as possible.



DEADLINES

- Meeting deadlines is a top priority.
- Absent events beyond our control, be assured we'll meet all deadlines we've collectively established in the Planning stage.



QUALITY CONTROL

- We have an extensive review process to ensure the highest standards are met. A firm principal reviews all services before they're considered "complete."
- It's our policy to lock audit work papers within 45 days of the report date, allowing time to resolve any issues and still meet professional standards.

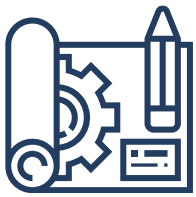
Timeline

Below is a suggested timeline for the project based on our experience with similar clients. As always, we'll work with you to create a timeline that works best for your team.

Audit for Calendar Year June 30, 2025	
Planning • Discuss current year audit with management. Assess risk, write/tailor audit programs, test controls, document understanding of transaction cycles, perform SAS 99 procedures, perform preliminary analytical review, prepare confirmations, review minutes, review permanent file information, prepare list of audit schedules to be prepared by client personnel, complete planning. • Formal planning meeting with client. • Consider changes needed due to recent technical pronouncements and management's desire. • Document understanding of internal compliance processes and perform system walkthroughs.	June 2025
Fieldwork • Perform audit testwork including analytical procedures, compliance testing and other substantive procedures. • Meet with management to discuss adjustments and management letter comments. • Conduct exit conference with client. • Review draft financial statements and finalize changes with client.	September 2025
Issue Deliverables (draft for finalization) • Audit report • Management advisor letters • Audit committee correspondence	November 2025
Presentation to Village Council	November 2025

Additional Service Capabilities

Maner Costerisan's dedicated Government team delivers an unprecedented level of support where you need it most. You'll get guidance from partner-level staff, along with hands-on help proven to lower costs and elevate performance. When every dollar matters, trust Maner to get the job done.



Outsourced Accounting Solutions

From day-to-day accounting support to filling a CFO role, we can supplement your dedicated accounting staff with a team of experts. It's the proven way to lower costs and minimize disruptions to daily operations - all while staying compliant and implementing data-driven financial strategies that can secure a bright future for your municipality.

Technology

When every recourse is precious, the right technology makes all the difference. Our experts can help you customize, implement, and maintain technology that streamlines your accounting, improves communication across departments and delivers actionable financial analytics for better decision-making - all while upholding the highest level of security.

Defined Benefit & Contribution Plans

Managing and growing a large asset pool like a government entity's retirement plan is a huge responsibility. Which is why we bring decades of skill and experience to the job - considering countless factors from investment volatility to your fiduciary obligations. Working with our team helps reduce your liability and potentially lowers costs and fees, while giving your employees more choices and control.

Audit & Assurance

When you work for the public, financial transparency and accuracy are essential. We'll complete an independent review of financial statements and provide a detailed report that confirms the reliability of your data - protecting you and the trust of the people you serve.

Wealth Management

While you're working long hours to support your clients and community, we help make sure your money is working for you. Our wealth management experts customize investments around where you are today and where you want to be tomorrow. With our sound, proven investment strategy, you can be confident your money is building toward your personal goals and the retirement of your dreams.

Total All-inclusive Maximum Price

The cost of the audit is based on the amount of time it takes to perform the audit of the Village. Our charges for audit or management services are based on the level of team member necessary to perform the services. The standard hourly governmental audit billings rates are as follows:

Principal	$	300 - 420
Senior Manager		285 - 300
Manager		250 - 285
Senior Associate		180 - 220
Associate		125 - 180
Technology		160 - 250
Administrative		105 - 150

These billing rates would also apply to any management services assistance or other services the Village may request that are not covered by the scope of the audit. If there are questions regarding technical matters and advice that may arise throughout the year, if a significant amount of time is not needed for research, we do not charge for that assistance.

The fees quoted below assume the Village records are in reasonable condition and are based on anticipated levels of client assistance and expertise. Should any of these levels of assistance or expertise change significantly during the period of our engagement, we will need to discuss this situation with the Village to determine a plan of action for the remainder of the agreement. If circumstances are encountered (i.e., unrecorded accruals, unbalanced records, significant audit journal entries, inadequate staff assistance, etc.), that cause us to spend additional time that was not planned we will discuss the situation with you prior to performing any additional services.

The estimated fees for deliverables are as follows:

Year Ending June 30,		Financial Audit
2025	$	34,600
2026		36,300
2027		38,100
2028		39,900
2029		41,700

If a single audit is required, the fee for a Single Audit will be $6,000. The single audit fee assume that the Village will require one major program for the Single Audit. For each additional major program tested, there is an additional charge of $4,000 for each major federal program audited.

Total All-inclusive Maximum Price (cont.)

The following summarizes our estimate of the audit hours required to complete the engagement for the fiscal year ending June 30, 2025, detailed by team member level and section of the engagement:

	Hours			
	Preliminary Fieldwork	Final Fieldwork	Review & Reporting	Total Reporting
William I. Tucker IV, CPA Engagement Principal	2	10	5	17
Aaron M. Stevens, CPA Independent Review Principal	0	0	4	4
Tyler P. Baker, CPA Senior Manager	8	32	8	48
To be determined Associates	16	60	8	84
Administrative personnel	0	0	2	2
	26	102	27	155

Total All-inclusive Maximum Price (cont.)

Because we are extremely interested in serving the Village and the fact that our team members have a great deal of experience working with governmental units, we are proposing a significant discount to our cost estimate. The price schedule detailed above is a firm price assuming the Village records are in reasonable condition, and we are provided reasonable Village staff assistance. If our team members spend more hours than the projected hours detailed above that are not due to certain circumstances (i.e., unbalanced record, improperly recorded activities, the state of the records being significantly different than what was stated in the proposal process, inadequate staff assistance, etc.) then we will not bill for any amounts over the cost estimate.

Our proposal is to provide the Village with auditing services (attest services), rather than accounting services (non-attest services). The cost schedule detailed above assumes that extensive journal entries to adjust the accounting records (i.e., bookkeeping) will not be required as part of the audit process. If a significant number of journal entries are required in order for the financial statements to be fairly presented, we propose a per entry fee of $200. Creation of required schedules will be the responsibility of the Village but if the Village needs assistance to prepare any of the necessary supporting schedules, we will assist in this and we will perform these services at the above stated rates.

If certain circumstances are encountered, such as significant areas not being ready for audit that delay or disrupt field work or those issues listed above, we will discuss them with you and negotiate additional billings. While we do not expect that there will be additional billings in any audit year, because of the discounted fee that is being proposed, it is important that the Village adhere to the agreed-upon audit schedule - allowing us to conduct the audit as efficiently as possible.

Peer Review Report

RPB CPAs
A century of new ideas

Report on the Firm's System of Quality Control

July 31, 2023

To the Principals of Maner Costerisan PC
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Maner Costerisan PC (the firm) in effect for the year ended March 31, 2023. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a system review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported on in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act; and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Maner Costerisan PC in effect for the year ended March 31, 2023, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)*, or *fail*. Maner Costerisan PC has received a peer review rating of *pass*.

Reilly, Penner & Benton LLP

Reilly, Penner & Benton LLP

Reilly, Penner & Benton LLP
1233 N. Mayfair Road Suite #302 • Milwaukee, WI 53226-3255 • 414-271-7800

www.rpb.biz

Certificate of Liability Insurance

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 01/06/2025

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	CONTACT NAME: Certs@PCIAonline.com	
Professional Concepts Insurance Agency, Inc. 1127 South Old US Highway 23 Brighton MI 48114-9861	PHONE (A/C, No, Ext): (800) 969-4041	FAX (A/C, No): (800) 969-4081
	E-MAIL ADDRESS: Certs@PCIAonline.com	

INSURED	INSURER(S) AFFORDING COVERAGE	NAIC #
Maner, Costerisan & Ellis, P.C 2425 E Grand River Ave Suite 1 Lansing MI 48912-3291	INSURER A : Travelers	
	INSURER B : Travelers Property & Casualty Co of America	25674
	INSURER C : The Standard Fire Insurance Co	19070
	INSURER D : Hanover	
	INSURER E : Markel American Insurance Co	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** 25-26 All **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	[X] COMMERCIAL GENERAL LIABILITY [ ] CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: [X] POLICY [ ] PRO-JECT [ ] LOC [ ] OTHER:			BIP5X2140392442	01/01/2025	01/01/2026	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 300,000 $ 10,000 $ 1,000,000 $ 2,000,000 $ 2,000,000
A	AUTOMOBILE LIABILITY [ ] ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [X] HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY			BIP5X2140392442	01/01/2025	01/01/2026	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
B	[X] UMBRELLA LIAB [X] OCCUR EXCESS LIAB [ ] CLAIMS-MADE DED [X] RETENTION $ 5,000			CUP5X2162662542	01/01/2025	01/01/2026	EACH OCCURRENCE AGGREGATE	$ 10,000,000 $ 10,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N: N If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		UB5X2166232542	01/01/2025	01/01/2026	[X] PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 500,000 $ 500,000 $ 500,000
D	Professional Liability			LHN J929682 00	01/01/2025	01/01/2026	Per Claim Ann Aggregate	$ 5,000,000 $ 5,000,000

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

Insurer E; Markel American Insurance Co; Professional Liability Policy #MPAX100043-01; Effective Date: 01/01/2025; Expiry Date: 01/01/2026; Per Claim: $5,000,000; Ann Aggregate: $5,000,000.

CERTIFICATE HOLDER

For Informational Purposes Only

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

Michael Cosgrove

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A *VIEW* of Success

A Proposal to Provide Professional Services Prepared for

Village of Beverly Hills

Submitted by

Greg Soule, CPA, CFE - Partner

Delivered on
April 18, 2025

Prepared by

AHP

43252 Woodward Avenue, Suite 150 | Bloomfield Hills, MI 48302
248.340.6050 | www.ahpplc.com

April 18, 2025

Mr. Warren Rothe, Village Manager
Village of Beverly Hills

Choosing an audit team is an important decision for you and the Village of Beverly Hills, but it doesn't need to be a complicated one. The team you select should have the ability to add *value* and advise your organization as you grow and your needs change. It should have *integrity* and an *efficient* and collaborative work ethic that shows a commitment to the Village's success based on a *wealth* of experience in the local government industry. You need a team who can identify and respond to your specific needs, keeping you in their *VIEW* at all times. We are that team!

we appreciate the time you spent meeting with us and answering our questions. Based on our review of your previous reports, our discussions, and our knowledge of the industry, we have made the following observations:

- **Scope of Work** – We understand that management is requesting an audit of the financial statements for the Village of Beverly Hills and assistance preparing the financial statements and State filings. You've noted that a single audit of federal expenditures is not expected to be required.
- **Need for a Firm Committed to Municipalities** – AHP currently serves many governmental organizations. Please call our references.
- **Need for Timely Service** – AHP is committed to audit reports delivered on your timeline. We ensure this through our technology, including workflow and collaboration tools listed within this proposal, and having management onsite during fieldwork.
- **Need for an Experienced Team** – All of the executives and management assigned to your services have municipal experience. We have also ensured your team includes expertise in information technology and compliance audits of federal awards.
- **Need for More than Just an Auditor** – We expect open and frequent communication throughout the year on trends and issues affecting the Village. We will collaborate with you and offer recommendations to improve operations.

We have taken the above observations into consideration and have assembled a team of professionals with the necessary skills and experience to provide solutions to meet the needs of the Village of Beverly Hills today and into the future.

Thank you for the opportunity to propose on the Village of Beverly Hills engagement. We would be happy to speak with you in more detail about the information contained in this proposal. We look forward to working with you. Greg Soule is authorized to represent the firm regarding this proposal and can be reached via phone at 248-340-6050 and via email at gregory.soule@ahpplc.com.

Sincerely,

Andrews Hooper Pavlik PLC

Proposal Roadmap

AHP View	Page 3
A Snapshot of Your Proposal	Page 4
Firm Overview	Page 6
Your Audit Team	Page 8
Your AHP Experience	Page 12
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Industry Experience	Page 18
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Your Investment	Page 22
Peer Review Report	Appendix A



As a client of AHP, you can trust that our interactions are guided by these four core principles:

Value
Quality services from a regional firm that bring value to our clients

Integrity
A high level of integrity to support the continued success of our clients and our firm

Efficiency
Efficiency in achieving cost-effective results for our clients and AHP

Wealth
Services that increase our clients' wealth of knowledge and financial resources

Snapshot

A glimpse into your proposal

We are excited to propose on auditing services for the Village of Beverly Hills. As a client of AHP, you'll receive top-notch client service based on the AHP VIEW philosophy. Guided by our VIEW, AHP's goal is to create a long-term relationship in which you receive exceptional value, creative solutions, and excellent service. In this proposal you'll find how our VIEW translates to success for this engagement and your organization. Below is a summary of what you'll find in the proposal.

Value

Quality services from a regional firm that bring value to our clients

- We believe our fees are fair to both our clients and our firm and we work hard to ensure you'll see the value of the solutions we provide above and beyond the scope of the engagement.
- As a client, you will have direct and significant access to engagement partners and executives in all phases of our services, as well as throughout the year.
- Year-round we answer miscellaneous questions and communicate with you when any issues affecting Village of Beverly Hills arise.
- We feel our proposed fees are fair to you and to AHP. If additional services are needed, the associated fees will be at the same reasonable rates.

Integrity

A high level of integrity to support the continued success of our clients and our firm

- AHP has the appropriate licensure, independence, experience, and controls in place to support the integrity of the work we will perform for you.
- You can trust our experience in financial reporting is backed by an unblemished record. Our practices are sound, and we will protect your confidentiality with utmost seriousness.
- AHP has controls in place to ensure quality standards have been met and is subject to internal and external quality control procedures.
- You'll find a sample of AHP clients who will endorse our level of integrity in the *References* section.

Snapshot

Efficiency

Efficiency in achieving cost-effective results for our clients and AHP

- *Your AHP Experience* goes into detail on how we work with your current auditors and staff to ensure the transition to a new firm is smooth.
- Effective use of technology allows us to work seamlessly with you throughout the engagement, increasing collaboration and efficiency. It also provides us with the ability to provide you with the best service team possible, regardless of location.
- AHP's *Audit Approach* is a process designed to obtain sufficient audit evidence and render an opinion in a manner that is timely and cost-effective for our clients.

Wealth

Services that increase our clients' wealth of knowledge and financial resources

- *Your Audit Team* is constructed of professionals who have significant experience in auditing governmental entities. We leverage the skill sets and experience of professionals from across the firm for your benefit.
- Our professionals stay ahead of trends in governmental accounting and auditing, as well as the latest in compliance and federal program auditing, ensuring that your audit will be completed efficiently.
- AHP's membership in Allinial Global (AG), an association of over 100 accounting and consulting firms throughout the world, extends your access to expertise through the extensive industry and service-specific knowledge base of our fellow AG firms.
- We continue to discuss with you and evaluate any potential impact that new and emerging issues will have on the Village of Beverly Hills (fees related to resolution of the issues will be fair and reasonable based on the time incurred).

Testimonial Video

Please visit https://www.ahpplc.com/about to watch this short video to learn more about AHP and why our clients chose and continue to choose us.



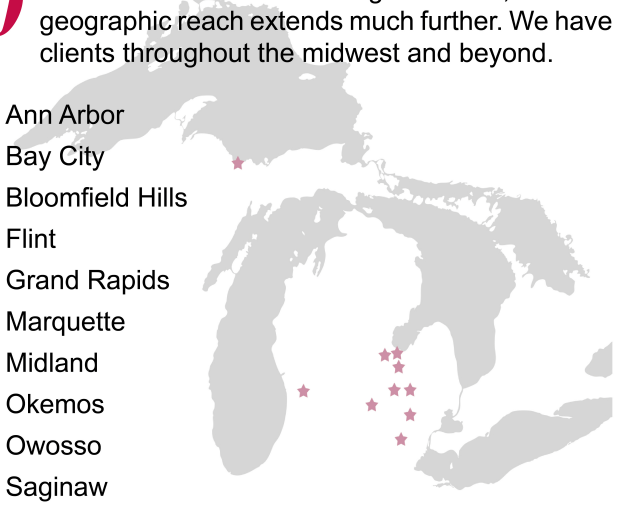
Firm Overview

AHP by the Numbers

1993 Built on a foundation of delivering excellence and value, Andrews Hooper Pavlik PLC was founded in 1993 by three partners from the Saginaw and Lansing offices of Ernst & Young. They set out to provide traditional accounting, audit, and tax services with accessibility at a local level. Our "Big Four" firm history allows us to bring a level of technical and industry experience to our engagements that makes AHP stand out from other regional CPA firms.

Large enough to meet all of your accounting and consulting needs...

10 Our roots are in ten Michigan offices, but our geographic reach extends much further. We have clients throughout the midwest and beyond.



Ann Arbor
Bay City
Bloomfield Hills
Flint
Grand Rapids
Marquette
Midland
Okemos
Owosso
Saginaw

190+ With a team of over 190 professionals to provide a full suite of professional services.

2 AHP's two affiliates have broadened our service offering and allowed us to transition beyond traditional certified public accounting services into a trusted advisor role.

AHP CONSULTING

Offers a broad range of services to help businesses improve processes, manage risk, and promote growth. We also offer an extensive array of technology services that are designed to assist you in identifying and organizing your business' pertinent information, safeguarding it from unauthorized users, and regenerating it should a disaster occur.

AHP FINANCIAL SERVICES INC

As an Independent Registered Investment Advisor, AHPFS can provide a full portfolio of retirement planning and investment management services to assist you in planning for a secure future. With their innovative financial planning tools, clients are able to visualize their future with confidence.

#12 ***AHP's current ranking on Crain's 2025 list of Michigan Accounting Firms by Number of Employees.***

...small enough to offer personalized service.

Client Satisfaction Survey

3 When asked which three words they would choose to describe AHP, the top three answers were:

Professional
Responsive
Knowledgeable



97% of clients surveyed indicated they were likely to recommend AHP services to a friend, family member, or colleague.

"We have confidence AHP can handle any difficult situation that comes up. They always answer the call and come through for us."

- Matt Pumford
Owner of Pumford Construction

Firm Overview

AHP has a proven and successful track record of delivering high quality.

License to Practice, Membership, and Registration

AHP is registered to practice in the State of Michigan and is a member of the Michigan Association of Certified Public Accountants (MICPA) and American Institute of Certified Public Accountants' (AICPA). All key professional staff members are properly licensed to practice in the State of Michigan.

We are registered with the Public Companies Accounting Oversight Board (PCAOB) and our most recent PCAOB inspection was completed in 2021 with no comments. Industry specific memberships and registrations are listed in the Industry Experience section.

Peer Review

Our most recent peer review was completed in 2022, with the highest rating available, and is enclosed as Appendix A. Our peer review included governmental engagements. Our firm is appropriately covered by professional liability insurance.

Independence

AHP is independent of the Village of Beverly Hills as defined by the United States Government Accountability Office's *Government Auditing Standards* and U.S. Generally Accepted Auditing Standards. AHP has no professional relationships involving the Village of Beverly Hills or any of its agencies or component units for the past five years.

No Desk or Field Reviews and Disciplinary Action

- Because of the size of our governmental audit practice, our engagements are reviewed regularly by the Auditor General of the State of Michigan. The results of these reviews have not resulted in any written comments.
- No members of AHP or AHP itself have had any disciplinary action taken or pending.
- AHP has no record of substandard work.

Debarment, Suspension, Ineligibility, and Voluntary Exclusion

AHP is in compliance with the provisions of 24 CFR Part 24 and neither the firm nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this contract. Additionally, the firm will not use, directly or indirectly, any of the funds provided by this contract to employ, award contracts to, or otherwise engage the services of, or fund any contractor/subcontractor during any period that the contractor/subcontractor is debarred, suspended, or ineligible under the provisions of 24 CFR Part 24.



Your Audit Team

People make the difference in any professional relationship.

The Village of Beverly Hills will be served mainly by our Bloomfield Hills office, but we will also leverage the skill sets and experience of professionals from across the firm for your benefit. All proposed staff listed are full-time employees and we will not use any sub-contractors on this engagement. Your engagement will be staffed by the following AHP professionals. All members of the engagement team have received appropriate CPE during the past three years. There are no complaints against any proposed staff member.



Gregory Soule, CPA, CISA, CISSP, CFE – Partner, Bloomfield Hills

Greg will serve as the **Engagement Executive** for the Village. Greg serves in a similar role in other municipal and Village audit engagements and has served municipalities throughout his entire 18 year career. Greg is also a member of GFOA and serves on the GFOA Special Review Committee, reviewing submitted financial statements for compliance with GFOA award criteria.

Greg has served as a discussion leader and lecturer for various educational programs on topics of accounting, auditing, internal controls, fraud, and forensic accounting. In addition, he has published articles in both local and national business publications.

Professional History:

- Over 18 years of public accounting experience with AHP
- Serves institutions of higher education, governmental entities, and not-for-profit organizations

Education:

- Central Michigan University

Continuing Professional Education:

- Meets CPE requirements under Government Auditing Standards
- Accounting and Auditing CPE during the past two years exceeds 80 hours

Other Activities:

- American Institute of Certified Public Accountants (AICPA)
- Michigan Association of Certified Public Accountants (MICPA)
- MICPA Information Technology Task Force – Past Chair
- MICPA Forensic Accounting Task Force
- Central Michigan University – School of Accounting Advisory Board
- St. Joseph Catholic Church – Finance Council Chair



Your Audit Team



Jamie Rabe, CPA – Partner, Okemos

Jamie will serve as the **Independent Review Partner** for the Village of Beverly Hills. She will be independent of the planning and performance of the audit and will perform a review of the audited financial statements and critical items for compliance with professional standards. Jamie will draw from her breadth of experience to perform a valuable technical review and help identify matters that are important to you.

Professional History:

- Over 20 years of auditing, accounting, and financial reporting experience with AHP.
- Has served as the engagement executive or independent technical reviewer for governmental, not-for-profit, employee benefit plan, and other engagements.

Education:

- Northern Michigan University

Continuing Professional Education:

- Meets CPE requirements under Government Auditing Standards
- Accounting and Auditing CPE during the past two years exceeds 80 hours

Other Activities:

- American Institute of Certified Public Accountants (AICPA)
- Michigan Association of Certified Public Accountants (MICPA)
- United Way for South Central Michigan – Board Treasurer

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Your Audit Team



Danielle Hoppe, CPA – Audit Manager

Danielle will serve as the **Audit Manager** for the Village. Danielle will draw from her extensive experience working with governmental organizations to provide oversight to the engagement team and to offer significant technical expertise throughout the engagement. Danielle will ensure seamless execution of audit services through effective and efficient use of team resources and regular communications with your financial executives. Danielle has over eight years of public accounting experience and currently serves many governmental entities, including those with *Uniform Guidance* single audits.

Professional History:

- Over 8 years of experience with AHP
- Extensive experience with governmental and municipal organizations
- Conducts internal training seminars on governmental accounting and auditing

Education:

- Northwood University

Continuing Professional Education:

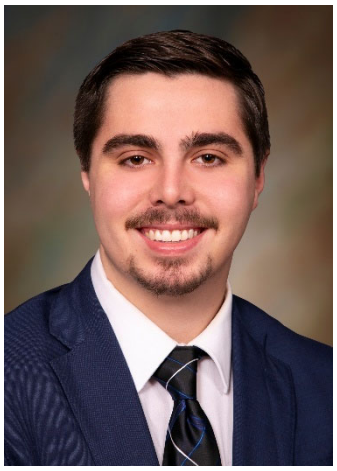
- Meets CPE requirements under Government Auditing Standards
- Accounting and Auditing CPE during the past two years exceeds 80 hours

Other Activities:

- American Institute of Certified Public Accountants (AICPA)
- Michigan Association of Certified Public Accountants (MICPA)
- Michigan Government Finance Officers Association (MGFOA)



Your Audit Team



Justin Comis – Audit In-Charge

Justin will serve as the **Audit In Charge** for the Village. He will have primary responsibility for executing the day-to-day audit services and supervising staff. Justin has served in a similar role on other governmental and Village engagements.

Professional History:

- Extensive experience with governmental and municipal organizations
- Conducts internal training seminars on governmental accounting and auditing

Education:

- Central Michigan University

Continuing Professional Education:

- Meets CPE requirements under Government Auditing Standards
- Accounting and Auditing CPE during the past two years exceeds 80 hours

Other Activities:

- American Institute of Certified Public Accountants (AICPA)
- Michigan Association of Certified Public Accountants (MICPA)

Your AHP Experience

Collaboration is the key to audit efficiency.

The Transition to AHP

We understand the thought of transitioning to a new firm can be intimidating, but we commit to doing our best to help make it an easy process!

Upon being awarded the audit, our first step is to coordinate the transition with your current auditor. We review their workpapers, review their communications with your organization, and address areas of continuing accounting and auditing significance. We leverage this information in developing our initial planned audit approach. Once the audit plan is developed and coordinated with the Village of Beverly Hills, the plan will be executed by the engagement team in accordance with the planned timelines listed in the Audit Approach section of this proposal.

The first year of an audit relationship will take more time on our part as we work to develop and refine our understanding of your systems and processes. **We do not bill extra for this time and instead view it as an investment in our relationship with the Village of Beverly Hills.** We view that this additional time spent understanding your systems is critical in ensuring the audit will go smoothly in future years.

Use of Village of Beverly Hills Staff

As is consistent with most CPA firms, we assume that the Village of Beverly Hills staff will reconcile and close the general ledger, locate documents selected by us for testing, investigate any questions or discrepancies that we have based on our testing, and run reports from the general ledger system (or provide us access to your general ledger system to allow us to look up transactions and activity), among other functions. We will work with your staff throughout the audit to ensure a smooth and efficient audit.

Quality Review Process

We ensure the quality of our service not only by guaranteeing involvement of partners and managers in every phase of the audit, but also through our policy of Executive and Independent Review on every significant engagement. The Executive Reviewer on your engagement will review every audit area, followed up with a review of the financial statements and sensitive audit areas by the Independent Review Partner. These reviews are preceded with detail review by the manager or senior manager, who will be on-site during fieldwork.

Clients Lost

The largest governmental clients that we have lost in the past five years include Ferris State University, Lake Superior State University, Arenac County, and Owosso Charter Township. All were lost through a proposal process and there were no unresolved accounting and auditing issues.

> *"Great service, working with great people."*
>
> - Bill Gipson, *Senior VP / Treasurer*
> *Fishbeck, Thompson, Carr & Huber, Inc.*

Your AHP Experience

Use of Technology

Technology has rapidly changed the way we provide services to our clients. It allows us to work seamlessly with you throughout the engagement, increasing collaboration and efficiency.

At AHP, workpapers are always retained electronically on a secure server. This allows engagement executives and team members to access information on a real-time basis from multiple locations with no service disruptions. This also provides us with the ability to provide you with the best service team possible, regardless of location.

Anytime transferring sensitive information is discussed, security is a concern. AHP has systems and policies in place to ensure all of our clients' information is safe. Our team members take great pride and ownership in ensuring our clients' information always remains confidential and secure. We would be glad to discuss our internal controls and policies with you in greater detail if you would like more specific information.

Suralink

AHP utilizes Suralink, a browser-based client workflow and collaboration tool that assists in tracking audit requests and status updates. This dynamic tool creates and tracks each requested document, such as bank reconciliations or Board minutes, and provides reporting regarding the status of each requested item.

Using the Suralink dashboard, you can immediately understand what requests have been fulfilled, which requests have been accepted by the audit team, or what requests have not been fulfilled. The tool's easy-to-use interface streamlines the audit document request and management process. We also use Suralink to send secure files, such as the final audit reports and workpapers.

Potential Audit Problems

To ensure our clients have the highest level of satisfaction, we encourage frequent and open communication between the engagement team and your team. Our goal for every client is to add value while performing an efficient and collaborative engagement. AHP works diligently to ensure our clients' needs are met. We do not anticipate any problems that could negatively impact the audit. We believe that early detection of potential issues or problems is critical to providing you with the information you need to make quality decisions that may impact the Village of Beverly Hills. The planning stage of our audit is designed to identify key issues that impact the Village of Beverly Hills and communicate these items to you as early as possible. We will meet with your management team regularly to discuss accounting, reporting, or operating issues, and potential problems.

If an audit issue arises during the engagement, the timeliness and level of communication would depend on the severity and materiality of the issue. Items that would be included in the management letter would be communicated to management in advance of the management letter issuance. Certain issues would be brought to the attention of management, and potentially Village Council, immediately, as prescribed under professional standards.

We understand additional audit effort may be required for assistance with adoption of new GASB standards. Fees for such assistance will be discussed with you and will be fair and reasonable based on the time incurred.

Audit Approach

Scope of Your Engagement

You are requesting a proposal for the years ending June 30, 2025 through 2029 for the Village of Beverly Hills including the following services:

- Financial statement audit for the Village of Beverly Hills, in accordance with Generally Accepted Auditing Standards
- Federal expenditures audit, if needed
- Assistance with preparation of the financial statements and State filings
- Consultation services to Village personnel throughout the year regarding matters or developments affecting accounting and financial reporting of governmental entities

Value-Added Services

There are various services we will provide for the Village of Beverly Hills at no additional charge. These services include:

- Year-round answers to brief miscellaneous accounting, business operations, or tax questions that may arise (should the question warrant significant research, any fees would be fair and reasonable based on the time incurred)
- Workpapers and reports retained for a minimum of seven years
- Periodic mailing of information on relevant and emerging issues
- Discussions and evaluation of any potential impact that new and emerging issues will have on the Village of Beverly Hills (fees related to resolution of the issues will be fair and reasonable based on the time incurred).

Financial Statement Audit Key Phases

Our professional responsibility is to obtain sufficient audit evidence before an opinion is rendered on any financial statements. To achieve this, we will conduct our work in the following phases:

- Pre-Engagement Planning
- Assess Internal Controls and Risks
- Audit Fieldwork
- Reporting and Conclusion

Details of these phases are listed on the following pages. All phases will be performed by staff and seniors and overseen by managers and partners. We anticipate using two to three partners, one manager, and two or more staff accountants on this engagement.

Report Format

AHP will perform the typing and assembly of all audit reports.

Audit Approach

Financial Statement Audit Key Phases

Phase 1
(40 hours)

Pre-Engagement Planning

- Planning meeting with your personnel to discuss audit scope, process, and timing
- Review prior year audit results and predecessor workpapers
- Obtain an understanding of the Village of Beverly Hills programs and activities
- Pro-forma financial reports and schedules

Phase 2
(40 hours)

Assess Internal Controls and Risks

- Obtain an understanding of internal controls over key transaction cycles, including information technology controls
- Perform walkthroughs of significant transaction classes
- Assess risks of material misstatements, including consideration of fraud risks and risks by audit assertion for each significant balance and transaction class

Phase 3
(80 hours)

Audit Fieldwork

- Design and perform specific audit procedures for your organization based on information obtained during Phase 1, focusing on areas of greatest risk
- Include testing of internal controls where effective and efficient to do so, in accordance with professional standards
- Utilize substantive analytical procedures and review of financial information and operating trends
- Focus on an efficient process that minimizes disruptions to your staff

Phase 4
(80 hours)

Report and Conclusion

- Draft financial statements and agree to underlying audited records
- Draft other required reports
- Prepare a management letter detailing recommendations for strengthening internal controls or improving operating procedures
- Audit closing meeting to discuss audit results and review reports before final issuance
- Report to those charged with governance

Audit Approach

A Tailored Approach for Your Benefit

To provide you with quality audit service, we believe you should have an audit tailored to the circumstances unique to your organization and its programs. This approach includes the following components:

- Considering significant accounts, potential problems or issues, and related sources of information in developing our overall audit strategy. This process enables us to focus our audit effort in high-risk areas and provides a basis for minimizing our audit procedures in low-risk areas.
- Applying appropriate sampling to maximize audit efficiency and effectiveness. Sample sizes, to the extent used for audit procedures, vary depending on our assessment of risk, population sizes, and other factors. When applicable, we use a stratified sampling approach which includes key items (large or unusual transactions or balances) in performing substantive testing of account balances (assets, liabilities, etc.). Common sample sizes often fall between 5 and 30 items.
- Use of IDEA data extraction software to supplement the audit process. Examples of how we have used this software on municipal audits include examining multi-year expense and vendor payment trends, examining expenses for unusual characteristics, selecting transaction samples, summarizing information using various filters, and other applications.
- Using analytical review procedures during planning and in testing of material balances to see that financial and operating trends, ratios, and relationships make sense. Analytical procedures can be used extensively to test the material components of the financial statements because of the availability of budgets, historical data, and interrelated non-financial operating data.
- Applying an interactive internal control assessment process which utilizes interviews and questionnaires to gather the basic elements and processes for the five components of internal control. This is performed within a practical context realizing that not all municipalities have the same staffing, experience, or resources. We are proactive with our recommendations for improvement. Our preference is to suggest opportunities that represent best practices so you can evaluate the nature of the recommendation and determine which are in the best interest for the Village overall. We verify our understanding of the facts of all comments with you before communicating our suggestions in writing.
- Determining laws and regulations subject to audit testing based on our monitoring of guidance from the Michigan Department of Treasury, inquiries with key management personnel, review of your policies, and knowledge gained from other audits to ensure all significant compliance issues are identified.
- AHP will perform all the work and use no subcontractors or affiliate firms.

Audit Approach

Timetable

The expected timing for the completion of the audit and overall work plan is outlined below. The ability to meet these deadlines is contingent upon receiving the levels of assistance from the Village of Beverly Hills staff as indicated in your proposal request. As outlined in the request for proposal, entrance, progress, and exit meetings will be held with AHP and the Village of Beverly Hills to communicate pertinent audit matters throughout the engagement.

Planning and Preliminary Audit Work	July
Fieldwork	September
Report Date (Draft Reports Completed)	October
Completion of Audit Final Printed Reports Provided	End of October
Presentation to Village Council	November meeting

"AHP is a partner that meets and exceeds our expectations every time."

Paul Barbeau
Director, Michigan Baseball Foundation
Former President & GM, Great Lakes Loons

Industry Experience

A Commitment to Your Industry

Governmental organizations are a significant focus for AHP. We currently have over 50 people working on audits of governmental organizations. Our commitment to governmental organizations and our reputation in Michigan are well known based on over 40 years of services through Andrews Hooper Pavlik PLC and its predecessor offices. AHP performs numerous governmental audits and single audits, including municipalities, component units and agencies of the State of Michigan, universities, community colleges, and other governmental entities. AHP's experience includes assistance with and preparation of Annual Comprehensive Financial Reports, including those submitted to the GFOA as part of the Certificate of Achievement for Excellence in Financial Reporting program.

AHP's federal single audit experience is extensive. This experience covers most typical federal and state assistance programs, including both construction and operating grants. Federal granting sources include the US Departments of Education, Health and Human Services, Housing and Urban Development, Transportation, and others.

AHP Stays Current on Matters Important to Municipal Clients

By staying ahead of trends in governmental accounting and auditing, as well as the latest in compliance and federal program auditing, we ensure that your audit will be completed efficiently. This wealth of knowledge will be leveraged throughout your audit to ensure that you are getting up-to-date, accurate information. Through internal and external trainings and events, each of AHP's professionals obtain the continuing professional education required under *Government Auditing Standards*. We also consistently exceed the continuing professional education requirements of the AICPA, the Michigan State Board of Accountancy, the U.S. Government Accountability Office, and any other regulatory agencies where applicable.

Mandatory Training for Professional Staff Members – Our partners and staff spend an average of 60 hours per year in formal education. This represents 150% of the required amount.

Specialized Training – Staff members receive specialized training, where appropriate, in matters affecting our municipal clients. The training programs are designed for each individual so as to ensure a proper balance in accounting and auditing experience and meet the education requirements of *Government Auditing Standards*. Additional training is provided for industry-specific matters (e.g., implementation of recent GASB pronouncements).

Organizational Involvement – AHP is a member of the AICPA Center for Audit Quality, the Governmental Audit Quality Center, and the Employee Benefit Plan Audit Quality Center. Our professionals serve on various task forces of the Michigan Association of Certified Public Accountants (MICPA). In addition, Greg Soule, AHP Partner, is a member of the Michigan Government Finance Officers Association (MGFOA). Through these resources and direct communication with the standards boards, we remain aware of current and emerging issues.

Industry Experience

Thought Leadership



AHP professionals have presented to numerous industry organizations, including at Michigan Association of CPAs (MICPA) annual governmental accounting and auditing conferences, including a recent presentation by Greg Soule at the May 2024 MICPA governmental conference on internal controls. Greg lead a recent presentation in March 2025 on Preparing for an Audit for the Michigan Government Finance Officers Association (MGFOA) at their spring conference. Recent presentations at other MICPA conferences have covered:

- Emerging technologies
- New auditing standards
- Audit documentation requirements
- Changes in accounting standards
- Ethics

In addition, we offer a webinar series that is free for our clients to attend. Previous webinars have covered the new changes in financial reporting, revenue recognition, tax topics, cybersecurity, and an update to the financial markets. We continue to invest in thought leadership and presentations to ensure our clients are aware of emerging issues relevant to governmental organizations.

Additional Resources

All professional staff maintain an awareness and understanding of current developments in technical literature and other resources, including:

- Governmental Accounting Standards Series including the Action Report
- Government Finance Review published by GFOA
- GFOA Newsletter
- The Practitioners Publishing Company (PPC) Governmental Update
- Accounting and Financial Reporting for Governmental Entities published by PPC
- Michigan Uniform Budgeting Act
- Michigan Government Accounting & Auditing Guide

Allinial Global Member

AHP is a proud member of Allinial Global (AG), an association of over 100 accounting and consulting firms throughout the world. Our membership with AG allows us to reinforce client service by exchanging expertise, resources, and advice in a wide range of industries. Your access to expertise is extended through the extensive industry and service-specific knowledge base of our fellow Allinial Global firms.

Member of Allinial GLOBAL®

An association of legally independent firms

AHP

Industry Experience

AHP Governmental Engagements

While AHP serves clients in a number of industries, a significant percentage of our business is dedicated to governmental entities. Our governmental experience was gained through performing services for many entities. A sample of these includes:

Cities
- City of Essexville
- City of Clare
- City of Berkley

Townships
- Charter Township of Midland
- Charter Township of Oakland
- Grant Township
- Homer Township
- Ingersoll Township
- Larkin Township
- Lee Township

Counties and Transit Authorities
- Clare County Transit Corporation
- Midland County Central Dispatch Authority
- Marquette Transit Authority
- Sanilac County
- Sanilac County Transportation

Villages
- Village of Chesaning
- Village of Copper City
- Village of Dansville
- Village of Lake Orion

Libraries
- Capital Area District Library
- Clinton-Macomb Public Library
- Community District Library
- Rochester Hills Public Library
- Plymouth District Library
- Orion Township Public Library

State of Michigan Agencies and Component Units
- Farm Produce Insurance Authority
- Michigan Education Savings Program
- Michigan Unemployment Insurance Agency
- State Bar of Michigan
- State Building Authority of the State of Michigan

Colleges and Universities
- Delta College
- Oakland University
- Monroe County Community College
- Saginaw Valley State University
- Washtenaw Community College

Other Governmental Entities
- Marquette Board of Power and Light
- Michigan Universities Self-Insurance Corporation
- Rochester Older Persons Commission Center (OPC)

References

We focus on long-term relationships with our clients with the ultimate goal of benefiting you. As we get to know you and your operations better, we are better able to provide highly tailored advice and recommendations.

The following is a sample of AHP audit clients served by those assigned to your engagement:

Oakland Township Partner: Greg Soule Financial Audit 2023 – Present	Mr. John Giannangeli, Treasurer 248-651-4440 jgiannangeli@oaklandtownship.org
City of Berkley Partner: Greg Soule Financial Audit 2024 – Present	Mr. Carl Johnson, Finance Director 248-658-3340 cjohnson@berkleymi.gov
Village of Lake Orion Partner: Greg Soule Financial Audit 2017 – Present	Ms. Sonja Stout, Clerk/Treasurer 248.693.8391x102 stouts@lakeorion.org



Your Investment

We believe our fees should be fair to both our clients and our firm. We establish our fees based on our estimate of time spent and the complexity of work to be performed. The following is a breakdown of our estimated fees for the services discussed for the years ending June 30:

Service	2025	2026	2027	2028	2029
Audit of Financial Statements	$31,000	$ 32,000	$ 33,000	$ 34,000	$ 35,000
Total	**$31,000**	**$ 32,000**	**$ 33,000**	**$ 34,000**	**$ 35,000**

The fees presented above include assistance with the preparation of the financial statements and related notes to the financial statements and supplementary information and a management letter. The fees also include filing applicable State of Michigan reports (Auditing Procedures Report, etc.).

If a single audit of federal expenditures is required, the fee would be approximately $5,000 for one major program.

We noted that the Village recently engaged Plante Moran Government Accounting Professionals (PMGAP) to assist the new finance director. The above fees assume that the Village's books will be closed and ready for audit and no assistance in preparing closing entries will be required by AHP.

The above fees are all-inclusive which would include all out-of-pocket and administrative costs and routine inquiries that do not require extensive time or research (any fees for questions that require such time or research would be fair and reasonable based on the time incurred). Potential one-time costs could result from matters that require additional time and effort outside of the normal course of audit services, including significant financial reporting or compliance matters; adoption of new accounting standards; accounting assistance and assistance with year-end closing adjustments; and other out-of-scope services that may be requested. To the extent possible, we will discuss any such matters with you in advance, and related fees will be fair and reasonable based on time incurred.

Hourly rates for expansion of scope or additional accounting assistance are as follows:

Staff	$ 140	Senior Manager	$ 270
Senior Accountant	$ 175	Audit Partner	$ 340
Manager	$ 200		

We believe our fees should be fair to both our clients and our firm. We establish our fees based on our estimate of time spent and the complexity of work to be performed.

Your Investment

Value-Added Services

There are various services we will provide for Village of Beverly Hills at no additional charge. These services include:



- year-round answers to brief miscellaneous accounting, business operations, or tax questions that may arise (should the question warrant significant research, any fees would be fair and reasonable based on the time incurred)
- workpapers and reports retained for a minimum of seven years
- periodic mailings of information on relevant and emerging issues
- discussions and evaluation of any potential impact that new and emerging issues will have on Village of Beverly Hills (fees related to resolution of the issues will be fair and reasonable based on the time incurred.

Appendix A:

Peer Review Report

Kelley Galloway Smith Goolsby, PSC
Certified Public Accountants and Advisors

1200 Corporate Court • P. O. Box 990 • Ashland, Kentucky 41105
• Phone (606) 329-1811 (606) 329-1171 • Fax (606) 329-8756 (606) 325-0590
• Web www.kgsgcpa.com Member of Allinial GLOBAL

Report on the Firm's System of Quality Control

To the Members
Andrews Hooper Pavlik PLC
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Andrews Hooper Pavlik PLC (the firm) applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended December 31, 2021. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act; audits of employee benefit plans, an audit performed under FDICIA, and examinations of service organizations (SOC 1 and SOC 2 engagements).

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Andrews Hooper Pavlik PLC applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended December 31, 2021, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass, pass with deficiency(ies)* or *fail*. Andrews Hooper Pavlik PLC has received a peer review rating of *pass*.

Kelley Galloway Smith Hobby, PSC

Ashland, Kentucky
June 15, 2022

MEMO

Date: 05-08-25

TO: Honorable Members of Council

FROM: Jacob Townsend, Building Official

SUBJECT: Building, Code Enforcement and Public Services Vehicles

I am respectfully requesting the purchase of three vehicles for the Building Official, Code Enforcement Officer and the Public Services Director with funds from the approved 2026 Capital Expenditure General Fund. The purchases would be made from the Lunghamer Ford of Owosso, which is a MIDeal vendor. These vehicles were chosen from the approved Michigan Contract vehicle purchase program # 21-18 Bid.
This would be the first time we have purchased new vehicles for these positions. Prior vehicle assignments have come from the retired public safety fleet. The vehicles are now aging out and will require costly repairs soon. The cost of the vehicles and their required Michigan Motor Vehicle Code MCL 257.698 (d) accessory equipment are listed below.

Building Officials Vehicle and Public Services Director :	
2025 Ford F150 Super Crew XLT	$50,975.00
Canfield Equipment Service Inc.	$ 6,243.49
Total Cost per vehicle	$ 57,218.49
Total Cost for both vehicles	$114,436.98
Code Officer Vehicle:	
2025 Ford Explorer 4wd Active	$44,370.00
Canfield Equipment Services Inc.	$ 3,278.31
Total Cost	$ 47,370.31
Total Cost of all three vehicles	$161,807.29
Total Village Council Approved Budgeted Amount	$172,500.00
Under Budgeted Amount	$ 10,692.71

Proposed Resolution

Be it resolved that the Village of Beverly Hills Council authorizes the purchase of two (2) 2025 Ford F150 Super Crew XLT and one (1) Ford Explorer 4wd vehicles in the amount of $161,807.29 from Lunghamer Ford of Owosso 1960 E. Main St. Owosso, MI 48867. The Village further approves the Michigan Motor Vehicle Code required accessory equipment with the preferred vendor. Funds are available in Account #101-900-983.01.

Respectfully Submitted,

Jacob Townsend
Building Official
Village of Beverly Hills

Lunghamer Ford Of Owosso

May 2, 2025

City of Beverly Hills
Attn: Jacob Townsend
18500 W 13 Mile Rd.
Beverly Hills, MI 48025

Dear Jacob Townsend:

Price on 2025 Vehicle State of Michigan Contract# MA 240000001208 and Macomb County Contract# 21-18 Bid:

(2) 2025 Ford F150 Super Crew XLT Pickup 5 ½' Box in Gray	**$50,975.00 ea**
Total Delivered Price	**$101,950.00**

Order Cutoff Date: TBD.

Delivery date: Approximately 90-120 Days A.R.O.

Standard Service Contract: 36,000 miles or 36 months factory Bumper to Bumper Warranty and 60,000miles 60 months Powertrain Warranty. Service to be handled by your local Ford Dealer.

Ford Motor Company does not guarantee delivery---Ford Motor Company will make reasonable efforts to schedule orders received prior to fleet order cut-off date.

Payment requirements: All departments to pay on delivery of vehicle. 10-day grace period will be given if previous arrangements have been made. A $9.50 per day floor plan will be charged if payment is not at the dealership within 10 days of delivery of the vehicle (s).

If you have any questions please call me, 888-92-FLEET (923-5338)

Respectfully Submitted,

Bill Campbell

Bill Campbell
Government & Fleet Sales

2025 F-150 Super Crew XLT
Major Standard Equipment

MECHANICAL
- 2.7L V6 EcoBoost® with Auto Start-Stop Technology (standard on 141" and 145")
- 5.0L V8 with Auto Start-Stop Technology (standard on 122" and 157")
- 4x4 Electronic-Shift-On-the-Fly (ESOF) with Neutral Towing Capability
- Auto Hold
- Axle, Front – Independent Front Suspension (IFS)
- Brakes – 4-Wheel Disc with ABS
- Selectable Drive Modes: Normal, ECO, Sport, Tow/Haul, Slippery, Trail – 4x2 only
- Selectable Drive Modes: Normal, ECO, Sport, Tow/Haul, Slippery, Deep Snow/Sand, Mud/Rut – 4x4 only
- Electronic Ten-Speed Automatic Transmission • Fail-Safe Cooling
- Jack
- Electric Parking Brake
- SelectShift® Automatic Transmission with Progressive Range Select
- Shock Absorbers, Gas – Heavy-Duty, Front
- Shock Absorbers, Gas – Heavy-Duty, Outboard Mounted, Rear
- Springs, Front – Coil
- Springs, Rear – Leaf, Two-Stage Variable Rate • Stabilizer Bar, Front
- Steering – Power, Rack-and-Pinion

EXTERIOR
- Bed Storage Boxes (NA w/ 8' Box)
- Bumper and Fascia, Front – Black
- Bumper, Rear – Black
- Cargo Lamp – integrated with Center High-mounted Stop Lamp
- Daytime Running Lamps (DRL) (On/Off Cluster Controllable)
- Easy Fuel® Capless Fuel-Filler
- Exhaust – Single Rear
- F-150 Fender Badge
- Fuel Tank
  - — Standard Range 23 Gallon (Regular Cab 6.5' Box)
  - — Extended Range 36 Gallon (Regular Cab (NA w/ 6.5' Box), SuperCab and SuperCrew®)
- Fully Boxed Steel Frame
- Grille – Black Coast to Coast
- Handles, Black – Door and Tailgate with Black Bezel
- Hooks – Pickup Box Tie-Down, four (4)
- Hooks – Front Tow 4x4, two (2)
- Mirrors, Sideview – Manual-folding, Power Glass with Heat and Black Skull Caps
- Power Tailgate Lock
- Spare Tire Carrier – Rear Under Frame
- Spare Tire
- Stone Cuffs, Front & Rear
- Tailgate Lift Assist
- Tailgate – removable with key lock
- Tires
  - — 245/70R 17 BSW all-season tires (A/S) 4x2
  - — 265/70R 17 BSW all-terrain tires (A/T) 4x4
- Trailer Sway Control
- Trailer Towing – 4-pin wiring, ball mounting provisions in rear bumper
- Wheels – 17" silver steel
- Wipers – Intermittent speed

INTERIOR/COMFORT
- 12" Productivity Screen in Instrument Cluster
- Air Conditioning Registers – Black Vanes with Chrome Knob
- Auxiliary Audio Input Jack
- Black Vinyl Floor Covering
- Compass Display in Instrument Cluster
- Cruise Control
- Dome Light • Door trim – Soft armrest, grab handle and front map pockets
- Fade-to-Off Interior Lighting
- Gauges and Meters – Fuel, Oil Pressure, Transmission Temperature and Engine Coolant Temperature Gauges; Speedometer, Odometer and Tachometer
- Grab Handles
  - — Front – A-Pillar, Driver and Passenger Side — Rear – B-Pillar (SuperCrew®)
- Horn – Dual-Note
- Illuminated Entry
- Manual Air Conditioning, Single Zone
- Outside Temperature Display
- Powerpoint 12V
- Power Door-Locks with Flip Key and Integrated Key Transmitter Keyless-Entry (incl. Autolock)
- Power Windows (Front/Rear) – One-touch Up/Down Driver and Passenger Front Windows (Rear Power Windows not available on Regular Cab)
- Rear-window with Fixed Glass and Solar Tint
- Rearview Mirror, Day/Night
- Scuff Plates – MIC, Front
- Seat, Front
  - — Cloth 40/20/40
  - — 2-Way manual driver/passenger
  - — Armrest
- Seat, Rear
  - — Cloth
  - — USB charging ports – two (2)
  - — 60/40 flip-up split seat (SuperCab)
  - — 60/40 flip-up split seat with elongated cushion (SuperCrew®)
- Steering Wheel, Black Urethane – Manual Tilt/Telescoping and Manual Locking
- Visor, Driver Side; Visor with Mirror, Passenger-Side

SAFETY/SECURITY
- AdvanceTrac® w/RSC® (Roll Stability Control™)
- Airbags
  - — Driver and Passenger Front Airbags
  - — Driver and Passenger Seat-Mounted Side Airbags — Safety Canopy® Side-Curtain Airbags (1st and 2nd row coverage)
- Curve Control
- LED Reflector Headlamps – Black Bezels
- Perimeter Alarm
- Rainlamp Wiper Activated Headlamps
- Seat Belts, Active Restraint System (ARS). Three-point Manual Lap/Shoulder Belts with Height Adjusters, Pretensioners & Energy Mgmt Retractors on Outside Front Positions. Includes Autolock Features for Child Seats
- SecuriLock® Passive Anti-Theft System (PATS)
- SOS Post-Crash Alert System™
- Tire Pressure Monitoring System (TPMS)
- Stolen Vehicle Services (1-year Plan Included)
- Ford Co-Pilot360™ 2.0
  - — Pre-Collision Assist with Automatic Emergency Braking (AEB)
    - o Pedestrian Detection
    - o Forward Collision Warning
  - o Dynamic Brake Support
  - — BLIS® with Cross-Traffic Alert
  - — Lane-Keeping System
    - o Lane-Keeping Alert
    - o Lane-Keeping Aid
    - o Driver Alert
  - — Rear View Camera
  - — Auto High Beams
  - — Reverse Sensing System
  - — Reverse Brake Assist
  - — Post-Collision Braking
- Autolamp – Auto On/Off Headlamps

FUNCTIONAL
- AM/FM Stereo (speakers; four (4) with Regular Cab, six (6) with SuperCab and SuperCrew®)
- Class IV Trailer Hitch (incl. Smart Trailer Tow Connector, 7/4 pin-connector; Class IV trailer hitch receiver)
- FordPass™ Connect (5G)
  - — 5G LTE Wi-Fi hotspot connects up to 10 devices
  - — Schedule specific times to remotely start vehicle
  - — Locate parked vehicle
  - — Check vehicle status
- Hill Start Assist
- SYNC® 4 with Enhanced Voice Recognition (Incl. SiriusXM® with 360L)
  - — 12" LCD Capacitive Touchscreen with Swipe Capability
  - — Wireless Phone Connection
  - — Cloud Connected
  - — AppLink® w/App Catalog
  - — 911 Assist®
  - — Apple CarPlay® and Android Auto™ Compatibility
  - — Digital Owner's Manual
  - — Conversational Voice Command Recognition
  - — Connected Navigation.
- USB charging ports – two (2)
- USB data charging ports – two (2)

XLT Contains All Standard Equipment Plus:

EXTERIOR

- Bumper, Front – Chrome with Body-color Fascia
- Bumper Rear – Chrome
- Electronic Rear-Window Defroster
- Door and tailgate handles – Black
- Grille – Coast to Coast Black
- LED Fog Lamps
- Tires
  - 245/70R 17 BSW all-season (A/S) (4x2)
  - 275/65R18 BSW all-terrain (A/T) (4X4)
- Rear Privacy Glass
- Wheels
  - 17" Silver Painted Aluminum (4x2)
  - 18" Chrome-like PVD (4x4)

INTERIOR/COMFORT

- Carpet – Color-coordinated with Carpeted Floor Mats
- Seat, Front
  - Cloth 40/20/40
  - 2-Way manual driver/passenger
  - Manual lumbar (driver)
  - Armrest
- Seat, Rear
  - Cloth
  - USB charging ports – two (2)
  - 60/40 flip-up split seat with elongated cushion (SuperCrew®)
  - Rear Under-seat Storage
- Steering Wheel, Black Urethane – Manual Tilt/Telescoping and Manual Locking
- Visors with Driver and Passenger Covered Mirrors

FUNCTIONAL

- Zone Lighting

XLT 300A Crew Cab 5.5 Ft. Box 145" WB

[ ]	**Base Price W3K 4x2** (2.7L V6 EcoBoost™ engine 6426 GVWR) 99P/44G	**$43,888.00**
[ ]	**Base Price W3K 4x2** (5.0L 4V V8 engine 6850 GVWR) 995/44G	**$45,319.00**
[ ]	**Base Price W3K 4x2** (3.5L V6 EcoBoost™ engine 6800 GVWR) 998/44G/53T	**$45,319.00**
[ ]	**Base Price W3L 4x4** (2.7L V6 EcoBoost™ engine 6650 GVWR) 99P/44G	**$47,314.00**
[x]	**Base Price W3L 4x4** (5.0L 4V V8 engine 7000 GVWR 2080 PAYLOAD) 995/44G	**$48,345.00**
[ ]	**Base Price W3L 4x4** (3.5L V6 EcoBoost™ engine 7000 GVWR 2080 PAYLOAD) 998/44G	**$48,345.00**

XLT 300A Crew Cab 6.5 Ft. Box 157" WB

[ ]	**Base Price W3L 4x4** (5.0L 4V V8 engine 7050 GVWR) 995/44G	**$49,160.00**
[ ]	**Base Price W3L 4x4** (3.5L V6 EcoBoost™ engine 7050 GVWR) 998/44G	**$49,160.00**

Free Standing Options	Option Code	Price
[x] **XLT Low Mid Package**	**301A**	**1585.00**

- Cloth 40/20/40 front seats (8-way power driver's seat w/ power driver lumbar; Armrest w/storage and Locking storage under 20% seat)
- 6" Angular Bright Anodized Step Bar
- Chrome Door and Tailgate handles
- Grille – Black Painted Coast to Coast Black Mesh with chrome center bar
- Dual-zone Electronic Automatic Temperature Control (DEATC)

[ ] **XLT Mid Package (Includes XLT Low Mid Package 301A)** — **302A** — **5440.00**

- Connected Navigation
- **Ford Co-Pilot360™ Assist 2.0**
  - 360-Degree Camera
  - Adaptive Cruise Control (ACC) (Lane Centering, Predicitive Speed Assist, & Stop & Go)
  - AEB Oncoming
  - Driver State Detection
  - Evasive Steering Assist
  - Front Parking Sensors
  - Towing Technology (Pro Trailer Backup Assist™ & Pro Trailer Hitch Assist™
- Auto Dimming Rear View Mirror
- Manual-folding, Power Glass Sideview Mirrors with Heat, Turn Signal, (Driver's Side), High-Intensity LED Security Approach Lamps, LED Sideview mirror Spotlights and Chrome Skull Caps (incl. interior auto-dimming rearview mirror)
- Remote Start System with Remote Tailgate Release
- Cloth 40/Console/40 Seats (10-way power driver seat w/ power lumbar, 8-way power passenger seat w/ power lumbar
- Heated Front Seats
- Intelligent Access with Push-Button Start (incl. Approach Detection)
- Power-Sliding Rear Window
- 400W Outlets (Cab & Bed)

[ ] **XLT Luxury Package** • **Includes XLT Low Mid Package 301A and XLT Mid Package 302A** • 20" Chrome-Like PVD Wheel • B&O Sound System by Bang & Olufsen with HD Radio™ (8 speakers including subwoofer) • Power-Adjustable Pedals • Mobile Office Package	**303A**	**9915.00**
[ ] **FX4 Off Road Package (4X4 Only)** • Electronic-locking rear-axle • 4x4 "FX4 Off-Road" bodyside decal • Hill Descent Control™ • Off-Road tuned front shock absorbers • Monotube Rear Shocks • Rock Crawl Mode • Skid plates: fuel tank, transfer case and front differential	**55A**	**1095.00**
[x] **Mobile Office Package (301A & 302A Packages Only)** • Console Worksurface • 400W Outlets (Cab & Bed) • Bucket Seats	**50M**	**1045.00**
[ ] **Tow Haul Package** • Integrated Brake Controller • Locking Rear Axle • Upgraded Rear Bumper	**53T/67T/XL_**	**785.00**
[ ] **Bed Utility Package** • Tailgate Step • Tailgate Work Surface • Four (4) Pickup Box Tie-Down Plates • LED Box Lighting	**68L**	**635.00**
[ ] Black Platform Running Boards **(Base XLT 300A Only)**	18B	250.00
[ ] Trailer Tow Mirrors Sideview Manual-folding, Manual Telescoping Power Glass with Heat, Turn Signal Auto-Dimming Feature (Driver's Side), High-Intensity LED Security Approach Lamps, LED Side-mirror Spotlights and Black Skull Caps **Requires Tow Haul Package (53T/67T/XL)**	54Y/59S	590.00
[ ] Vinyl Black Flooring	16G	N/C
[ ] LT265/70R18C BSW All-Terrain (A/T) Tires **(301A and 302A Only)**	T8C	295.00
[ ] Skid Plates 4x4 Only	413	160.00
[ ] Axle Locking Rear	XL_	570.00
[ ] Daytime Running Lights	942	50.00
[ ] Engine Block Heater	41H	190.00
[ ] Back up Alarm System	85H	220.00
[ ] Front License Plate Holder	153	N/C
[ ] SecuriCode Wired Keypad	DIO	455.00
[ ] Front and Rear Molded Splash Guards	DIO	150.00
[ ] Spray in Bedliner	96W	595.00
[ ] Bed Liner – Plastic, Drop-in (NA w/ Cable Lock – 47S)	96P	350.00
[ ] Tonneau Pickup Box Cover – Soft Folding	96T	590.00
[ ] Tonneau Pickup Box Cover – Hard Folding	96X	1200.00
[ ] Tonneau Pickup Box Cover – Retractable	96J	2200.00
[ ] LED Warning Strobes – Amber	94S	650.00
[ ] LED Warning Strobes – Amber/White	94W	650.00

TOTAL $50,975.00 ea

Colors & Trim Availability:

Exterior		Interior (Med. Earth Grey)(AS)
Agate Black	(UM)	[ ]
Oxford White	(YZ)	[ ]
Carbonized Gray	**(M7)**	**[x]**
Avalanche	(DR)	[ ]
Iconic Silver	(JS)	[ ]
Atlas Blue	(B3)	[ ]
Space White	(A3)	[ ]
SPECIAL PAINT		
Rapid Red Clearcoat Add $495.00	**[D4}**	**[ ]**
Vermillion Red Add $660.00	**[E4}**	**[ ]**
School Bus Yellow Add $660.00	**[B1]**	**[ ]**
Omaha Orange Add $660.00	**[MB]**	**[ ]**

CANFIELD
EQUIPMENT
SERVICE, INC.

21533 Mound Road, Warren, MI 48091
Phone: 586.757.2020 Fax: 586.757.2294

QUOTATION 1

QUOTE NO.	173501
DATE	05/ 7/25
EXPIRES	05/28/25

SUBMITTED TO 5403400
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
PHONE: 248-540-3410

SHIP TO:
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
CONTACT: Jtownsend@villagebeverlyhill

TERMS	F.O.B	SALES REP	WRITTEN BY	POOL NO.	TAG
N30		K ENGBLOM	KE		
YOUR INQUIRY		MAKE	MODEL	YEAR	EST SHIP DATE

We hereby submit our quotation, subject to all terms and conditions as set forth below or on attached sheets.

Furnish and install the following equipment into a
2025 Ford F150 with 5'6" bed

Whelen
2 DUO Green/Amber T-ION Series LED
*Mounted in the grille front facing
$558.00 Installed

Whelen
1 Single Avenger II DUO Amber/Green
*Mounted behind the windshield, upper passenger side
$379.44

Whelen
2 DUO Green/Amber U180 Series LEDs
1 F150 Sideview Mirror Mount Kit
*Mounted under the sideview mirror
$816.17 Installed

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CANFIELD
EQUIPMENT
SERVICE, INC.

21533 Mound Road, Warren, MI 48091
Phone: 586.757.2020 Fax: 586.757.2294

QUOTATION 2

QUOTE NO.	173501
DATE	05/ 7/25
EXPIRES	05/28/25

SUBMITTED TO 5403400
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
PHONE: 248-540-3410

SHIP TO:
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
CONTACT: Jtownsend@villagebeverlyhill

TERMS F.O.B	SALES REP	WRITTEN BY	POOL NO.	TAG
N30	K ENGBLOM	KE		
YOUR INQUIRY	**MAKE**	**MODEL**	**YEAR**	**EST SHIP DATE**

We hereby submit our quotation, subject to all terms and conditions as set forth below or on attached sheets.

Whelen
4 DUO Green/Amber T-ION Series LED
*Mounted between the bumper and tailgate rear facing
$1,116.00 Installed

Canfield
1 Shop Supplies / Power Distribution
1 Toggle Switch
*Single toggle switch to turn all lights on, wired to B+
$250.00

BAKFlip / Decked
1 MX4 Hard Folding Tonneau Cover
1 XF4G Decked Drawer System
$3,123.88 Installed

This quotation may be withdrawn by us if order is not placed within 30 days. Please refer to the above quotation number when placing order.

Customer PO_____ Dealer Code_____
Authorized Signature_____

EST	SUB TOTAL	6243.49
EST	SALES TAX	0.00
	EST TOTAL	6243.49

CANFIELD
EQUIPMENT
SERVICE, INC.

21533 Mound Road, Warren, MI 48091
Phone: 586.757.2020 Fax: 586.757.2294

QUOTATION 1

QUOTE NO.	173502
DATE	05/ 7/25
EXPIRES	05/28/25

SUBMITTED TO 5403400
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
PHONE: 248-540-3410

SHIP TO:
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
CONTACT: Jtownsend@villagebeverlyhill

TERMS	F.O.B	SALES REP	WRITTEN BY	POOL NO.	TAG
N30		K ENGBLOM	KE		
YOUR INQUIRY		MAKE	MODEL	YEAR	EST SHIP DATE

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$558.00 Installed

Whelen
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$379.44

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2 DUO Green/Amber U180 Series LEDs
1 F150 Sideview Mirror Mount Kit
*Mounted under the sideview mirror
$816.17 Installed

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CANFIELD
EQUIPMENT
SERVICE, INC.

21533 Mound Road, Warren, MI 48091
Phone: 586.757.2020 Fax: 586.757.2294

QUOTATION 2

QUOTE NO.	173502
DATE	05/ 7/25
EXPIRES	05/28/25

SUBMITTED TO 5403400
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
PHONE: 248-540-3410

SHIP TO:
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
CONTACT: Jtownsend@villagebeverlyhill

TERMS F.O.B	SALES REP	WRITTEN BY	POOL NO.	TAG
N30	K ENGBLOM	KE		
YOUR INQUIRY	**MAKE**	**MODEL**	**YEAR**	**EST SHIP DATE**

We hereby submit our quotation, subject to all terms and conditions as set forth below or on attached sheets.

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*Mounted between the bumper and tailgate rear facing
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*Single toggle switch to turn all lights on, wired to B+
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BAKFlip / Decked
1 MX4 Hard Folding Tonneau Cover
1 XF4G Decked Drawer System
$3,123.88 Installed

This quotation may be withdrawn by us if order is not placed within 30 days. Please refer to the above quotation number when placing order.

Customer PO_____ Dealer Code_____
Authorized Signature_____

EST	SUB TOTAL	6243.49
EST	SALES TAX	0.00
	EST TOTAL	6243.49

Lunghamer Ford Of Owosso

May 2, 2025

City of Beverly Hills
Attn: Jacob Townsend
18500 W 13 Mile Rd.
Beverly Hills, MI 48025

Dear Jacob Townsend:

Price on 2025 Vehicle State of Michigan Contract# MA 240000001208 and Macomb County Contract# 21-18 Bid:

(1) 2025 Ford Explorer 4WD Active in Carbonized Gray $44,370.00 ea

Order Cutoff Date: TBD.

Delivery date: Approximately 90-120 Days A.R.O.

Standard Service Contract: 36,000 miles or 36 months factory Bumper to Bumper Warranty and 60,000miles 60 months Powertrain Warranty. Service to be handled by your local Ford Dealer.

Ford Motor Company does not guarantee delivery---Ford Motor Company will make reasonable efforts to schedule orders received prior to fleet order cut-off date.

Payment requirements: All departments to pay on delivery of vehicle. 10-day grace period will be given if previous arrangements have been made. A $9.50 per day floor plan will be charged if payment is not at the dealership within 10 days of delivery of the vehicle (s).

If you have any questions please call me, 888-92-FLEET (923-5338)

Respectfully Submitted,

Bill Campbell

Bill Campbell
Government & Fleet Sales

2025 Explorer RWD and 4x4 Fleet, 4-Door
Major Standard Equipment

MECHANICAL
- Electric Parking Brake with Auto Hold
- Engine – 2.3L EcoBoost® I-4 with Auto Start-Stop Technology
- Four-Wheel Disc Brakes with Anti-Lock Brake System (ABS), Electric Brake Boost and ESC
- Standard-Duty Front and Rear Brake Calipers
- Transmission – 10-Speed Automatic

EXTERIOR
- 18.6 Gallon Tank
- Active Grille Shutters
- Black – Molded-in-Color
  - — Liftgate Scuff
  - — Wheellip Molding
- Body-Color
  - — Bumpers, Front and Rear (Body-Color Upper, Black Lower)
  - — Rear Spoiler
- Class III Trailer Tow Package
- Configurable Daytime Running Lamps (DRL) (Activates LED Low Beam Headlamps with Courtesy Delay)
- Door Handles – Body-Color
- Easy Fuel® Capless Fuel Filler
- Front Air Curtain
- Grille – Black Mesh Insert with Chrome Bars
- LED Taillamps with Amber Turn Signals
- Lower Bodyside Cladding – Black with Chrome Accent
- Power Liftgate
- Privacy Glass – Second Row, Third Row and Liftgate
- Rear Bumper Step Pad – Molded-In-Color Black
- Roof-Mounted Antenna
- Roof-Rack Side Rails – Black
- Tires — P255/65R18 All-Season (A/S) BSW
  - — Mini Spare
- Wheels – 18" Sparkle Silver-Painted Aluminum
- Wipers
  - — Windshield – Variable Intermittent/Continuous
  - — Rear Window – Single-Speed Intermittent/Continuous

INTERIOR/COMFORT
- Beverage Holders (10) – Front Row, four (4), Second Row, four (4), Third Row, two (2)
- Center Floor Console – Front
  - — Armrest
  - — Storage Bin
- Climate Control
  - — Tri-Zone Electronic Temperature Control
  - — Cabin Particulate Air Filter
  - — Rear Auxiliary Controls
- Door-Sill Scuff Plates, Front and Rear – Black Molded-inColor (MIC), embossed with "EXPLORER"
- Driver and Front Passenger Seat Back Map Pockets
- Driver's Side Footrest
- Floor Mats – Black Carpet, Front and Second Rows
- Grab Handles – Front-Passenger; Second Row – two (2), includes Coat Hooks
- Illuminated Visor Vanity Mirrors (Driver and Front Passenger)
- Instrument Panel Cluster
  - — 12.3" Color LCD Productivity Screen
  - — Message Center
  - — Outside Temperature Display
  - — Trip Computer
- Lighting
  - — Front Overhead Console Mounted Map Lights
  - — Illuminated Entry System
  - — Rear Cargo Area Light
  - — Second and Third Row Dome Lights
- Overhead Console with Sunglasses Storage
- Powerpoints (12V) – three (3)
  - — Front row; one (1) in Media Hub, one (1) in center console
  - — Second row; one (1) in rear section of center console
  - — Rear Cargo Area; one (1)
- Rotary Gear Shift Dial
- Seats (Refer to the Color & Trim Availability section for additional information)
  - — Unique Cloth
  - — Front Captain's Chairs
  - — 10-way Power Driver's
  - — 4-way Power Passenger
  - — First Row Heated Seats
  - — Seats- Second Row Captain's Chairs with E-Z Entry and Armrest
- Steering Column – Manual Tilt/Telescoping
- Steering Wheel with Mounted Features
  - — 5-Way Controls
  - — Audio Controls
  - — Cruise Controls
- Windows, Power – Front and Rear. Front Row One-TouchUp/Down Feature (door mounted controls)

SAFETY/SECURITY
- AdvanceTrac™ with RSC® (Roll Stability Control™)
- Airbags
  - — First Row: Driver and Passenger Dual-Stage Front, Frontseat Side and Driver/Passenger Knee
  - — All Rows: Safety Canopy® Side-Curtain with Rollover Sensor
- Center High-Mounted Stop Lamp (CHMSL)
- Curve Control
- Day/Night Rearview Mirror – Manually Adjustable
- Door Locks, Power
  - — Auto lock/Auto unlock
  - — Child-Safety Rear
- Head Restraints
  - — Two-Way Manually Adjustable (Up/Down) – All Rows. Second Row Center Head Restraint is fixed position.
- Headlamps
  - — LED Low and High Beams with Courtesy Delay
  - — Wiper-Activated
- Hooks
  - — Cargo Net – Four (4)
  - — Load Floor Tie-Down – Four (4)
- Individual Tire Pressure Monitoring System (ITPMS)
- LATCH (Lower Anchors and Tether Anchors for Children) on Second and Third Row Outboard Seating Positions
- Mirrors, Sideview – Power and Heated Glass, ManualFolding, Security Approach Lamps and Black Caps
- Perimeter Alarm
- Personal Safety System™2
- Rear-Window Defroster and Washer
- Safety Belts
  - — Front Row – Belt-Minder® (Front Safety Belt Reminder)
  - — Front Row – Adjustable Height
  - — Second Row – Outboard and Center Seat Shoulder
  - — Third Row – Outboard
- SecuriLock® Passive Anti-Theft System (PATS)
- SOS Post-Crash Alert System™

FORD CO-PILOT360 TECHNOLOGY
- Ford Co-Pilot360™ Assist+
  - — Adaptive Cruise Control with:
    - ○ Stop-and-Go
    - ○ Lane Centering
  - — Auto High-Beam Headlamps
  - — BLIS® (Blind Spot Information System) with Cross-Traffic Alert, Exit Warning and Trailer Coverage
  - — Evasive Steering Assist
  - — Intersection Assist 2.0
  - — Lane-Keeping System ○ Lane-Keeping Alert
    - ○ Lane-Keeping Assist
    - ○ Driver Alert
  - — Pre-Collision Assist with Automatic Emergency Braking (AEB)
    - ○ Pedestrian Detection
    - ○ Forward Collision Warning
    - ○ Dynamic Brake Support
  - — Rear Cross Traffic Braking
  - — Rear View Camera
  - — Reverse Parking Assist
  - — Post-Collision Braking
- Headlamps – Autolamp (Automatic On/Off)
- Hill Start Assist
- Side-Wind Stabilization
- Trailer Sway Control

FUNCTIONAL
- 3.58 Non-Limited-Slip Rear Axle (RWD and 4WD)
- 4-Door Intelligent Access (Lock/Unlock) with Push-Button Start
- 5G LTE Modem and Hotspot
- Ford Power-Up Software Update Capability
- Audio
  - — AM/FM Stereo
  - — MP3 Capable
  - — Six (6) Speakers
  - — Speed-Compensated Volume
  - — SiriusXM® with 360L
- Battery Saver

- Compass
- Electric Power-Assisted Steering (EPAS)
- FordPass Connect™
— 5G LTE Wi-Fi Hotspot connects up to 10 devices4 (if equipped) — Remotely start, lock and unlock vehicle
— Schedule specific times to remotely start vehicle
— Locate parked vehicle
— Check vehicle status
- Front and Rear Stabilizer Bars
- Independent Front and Rear Suspension
- Intelligent Oil-Life Monitor®
- Infotainment
— 13.2" Color LCD Touchscreen in IP Center-Stack
— Alexa Built-In
— Google Built-In
○ Google Assistant
○ Google Maps
○ Google Play Store
— Pinch-to-Zoom capability
— 911 Assist®
— Apple CarPlay® and Android Auto™ Wireless Compatibility
— USB Ports, First Row – One (1) "A" and One (1) "C" in Media Bin and Two (2) "C" in Center Floor Console. Second Row – Two (2) "C" and Third Row – Two (2) "C".
- Terrain Management System™ (Deep Snow/Sand Mode – 4WD Only)

4WD MODELS INCLUDE:
- Hill Descent Control
- Intelligent 4WD

[x] Explorer 4x4 Active Price K8D/200A $39,895.00

Explorer Active Options	Option Code	Price
[x] **Active Comfort Package** • Heated Steering Wheel • Front Fascia – LED Fog Lamps Skid Plate Elements, Front— Silver-Painted – LED Signature Lighting • Remote Start System • Seats – 8-Way Power Passenger Seat – ActiveX™ Seating Material • Universal Garage Door Opener (UGDO) • 20" Aluminum Wheels	**68A**	**4475.00**
[ ] **Cargo Management System** • Cargo Net • Cargo Well Rubber Mat • Reversible Load Floor	**21F**	**240.00**
[ ] Twin Panel Moonroof **(Available w/68A Package and 4WD Only)**	439	1695.00
[ ] Seats- Second Row Captain's Chairs with E-Z Entry and Armrest	17H	N/C
[x] Second Row 35/30/35 Bench with E-Z Entry and Armrests	**17U**	**N/C**
[ ] Floor Liners, Front and Second Rows	16B	200.00
[ ] Engine Block Heater	41H	190.00
[ ] License Plate Bracket Front	153	N/C
[ ] Daytime Running Lights	942	45.00
[ ] Remote Starter **(Included in 68A Package)**	Parts	550.00
[ ] Extra keys with Integrated Keyless Entry ____@ $300.00 ea =_____	SIG	_____

Total Price $44,370.00 ea

2025 Explorer Active Colors

Exterior Colors		Interior Colors Ultra Dark Space Gray (8H/SH)
Oxford White	[YZ]	[ ]
Agate Black	[UM]	[ ]
Carbonized Gray Metallic	**[M7]**	**[x]**
Extra Cost Paint ($495.00)		
Vapor Blue Metallic	[K1]	[ ]
Extra Cost Paint ($795.00)		
Star White Metallic Tri-coat	[AZ]	[ ]

CANFIELD
EQUIPMENT
SERVICE, INC.

21533 Mound Road, Warren, MI 48091
Phone: 586.757.2020 Fax: 586.757.2294

QUOTATION 1

QUOTE NO.	173503
DATE	04/29/25
EXPIRES	05/28/25

SUBMITTED TO 5403400
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
PHONE: 248-540-3410

SHIP TO:
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
CONTACT: Jtownsend@villagebeverlyhill

TERMS	F.O.B	SALES REP	WRITTEN BY	POOL NO.	TAG
N30		K ENGBLOM	KE		
YOUR INQUIRY		MAKE	MODEL	YEAR	EST SHIP DATE

We hereby submit our quotation, subject to all terms and conditions as set forth below or on attached sheets.

Furnish and install the following equipment into a
2025 Ford Explorer

Whelen
2 DUO Green/Amber ION Series LED
*Mounted in the grille front facing
$610.90 Installed

Whelen
1 Single Avenger II DUO Amber/Green
*Mounted behind the windshield, upper passenger side
$379.44

Whelen
2 DUO Green/Amber U180 Series LEDs
1 Explorer Sideview Mirror Mount Kit
*Mounted under the sideview mirror
$816.17 Installed

*** CONTINUED NEXT PAGE ***

CANFIELD
EQUIPMENT
SERVICE, INC.

21533 Mound Road, Warren, MI 48091
Phone: 586.757.2020 Fax: 586.757.2294

QUOTATION 2

QUOTE NO.	173503
DATE	04/29/25
EXPIRES	05/28/25

SUBMITTED TO 5403400
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
PHONE: 248-540-3410

SHIP TO:
BEVERLY HILLS PUBLIC SAFETY
18600 13 MI RD

BEVERLY HILLS MI 48025
CONTACT: Jtownsend@villagebeverlyhill

TERMS	F.O.B	SALES REP	WRITTEN BY	POOL NO.	TAG
N30		K ENGBLOM	KE		
YOUR INQUIRY		MAKE	MODEL	YEAR	EST SHIP DATE

We hereby submit our quotation, subject to all terms and conditions as set forth below or on attached sheets.

Whelen
2 DUO Green/Amber ION Series LED
*Installed side facing behind the rear cargo windows
$610.90 Installed

Whelen
2 DUO Green/Amber ION Series LED
*Installed rear facing on the upper portion of the hatch
$610.90 Installed

Canfield
1 Shop Supplies / Power Distribution
1 Toggle Switch
*Single toggle switch to turn all lights on, wired to B+
$250.00

This quotation may be withdrawn by us if order is not placed within 30 days. Please refer to the above quotation number when placing order.

Customer PO_____ Dealer Code_____
Authorized Signature_____

EST	SUB TOTAL	3278.31
EST	SALES TAX	0.00
	EST TOTAL	3278.31

To: Honorable President George; Village Council Members

From: Neil Johnston, Public Services Director

CC: Warren Rothe, Village Manager

Subject: FY 2025/2026 Road Improvement Project

Date: May 16, 2025

A memorandum from our engineering firm, Hubbell, Roth, and Clark, Inc. is attached describing the bid results for the FY 25/26 Road Improvement Project. Brad Shepler from HRC is in attendance to answer questions. Administration is recommending Hutch Paving to complete this project.

Suggested Resolution:
Be it resolved, The Beverly Hills Village Council approves the construction proposal, from Hutch Paving, Inc., for the FY 2025/2026 Road Improvement Project in the amount of $1,189,917.01, and the inclusion of a 10% construction contingency, for the total amount of $1,308,909.00. Funds are available in Accounts 203-449-926.02 (Local Streets).

HUBBELL, ROTH & CLARK, INC
CONSULTING ENGINEERS SINCE 1915

555 Hulet Drive
Bloomfield Hills, MI 48302-0360

248-454-6300

www.hrcengr.com

May 15, 2025

Village of Beverly Hills
18500 W. 13 Mile Rd.
Beverly Hills, MI 48025

Attention: Mr. Warren Rothe, Village Manager

Re: FY 2025/2026 Road Improvements Project — HRC Job No. 20240257
Bid Results

Dear Mr. Rothe,

On May 13, 2025, the Village received and opened bids for the subject project utilizing a competitive bidding process. A total of nine (9) bids were opened and are summarized as follows:

Asphalt Specialists, LLC	$1,138,468.00	Pro-Line Asphalt Paving Corp.	$1,276,415.00
Hutch Paving, Inc.	$1,189,917.01	Al's Asphalt Paving Co.	$1,299,573.75
Best Asphalt, Inc.	$1,198,209.40	Cadillac Asphalt, LLC	$1,362,331.87
Allied Construction Co.	$1,229,987.55	R&R Asphalt	$1,398,890.48
Florence Cement	$1,269,984.49		

The three (3) lowest bidders were within 5% of each other with Asphalt Specialists, LLC being the lowest bidder with a proposed project price of $1,138,468.00. Copies of the Bid Tab are enclosed for your reference and distribution. These bids were below the final pre-bid Engineer's Opinion of Probable Cost on this Contract.

HRC performed a review of the submitted bid packages. A complete bid package should include:

1. Base Bid Proposal Form and Bid Bond
2. Signed acknowledgement of Addendum No. 1
3. A Proposed Construction Schedule
4. Signed Iran-Linked Business Vendor Certification

Of the three (3) lowest bidders, only Hutch Paving, Inc of Warren, MI provided a complete bid package. The lowest bidder, Asphalt Specialists, LLC of Pontiac, Michigan did not provide a proposed construction schedule and did not sign/acknowledge Addendum No. 1. Best Asphalt, Inc. of Romulus, Michigan did not provide a proposed construction schedule.

HRC also reviewed Bidder provided references and work history and confirmed that each of the three low bidders have shown the successful completion of project of comparable size and scope indicating the capability of performing the work included in this Contract.

Please note that the Village's Contract provisions include the following language in the Instructions to Bidders and Proposal sections to aid in the selection process for the Village;

- The Owner reserves the right to accept any Proposal, to reject any or all Proposals, and to waive any defects or irregularity in the Proposal if it appears advantageous to the Owner to do so.
- The Owner, at its sole discretion, reserves the right to award to the Bidder who, in the sole determination of the Owner, will best serve the interest of the Owner. The Owner reserves the right to accept any bid, to reject any or all bids, to waive any and all informalities involving price, time, or changes in the work, and to negotiate contract terms with the successful Bidder, and the right to disregard all nonconforming, nonresponsive, unbalanced or

conditional bids.

- The Owner reserves the right to reject the bid of any Bidder if the Owner believes that it would not be in the best interest of the Project to make an award to that Bidder, whether because the bid is not responsive or the Bidder is unqualified, of doubtful financial ability, or fails to meet any other pertinent standard or criteria established by the Owner.

If desired, the Village may hold a pre-award meeting with the low bidders to review additional information relative to proposed scheduling, staffing, and coordination to aid in the decision-making process.

It is recommended that the Village approve a 10% construction contingency to whichever contract price is selected by the Village. Construction is anticipated to be completed by September 13, 2025 per the Contract provisions.

If you have any questions or require any additional information, please contact the undersigned.

Very truly yours,

HUBBELL, ROTH & CLARK, INC.

Adam Mansfield, E.I.T.
Graduate Engineer II

Attachment

pc: Village of Beverly Hills; N. Johnston
HRC; D. Mitchell, B. Shepler, J. Nagle, File

BID TABULATION
FY '25/26 ROAD IMPROVEMENT PROGRAM
VILLAGE OF BEVERLY HILLS
OAKLAND COUNTY, MICHIGAN

Bids Due: Tuesday, May 13, 2025 at 11:00 a.m.
HRC Job # 20240257

				Asphalt Specialists, LLC 1780 E. Highwood Pontiac, MI 48340 Phone: (248) 334-4570		**Hutch Paving, Inc.** 3000 E. Ten Mile Rd Warren, MI 48091 Phone: (989) 980-4201		**Best Asphalt, Inc.** 6334 N. Beverly Plaza Romulus, MI 48174 Phone: (734) 729-9440	
	Item	Quantity	Unit	Unit Price	Total Cost	Unit Price	Total Cost	Unit Price	Total Cost
1.	Mobilization, Max 5%	1	LS	$55,500.00	$55,500.00	$20,000.00	$20,000.00	$36,000.00	$36,000.00
2.	Color Audio-Video Route Survey	1	LS	$1,800.00	$1,800.00	$1,900.00	$1,900.00	$3,480.00	$3,480.00
3.	Cold Milling HMA, 2 Inch	2,655	syd	$3.00	$7,965.00	$3.75	$9,956.25	$4.20	$11,151.00
4.	Cold Milling Pavt, Profile	6,000	syd	$3.00	$18,000.00	$2.17	$13,020.00	$3.00	$18,000.00
5.	HMA Surface, Rem	12,350	syd	$3.00	$37,050.00	$5.68	$70,148.00	$6.00	$74,100.00
6.	Pavt Repr, Rem, Special (As Needed)	100	syd	$25.00	$2,500.00	$30.00	$3,000.00	$66.00	$6,600.00
7.	Sidewalk, Rem	66	syd	$60.00	$3,960.00	$25.00	$1,650.00	$18.00	$1,188.00
8.	Curb and Gutter, Rem (As Needed)	100	lft	$15.00	$1,500.00	$18.50	$1,850.00	$24.00	$2,400.00
9.	Sign, Remove, Salvage and Reinstall	5	ea	$750.00	$3,750.00	$350.00	$1,750.00	$270.00	$1,350.00
10.	Structure, Adjust	38	ea	$950.00	$36,100.00	$1,750.00	$66,500.00	$600.00	$22,800.00
11.	Structure, Reconstruct (As Needed)	5	vft	$1,200.00	$6,000.00	$400.00	$2,000.00	$960.00	$4,800.00
12.	Aggregate Base, 21AA, CIP, Special	1,039	ton	$17.00	$17,663.00	$35.00	$36,365.00	$48.00	$49,872.00
13.	HMA, 4EML, Mod	4,961	ton	$130.00	$644,930.00	$128.71	$638,530.31	$130.00	$644,930.00
14.	Hand Patching, 4EML (As Needed)	25	ton	$130.00	$3,250.00	$175.00	$4,375.00	$360.00	$9,000.00
15.	Station Grading, Type I, Mod	32.8	sta	$1,200.00	$39,360.00	$995.00	$32,636.00	$960.00	$31,488.00
16.	Station Grading, Type II, Mod	12.7	sta	$2,800.00	$35,560.00	$5,000.00	$63,500.00	$1,200.00	$15,240.00
17.	Butt Joint	783	lft	$8.00	$6,264.00	$2.65	$2,074.95	$4.00	$3,132.00
18.	Longitudinal Joint Sealant	7,790	lft	$4.50	$35,055.00	$3.50	$27,265.00	$3.85	$29,991.50
19.	Pavt Repr, Nonreinf Conc, 7 inch, Special (As Needed)	100	syd	$125.00	$12,500.00	$85.00	$8,500.00	$86.25	$8,625.00
20.	Curb Ramp, Conc, 6 inch	590	sft	$11.00	$6,490.00	$19.85	$11,711.50	$12.10	$7,139.00
21.	Detectable Warning Surface	103	lft	$57.00	$5,871.00	$90.00	$9,270.00	$82.50	$8,497.50
22.	Curb and Gutter, Conc, Det F4, Special, Nottingham (As Needed)	50	lft	$60.00	$3,000.00	$43.00	$2,150.00	$66.00	$3,300.00
23.	Curb and Gutter, Conc, Det F4, Special, Kirkshire (As Needed)	50	lft	$60.00	$3,000.00	$43.00	$2,150.00	$66.00	$3,300.00
24.	Dr Structure Frame and Cover	17	ea	$750.00	$12,750.00	$650.00	$11,050.00	$1,155.00	$19,635.00
25.	Shld, 21AA	145	ton	$40.00	$5,800.00	$45.00	$6,525.00	$55.00	$7,975.00
26.	Subgrade Undercutting, Type IV (As Needed)	260	cyd	$75.00	$19,500.00	$70.00	$18,200.00	$93.50	$24,310.00
27.	1" x 3" Crushed Concrete, Special	740	ton	$27.00	$19,980.00	$40.00	$29,600.00	$55.00	$40,700.00
28.	Granular Material, Class II	13	cyd	$60.00	$780.00	$40.00	$520.00	$41.80	$543.40
29.	Site Restoration	5,240	syd	$6.00	$31,440.00	$10.50	$55,020.00	$10.30	$53,972.00
30.	Property Protection Fence	100	lft	$11.00	$1,100.00	$2.00	$200.00	$4.40	$440.00
31.	Maintenance Gravel (As Needed)	50	ton	$17.00	$850.00	$20.00	$1,000.00	$55.00	$2,750.00
32.	Soil Erosion and Sedimentation Control	1	LS	$9,200.00	$9,200.00	$7,500.00	$7,500.00	$16,500.00	$16,500.00
33.	Maintaining Traffic	1	LS	$40,000.00	$40,000.00	$20,000.00	$20,000.00	$25,000.00	$25,000.00
34.	Allowance for Permit Fees	1	LS	$10,000.00	$10,000.00	$10,000.00	$10,000.00	$10,000.00	$10,000.00
TOTAL AMOUNT OF BID					**$1,138,468.00**		**$1,189,917.01**		**$1,198,209.40**

ENGINEER: John Nagle, P.E.
Hubbell, Roth & Clark, Inc.
555 Hulet Drive
Bloomfield Hills, MI 48303

Corrected by Engineer *

Additional Bids

Allied Construction Company, Inc (4th bidder) - $1,229,987.55
Florence Cement Co. (5th bidder) - $1,269,984.49
Pro-Line Asphalt Paving Corp. (6th bidder) - $1,276,415.00
Al's Asphalt Paving Co. (7th bidder) - $1,299,573.75
Cadillac Asphalt, LLC (8th bidder) - $1,362,331.87
R&R Asphalt (9th bidder) - $1,398,890.48 *

HRC
HUBBELL, ROTH & CLARK, INC
CONSULTING ENGINEERS SINCE 1915

VILLAGE OF BEVERLY HILLS

RESOLUTION DECLARING NECESSITY AND TO PROCEED WITH PROJECT AND TO DEFRAY A PORTION OF THE COSTS OF THE PROJECT BY SPECIAL ASSESSMENTS UPON SPECIALLY BENEFITED PROPERTIES (RESOLUTION NO. 2)

At a regular meeting of the Village Council of the Village of Beverly Hills, Oakland County, Michigan, held in the Council Chambers at 18500 W. Thirteen Mile Road, Beverly Hills, Michigan 48025, at 7:00 p.m. on the 20th day of May, 2025, the following resolution was offered by Councilperson _____ and supported by Councilperson _____:

WHEREAS, the Village has considered construction of the proposed improvement described below (the Project) and has further requested the establishment of a special assessment district to finance and defray a portion of the costs of the project; and

WHEREAS, the proposed improvement ("the project") is the repair of and replacements to sidewalk slabs; and

WHEREAS, the Project is designed and intended to specially benefit the properties identified in the special assessment district (the District) attached to this Resolution; and

WHEREAS, the Village Council on April 1, 2025, adopted its Resolution No. 1 declaring its tentative intent to proceed with the Project and with the establishment of the District; and

WHEREAS, plans for the Project, and an estimate of the costs of the project in the amount of $65,000 of which amount it is estimated that approximately 80% of the cost paid by the property owner and 20% of the cost paid by the Village will be defrayed by special assessments against the properties in the special assessment district, have been prepared and notice of public hearing has been duly given, according to law, to the owners of property in the District to inform them of their opportunity to present comments and objections to the Project and to the District; and

WHEREAS, a hearing was duly conducted and held on May 20, 2025, consistent with the notice, following which the Village Council determined to proceed with the project and the establishment of the district.

NOW, THEREFORE, it is hereby resolved as follows:

1. The Village Council determines that the Project is necessary.

2. The Village shall proceed with the Project.

3. The plans and specifications prepared for the Project and the cost estimate for the Project in the amount of $65,000 presented at the hearing are approved.

4. The District shall consist of the properties identified in the special assessment district attached to this Resolution and against which 80% of the cost of the project shall be assessed.

5. The District shall be designated and known as the Improvement Special Assessment District, Special Assessment District No. 1.

6. The duration of the District's existence shall be two (2) years, and unless paid in cash earlier with respect to a particular property, the special assessment shall be paid in (2) annual installments at the rate of five percent (5%) interest to be charged on said installments, with the date of the first assessment installment to be determined and set forth in the Village Council's Resolution confirming the special assessment roll.

7. The Village Finance Director shall prepare a special assessment roll that includes all lots and parcels of land within the District with the names of the respective record owners of each property, if known, and shall also include the total amount to be assessed against each property. The amount to be assessed against each property shall be based upon the proportionate amount of special benefit to be received by each property from the Project. The amount spread in each case shall be based upon the detailed estimate of costs as approved by the Village Council.

8. When the Finance Director completes the assessment roll, the Finance Director shall file it with the Village Clerk for presentation to Village Council, along with the Finance Director's certification that the roll has been prepared by the Finance Director pursuant to the May 20, 2025, Resolution of the Village Council and that in making the assessments contained in the assessment roll, the Finance Director has, as near as may be, according to the Finance Director's best judgment, conformed in all respects with the directions contained in the May 20, 2025 Resolution of the Village Council and the Village Charter and the provisions of Chapter 34 of Beverly Hills Municipal Code.

9. The Village Manager is directed to obtain firm bids from companies and/or other entities who are interested in performing the work necessary to complete the project.

AYES:
NAYES:
ABSENT:
ABSTENTIONS:

STATE OF MICHIGAN)
)ss
COUNTY OF OAKLAND)

I, CARISSA BROWN, the duly qualified and appointed Village Clerk of the Village of Beverly Hills, Oakland County, Michigan, do hereby certify that the foregoing is a true and complete copy of a Resolution adopted at a regular meeting of the Village Council held on the 20th day of May, 2025, the original of which is on file in my office.

In witness whereof, I have hereunto affixed my official signature on this 20th day of May, 2025.

_____
CARISSA BROWN, Village Clerk

Memorandum

To: Honorable President George, Village Council Members

From: Warren Rothe, Village Manager

CC: Lee Davis, Interim Public Safety Director

Re: Review and Consider Purchase of Flock Safety Cameras

Date: May 20, 2025

Included in the FY 2026 budget is the purchase of license plate reader (LPR) cameras through Flock Safety, a major supplier of LPR technology, especially within Oakland Couty. Accompanying this cover sheet is a memo from Lieutenant Van Horn and materials from Flock Safety. Lieutenant Van Horn and a representative from Flock Safety will be in attendance to answer questions and provide a more in-depth overview of this request.

Suggested Resolution:

NOW THEREFORE BE IT RESOLVED, the Village of Beverly Hills accepts the quote as prepared by Flock Safety. Funding is available in account #205-900-980.05

MEMO

To: Interim Chief Davis

From: Lieutenant Van Horn

Date: 04/26/2025

Subject: Flock Safety Vendor

Director Davis, I am requesting the Beverly Hills Public Safety Department enter a five-year contract with a License Plate Reader vendor named Flock Safety.

Flock Safety

Flock Safety is a vendor that installs a mounting pole, solar panel, and the Flock Safety Falcon camera which captures computer-readable images of license plates. This allows law enforcement agencies to compare the plate number against stolen vehicles or people suspected of being involved in criminal activities inside the Village. This information can be shared with other Law Enforcement agencies who also use Flock Safety. This creates a large network of information to assist in solving crimes.

According to Flock Safety, based on the number of public safety officers, the minimum number of Falcon cameras to purchase from Flock is six. The contract will include all permits needed for installation from the Oakland County Road Commission, Flock Safety Operating System (data transmission via LTE cellular and storage), six Falcon cameras, mounting poles, batteries, and solar panels. All maintenance, including battery swaps, cleaning of solar panels, software upgrades and replacement to components that break are included.

Privacy

Flock Safety does not have facial recognition capabilities and only holds the image of the vehicle/license plate for 30 days in their operating system. Beverly Hills Public Safety has a department general order that allows properly trained sworn officers or select non-sworn staff to have access to the Flock information. The Director or his designee will audit the system each year for compliance to privacy laws and department general orders.

Locations of the Falcon Camera (see attached photos of the locations)

There will be six mounting poles along with the Falcon camera located in specific locations:

1. Camera 1 is located on Greenfield Rd north of 13 Mile Rd
2. Camera 2 is located on Southfield Rd north of 13 Mile Rd
3. Camera 3 is located on Evergreen Rd south of Embassy Rd.
4. Camera 4 is located on Lahser Rd south of Hillview Lane.
5. Camera 5 is located on 13 Mile Rd west of Old Stage Rd.
6. Camera 6 is located on Lahser Rd south of 14 Mile Rd.

Beverly Hills Success with Flock Safety

Beverly Hills is not the first community in Oakland County to utilize Flock Safety. Many Oakland County Law Enforcement agencies including the surrounding communities of Birmingham, Royal Oak, Southfield, and Bloomfield Twp use Flock Safety. Theres no doubt that license plates of Beverly Hills residents have already been captured on surrounding Flock systems. In fact, the Beverly Hills Public Safety Dept has utilized our professional relationships with these surrounding communities. With these partnerships we have solved a few recent crimes.

For example, an elderly resident was distracted in her front yard by an unknown suspect pretending to be a contractor. A second suspect entered the rear of the home and stole items from within. In this case we developed an image of the suspect vehicle from surrounding surveillance cameras, searched for that vehicle in a local Flock system and developed an actual suspect vehicle and owner of that vehicle. The occupant in the vehicle was identified in a photo line by the victim, successful felony criminal charges were issued by the Oakland County Prosecutor's office, who successfully received a guilty plea.

In the second incident, a suspect vehicle with 3 individuals committed Identity Theft at a local Beverly Hills financial institution. Again, a neighboring Flock camera was used to identify the suspect vehicle and the owner. Oakland County Prosecutors Office issued felony Identity Theft charges on two of the suspects and again received a successful guilty plea.
Having these six cameras in the Village is like having six additional public safety officers assigned to those locations. Multiple that by the number of Flock cameras located throughout the County and you can see the value you are getting with Flock Safety, and how it assists in keeping our communities safe.

Cost of the five-year contract.

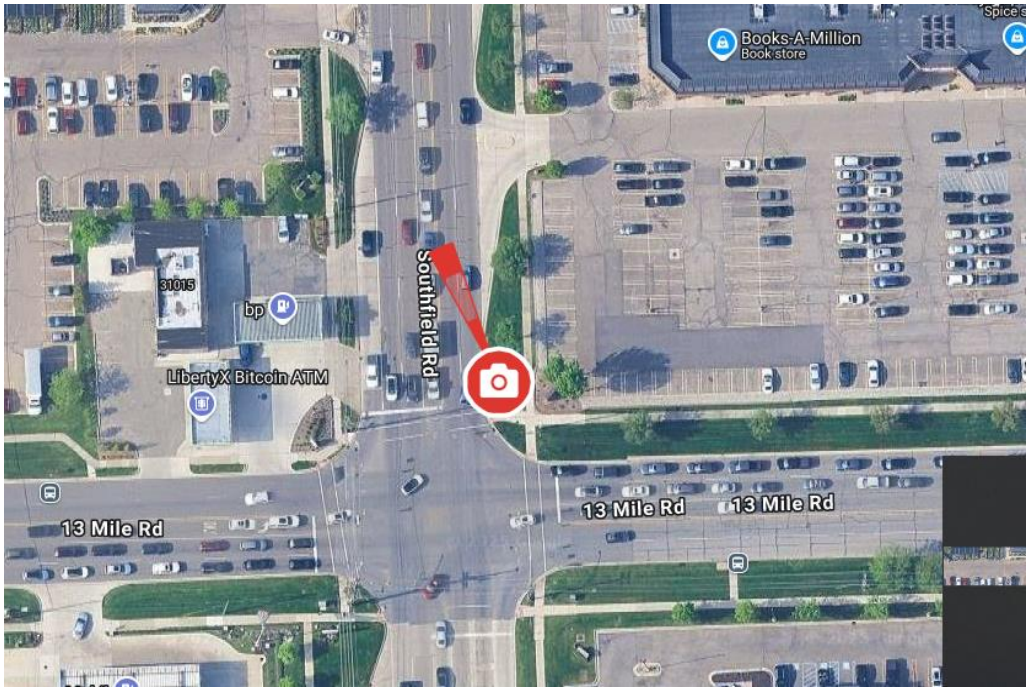
This is a 5-year contract at **$18,000** per year for six units, except for year one, which has some added permit and installation fees. Below is a breakdown.
Year 1 A onetime installation fee of **$650** per camera. **$650 x 6 units = $3,900 + $18,000 = $21,900**
Year-2 Annual **$18,000**
Year 3 Annual **$18,000**
Year 4 Annual **$18,000**
Year 5 Annual **$18,000**

The total cost for the five-year contract is **$93,900**.

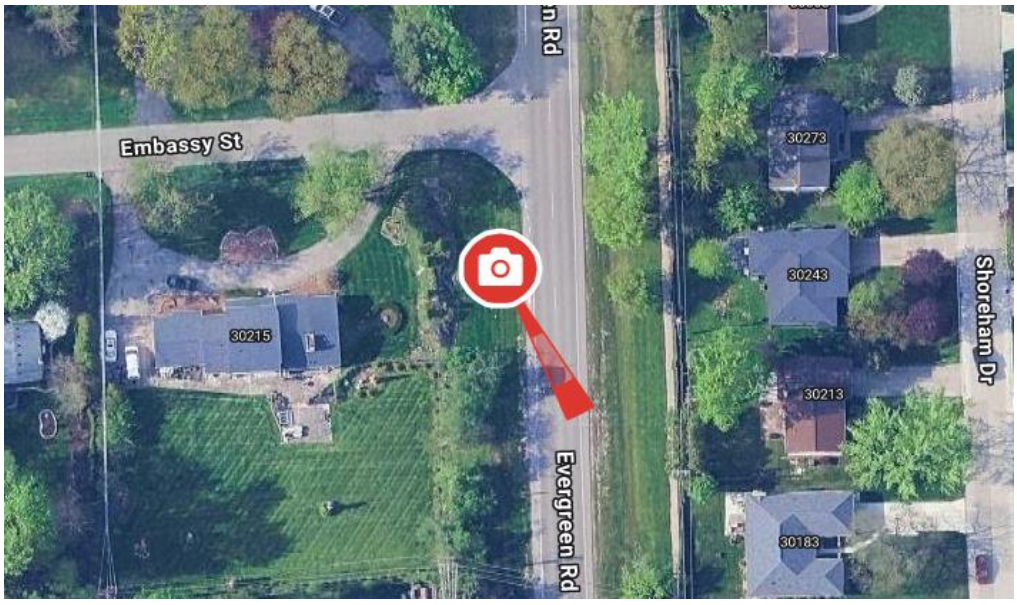
Camera 1 **Greenfield Rd and 13 Mile Rd**



Camera 2 **Southfield Rd and 13 Mile Rd**



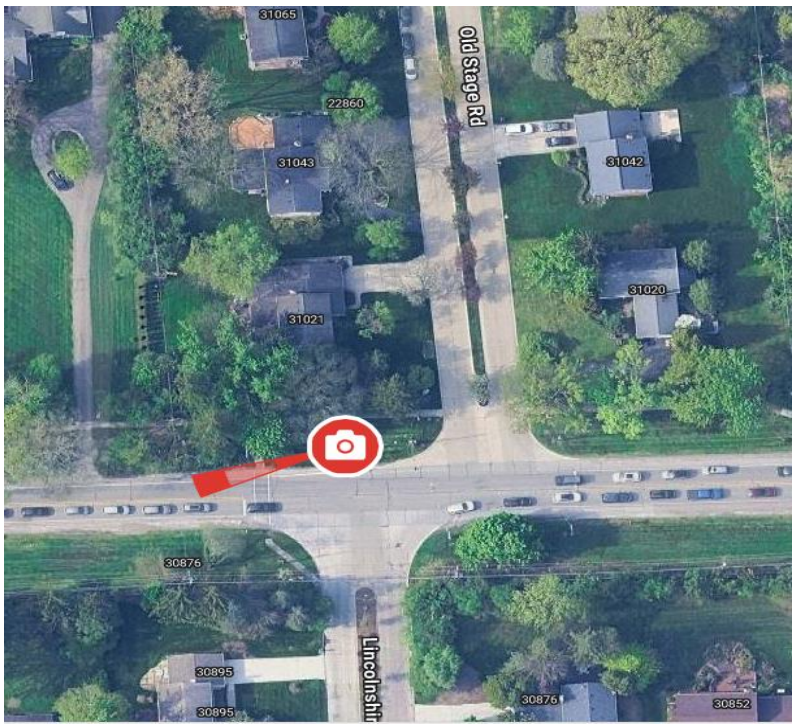
Camera 3 **Evergreen Rd and Embassy St**



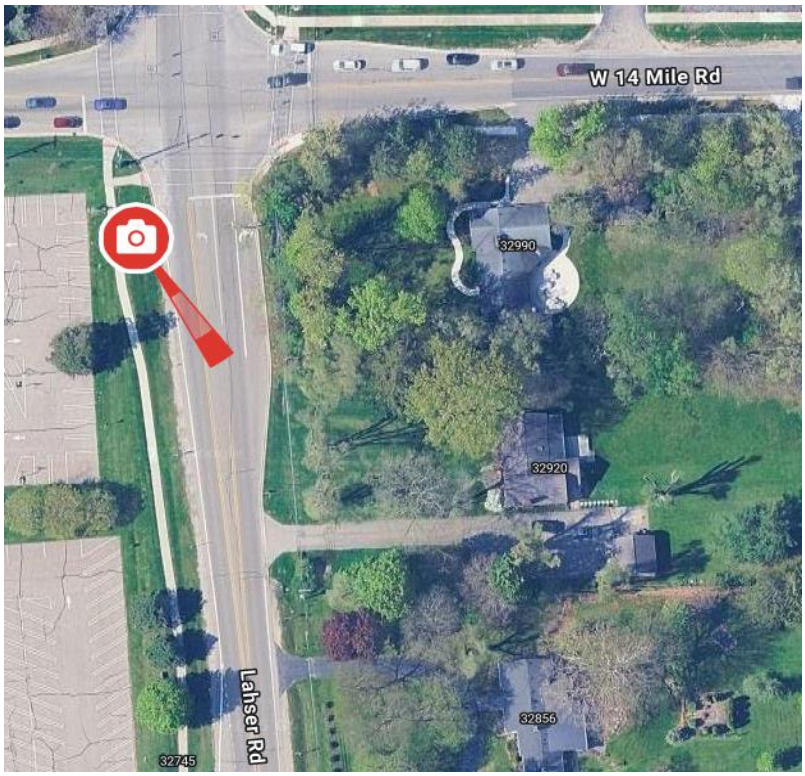
Camera 4 **Lahser Rd and Hillview Ln**



Camera 5 **13 Mile Rd and Old Stage Rd**



Camera 6 **Lahser Rd and 14 Mile Rd**


W 14 Mile Rd
32990
32920
32856
32745
Lahser Rd

Example Image of Camera



Example Image of Camera, Slolar Panel, and Pole



flock safety

Budgetary Quote

This document is for informational purposes only. Pricing is subject to change.

Bill To: 18600 W 13 Mile Rd Beverly Hills, Michigan 48025

Ship To: 18600 W 13 Mile Rd Beverly Hills, Michigan 48025

Billing Company Name: MI - Beverly Hills Dept of Public Sfty
Billing Contact Name:
Billing Email Address:
Billing Phone:

Subscription Term: 60 Months
Payment Terms: Net 30
Retention Period: 90 Days
Billing Frequency: Annual Plan - First Year Invoiced at Signing.

Hardware and Software Products

Annual recurring amounts over subscription term

Item	Cost	Quantity	Total
Flock Safety Platform			**$18,000.00**
Flock Safety Flock OS			
FlockOS ™ - Essentials	Included	1	Included
Flock Safety LPR Products			
Flock Safety LPR, fka Falcon	Included	6	Included

Professional Services and One Time Purchases

Item	Cost	Quantity	Total
One Time Fees			
Flock Safety Professional Services			
Professional Services - Standard Implementation Fee	$650.00	6	$3,900.00

Subtotal Year 1:	$21,900.00
Annual Recurring Subtotal:	$18,000.00
Estimated Tax:	$0.00
Contract Total:	$93,900.00

Taxes shown above are provided as an estimate. Actual taxes are the responsibility of the Customer. This is not an invoice – this document is a non-binding proposal for informational purposes only. Pricing is subject to change.

Billing Schedule	Amount (USD)
Year 1	
At Contract Signing	$21,900.00
Annual Recurring after Year 1	$18,000.00
Contract Total	$93,900.00

*Tax not included

Product and Services Description

FlockOS Features	Description
FlockOS ™ - Essentials	An integrated public safety platform that detects, centralizes and decodes actionable evidence to increase safety, improve efficiency, and connect the community.
Flock Safety LPR, fka Falcon	Law enforcement grade infrastructure-free (solar power + LTE) license plate recognition camera with Vehicle Fingerprint ™ technology (proprietary machine learning software) and real-time alerts for unlimited users.
Professional Services - Standard Implementation Fee	One-time Professional Services engagement. Includes site and safety assessment, camera setup and testing, and shipping and handling in accordance with the Flock Safety Standard Implementation Service Brief.

FlockOS Features & Description

FlockOS Features	Description
Community Network Access	The ability to request direct access to feeds from privately owned Flock Safety LPR cameras located in neighborhoods, schools, and businesses in your community, significantly increasing actionable evidence that clears cases.
Unlimited Users	Unlimited users for FlockOS
State Network (License Plate Lookup Only)	Allows agencies to look up license plates on all cameras opted into the Flock Safety network within your state.
Nationwide Network (License Plate Lookup Only)	With the vast Flock Safety sharing network, law enforcement agencies no longer have to rely on just their devices alone. Agencies can leverage a nationwide system boasting 10 billion additional plate reads per month to amplify the potential to collect vital evidence in otherwise dead-end investigations.
Time & Location Based Search	Search full, partial, and temporary plates by time at particular device locations
License Plate Lookup	Look up specific license plate location history captured on Flock devices
Vehicle Fingerprint Search	Search footage using Vehicle Fingerprint™ technology. Access vehicle type, make, color, license plate state, missing / covered plates, and other unique features like bumper stickers, decals, and roof racks.
Insights & Analytics	Reporting tool to help administrators manage their LPR program with device performance data, user and network audits, plate read reports, hot list alert reports, event logs, and outcome reports.
ESRI Based Map Interface	Map-based interface that consolidates all data streams and the locations of each connected asset, enabling greater situational awareness and a common operating picture.
Real-Time NCIC Alerts on Flock ALPR Cameras	Receive automated alerts when vehicles entered into established databases for missing and wanted persons are detected, including the FBI's National Crime Information Center (NCIC) and National Center for Missing & Exploited Children (NCMEC) databases.
Unlimited Custom Hot Lists	Ability to add a suspect's license plate to a custom list and get alerted when it passes by a Flock camera
Law Enforcement Network Access	The ability to request direct access to evidence detection devices from Law Enforcement agencies outside of your jurisdiction.

Beverly Hills
Department of Public Safety

Interim Director of Public Safety Lee Davis

General Order	SUBJECT	Number of Pages
X.X.1234	Automated License Plate Reader (ALPR)	7
This Directive Supersedes All Previously Issued Correspondence Relative To This Topic		
MLEAC Standards:	N/A	Effective Date: 03/27/2025 / Revised Date: 03/27/2025

I. Purpose

The purpose of this policy is to provide guidance for the capture, storage, and use of digital data obtained through the use of Automated License Plate Reader (ALPR) technology.

II. Policy

The policy of the Beverly Hills Department of Public Safety is to utilize ALPR technology to capture and store digital license plate data and images while recognizing the established privacy rights of the public. This technology shall be utilized to proactively detect, alert, and respond to wanted vehicles/persons and used to investigate criminal activity. Data is retained by the vendor for no more than 30 days.

All data and images gathered by the ALPR are for the official use of this department. Because such data may contain confidential information, it is not open to the public review.

III. Definitions

Automated License Plate Reader (ALPR) – A device that uses cameras and computer technology to capture and digitalize images from vehicles including their license plates.

ALPR Operator – Trained Department members who may utilize ALPR system/equipment. ALPR operators may be assigned to any sworn or dispatch position within the Department, and the ALPR Administrator may order the deployment of the ALPR systems for use in various efforts.

ALPR Administrator – The Detective Sergeant, serves as the ALPR Administrator for the Department.

Hot List – A list of license plates associated with vehicles of interest compiled from one or more databases including, but not limited to, NCIC, SOS, LEIN, Local BOLO's, etc.

Vehicles of Interest – Including but not limited to vehicles which are reported as stolen; display stolen license plates or tags; vehicles linked to missing and/or wanted

persons and vehicles flagged by the Department of Motor Vehicles Administration or law enforcement agencies.

Detection – Data obtained by an ALPR of an image (such as a license plate) within public view that was read by the device, including potential images (such as the plate and description of vehicle on which it was displayed), and information regarding the location of the ALPR system at the time of the ALPR's read.

Hit – Alert from the ALPR system that a scanned license plate number may be in the National Crime Information Center (NCIC) or other law enforcement database for a specific reason including, but not limited to, being related to a stolen car, wanted person, missing person, domestic violence protection order or terrorist-related activity.

IV. Procedures

A. Administration

The ALPR technology, also known as License Plate Recognition (LPR), allows for the automated detection of license plates along with the vehicle make, model, color, and unique identifiers through the Beverly Hills Department of Public Safety's ALPR's system and the vendor's vehicle identification technology. The technology is used by the Beverly Hills Department of Public Safety to convert data associated with vehicle license plates and vehicle descriptions for official law enforcement purposes, including identifying stolen or wanted vehicles, stolen license plates and missing or wanted persons. It may also be used to gather information related to active warrants, homeland security, electronic surveillance, suspect interdiction, and stolen property recovery. All installation and maintenance of the ALPR equipment, as well as, ALPR data retention and access, shall be managed by the Detective Sergeant. The Detective Sergeant will assign members under his/her command to administer the day-to-day operation of the ALPR equipment and data.

B. ALPR Administrator

The Detective Sergeant shall be responsible for compliance with the requirements of Civil Codes.

a. Only properly trained sworn officers or select non-sworn staff are allowed access to the ALPR system or to collect ALPR information.
b. Ensuring that training requirements are completed for authorized users. This will be documented on the department training sign in sheet.
c. ALPR system monitoring to ensure the security of the information and compliance with applicable privacy laws.
d. The Detective Sergeant oversees the ALPR operation is maintained.

C. Operations

Use of an APLR is restricted to the purposes outline below. Department members shall not use or allow others to use the equipment or database records for any unauthorized purpose(s).

a. An ALPR shall only be used for official law enforcement business.

b. An ALPR may be used in conjunction with patrol operations or criminal investigation.

c. Partial license plates and unique vehicle descriptions reported during major crimes should be entered into the ALPR system in an attempt to identify suspect vehicles.

d. No member of this department shall operate ALPR equipment or access ALPR data without first completing department-approved training.

e. When an alert is received, the officer shall verify an ALPR response through the Law Enforcement Information Network (LEIN) before taking enforcement action based solely on an ALPR alert. Once an alert is received, the operator shall confirm that the observed license plate from the system matches the license plate of the observed vehicle. Members will not take any police action that restricts the freedom of an individual based solely on an ALPR alert unless it has been validated. Because the ALPR alert may relate to a vehicle and may not relate to the person operating the vehicle, officers are reminded that they need to have reasonable suspicion and/or probable cause to make an enforcement stop of any vehicle. (For example, if a vehicle is entered into the system because of its association with a wanted individual, Officers should attempt to visually match the driver to the description of the wanted subject prior to making the stop or should have another legal basis for making the stop.)

f. Hot Lists. Designation of hot lists to be utilized by the ALPR system shall be made by the on duty supervisor or his/her designee. Hot lists shall be obtained or compiled from sources as may be consistent with the purpose of the ALPR system set forth in this policy. Occasionally, there may be errors in the LPR system's read of a license plate. Therefore, an alert alone shall not be the basis for police action (other than following the vehicle of interest). Prior to initiation of a stop of a vehicle or other intervention based on an alert, Department members shall undertake the following:

a. **Verification of status on a Hot List**. An officer must receive confirmation, from a Beverly Hills Department of Public Safety member or other department computer device, that the license plate

is stolen, wanted, or otherwise of interest before proceeding (absent exigent circumstances).

b. **Visual verification of license plate number**. Officers shall visually verify that the license plate of interest matches identically with the image of the license plate number captured (read) by the LPR, including both the alphanumeric characters of the license plate, state of issue, and vehicle descriptors before proceeding. Department members alerted to the fact that an observed motor vehicle's license plate is entered as a Hot List (hit) in a specific BOLO (be on the lookout) list are required to make a reasonable effort to confirm that a wanted person is actually in the vehicle and/or that a reasonable bases exists before a Department member would have a lawful basis to stop the vehicle.

c. Department members will clear all stops from the hot list alerts by indicating the positive ALPR Hit, i.e., with an arrest or other enforcement action. If it is not obvious in the text of the call as to the correlation of the ALPR Hit and the arrest, then the department member shall update with the original person inputting the vehicle in the Hot List (hit).

d. All entries and updates of the specific Hot Lists within the ALPR system will be documented by requesting department members within the appropriate general offense report. As such, specific Hot Lists shall be approved by the ALPR Administrator (or his/her designee) before initial entry within the ALPR system.
The updating of such a list within the ALPR system shall therefore be
accomplished pursuant to the approval of the department member's immediate supervisor. The hits from these data sources should be viewed as informational; created solely to bring the officers attention to the specific vehicles that have been associated with criminal activity.

All Hot Plates and suspect information entered into the ALPR system will contain the following information as a minimum:

1. Entering Department member's name and related case number
2. Short synopsis describing the nature of the originating call

D. Training

1. All authorized members shall receive department-approved training for the use and access of the ALPR system.
2. No member of this department shall operate the ALPR equipment or access ALPR data without first completing department-approved training and signing for this policy.

E. Login/Log-Out Procedure

To ensure proper operation and to facilitate oversight of the ALPR system, all users will be required to have individual credentials for access and use of the system and data, which has the ability to be fully audited.

F. Permitted/Impermissible Uses

The ALPR system, and all data collected is the property of the Beverly Hills Department of Public Safety. Department personnel may only access and use the ALPR system for official and legitimate law enforcement purposes consistent with this policy. The following uses of the ALPR system are specifically prohibited:

a. Invasion of Privacy: Except when done pursuant to a court order such as a search warrant, is a violation of this policy to utilize the ALPR to record license plates except those of vehicle that are exposed to public view (e.g., vehicles on a public road or street, or that are on private property but whose license plate(s) are visible form a public road, street, or place to which members of the public have access, such as the parking lot of a shop or other business establishment).

b. Harassment or Intimidation: It is a violation of this policy to use the ALPR system to harass and/or intimidate any individual or group.

c. Use Based on a Protected Characteristic: It is a violation of this policy to use the ALPR system or associated scan files or hot lists solely because of a person's, or group's race, gender, religion, political affiliation, nationality, ethnicity, sexual orientation, disability, or other classification protected by law.

d. Personal Use: It is a violation of this policy to use the ALPR system or associated scan files or hot lists for any personal purpose.

e. First Amendment Rights: It is a violation of this policy to use the ALPR system or associated scan files or hot lists for the purpose, or known effect of, infringing upon First Amendment Rights.

Anyone who engages in an impermissible use of the ALPR system or associated scan files, or hot lists may be subject to:

a. Criminal Prosecution

b. Civil Liability, and or

c. Administrative sanctions, up to and including termination, pursuant to and consistent with the relevant collective bargaining agreement and department policies.

G. Data Collection and Retention

The Director of Public Safey or his/her designee(s) is responsible for ensuring systems and processes are in place for the proper collection and retention of ALPR data.

ALPR vendor, Flock Safety will store the data and ensure proper maintenance and security of the data stored in their data towers. Flock Safety will purge their data at the end of the thirty (30) days of storage.

Any data retrieved from the ALPR system, such as investigative search results for a criminal case, shall be stored in the Beverly Hills Department of Public Safety's CFS or Case Report. Large amounts of data can be stored in Watchguard.

Restrictions on use of ALPR data: Information gathered or collected, and records retained by the Flock Safety cameras will not be sold, accessed, or used for any purpose other than legitimate law enforcement or public safety purposes.

H. Accountability and Safeguards

All data will be closely safeguarded and protected by both procedural and technological means. The Beverly Hills Department of Public Safety will observe the following safeguards regarding access to and use of stored data:

a. All ALPR data downloaded to the mobile workstation shall be accessible only through a login/password-protected system capable of documenting all access of information by name, date, and time.

b. Persons approved to access ALPR data under these guidelines are permitted to access the data for legitimate law enforcement purposes only, such as when the data is related to a specific criminal investigation or department-related civil or administrative action.

c. Such ALPR data may be released to other authorized and verified law enforcement officials and agencies for legitimate law enforcement purposes.

d. Every ALPR Detection Browsing Inquiry must be documented by either the associated Beverly Hills Department of Public Safety incident number, and noted in respective CFS or Case Report.

I. ALPR Data Detection Browsing Audits

It is the responsibility of the Director of Public Safety or his/her designee(s) to ensure that an audit is conducted of the ALPR Detection Browsing Inquiries once each calendar year. The department will audit a sampling of the ALPR system utilization from the prior 12- month period to verify proper use in accordance with

the above authorized uses. The audit shall randomly select at least 5 Detection Browsing Inquiries conducted by department employees during the preceding 12 month period and determine if each inquiry meets the requirements established in this policy.

The audit shall be documented on a departmental memorandum to the Director of Public Safety. The memorandum shall include any data errors found so that such errors can be corrected. After review by the Director of Public Safety, the memorandum and any associated documentation shall be filled and retained by the Beverly Hills Department of Public Safety.

J. Releasing ALPR Data

The ALPR data may be shared only with other law enforcement or prosecutorial agencies for official law enforcement purposes or as otherwise permitted by law.

a. The request is reviewed by the Detective Sergeant designee and approved before the request is fulfilled.
b. The approved request is retained on file by completing a call for service (Assist of Law Enforcement Agency) listing the above information.
c. Requests for ALPR data by non-law enforcement or non-prosecutorial agencies will be declined unless otherwise authorized by the Freedom of Information Act. Such as data retained by the agency within an incident report. However, such data is subject to redactions allowed by law.

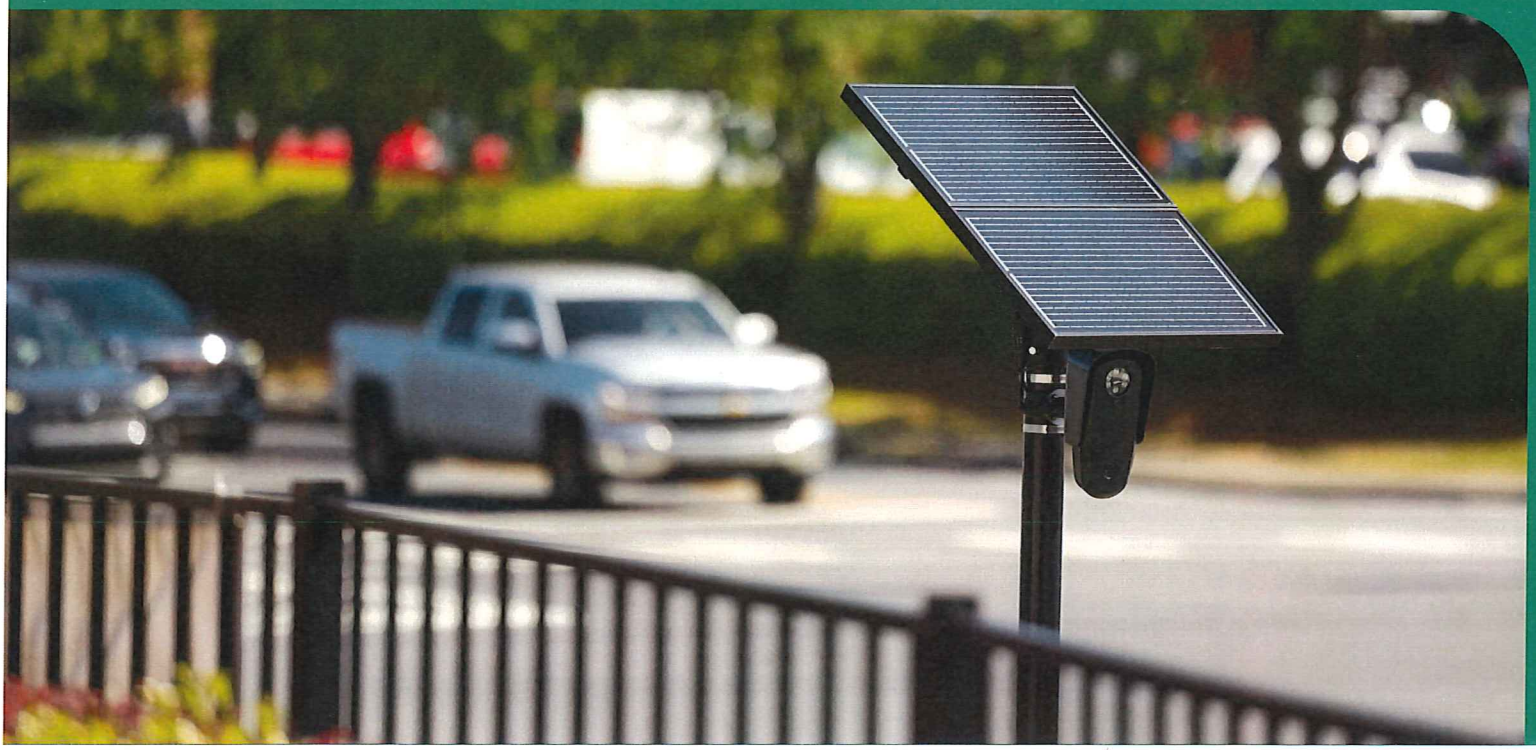
II. REVISION RESPONSIBILITY

Revision responsibility shall rest with the Director of Public Safety.

IMPACT STUDY

How Many Crimes Do Automated License Plate Readers (ALPRs) Solve, Anyway?

flock safety



As Automated License Plate Reader (ALPR) technology has become more ubiquitous, discussion has shifted from the proven utility to **understanding how they contribute to solving crimes.**

Recent studies highlight significant positive outcomes, such as increased follow-up arrests, identification of stolen vehicles, and improved case closure rates.

To better understand effective deployment and usage of ALPR cameras, Flock Safety, the leading provider of ALPR technology to 4,000+ communities across the United States, conducted a large-scale analysis of ALPR outcomes correlated with crime clearance and reduction data.



Methodology

The study utilizes a comprehensive survey of Flock Safety ALPR customers, conducted from April to June 2023. Individual agencies' crime clearance data is analyzed in conjunction with FBI-reported crime data, employing multilinear regression to isolate the impact of ALPR-centric, agency-centric, and jurisdiction-centric factors. The survey focuses on raw numbers of crimes solved, filtering out minor offenses. Data which did not meet rigorous criteria for inclusion are also filtered out, leading to 123 survey respondents, representing a diverse range of sizes and demographics, with sufficient granularity for analysis.

The study employs single and multilinear regression to identify factors most associated with ALPR-assisted clearance rates. Notable findings include the importance of ALPR-centric factors, agency behavior, collaboration with other agencies, and surprising success in challenging environments.

10%

Flock Safety devices are now helping solve 10% of reported crime in the U.S.

200x

A typical agency that works with Flock will have access to more than 200 times the number of cameras that they own

9.1%

A typical agency that acquires an additional 1 Flock Device per Sworn Officer, may expect a 9.1% increase in clearance rate

flocksafety.com
(866) 901-1781 | media@flocksafety.com

Key Findings

Access to Evidence

Agencies with more Flock Devices per Sworn Officer and shared devices exhibit higher clearance rates, emphasizing the power of additional investigative evidence.

Agency Behavior

Broad access to ALPR technology within an agency correlates with higher success in solving crimes, highlighting the role of officers in the field and the importance of proper technology use. Agencies who provide Flock access and training to a broad spectrum of officers, from patrol to their investigative bureau and beyond, see more success with the technology.

Collaboration with Other Agencies

Network effects, both locally and on a national scale, should agencies choose to engage in such, can play a significant role. In fact, the number of nearby Flock customers and shared devices per sworn officer may greatly impact clearance rates. As an example, the addition of 20 Flock customers near an agency can lead to a 1% increase in clearance rate.

Overcoming Challenging Environments

Agencies with fewer sworn officers and larger population areas achieve higher clearance rates when using ALPR, suggesting ALPR's effectiveness in addressing resource challenges. This is especially important when considering the current hiring and retention challenges that agencies across the country face.

This research provides valuable insights into ALPR technology's impact on law enforcement outcomes. The identified factors can guide agencies in optimizing their use of ALPR technology for enhanced crime clearance rates.

Applying this framework to all of Flock's customers and estimating the totals, over 700,000 crimes each year are solved using Flock Safety technology. This represents roughly 10% of reported crime nationwide.

These findings warrant further research specifically examining the impact of ALPR usage on specific categories of crimes, especially in examining the before-and-after impacts of those changes. Such a study is presently underway as part of a joint research project by Texas Christian University and the University of Texas at Tyler.

Read the full white paper, published on Researchgate.



flock safety

Privacy Commitment

Let's defeat crime together.

Our commitment to **protecting the whole community**

Flock Safety helps thousands of cities prevent and eliminate crime with technology that captures objective evidence and delivers it into the hands that serve and protect. In our pursuit of a safer society, we place our commitment to protecting individual privacy and mitigating bias at the core of every policy and product we develop.

WE FOCUS ON PROTECTING PRIVACY AND ENABLING ACCOUNTABILITY

- Flock devices only capture objective evidence, whether vehicular, audio, or video. Flock does not enable predictive policing.
- Flock devices do not connect to databases to identify name, identifiers, addresses, or other information about people.
- The system always requires a documented search reason or case number every time a user accesses Flock data, creating a permanent audit trail for every user.
- Customers own 100% of all data captured on our devices. We never share or sell data with third parties.
- All images and metadata are encrypted in the cloud for maximum security compliance.
- Flock has created the first LPR Transparency Portal, provided to customers optionally for free, to document LPR usage, policies, and ROI for their community.



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About Flock Safety

Frequently Asked Questions

1

WHAT IS LPR?

License Plate Readers (LPR) have long helped law enforcement solve crimes. LPRs capture computer-readable images of license plates, allowing law enforcement agencies to compare plate numbers against those of stolen cars or cars driven by people suspected of being involved in criminal activities.

The information by LPR cameras can help determine whether a vehicle was at the crime scene and discover cars that may be associated with each other. Law enforcement agencies can choose to share their information with other agencies. The cameras can also integrate data from national or state crime databases to provide realtime alerts when a vehicle associated with a known suspect or a stolen vehicle passes the camera.

According to the National Conference of State Legislatures, when employed ethically and objectively, LPRs are an effective force-multiplying tool for law enforcement. A 2011 study by the Police Executive Research Forum concluded that LPRs used by Mesa, Ariz., Police resulted in "nearly three times as many 'hits' for stolen vehicles, and twice as many vehicle recoveries."

A comprehensive study conducted with oversight from independent criminology research experts found a clear correlation between Flock technology and increased case clearance rates.

2

WHAT IS FLOCK SAFETY?

Flock Safety is an all-in-one technology solution to eliminate crime and keep your community safe. Our intelligent platform combines the power of communities at scale – including cities, businesses, schools, and law enforcement agencies – to shape a safer future together.

Our full-service, maintenance-free technology solution is trusted by more than 4,000 communities across the country to help solve and deter crime in the pursuit of safer communities for everyone. Visit **www.flocksafety.com** for more info.



3

WHO DOES FLOCK SAFETY SERVE?

Flock Safety serves HOAs, neighborhood associations, businesses, law enforcement agencies, schools, cities, counties, and states to provide them with the tools they need to increase the effectiveness of their public safety efforts, target crime efficiently and objectively, and help provide the information police need to stop crime.

4

WHERE IS FLOCK SAFETY LOCATED?

There are thousands of Flock Safety communities across the U.S. We can service customers almost anywhere across the U.S. with our local teams strategically located in cities across the country.Flock Safety is headquartered in Atlanta and has over 700 employees across the U.S.

5

WHAT IS THE FLOCK SAFETY FALCON®?

The Flock Safety Falcon® is a solar-powered, motion-activated, and infrastructure-free camera that leverages Flock's proprietary Vehicle Fingerprint® technology to identify and take a snapshot of the critical details of a vehicle that passes by it.

The Flock Safety Falcon® captures the make, vehicle type, color, license plate (full, partial, or missing), state of the license plate, and the vehicle's unique features, including damage and after-market alterations.

They are connected to the cloud through LTE, like a mobile phone, and perform 24/7 in any weather.

Flock Safety LPR cameras leverage the FBI's National Crime Information Center (NCIC) federal and state hotlist, which are updated at least every 24 hours, to send real-time alerts to nearby law enforcement officers when a wanted or stolen vehicle is detected. Officers can then verify that information with their dispatch to safely make arrests and recover stolen property.

They also integrate with the National Center for Missing and Exploited Children's AMBER Alert database to help locate missing individuals, and can be used in the event of a Silver Alert in the same capacity.



6 WHAT MAKES FLOCK SAFETY LPR UNIQUE?

While traditional automated license plate reading (LPR) cameras are an effective crimefighting option, they are also extremely expensive. The $10,000-$40,000 price tag is unrealistic for many of Flock Safety's customers.

As a more affordable option, Flock Safety cameras employ best-in-class LPR and machine learning technology. Flock cameras have an intentionally short shutter speed, which allows the camera to start taking pictures in less than a tenth of a second following vehicle motion sensing and to capture multiple frames of a car traveling up to 75 MPH.

The camera's infrared captures highly-accurate, clear images day or night. The machine learning allows the camera to capture vehicle information beyond the license plate — valuable evidence like vehicle make, type, color, and unusual characteristics.

In side-by-side tests, Flock Safety technology consistently performs above competitors. In a study conducted by a neutral law enforcement agency, Flock Safety produced 30% more accurate reads than the competition.

Additionally, Flock Safety LPR is infrastructure-free, powered by solar and connected through LTE. The flat annual fee covers installation, maintenance, data, security, and customer service.

Lastly, Flock Safety is in the top echelon of the industry for privacy, transparency, and security. Flock Safety data will never be shared without permission, sold to third parties, or used for unpaid fines, unauthorized viewing outside of a legitimate crime-related event, or kept in a library. The footage is fully encrypted and stored in the cloud. All footage is deleted after 30 days on a rolling basis, unless a democratically-elected governing body or official legislates a different retention period.

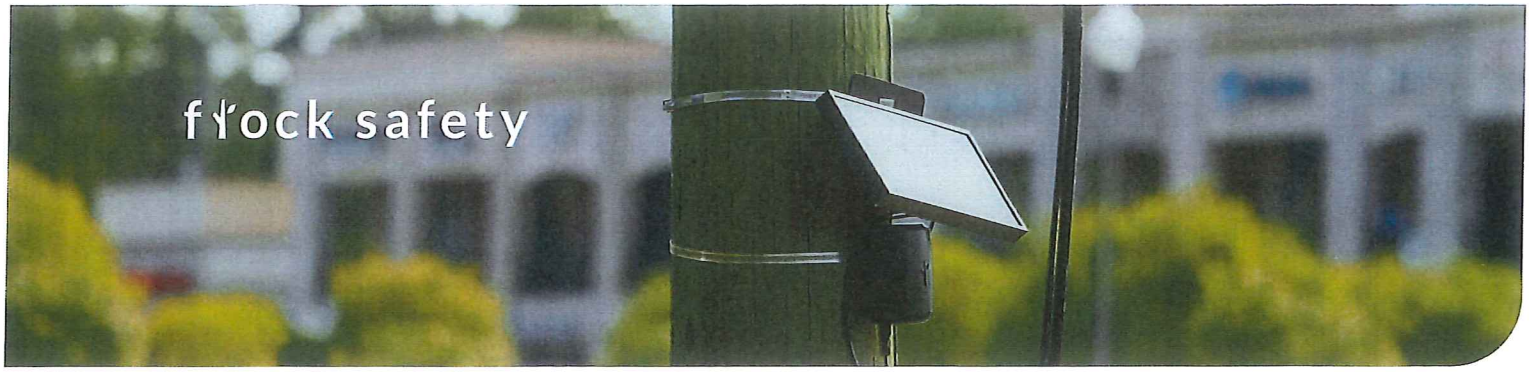
7 HOW DOES FLOCK SAFETY'S LPR HELP PROMOTE TRANSPARENCY AND OBJECTIVITY IN POLICING?

Flock Safety technology is purpose-built to remove human bias from crime-solving. The LPR cameras and machine learning technology are engineered to capture vehicle characteristics, types, and license plates, which are then checked against state and federal records to ensure accuracy and minimize errors.

The LPR cameras take still images of cars passing through the lens (not video) and cannot follow or track vehicles once they leave the camera's view.

Flock Safety DOES NOT record names, phone numbers, or addresses and doesn't mark specific locations where people have been. There is no capability in the system to mark or annotate the locations of passersby.

Finally, Flock Safety is built to enable and encourage transparency, with several features that create robust audit capability. Both private and law enforcement customers must enter a reason for each search made through the Flock Safety system. That search history can be easily displayed for a community or law enforcement leadership to see what the Flock system has been used for.



Flock Safety has also created the first free, optional LPR Transparency Portal to serve as a hub for a police agency's LPR usage, data retention, and search policies. Any law enforcement customer can access the LPR Transparency Portal.

Flock Safety is committed to building technology, tools, and a team that treats all people equitably, regardless of race, ethnicity, class, background, and orientation. We believe that everyone has a right to public safety.

8

WHAT IS THE FLOCK SAFETY RAVEN® AUDIO SENSOR?

The Flock Safety Raven® is an audio detection device that pairs with the Flock Safety Falcon® LPR camera for law enforcement who want to decrease response times and increase case clearance.

Unlike single-point gunshot detection and traditional LPR, which segment evidence into silos, the Flock Safety Raven® recognizes the sound of gunshots, immediately calls 911, and consolidates actionable LPR and audio evidence into one streamlined system so first responders can save lives and collect crucial evidence that solves crime.

9

HOW DOES THE FLOCK SAFETY RAVEN® WORK?

The Flock Safety Raven® provides law enforcement agencies an affordable, infrastructure-light option for gunshot detection. It wakes when it detects a gunshot and is connected to a Flock Safety Falcon® LPR camera, activating the camera when it detects a crime in progress to capture the vehicle(s) on scene, and helping police build a more robust case.

The Flock Safety Raven® is solar and LTE-powered and can be deployed to mirror the structure of your community.

10

DOES THE FLOCK SAFETY RAVEN® CAPTURE PERSONAL INFORMATION?

No. The Flock Safety Raven® is intended to capture loud sounds indicative of a crime in progress, not human voices or conversations. The audio clip is only a few seconds long, not long enough for any meaningful portion of identifiable audio to be captured. Sounds and data collected by the Flock Safety Raven® are subject to the same privacy and security standards as that of Flock Safety LPR devices.

Memorandum

To: Honorable President George, Village Council Members

From: Warren Rothe, Village Manager

CC: Carissa Brown, Village Clerk

Re: Review and Consider Purchase of Civic Clerk Agenda Software

Date: May 20, 2025

The Village currently manages the preparation of distribution of meeting agendas and minutes through a largely manual and decentralized process. Agenda materials are submitted by various departments – typically via email - and are subsequently compiled using Adobe Acrobat. This approach is time-intensive, prone to version control issues, and lacks a unified system for collaboration and archival.

To improve efficiency and transparency in meeting management, I recommend the purchase of Civic Clerk, a dedicated agenda and minute management software solution offered through Civic Plus, a leading provider of government software. I have previously used Civic Clerk in Grosse Pointe Park with great success, and both Clerk Brown and Planning Director Stec – who will be the primary users – have participated in product demonstrations.

Civic Clerk allows departments to submit items directly into a centralized system, with built-in internal review and approval workflows. One of the most significant time-saving features is the automatic generation of agenda packets, which can be completed in seconds and instantly distribution to the appropriate board or commission.

In addition to internal efficiencies, Civic Clerk provides substantial benefits to the public. The software includes an online meeting portal where residents can view, subscribe to, and download agendas, attachments, and meeting minutes, as well as watch embedded video recordings—all within a single platform. The portal also includes powerful search and filtering tools, making it easy for users to find specific items or votes, even from older meetings.

An example of the portal, with integrated video and searchable archives, can be viewed here: https://macombtwpmi.portal.civicclerk.com/

Another added benefit is Civic Clerk's integration with Municode, allowing for next-day publication of approved ordinances to the Village's online code.

Cost and Funding

The initial cost for the software—including onboarding and training—is $9,900. The annual subscription fee is $6,000. Unspent funds in the capital outlay line item of the General Fund are available for this purchase in FY 2025. We have requested and been offered a 13-month initial term, meaning the first annual renewal payment will not be due until FY 2027. This arrangement allows us to proceed without requiring any amendments to the recently adopted FY 2026 budget.

Suggest Resolution

BE IT RESOLVED, the Village Council of Beverly Hills hereby approves the work order authorizing the purchase of the Civic Clerk software. Funds are available within the General Fund's capital outlay department to complete this purchase.

CivicPlus
302 South 4th St. Suite 500
Manhattan, KS 66502
US

Statement of Work

Quote #: Q-99970-1
Date: 5/12/2025 3:10 PM
Expires On: 5/31/2025

Client:
Village of Beverly Hills, MI

Bill To:
BEVERLY HILLS VILLAGE, MICHIGAN

SALESPERSON	Phone	EMAIL	DELIVERY METHOD	PAYMENT METHOD
Gabby Bond		gabriel.bond@civicplus.com		Net 30

One-time(s)

QTY	PRODUCT NAME	DESCRIPTION
1.00	AMM Select: Pro Premium Implementation	Pro Premium Implementation; Includes config. of up to 10 meeting types, up to 10 boards, 1 approval workflow per meeting type, 4 hrs of training, and 2 hrs of consulting; Includes 1 original agenda, 1 original minutes, and 1 original staff report design

Recurring Service(s)

QTY	PRODUCT NAME	DESCRIPTION
1.00	AMM Select: Pro Annual Fee	AMM Select: Pro Annual Fee

Total Investment - Initial Term	USD 9,900.00
Annual Recurring Services (Subject to Uplift)	USD 6,000.00

Initial Term	12 Months
Initial Term Invoice Schedule	100% Invoiced upon Signature Date

Renewal Procedure	Automatic 1 year renewal term, unless 60 days notice provided prior to renewal date
Annual Uplift	5% to be applied in year 2

This Statement of Work ("SOW") shall be subject to the terms and conditions of the CivicPlus Master Services Agreement and the applicable Solution and Services terms and conditions located at https://www.civicplus.help/hc/en-us/p/legal-stuff (collectively, the "Binding Terms"), By signing this SOW, Client expressly agrees to the terms and conditions of the Binding Terms throughout the term of this SOW.

Please note that this document is a SOW and not an invoice. Upon signing and submitting this SOW, Client will receive the applicable invoice according to the terms of the invoicing schedule outlined herein.

Acceptance of Quote # Q-99970-1

The undersigned has read and agrees to the Binding Terms, which are incorporated into this SOW, and have caused this SOW to be executed as of the date signed by the Customer which will be the Effective Date:

For CivicPlus Billing Information, please visit https://www.civicplus.com/verify/

Authorized Client Signature	CivicPlus
By (please sign):	By (please sign):
_____	_____
Printed Name:	Printed Name:
_____	_____
Title:	Title:
_____	_____
Date:	Date:
_____	_____

Organization Legal Name:

_____
Billing Contact:

_____
Title:

_____
Billing Phone Number:

_____
Billing Email:

_____
Billing Address:

_____

_____
Mailing Address: (If different from above)

_____

_____
PO Number: (Info needed on Invoice (PO or Job#) if required)

_____

MEMO

To: Council President George; Village Council Members

From: Carissa Brown, Village Clerk

CC: Warren Rothe, Village Manager

Re: Second Announcement of Various Board/Commission Vacancies

Date: May 16, 2025

The following is a list of board members whose terms expire on June 30, 2025. All of the members listed below have been notified of their term expiration and asked to submit an application if they are interested in reappointment. Council agreed in November of 2008 to make these vacancies open to the public as well as the currently seated member.

Birmingham Area Cable Board
Gilbert Gugni
Shane Henry**

Parks & Recreation Board
Sara Bresnahan

Planning Commission
Neil Hitz**
(Megan Tessler)
Patrick Westerlund

Zoning Board of Appeals
Pamela Caputo
(Christopher Michael)
(Susan Robbins)

KEY:
( )The names in parenthesis are not seeking reappointment
*** No response as of 5/16/2025*

All terms are for three years beginning July 1, 2025 and expiring June 30, 2028. All interested and eligible residents of Beverly Hills are encouraged to apply. Descriptions of each Board/Commission can be found on the Village website by selecting "Boards/Commission" under the "Government" tab. The deadline for applications is Wednesday, June 4, 2025. Applications are available on the Village website or in the Village Office. A blank application is also included in this packet. This constitutes the first announcement of the vacancies with appointments scheduled to take place at the June 17, 2025 regular Village Council meeting.

APPLICATION FOR BOARDS AND COMMITTEES

Thank you for your interest in serving on an Advisory Board or Committee. The purpose of this form is to provide the Selection Committee and Council with basic information about residents considered for appointment. Please indicate your preferences for service (limit of three selections), on the accompanying form. The file of completed applications is open for public inspection upon request.

Name:_____
Please print (Last) (First) (Middle)

Street & Number:_____

Home Phone:_____Employed By:_____

Business Phone:_____E-mail address:_____

Business Address:_____

Are you a registered voter of Beverly Hills:_____Length of residency:_____

Educational background:_____

_____

Past experience on other Village Boards, Churches, Civic, or Community Groups:

_____

_____

_____

Related Employment Experience (Please give dates):

_____

_____

Travel Commitments (if any):

_____

_____

Other Relevant Information (Memberships, Associations, etc.):

_____

_____

_____

Reasons for Desiring to Serve:

_____

_____

_____

Date:_____Signature:_____

5-2-25

REQUEST FOR APPOINTMENT
TO BEVERLY HILLS COUNCIL, BOARDS, COMMITTEES and COMMISSIONS

PLEASE COMPLETE THE FOLLOWING INFORMATION:

Name:_____ Date:_____

Please designate, in priority order, your interest in any ***three*** of the following:

_____**BIRMINGHAM AREA CABLE BOARD** – 4 Member Board – 3 year term
(Meets 3rd Wednesday of every other month month at 7:45 a.m. at the Village Municipal Building). Advises Village Council as to all matters related to Cable Television. Monitors performance of franchisee and compliance with franchise agreement. Acts as liaison between residents and franchisee. Oversees Cable Administrator and Municipal Access Channel.

_____**VILLAGE COUNCIL** – 7 Member Council – 4 year term
(Meets 1st and 3rd Tuesday of each month at 7:00 p.m.)
Appointment to fill unexpired term of elected Council member. Council is the legislative and governing body of the Village.

_____**PARKS AND RECREATION BOARD** – 7 Member Board – 3 year term
(Meets 3rd Thursday of each month at 7:00 p.m.)
Makes recommendations to Village Council and administration as to the maintenance, major improvements and future development of Village parks. Evaluates parks and recreational facilities and advises administration as to park functions and usage. Recommends fees and regulations with concurrence of Village Council.

_____**PLANNING COMMISSION** – 9 Member Commission – 3 year term
(Meets 4th Wednesday of each month at 7:00 p.m.)
Advises Council in regard to the proper physical development of Beverly Hills. Recommends ordinances, or amendments to existing ordinances. Makes recommendations on zoning changes, site plan developments and special approval uses.

_____**ZONING BOARD OF APPEALS** – 9 Member Board and 2 Alternates – 3 year term
(Meets 2nd Monday of each month at 7:00 p.m.)
Hears appeals of applicants who request exceptions from or official interpretations of the zoning ordinance. Members must decide whether or not a physical hardship or practical difficulty exists which justifies the granting of a variance.

It is suggested that applicants detach, read, and keep the enclosed **POLICIES FOR NEW APPOINTMENTS AND REAPPOINTMENTS** with special attention to attendance requirements.

Eligibility for Service on Boards and Standing Committees as appointed by the Village Council

- Shall have resided in the Village for at least one year
- Shall be a qualified and registered voter of the Village of Beverly Hills
- Shall expect to have a 70% annual attendance record
- Shall agree to abide by the "Ethical Standards of Conduct" as recorded in the Village of Beverly Hills *Organizational and Council Policies and Procedures Manual*
- Removal for Cause – Members of any board or standing committee may, after a public hearing, be removed for cause by the Village Council

Memorandum

To: President George and Village Council

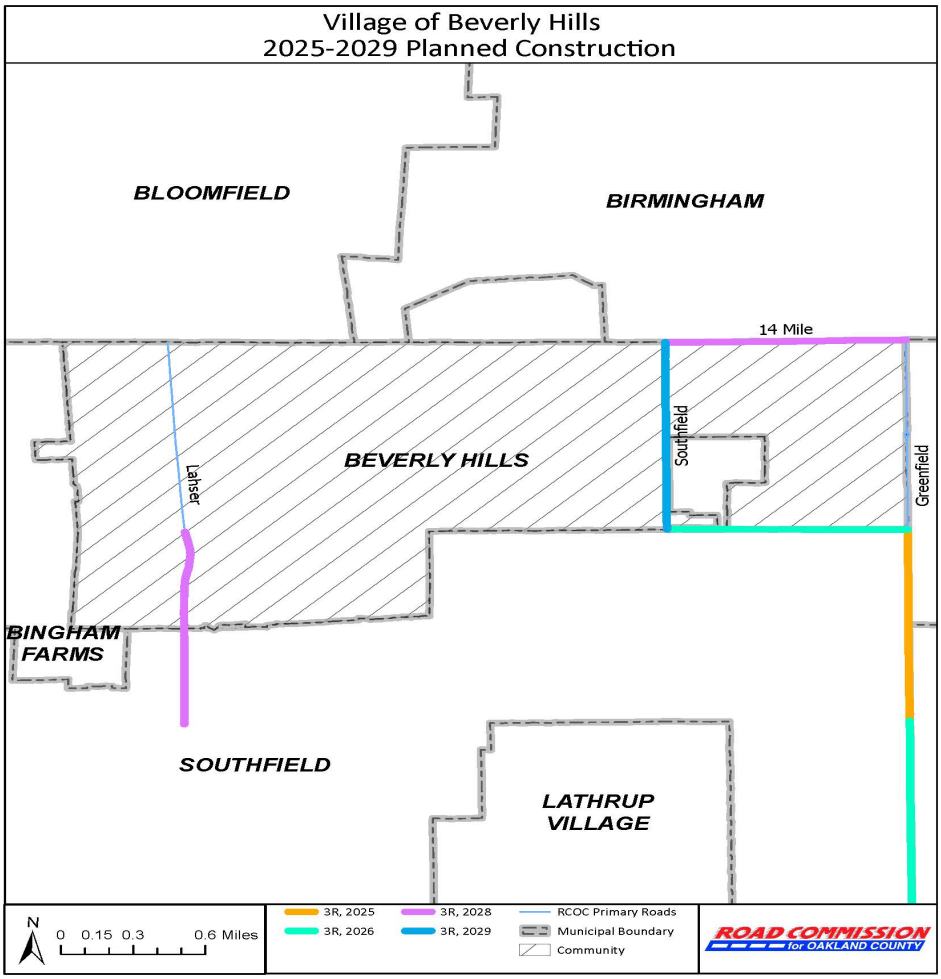
From: Warren Rothe, Village Manager

Re: May 20, 2025, Manager Report

General Updates

- Neil and I met with EGLE to begin reviewing the requirements for the *Dam Risk Reduction Grant* the Village was recently awarded.
- *Bids for the 2025 Sidewalk Program* are due **May 22**. A bid award is expected to be considered at the **June 3 Council meeting**.
- The **May edition of the Villager** has been prepared. Printing and distribution to residents will be completed in the coming days.
- *The new Code should be going live within the next few weeks*. There have been several communication challenges we are working through.
- Work on the **Safe Route to School** project is expected to start the week of May 19th.
- The pre-construction meeting for the **Pierce water main** project was held on May 15, mobilization will start soon, along with work on Beechwood. Pierce watermain installation will not begin until the school year finishes for Our Lady Queen of Martyrs.
- A meeting with *Oakland County Water Resource Commissioner's Office* has been scheduled for June 4th to follow up from our previous meeting about the level of service the Village receives from WRC. Additionally, in reviewing the upcoming fiscal year 2026 sewer maintenance charges, approximately $29,000 in savings will be realized.

- *Municipal Analytics* provided a draft rate study on May 15th. Village staff are reviewing the document, and a final presentation is expected in the coming weeks. Municipal Analytics also completed a review of the Village's utility ordinance.
- *Public Safety Director* interviews will be held on May 20th and May 21st. Finalists will be identified for a second round of interviews.
- The *Zoning Board of Appeals* met in May and approved three applications for dimensional use variances.
- Finance Director Kutey and I reviewed the audit proposals and prepared the recommendation for the May 20th Council meeting.
- The Village will be **formally recognized** as entering the *Main Street Oakland County* program at the *Main Event* on **June 12**.
- The DNR continues to review our latest submission and materials for the **Spark Grant.**
- **Union negotiations** are scheduled to begin May 28th with the patrol union.
- On May 13, I attended the Oakland County City Manager's Association. The City of Farmington Hills gave a presentation on their **deer management strategies.** The Farmington Hills City Council approved a cull for 2026 and 2027. The City of Southfield also approved a cull with the USDA for 2026. *USDA does not have the capacity to take additional communities on for 2026*. The earliest the Village could use their services would be 2027. The Franklin Village Manager attended the meeting as well and we will be discussing this together shortly.
- The Village hosted the Road Commission of Oakland meeting for Beverly Hills, Franklin, Bingham Farms, and Southfield Township. The Road Commission's various services were discussed as well as planned projects for each of the communities in the upcoming years. A picture showing planned work in Beverly Hills is included below:



Resident Construction Communications Update

The following communications strategy has been developed with HRC and will be implemented this construction season to keep the community informed about the various construction projects we will be undertaking.

1. **Webpage on the Village Website**

   A new page on the Village website dedicated to ongoing construction projects has been created. It can be accessed here, and will be live on the home page by the time of the May 20 Council meeting.

2. **Postcards**

   - Prior to the start of each project, each adjacent property owner will receive a postcard with general information about the project within their area. This postcard will include a QR Code that will direct the resident to a webpage (see above) on the Village's website that provides more detail (if necessary)

as well as a link to allow the resident to sign up for project updates (see below) by a generic email that is created for each project (i.e. pierce_wm@hrcengr.com for the Pierce Water Main Replacement Project).

- Postcards for the Safe Routes to School and Pierce Watermain project *were sent out on May 12th*. Below is what one of them looks like:



Current Work in your Neighborhood

In an effort to fill gaps within the existing sidewalk network, the Village of Beverly Hills is installing segments of 5-foot wide sidewalk throughout the Village via the Safe Routes to School Sidewalk Project. This project is scheduled to begin on May 19 (weather permitting) and shall be completed by September 2025 with restoration completed immediately following (with as needed touch ups the following Spring). Prior to the start of the project, construction crews will be on-site to install layout stakes, traffic control signage, soil erosion control measures and marking utilities. **Please do not remove these stakes and markings** as they are needed to properly align construction of the sidewalk, culverts and other construction features. In preparation for the project, please remove any personal items from the right-of-way where work is scheduled to occur. We also ask that you mark any sprinkler heads (and piping if possible), invisible dog fences or any private underground utilities. We will make every effort to minimize disturbances, and all disturbed areas will be repaired to their existing conditions. We thank you in advance for your cooperation. Should you have any additional questions, please reach out to SRTS_Sidewalk@hrcengr.com.

Village of BEVERLY HILLS MI

HRC HUBBELL, ROTH & CLARK, INC CONSULTING ENGINEERS SINCE 1915

For more information about this project:
Please scan the QR Code that will direct you to the Village's website where you can sign up for project updates via email.

3. Email Updates

- HRC will create a form that the resident can fill out if they choose to receive updates that will be on the Village's Website.
- Based on the progress of the project, HRC will strive to send an update at least once a week to the residents who sign up for the email blast for each specific project.
- The signature of the generic emails would include the observer of site, the foreman and the project engineer's contact information.

4. Door Hangers

HRC will produce door hangers for immediate communication that is necessary for the project. An example of this would be to ask residents to not park on a particular street the next day because the road will be paved or that the resident's water service will be unavailable the next day because of the water main shutdowns.

Beverly Hills Public Safety Activity Report

May 1st to May 15th, 2025

The Public Safety Department has changed vendors for crime mapping, CrimeDar went out of business. If you are interested in crime mapping the Village, go to **CLEMIS Public Crime Search (arcgis.com).**

The Beverly Hills Public Safety Department is hiring Public Safety Officers again, please go to our webpage at **Beverlyhillspolice.com** and see if you qualify.

○ CALLS FOR SERVICE

- **195 Calls for Service**.
- **24 Tickets issued**.
- **4 Arrests.**
- Extra Patrol at Greenfield School.
- Extra Patrol at Beverly School.
- Extra Patrol at Beverly Park.
- Radar Detail at 14 Mile and Old Post.
- Extra Patrol at Beverly School.
- Extra Patrol at Berkshire School.
- Citizen Assist on Birwood.
- Larceny reported on Long Bow Court.
- Medical on Marimoor.
- Medical on Pierce.
- Traffic Accident at 13 Mile and Lahser.
- Reckless Driving reported on Lahser.
- Medical on Amherst.
- Extra Patrol requested at Paddle & Par.
- Medical in Huntley Square Apartments.
- Beverly Park closed for the night.
- Extra Patrol around Lincolnshire and 13 Mile.
- Animal Complaint.
- Suspicious Persons on Devonshire.
- Extra Patrol at Beverly School.
- Road hazard removed from 13 Mile and Southfield.
- Extra Patrol in Beverly Park.

- Traffic Detail at Beverly and Riverside.
- Medical on Lahser.
- Alarm on Walmer.
- Traffic Accident at 13 Mile and Lahser.
- Parking Complaint on Kirkshire.
- Extra Patrol at Greenfield School.
- Alarm on Reedmere.
- Motorist Assist at 13 Mile and Southfield.
- Juvenile Complaint on Nottingham.
- Suspicious Persons at Birwood and Madison.
- Beverly Park closed for the night.
- Suspicious Persons on Mayfair.
- Suspicious Circumstances on Meadow Lane.
- Noise Complaint on Meadow Lane.
- Suspicious Persons on 13 Mile.
- Medical on Hampton.
- Welfare Check on Mayfair Lane.
- Motorist Assist at Beverly and Southfield.
- Alarm on Evergreen.
- Hospice Death on Buckingham.
- Suspicious Persons at the Corners Shopping Mall.
- Suspicious Persons on Robinhood.
- Parking Complaint on Riverside.
- Suspicious Persons on Arlington.
- Extra Patrol at Beverly Park.
- Medical on Vernon.
- Traffic Detail at Beverly Park for Groves 5k walk.
- Noise Complaint at Lahser and Dover Court.
- Medical on Vernon.
- Fire Truck Checks at the station.
- Animal Complaint on Kirkshire.
- Suspicious Person in Beverly Park.
- Beverly Park closed for the night.
- Extra Patrol at Beverly School.
- Extra Patrol at Greenfield School.
- Radar Detail at 14 Mile and Lahser.
- Peace Officer standby on Saxon.
- Extra Patrol at the Paddle & Par.
- Suspicious Circumstances at Groves High School.
- Suspicious Persons on Elizabeth.
- Medical on Verona.
- Medical at Mission Point.
- Extra Patrol at Beverly School.
- Extra Patrol at Greenfield School.

- Extra Patrol at 14 Mile and Pierce.
- Extra Patrol around 14 Mile and Bellvine Trail.
- Noise Complaint on Chelton.
- Beverly Park closed for the night.
- Extra Patrol at Beverly School.
- Extra Patrol at Greenfield School.
- Extra Patrol at Beverly Park.
- Extra Patrol at Market Fresh.
- Officers were dispatched to Detroit PD to pick up a subject with a warrant. The arrest was without incident.
- Citizen Assist at Beverly Park.
- Extra Patrol at Greenfield School.
- Animal Complaint on Mayfair.
- Officers were dispatched to Detroit PD to pick up a subject with a warrant. The arrest was without incident.
- Neighbor Trouble on Beverly.
- Beverly Park closed for the night.
- Extra Patrol around 14 Mile and Robinhood.
- Traffic Enforcement at Southfield and Beverly.
- Suspicious Circumstances on Southfield.
- Extra Patrol at Beverly School.
- Extra Patrol at Greenfield School.
- Prisoner Transport to and from Birmingham PD.
- Motorist Assist at Southfield and 13 Mile.
- Adult Suicide on Mayfair.
- Animal Complaint on 13 Mile.
- Suspicious Vehicle on Marguerite.
- Beverly Park closed for the night.
- Suspicious Circumstances on Verona.
- Suspicious Circumstances on Arlington.
- Extra Patrol around Fairfax and Amherst.
- Extra Patrol around Robinhood and Nottingham.
- Medical on Sheridan.
- Medical on Southfield.
- Mental Health Call on Rutland.
- Extra Patrol at Greenfield School.
- Solicitor Complaint on Ronsdale.
- Car Seat Check at the station.
- Beverly Park closed for the night.
- Extra Patrol around Sheridan and Reedmere.
- Extra Patrol in Huntley Square Apartments.
- Medical at Mission Point.

- Police Training at the station.
- Extra Patrol at Beverly School.
- Animal Complaint on Sheridan.
- Fraud Reported in Huntley Square Apartments.
- Medical at Groves High School.
- Operation Medicine Cabinet.
- Neighborhood Trouble on Kirkshire.
- Larceny From Vehicle on riverside.
- Traffic Enforcement at Lahser and 13 Mile.
- Extra Patrol at Greenfield School.
- Extra Patrol at Beverly School.
- Extra Patrol at Beverly Park.
- Extra Patrol at Paddle & Par.
- Motorcycle Complaint at 14 Mile and Southfield.
- Beverly Park closed for the night.
- Reckless Driving reported on 13 Mile.
- Beverly Park opened for the day.
- Radar Detail on 13 Mile.
- Traffic Accident at 14 Mile and Greenfield.
- Alarm on Orchard Place.
- Animal Complaint at Beverly Park.
- Traffic Accident at Groves High School.
- Operation Medicine Cabinet.
- Reckless Driving reported on Lahser.
- Juvenile Complaint at Taco Bell.
- Injury Accident at 13 Mile and Southfield.
- Beverly Park closed for the night.
- Animal Complaint on Norwood.
- Beverly Park opened for the day.
- Structure Fire of a detached garage on Beverly.
- Assisted Edgar Town PD with a death notification on Riverside.
- Reckless Driving reported on Southfield.
- Fire Truck Checks.
- Beverly Park closed for the night.
- Extra Patrol around Beverly and Sheridan.
- Extra Patrol in Beverly Park.
- Medical on Arlington.
- Medical on Vernon.
- Suspicious Circumstances at the Vietnamese Church.
- Found Property on Lauderdale.
- Operation Medicine Cabinet.
- Medical on Lincolnshire.
- Suspicious Vehicles at Evergreen and Beverly.

- Odor Investigation on Nottingham.
- Larceny reported on Elwood.
- Citizen Assist on Hampton.
- Hospice Death on Normandale.
- Beverly Park closed for the night.
- Family Trouble in Huntley Square Apartments.
- Assisted Southfield PD with a fleeing suspect on foot at 12 Mile and Greenfield. The suspect was taken into custody without incident.
- Alarm on Bellvine Trail.
- Medical at Mission Point.
- Extra Patrol at Greenfield School.
- Animal Complaint at Groves High School.
- Parking Complaint on Riverside.
- Injury Accident traffic crash at 13 Mile and Churchill.
- Lost wallet returned to owner at the station.
- Welfare Check on east Valley Woods.
- Suspicious Persons on Coryell.
- Suspicious Circumstances on Buckingham.
- Beverly Park closed for the night.
- Extra Patrol around Sheridan and Madoline.
- Extra Patrol around Walmer and Chelton.
- Traffic Enforcement at Lahser and 13 Mile.
- Extra Patrol at Greenfield School.
- Motorist Assist at Lahser and Orchard Way.
- Animal Complaint on Riverside.
- Citizen Assist on Churchill.
- Medical on 13 Mile.
- Traffic Enforcement at 13 Mile and Lahser.
- Extra Patrol requested at Groves High School.
- Extra Patrol at Beverly School.
- Traffic Enforcement at 13 Mile and Evergreen.
- Extra Patrol around Beaconsfield and Riverside.
- Officers were dispatched to Detroit PD to pick up a subject with a warrant. The subject was arrested and taken into custody without incident.
- Suspicious Persons at Beverly School.
- Officers stopped a driver for a traffic violation at Greenfield and 13 Mile. The driver was arrested for Driving While License Suspended and taken into custody without incident.
- Informational report at the station.
- Beverly Park closed for the night.
- Suspicious Vehicles on Southfield.

- Runaway juvenile from Southfield recovered on Woodhaven and turned over to parents.
- Fraud reported on Buckingham.
- Medical on Verona Circle.

Fire and Emergency Medical Services

- 20 Medicals.
- 1 Structure Fire.
- 2 Injury Accidents.
- 2 Hospice Deaths.
- 1 Odor Investigation.
- 2 Fire Truck Checks.
- 1 Mental Health Call.
- 3 Operation Medicine Cabinets.

Detective Bureau and School Resource

- Follow up investigation on MDOP.
- SRO Geml investigation on Assault & Battery case at Groves High School.
- SRO Geml issued citation for Vicious Animal-Dog on Dog at Groves High School.
- Follow up investigation on Juvenile case Disorderly at Taco Bell-BYA Diversion.
- Fire Officer Safety training completed.
- In-custody arraignment for DWLS-FTA at 46th District Court.
- 3 Southfield arraignments at the 46th District Court.
- 1 Michigan State Police Arraignment at the 46th District Court.
- Attended autopsy at the Oakland County Medical Examiner's Office-Adult Suicide.
- Taser 10 Instructor Course training completed.
- Court Innovations at the 46th District Court.
- Traffic Conference at the 46th District Court.
- Anaphylaxis BLS training completed.
- Hyperthermic Patient training completed.
- Mental Health check police training completed.
- Collecting & Preserving Evidence training completed.
- Subpoena obtained for Fraud/Stolen Credit Card.