

2011 – 2016 Strategic Plan

Goal 1: Montgomery is a city of vibrant commercial and residential neighborhoods with a growing employment base anchored by a robust healthcare industry and sustained by public and private sector partnerships committed to retaining, expanding, and diversifying our residential, office, retail, entertainment and services options.

(Team: Frank Davis, Tracy Roblero, Ben Shapiro)

Strategy 1: Research and formulate a plan to implement the City’s expanded economic development effort.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
1.1.1	Identify several similarly situated communities who have a successful proactive economic development program that focuses on retail/office and medical office development and analyze and compile a report on the key components of those programs (i.e.: staffing structure and qualifications, integration of consultants with staffing or in lieu of staffing, financial incentives offered, partnerships with public/private organizations, outreach initiatives, business oriented community events, etc.)	Frank Davis	Staff reviewed the economic development incentive programs for Glendale, Wyoming, Mason, Blue Ash and Madeira, as well as Anderson Township. Some communities use HCDC for assistance (Wyoming, Glendale). Mason has robust in-house program. Blue Ash has internal staff, does not offer tax abatement. Reviewed state records on who uses CRA/Enterprise zone.	Local travel	2 months	8/2011 COMPLETE
1.1.2	Convene a focus group of local development professionals to solicit ideas and options on how to nurture economic development. This could include a discussion of how targeted community events could be used to benefit local businesses.	Frank Davis	Two economic development luncheon forums were held: <ul style="list-style-type: none"> 10/11/11 at Stone Creek with representatives from the Montgomery business community (33 attendees) 2/2/12 at Montgomery Inn with commercial realtors/developers (45 attendees) <p>There was a lot of beneficial feedback at both sessions, which were well attended.</p>	Staff time	1 month	9/2011 COMPLETE

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1.1.3	Create a list of options and resources needed to expand the City's current economic development efforts and prepare a report to City Council with recommendations.	Frank Davis	Staff entered a contract with Ice Miller/Whiteboard to analyze marketing options and review available incentives. Their report was submitted to Council along with an internal staff report.	Staff time	1 month	9/2011 COMPLETE
1.1.4	Build selected initiatives into the City Budget if needed and initiate selected components. Facilitate/Co-sponsor a community event designed to generate a benefit to the business community. (Link to 5.2.5)	Frank Davis	<p>One option considered was to hire a person part time to help expedite leasing of small retail space downtown and along the commercial corridor. Money was budgeted for this; however, the improvement in the economy resulted in increased occupancy in the strip centers and downtown and the position was not filled. Money from the general fund was transferred to the CIC for future downtown development projects. This will be an annual consideration by Council.</p> <p>Staff spent considerable time trying to develop a special promotion using a concept the City used back in 1954, where a car was placed on large blocks of ice and a contest was held to guess when the ice would melt. A local car dealership was interested in participating and the chamber of commerce and local merchants were contacted about selling tickets to draw customers into their stores. Unfortunately, there was no vendor willing/able to provide the size/quantity of ice for a reasonable price, and the logistics of keeping the car on the ice as it melts resulted in dropping this event. Staff investigated ways to be involved in the All Star Game; however, this did not work with Major Leagues Baseball's schedule.</p> <p>Julie Machon is working on a 12 Days of Christmas event that will draw people to the downtown and links to goal 5.2.5.</p>	Staff time	1 month	1/2012 COMPLETE On-going

Strategy 2: Create a business recruitment plan that increases and diversifies the employment base, increases the goods and services available to residents and complements the desired City image/brand.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
1.2.1	With assistance of staff/consultant and other resources identified in Strategy #1, create a list of the types of businesses that would find Montgomery attractive for their corporate offices.	Frank Davis	<p>Staff spent significant time discussing with Great Traditions options for the development of the Vintage Club with professional offices. Eventually Christ Hospital expressed interest and after intense efforts have committed to building 100,000 sq. ft. of medical office use at the Vintage Club.</p> <p>Staff has met on an on-going basis with commercial realtors/developers to discuss the types of businesses that would locate their corporate offices at the Gateway Redevelopment Area.</p> <p>3/4/15 – CIC issued an RFQ for the GRA and received 13 submissions. All included an office element each to varying degrees. A selection team will narrow down the group to a short list and then issue an RFP for the property.</p>	Input from site selection professionals/commercial realtors	3 months	<p>3/2012</p> <p>Initial recruitment effort at Vintage Club</p> <p>COMPLETE</p> <p>On-going effort at GRA</p>
1.2.2	Review existing marketing materials, and update if needed so that they reflect our image and business recognition efforts. (Link to 5.1.2)	Frank Davis	<p>Development Department staff and Community Engagement staff reviewed current marketing materials and worked with the Chamber of Commerce on new marketing materials. Staff has also reviewed the developer packet that was prepared for Montgomery by HCDC and used that document. Additionally, staff put together a PowerPoint highlighting Montgomery's assets and has presented to two realtor groups.</p> <p>3/4/2015 – much of this work has been put on hold as part of the next strategic plan process in which the City will be establishing a new MVV.</p>	Possible use of design consultant	6 months	<p>9/2012</p> <p>COMPLETE</p> <p>On-going as part of upcoming strategic plan</p>
1.2.3	Complete inventory of existing retail and service businesses downtown and along the commercial corridor.	Tracy Roblero	This inventory was completed	Staff time	1 month	<p>9/2011</p> <p>COMPLETE</p>
1.2.4	Study other successful local shopping districts and identify the mix of businesses in those districts.	Frank Davis	Site visits were conducted to Hyde Park Square, Mt. Lookout Square, Madeira, Harpers Point and Oakley and the list of businesses at each business district was compiled	Local travel/staff time	3 months	<p>12/2011</p> <p>COMPLETE</p>
1.2.5	Complete a list of neighborhood retail and service businesses that are missing in the City	Tracy Roblero	Using the inventories from 1.2.4, several types of businesses not represented in our downtown business district were noted, including a bakery, coffee shop and bookstore.	Staff time and input from a	3 months	<p>11/2011</p> <p>COMPLETE</p>

				commercial realtor		
1.2.6	Using the information collected in 1.2.4 and 1.2.5, work with commercial realtors, business associations, and commercial property owners to initiate a recruitment program for neighborhood based retail and service providers and regional niche retailers.	Frank Davis	This initiative has not been started, partly due to the decision not to hire a leasing facilitator. It was decided that this effort should be done by the Montgomery Chamber of Commerce. Also, the market has picked up and the vacancy rate for retail property being much lower. As of 3/2015 it is difficult for restaurants to find a space in Montgomery and the retail in the Corridor and downtown is doing well.	Staff time	Start date 12/2011- on going	COMPLETE
1.2.7	Identify appropriate staff, consultants, and/or community representatives to lead an ambassadors group to identify and recruit a major employer (Link to 3.2.2, 3.3.1 and 4.3.3)	Tracy Roblero	A group of city officials met twice with a major employer regarding their interest in the Gateway Redevelopment Area. Due to time and space needs of the company, this was not successful. Staff has also reached out to Ohio National regarding expanding to the GRA property; however, they decided to purchase a building in Blue Ash. Staff continues to have discussions with businesses interested in the GRA project. If a highly desirable prospect is interested, an ambassadors group including local business leaders may be organized; however, an internal staff team which includes participation from Council has been identified and has been used in the past.	Staff time	2 months	9/2012 COMPLETE On Going
1.2.8	Work with local property owners to identify viable, available locations for a major new employer. (Link to 6.2.8)	Frank Davis	This effort was successful at the Vintage Club, where Christ Hospital was successfully recruited by Great Traditions with the assistance of City staff. After working with a number of developers on the former car dealership properties, the City purchased the properties to facilitate recruitment of a major new employer for this site, which is the largest development area in the City.	Possible use of site selection consultant or commercial realtor	3 months	6/2012 COMPLETE
1.2.9	Market available sites through business associations, the Montgomery website, HCDC, Port Authority and commercial realtors. Utilize existing marketing materials and coordinate with image campaign. (Link to 5.1.2)	Tracy Roblero	The City has established an available properties inventory on the city website and has met with several commercial realtors about opportunities in Montgomery. The City recently met with the Port Authority. Staff continues to keep the available properties inventory updated and has had several meetings with commercial realtors/brokers regarding the GRA.	Funding for advertisements, marketing materials	Start date 6/2012- ongoing	On-going throughout the plan period COMPLETE

Strategy 3: Implement a comprehensive retention strategy for existing businesses that complements and expands the internal business calling team.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
1.3.1	Internal interdisciplinary team from Development Department, Finance, and Citizen Engagement will brainstorm the goals and scope of the business retention/expansion (BRE) strategy. Develop list of perceived impediments to operating successful businesses in Montgomery. (Link to 2.1.2)	Frank Davis	A series of discussions were held with Citizen Engagement staff in the winter of 2013 on this topic. Faith developed a list of impediments during this process.	Staff time	3 months	3/2012 COMPLETE
1.3.2	Working with the Citizen Engagement team, identify and recruit potential participant volunteers to work with the business calling team for an outreach task force. (Link to 4.3.3)	Frank Davis	A large pool of potential participants was developed and approached. 19 business representatives, 11 MCLA graduates plus staff agreed to participate in the outreach initiative.	Staff time	6 months	9/2012 COMPLETE
1.3.3	Conduct a meeting with volunteers to develop parameters for a BRE program, including performance measures, and establish task force. (Link to 4.3.3)	Frank Davis	The parameters were generally developed by a small steering team of 6-7 persons including representatives of the Chamber of Commerce and several local retailers plus a representative of Myers Y. Cooper, owner of Montgomery Square Shopping Center.	Refreshments	3 months	12/2012 COMPLETE 3/13
1.3.4	Internal business calling team reviews and updates marketing materials with input from task force.	Faith Dickerhoof	Faith conducted this update with a group of 6-7 volunteers from the business community.	Possible design consultant plus cost of new materials	6 months	3/2013 COMPLETE
1.3.5	Develop and conduct a survey of businesses using task force and other volunteers. (Link to 4.3.3)	Frank Davis	The survey was conducted between April 4 and the end of May. 120 surveys were completed by 33 different volunteers. The results were shared with the volunteers at a luncheon following the completion and with City Council.	Possible use of UC to assist with survey	12 months	12/2013 COMPLETE – 6/2013

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
1.3.6	Use existing business calling program and BRE survey meetings to develop relationship with existing businesses and create cross marketing opportunities; link their advertising to the City image campaign initiative. (Link to 5.1.3)	Frank Davis	A Montgomery shopping guide was developed out of this initiative; however, the on-going cross marketing has not been developed as hoped. This has been put on hold so that the new marketing materials can be established after development of the City's MVV through the next strategic planning process.	Possible creation of some new marketing materials	6 months	6/2014 COMPLETE
1.3.7	Review survey results and establish priorities for action/response.	Frank Davis	Staff has reviewed the results and conducted follow up responses to those who asked questions during the survey. The results will be used for additional initiatives in the future, particularly for downtown events.	Staff time	4 months	5/2014 COMPLETE
1.3.8	Initiate a business recognition program using the City website, Montgomery Bulletin, and other methods to increase visibility of existing businesses and drive customers to them. (Link to 5.2.4)	Frank Davis	Working with Citizen Engagement, an "It's Your Business" page has been included in the monthly Montgomery Bulletin. A business inventory has been created on the city website. Additional ways to provide business recognition are being discussed.	Staff time	9 months	3/2013 COMPLETE

Strategy 4: Establish partnerships to encourage redevelopment of vacant and under-utilized properties.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
1.4.1	Identify and prioritize a list of vacant and underutilized properties. (Link to 6.2.8)	Frank Davis	Completed and updated 1/3/12 and presented to City Council	Staff time	3 months	10/2011, then update semi- annually COMPLETE
1.4.2	Identify list of types of partners to work with.	Frank Davis	List was prepared and attached to list of vacant/under-utilized properties	Staff time	2 months	12/2011 COMPLETE
1.4.3	Meet with Chamber of Commerce and/or other business associations to establish partnership with them on this initiative.	Frank Davis	There are on-going discussions with the Montgomery Chamber of Commerce regarding development opportunities	Staff time	4 months	5/2012 COMPLETE On Going
1.4.4	Convene an organizational meeting with potential partners and begin initial marketing effort.	Frank Davis	This has not been convened as work has been focused on the Vintage Club and the redevelopment of the GRA	Staff time	3 months	9/2012 Carry Forward
1.4.5	Identify financing needs to facilitate new investment. (Link to 2.2.2)	Jim Hanson	See 1.1.1.3	Staff time	2 months	12/2012 COMPLETE
1.4.6	Work with partners to establish short and long range plan for the commercial corridor, downtown, and the medical corridor, including performance measures. Include information from business retention effort.	Frank Davis	Not yet started, focus has been on the Vintage Club and the redevelopment of the car dealership properties	Staff time/ possible land use design firm	6 months	6/2013 Carried Forward

Strategy 5: Maintain the desirability of Montgomery as a residential community by adopting policies that accommodate changing housing demands.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
1.5.1	Use federal, state, and local programs to offer incentives to increase energy efficiency in new home construction and renovation/retrofitting of existing homes.	Tracy Roblero	City offered solar installation incentives for six months in 2014, where building, electrical and zoning application fees were waived. The City is also studying the PACE program and the structure of Power Purchase Agreements. Reduction/elimination of Environmental Impact Fees was considered; however, there is currently a moratorium on collection of those fees and a new fee structure is being developed. Fees have been reinstated; however, they are being used for storm water infrastructure improvements and therefore waiving them for energy efficiency is not an option.	Local travel/ possible local match for grant programs	6 months then ongoing	12/2012 COMPLETE Ongoing
1.5.2	Evaluate and make recommendation on the value/affordability of offering tax incentives for energy efficiency for new and remodeled homes.	Frank Davis	See above for incentives	Staff time	3 months	3/2013 COMPLETE 3/2013
1.5.3	Study the benefits and problems of modifying the zoning code to allow 'granny flats' in single family residential zoning districts. Make recommendation to Planning Commission.	Tracy Roblero	This study was completed and presented to the Planning, Zoning and Landmarks Committee of Council in fall of 2014. The conclusion was that there is not a viable way to allow totally separate granny flats without creating the opportunity of establishing multiple dwelling units on a single family lot, increasing the likelihood of eventual rental units in our neighborhoods. There some ways staff can be flexible if attached to and part of principle residence.	Staff time	6 months	12/2014 COMPLETE
1.5.4	Evaluate ways to encourage developers to incorporate residential uses as part of a mixed use redevelopment downtown and other commercial districts. (Link to 1.4.6 and also 6.3.5)	Frank Davis	3/15 – the market has returned and there is no longer a need to encourage developers to include residential in mixed use developments as multi-family is currently the driver for these projects. There is now a need to establish a density level that is desirable for the community. The desirability of higher density residential dwellings for the Gateway redevelopment Area is being debated at a city level. A statement was included in the RFQ that complementary multi-family residential may be considered. There is a desire to encourage residential in the commercial section of the Vintage Club; however, the number of units is still being debated.	Staff time	6 months	6/2013 COMPLETE

Goal 2: Montgomery’s long- term fiscal stability plan is to support both current and future levels of service with controlled levels of expenditures and revenues generated locally gaining greater financial independence by reducing the City’s reliance on state-shared revenues.

(Team: Jim Hanson, Kelly Beach, Tom Wolf, John Crowell, Cindy Rains, Patty Alsip)

Strategy 1: Maintain a heightened awareness and informed perspective of internal/external economic factors which may impact existing revenues and expenditures and take appropriate measures to stay fiscally stable.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
2.1.1	Prepare and conduct analysis of the budgetary impacts of legislative efforts at state and federal level; update semi-annually.	Jim Hanson	<p>Task Completed with the preparation of the 2012 and 2013 Annual Operating Budgets. Complete analysis included in the Transmittal letters in both documents and a Budget in Brief presentation available on the City’s website. JH 9/7/12</p> <p>Preparation of 2014 Annual Budget 12/18/13. Continue to update Council & staff on the impact of House Bills which may impact the collection of Income Tax. 4/8/14</p> <p>The City spent a significant amount of time in 2015 working to understand House Bill 5 legislation and its implication on tax operations. The City will continue to monitor the status and engage in dialogue regarding substitute House Bill 5 and the potential impact of operations and budgetary impacts of this and further legislation. WD</p>	OML Membership	6 months Work will continue in this area throughout the strategic plan period	12/2016 COMPLETE
2.1.2	Identify and develop alternative sources of revenue to supplement losses in local government fund, estate tax, the elimination of the tangible personal property tax and other sources of revenue and make recommendation to City Council on the appropriate course of action. (Link to 1.3.1)	Jim Hanson & Kelly Beach	<p>Senior Staff conducted a list of alternative revenue sources in anticipation of doing the same work in each department – WSD 06/19/12</p> <p>A list of alternative revenues was developed from information provided by various departments which identified revenues which could be implemented to replace funds cut by the State (estate tax, personal property tax and local government fund). JH 11/16/12</p>	Todd Steinbrink; GFOA; OML; Staff time.	12 months	12/2012 COMPLETE

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2.1.3	Analyze current assessed valuation and flow of revenue coming from Hamilton County in regard to the decrease in assessed valuation of properties located in the City of Montgomery.	Jim Hanson & Kelly Beach	Task completed and reported in the City's operating budgets and in the Comprehensive Annual Financial Report. JH 9/7/12	Staff time.	9 months	03/2012 COMPLETE
2.1.4	Analyze the funding needs for the Fire Department operations beyond 2012 based on the decrease in assessed valuation of properties located within the City of Montgomery.	Paul Wright & Tom Wolf	<p>Cash flow analysis completed on the Fire Levy Fund for 10 years of actual revenues and operating expenses which demonstrate the impact on the cash balance of the fund. The analysis includes a forecast through 2017 which demonstrates a gradual reduction in the cash balance and suggests that a replacement levy may be needed in future years. JH 9/7/12</p> <p>Fire/EMS Levy fund added to the Targeted Fund Balance Policy JH 3/5/14</p> <p>This is a topic of discussion during each annual budget meeting. This will continue to be monitored. This has been included in the 2016-2021 Strategic Plan and is tentatively scheduled for 2017 so as to not overlap levy campaigns with the Sycamore Community Schools Levy scheduled for November 2016. MJV 3/31/2016</p>	Staff time.	9 months	03/2012 COMPLETE
2.1.5	<p>Reintroduce the City's Budget reduction exercise to provide an analysis of current/future services that the City can sustain with the future revenues generated. (Link to 3.1.3, 3.1.4, 3.1.7, 5.6.2, 6.1.3 and 6.3.4)</p> <ol style="list-style-type: none"> 1. Study the feasibility of operating a Mayor's Court 2. Study the feasibility of charging for garbage collection 3. Conduct a cost benefit analysis of all service programs offered by the City of Montgomery (i.e. Safety Village, Swim Team, Chili Fest, etc.) 4. Analyze and recommend modifications to all fee schedules (i.e. inspection services, cemetery fees, etc.) 5. Analyze facility rental fees and modify where appropriate. 	Jim Hanson, Don Simpson, Amber Morris, Susan Hamm & Matthew Vanderhorst	<p>The analysis of revenues generated by the sale and services from cemetery operations were reviewed and approved by the Financial Planning Committee at their November meeting. The City Manager authorized increases in the sale price of plots differentiated the price between residents and non-residents. In addition, increases were made in the charges for services provided to recapture the replacement of equipment and for future maintenance and improvements of the cemetery. These increases went into effect on January 1, 2013.</p> <p>A Tax Amnesty Program and a Tax Diversion Program were implemented to assist in the collection of delinquent taxes owed to the City. The Tax Amnesty Program ran from October 1 through November 30, 2012. The Tax Diversion Program went into effect on January 1, 2013. JH12/31/12</p> <p>LEAN Process completed on the Payroll process and Mayor's Court operations. 3/31/14.</p>	Staff time.	6 months	06/2012 COMPLETE

			<p>Assisting in updating rates for cemetery plots and services. 12/31/13.</p> <p>Staff annually updates the Law and Safety Committee on cases, billable hours, revenues and expenses. In 2015, a non-resident rate was established for lodges and non-residents were prohibited from reserving park shelters in an effort to increase availability to residents. MJV 3/31/2016</p>			
2.1.6	Evaluate the time and resources involved in the grant application process to justify the cost and return for the program benefited. Performance measures developed to demonstrate the effectiveness of the grants process.	Don Simpson, Cindy Rains, John Crowell, Paul Wright & Brian Riblet	This area will be monitored by individual departments as needs and opportunities arise. MG 12/11/15	Grants Team; subscription to grant publications (\$700).	6 months	12/2012 COMPLETE

Strategy 2: Enhance the City's financial position and operations with the implementation of policy and procedural improvements which promote efficiencies and effectiveness.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
2.2.1	Maintain target fund balance in all funds that provide service delivery, invest in capital improvement and payment of debt service and evaluate excess funds over the target balance for supporting ongoing operations.	Jim Hanson, Wayne Davis,	Target fund balances have been maintained as of 12/31/2011 and 12/31/12 as reported in both Comprehensive Annual Financial Reports and programmed to be maintained as estimated in years 2014-2018 in the City's operating budget. JH 7/16/13 Fire/EMS Levy fund added to the Targeted Fund Balance Policy JH 3/5/14 Inquired with GFOA about doing a fund balance study specific to the City. This can be done in the future if we desire. MG 12/11/15	Staff time.	Quarterly Work will continue in this area throughout the strategic plan period	12/2016 COMPLETE
2.2.2	Conduct a joint review of the city's services and financial status with City Council's Government Affairs and Financial Planning Committees (Link to 1.4.5 and 3.1.2)	Jim Hanson	Assisted the Goal 3 team of the Strategic Plan in developing a database of City services which cost out over 518 services provided to residents and businesses. The database captures hourly costs which include salary, benefits and overhead charges. JH 8/31/13	Annual meeting of Government Affairs and Financial Planning Committees.	4 months	06/2012 COMPLETE
2.2.3	Assess the current allocation of City Income Tax revenues to ensure adequate funding for appropriate levels of service (operations), continued investment in capital assets (roads, buildings, parks, etc.) and timely repayment of debt over a multi-year period of time. (Link to 3.1.4)	Kelly Beach & Cindy Abner	Analysis done for years 2011, 2012 and partially for 2013. In the 2014 Annual Operating Budget it is projected that the income tax may again be re-allocated between the General Fund and the Capital Improvement Fund with no tax revenues being credited to the General Bond Retirement Fund since all debt will be paid off in 2017 and sufficient reserves are in place for the retirement of that debt. JH 7/16/13	Staff time.	5 months	06/2013 COMPLETE
2.2.4	Evaluate all investment opportunities both liquid (cash and cash equivalents) and fixed assets to maximize return. This would include a report and performance measures to gauge results.	Jim Hanson	Analysis of the Investment Portfolio has been reviewed over the last 5 years with increases in the value of the portfolio increasing per the financial statements from \$6.5M in 2008 to \$19.5M in 2011. During the same period of time net fixed assets (cost minus depreciation) have increased from \$37.7M in 2008 to \$39.4M in 2011. JH 6/30/12 The City continues to analyze all of its investment options with professional support from Fifth Third Bank and other organizations with an aim of complying and adhering with investment guidelines and maximizing return on investment and ensuring liquidity of and access to assets. WD	Staff time.	9 months	06/2013 COMPLETE

2.2.5	Review, analyze and report the City's debt capacity via the City's Performance Measures.	Jim Hanson	<p>Performance measures presented to City Council at the September 5, 2012 Business meeting demonstrated the City's performance measures as they relate to debt management. JH 9/6/2012</p> <p>Performance measures developed which utilizes financial ratios to analyze liquidity, reserves, revenues to expenses and per capita debt to determine debt capacity. Ratios are the same used by major credit rating agencies in assigning ratings. JH 12/31/13</p>	Staff time.	Annually	12/2016 COMPLETE
2.2.6	Conduct an analysis of franchise agreements with utility providers and recommend revenue enhancement potential through a modification of these agreements	Brian Riblet & Jim Hanson	<p>Performed RFP for electric provider services in the last quarter 2015. Signed 3 year agreement with Dynegy (best rates). MG 12/11/15</p>	Law Director; Staff time.	13 months	09/2012 COMPLETE
2.2.7	Formalize and enhance the gifting program to benefit individuals wishing to make tax deductible donations to the City's funds such as Historical Trust, Cemetery, Parks, and Arts & Amenities. (Link to 5.5.6)	Kelly Beach, Susan Hamm, Amber Morris, and Frank Davis	<p>Staff created the option to donate online to the Arts and Amenities Fund. The link is located at the city's website under 'services' and 'gifting opportunities'. December 2014 JM</p> <p>The brochure and website have been updated to reflect updated information and to separate donation funds from purchases (i.e. benches, trees, bricks, etc.) JK and FL 3/31/2016</p>	Staff time; printer costs.	7 months	10/2013 COMPLETE

Strategy 3: Enhance the City's financial performance by giving consideration to the implementation of technology and best practices.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
2.3.1	<p>Develop a finance technology plan to improve productivity and enable timely decision-making.</p> <ol style="list-style-type: none"> 1. Purchase new financial software for accounts payable, accounts receivable, payroll, and fixed assets 2. Inventory all fixed assets (properties, land, etc.) and analyze the cost/benefit of continued ownership or disposal. 3. Provide technology improvements which may benefit all departments. 	Kelly Beach & Patty Alsip	<p>Monies for the acquisition of financial software have been programmed into the 2014 Capital Improvement Program budget for the Finance Department. KJB 1/8/13</p> <p>Due to Departmental changes in 2015 the purchase of new software has been postponed. This goal will be carried forward to the 2016-2021 Strategic Plan. MG 12/11/15</p>	Staff time.	24 months	<p>Stage 1: 12/2014</p> <p>Stage 2: 12/2015</p> <p>Stage 3: 12/2016</p> <p>COMPLETE</p>
2.3.2	<p>Conduct Citywide training on current and future technologies.</p> <ol style="list-style-type: none"> 1. Conduct analysis and standardize the City's guidelines for the purchase and acquisition of goods and services. 2. Conduct a Citywide training of financial processes for purchase requisitions and purchase orders. 	Kelly Beach, Patty Alsip & Robbin Mueller	<p>Purchasing and credit card policies, along with the check request form, were updated as needed. The updated policies were discussed with senior staff and communicated at a PEERS training. KJB 11/20/15</p> <p>The FINQ user manual was updated in 2015 and distributed to managers, along with new hires who would be involved in the purchasing process. Rather than a City wide training, a finance specialist would do individual trainings on a case by case basis to cover those areas where employees had questions or to educate those new to the process. KJB 12/11/15</p> <p>Additional training will take place when the new software is purchased and installed. See 2.3.1. MJV 3/31/2016</p>	Staff time.	7 months	<p>Stage 1: 09/2015</p> <p>Stage 2: 12/2015</p> <p>COMPLETE ONGOING</p>

Strategy 4: Continually communicate and provide information on the status of City finances with City Council, stakeholders, residents and other partners in the community on how budgetary constraints affect the City’s ability to maintain service levels and operations.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
2.4.1	Utilize the City’s PAFR and quarterly revenue and expenditure reports, and publish articles in City publications to better communicate the City’s financial position.	Jim Hanson & Kelly Beach	A Popular Annual Financial Report was issued for the year ending December 31, 2011 and was awarded a recognition award by the Government Finance Officers Association in December 2012. Articles were written in the City Bulletin covering topics such as Annual Operating Budget and Capital Improvement Program, the Tax Amnesty and Diversion Programs, the City’s objection to the State initiative to make the municipal tax code uniform across the state which would result in the City’s loss of control of collection thus reducing local tax revenues. JH 1/8/13	Consultant for the preparation of the CAFR (\$25K); printing costs; staff time.	3 months Work will continue in this area throughout the strategic plan period	12/2016 COMPLETE
2.4.2	Provide educational opportunities to the community on the financial condition and the need to maintain appropriate levels of service and revenues. Seek feedback on information presented to public. <ol style="list-style-type: none"> 1. Facilitate an economics class (Budgeting 101) at local schools. Engage students and seek feedback. 2. Present Montgomery’s financial outlook to interested organizations and civic groups. Engage residents, businesses, taxpayers and seek feedback. 3. Update the financial information and continue to present at the Community Leadership forum and Montgomery Leadership Academy. 4. Use the City website to provide financial information in an easy to read format. 	Kelly Beach, Sharon Savitt, Cindy Abner, Patty Alsip, & Matthew Vanderhorst	In July 2012, Jim Hanson and Wayne Davis met with concerned residents to discuss the 2013 tax budget and the financial outlook for the City. In June 2013, Jim Hanson and Wayne Davis met with concerned residents to discuss the 2014 tax budget and the financial outlook for the City. A number of articles have been written in the Bulletin which cover the City’s Comprehensive Annual Financial Report, Income Tax collections, Annual Operating Budget, Tax Increment Financing and the Capital Improvement Program. JH 7/16/13 The Sycamore High School Government Class has been assigning projects to engage the students in learning about local governments. During the fall of 2015, the City of Montgomery became part of the State of Ohio Open Checkbook Program. MJV 3/31/2016 The new City website contains financial charts and graphs as part of the online annual report. An online performance measure dashboard was created to easily share performance measures among all City staff. MJV 3/31/2016	Staff time; printer costs.	3 months Work will continue in this area throughout the strategic plan period	12/2016 COMPLETE

Goal 3: Montgomery's organizational structure and workforce enable it to be a national leader in the delivery of services that meet the essential needs of the community and are financially sustainable, efficient, of the right level and quality and within available resources (i.e. people, money, technology, facilities, etc.).

(Team: Wayne Davis, Paul Wright, Matthew Vanderhorst, Jerry Beitman, Brian Riblet, Julie Prickett, Greg Harris)

Strategy 1: Ensure services are financially sustainable, efficient, and of the right quality; the delivery of which contributes to the desirability and brand of the community.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.1.1	<p>Inventory and list all services provided by City departments.</p> <ol style="list-style-type: none"> Each department lists all the services they provide. Each service listed has a brief description and identifies the recipient(s) of the service. Lists are compiled into a master document which is available for use throughout the organization for the purposes of further work in the Strategic Plan. 	Matthew Vanderhorst	<p>Matthew met with Jim and Natasha on August 30 to review the service inventory template. The revised template will be shared with senior staff on September 6, 2011. The templates will be distributed to all departments by the members of the goal 3 team with a due date of October 1, 2011. Departments will brainstorm services they provide and complete a template for each service, no matter how small or insignificant, by filling out the "service name" and "service description" sections. MJV – 08/31/11</p>	<p>Staff Time Dane Williams, Evelyn Dumont</p>	2 months	11- 2011 COMPLETE
3.1.2	<p>Review services and categorization of City services. (Link to 2.2.2)</p> <ol style="list-style-type: none"> Definitions of City Services are reviewed and reaffirmed by Senior Staff. With the document created in 3.1.1, each department categorizes each City service and reviews previous categorizations and compares current to previous in order to assist in justifying categorizations. Departments' categorizations are exchanged with other departments for purposes of obtaining another perspective. The departments review the categorizations and debate or confirm the findings. Educate a group of citizens, utilizing MCLA graduates, about the City services and gather their feedback about the categorizations. Senior staff collects all categorizations and reviews, recommends and develops final list for presentation to City Council. 	Paul Wright	<p>A question that needs to be addressed "Is in how much detail should we look at the services?"</p> <p>Each department listed all the services that they provide including an explanation of each service and then provided a rating for the service. These listings of services were merged into one master list document. The next step involved the exchange of the categorization between the different departments and those rating were included in the master list. A group of MCLA Alumni were brought together and instructed into the service rating system. They rated each service under the guidelines of the rating criteria and their results were incorporated into the master list.</p>	<p>Staff time Dane Williams</p>	4 months	03-2012 COMPLETE

*** The first name listed in the Owner Column is the primary owner of that Implementation Step.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.1.3	<p>Identify the current cost of each service to establish a baseline. (Link to 2.1.5)</p> <ol style="list-style-type: none"> 1. The finance department establishes guidelines and templates for identifying costs of services. 2. Departments cost out each service and provide information on the templates. 3. Add to the master document created in 3.1.1 costs of service and make available to support other work in the Strategic Plan. 	Jim Hanson/ Kelly Beach	<p>Matthew met with Jim and Natasha on August 30 to review the service inventory template. MJV – 08/31/11</p> <p>Reassigned to Jim Hanson with help from Kelly Beach. MJV – 09/05/2012</p>	Staff time	1 month	10- 2012 COMPLETE
3.1.4	<p>Conduct an analysis of services/events and compare the value to the community to the cost. (Link to 2.1.5, 2.2.3 and 6.2.6)</p> <ol style="list-style-type: none"> 1. Each service is measured against the cost/benefit of alternative options. (Alternative options include but are not limited to outsourcing, elimination, modification, etc.) - A new budget reduction exercise as identified in 2.1.5 should be used as a tool to assist with this task. 2. Consideration is given to services which have the potential to be revenue generating and investigate the feasibility of charging for services (e.g. City-to-resident, City-to- City, City-to-organization, etc.). 	Jim Hanson	<p>Shared Service Example: Golden Valley and Hopkins, MN share one web designer. It's a full-time Web & Graphic Design position with benefits, split between the two communities. Neither city (both about 20,000 population) could afford a full-time person with those specialties. MJV – 03/29/12</p> <p>The Goal 3 team reviewed all services that we identified in the database and created a list of the “Top 20” that the team decided needed further review and analysis. A subcommittee of the team (Wayne, Paul, Brian) met on July 11, 2013 to review the “Top 20” list and will report back to the formal team during the August 7, 2013 meeting. MJV – 7/11/2013</p> <p>This practice is being carried forward into the 2016-2021 strategic plan. A new service inventory database was created to alleviate the bugs in the old systems. MJV – 3/17/16</p>	Staff time	6 months	04- 2012 COMPLETE

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.1.5	<p>Utilize the LEAN Process, or other alternative methods such as Design Thinking (IDEO), to ensure that services are more efficient, effective and of the right quality.</p> <ol style="list-style-type: none"> 1. The Efficiency and Effectiveness team will conduct refresher training on LEAN for all City staff and create a new training program to teach staff about reviewing a process utilizing a model such as "Design Thinking". 2. Specific services are identified by departments that would benefit from a LEAN Process review. 3. The LEAN Process is conducted and modifications to the services are made. 4. Data are collected based on performance measures showing the outcome(s) of the changes made to the service. 5. Data are assembled into a report for the City for use in future decisions regarding service delivery. 	Brian Riblet	<p>Design Thinking is a human-centered approach to service through the combination of empathy for the context of a problem, creativity in the generation of insights and solutions, and rationality to analyze and fit solutions to the context. I think LEAN fills this role quite well. I thought this would help clarify this step as we could get stuck in learning a whole new concept (Design Thinking) without realizing that we already have a process that is very similar. MJV – 01/29/2013</p> <p>A detailed summary of what Design Thinking is was provided to the goal 3 team. Design Thinking training will be added to the teams upcoming work plan. MJV – 04/24/2013</p> <p>The Efficiency and Effectiveness team has been tracking the services identified as potential Lean candidates but was waiting for the inventory to be completed on April 9, 2013. In addition to the existing Lean identifications, the team will also be reviewing all of the other services listed in the service database to determine if there are any other candidates that were not identified. The team is expected to finalize their 2013-2014 work plan on May 22 and will start work on this step soon thereafter. MJV – 05/10/2013</p> <p>The Efficiency and Effectiveness Team agreed upon the final list of Lean process reviews. Facilitators, observers, and SME have been identified. A rough schedule has been created and will be finalized during the team meeting on July 24, 2013. MJV – 07/11/2013</p> <p>All Lean process have been conducted on the services that were originally identified as possible Lean candidates. MJV 05/13/2014</p> <p>The Montgomery Bulletin was redesigned to reduce cost and increase value to the community. The community voted on three design options and staff reviewed the results and created a final design based on the community input. The result is a more modern version of the Bulletin that is easy to read, in color, with a significantly reduced cost. MJV 05/13/2014</p> <p>Created EMS SignPost to more quickly identify medical issues of people under the care of a first responder.</p>	<p>Staff time, \$2,500 for training</p> <p>Efficiency and Effectiveness Team</p>	18 months	<p>12-2012</p> <p>COMPLETE</p>

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.1.6	<p>Evaluate Services for “right quality” vs. “high quality.”</p> <ol style="list-style-type: none"> 1. Define “right quality” and “high quality” 2. Define what customer service and customer/citizen expectations are today (i.e. email response times, online services, transparency, accessibility, etc.) 3. Identify which services would benefit from a review of “right quality” vs. “high quality” by soliciting input from employees (Resident Survey may be used as a resource in this step). 4. Employees submit their suggestions of “right quality” for the services. 5. Create a process to receive community input on “right quality” vs. “high quality”. 6. Analyze data collected and create a process to transition services to “right quality” based on the best outcome for the community. 7. Create performance measures and collect data showing the efficiency gained by transitioning a service to the “right quality” and communicate these results to the community. 	Matthew Vanderhorst	<p>The Customer Service task team is creating a generic definition of “right quality” versus “high quality” and will share that with the Goal 3 team upon completion. The Customer Service task team will also meet to determine customer/citizen expectations based on citizen feedback, survey results, and research. The estimated completion date for these two parts is the end of April 2012. MJV – 1/9/12</p> <p>The Customer Service team completed #1 and #2 of this step. It has been added to the Goal 3 team folder on the S drive. MJV – 8/28/2012</p>	<p>Staff time</p> <p>Evelyn Dumont, Tracy Roblero</p> <p>Consultant, \$2,500</p>	18 months	<p>12-2012</p> <p>COMPLETE</p>

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.1.7	<p>Look for opportunities for employee, equipment, process and/or facility sharing among other communities and organizations. (Link to 2.1.5, 6.3.1, 6.3.2 and 6.6.1)</p> <ol style="list-style-type: none"> 1. Departments identify opportunities to share resources among other communities and organizations. 2. Departments create and present proposals to administration. 3. For any sharing opportunities enacted, performance measures are identified and data are collected to justify program/process. 	Brian Riblet	<p>Oct. 2011: W. Davis & P. Wright gave shared services presentation to Center for Local Government members and First Suburbs members.</p> <p>Feb. 2012: W. Davis, D. Simpson, G. Harbison participated in Shared Services Summit in Sharonville.</p> <p>1st Q 2012: City explored partnership in LGIF with City of Blue Ash and Sycamore Schools. Amber Morris designated as our contact person for LGIF.</p> <p>1st Q 2012: Reviewed Sycamore Township's RFP for fire/EMS services</p> <p>Montgomery is the recipient of grant funding from the Local Government Innovations Fund (LGIF) in partnership with Sycamore Schools and Blue Ash for the research of shared service opportunities to be done by Management Partners. The grant was awarded in the fall of 2012 and the acceptance process was finalized in March of 2013. Research started with one-on-one interviews with the staff from all three entities on opportunities, challenges and ROI for shared services between two or more of these entities. The goal is to have a final report prioritizing opportunities and outlining implementation steps by late fall 2013. – AM 5\13</p> <p>The LGIF grant report received its final update in March 2014. A finalized report is scheduled to be delivered by Management Partners over the next few weeks. MJV 05/13/2014</p> <p>Matthew Vanderhorst has met with Bill Fritz from Sycamore Community Schools about the possibility of IT resource sharing. Sycamore has an extensive fiber-optic network that they offered to share with Montgomery to connect the Public Works building to City Hall. This project would require Montgomery to install fiber optic cable from City Hall to Montgomery Elementary and from Sycamore High School to Public Works. Brian Riblet stated that there is a fiber optic traffic signal project scheduled for 2106 and there may be a cost savings if this project is picky backed off that project. If this project takes place, it will provide the foundation for many other potential IT sharing opportunities between</p>	Staff time	18 Months	<p>12-2012</p> <p>COMPLETE</p> <p>ONGONG</p>

		<p>Montgomery and Sycamore. MJV – 07/11/2013</p> <p>MyCommuniTree.com was created as a joint social media communications portal between the City of Montgomery, Blue Ash and Sycamore Community Schools. The project was selected to be presented as a case study during the 2014 Transforming Local Government Conference. MJV 05/13/2014</p> <p>Amberley Village joint bid...</p> <p>I275/Montgomery Rd. shared maintenance...</p> <p>Grant funding received from the state for the Pfeiffer Road improvement project. This lead to Ohio National receiving a tax credit for job growth...</p> <p>Sharing of Bucket truck and one-arm mower with Blue Ash...</p>			
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Strategy 2: Employee talents are developed and utilized to deliver services with creativity, integrity, and adaptability in meeting the essential needs of the community through our day-to-day operations and effective partnerships.

Implementation Steps		Owner	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.2.1	<p>Create a team which will develop and implement a process to assess employee skills and talents and create a directory of those skills and talents. Some suggested resources for the team include:</p> <ul style="list-style-type: none"> Existing databases (e.g. Volgistics) Strength Finder Program Employee interviews (or dialogue) Past internal and external surveys Myers/Briggs or Emergenetics Personality profiles results Skills beyond job description inventory <p>Utilize talent directory as a tool to align employees with functions that match their interests, skills and abilities with the organization's needs. Utilize talent directory to assign "experts" to employees in need of training in a particular skill.</p>	<p>Wayne Davis (Re-assigned to Julie Prickett 1/29/13)</p>	<p>Perhaps do more than simple surveys, possibly personal interviews? Look at previous surveys. Potential team – Paul Payne, DJ,</p> <p>1st Q 2013: G. Harris and J. Prickett divided up tasks. Employee skills inventory software programs were researched. Determined existing in-house program (Volgistics) could be used as a software platform for an employee skills inventory tool. GH and JP developed draft list of skills (skills beyond job description) for an inventory program. Depending on final product, employee interviews may not be needed. GH and JP experimented with sample Strength Finder online tool w/limited success. GH trying to locate copies of old employee talent surveys. JEP 5/2/13</p> <p>2nd Q 2013: JP contacted C. Rains for existing Myers/Briggs employee info. JEP 5/2/13</p>	<p>Staff time \$2,500 for training/tools Historical Data</p>	15 months	<p>09-2012 COMPLETE</p>
3.2.2	<p>Establish a team to develop a list of projected skills and talents that the organization may need in the future. (Link to 1.2.7 & 4.2.1)</p> <p>Possible resources include:</p> <ul style="list-style-type: none"> New technology Future trends in local government ICMA resources Potential new services required in the future New skills required to meet the modified services from strategy 3.1 Best practices Consolidation of services Mergers/partnerships Financial sustainability Other service providers in the community 	Julie Prickett	<p>NOTE: Implementation Step 1.2.7 was re-evaluated and focus changed in Jan. 2013. Change may impact link to 3.2.2?</p> <p>1st Q 2013: This step was reviewed by G. Harris and J. Prickett. More information may be needed before this step can be accomplished. However, some information from Personnel Profiles instrument may be relevant. JEP 5/2/13</p> <p>2nd Q 2103: JP contacted Paul Nolan re: tool that measures creativity, adaptability, and innovation. JEP 5/2/13 Update 5/10/13: According to P. Nolan, Personality Profiles can measure these traits. We can use abbreviated version of Personality Profile instrument for employees who have not completed this instrument.</p>	<p>Staff time \$1,500 tools</p>	15 months	<p>09-2013 COMPLETE</p>

	<ol style="list-style-type: none"> 1. The team will identify employee development opportunities to teach the newly identified skills. 2. The team will develop a process to measure an individual's creativity, integrity, adaptability and innovative skills and abilities. This process should be administered to existing employees. 3. Administration will review and modify existing job descriptions based on the new skills identified. This process will include working with the collective bargaining units as outlined by their contracts. 4. The hiring process is modified to support this strategy. 					
3.2.3	<p>Employee performance and development tools are reviewed and revised to ensure employees have the capacity to deliver services and the opportunity for career growth.</p> <ol style="list-style-type: none"> 1. A task team will create a career development plan section to be added to all employee performance achievement plans. 2. A task team will review the 360 process and forms to determine if they support this strategy. Modify if necessary. 3. Supervisors encourage employees to join organizations for professional development opportunities, networking, and partnerships. Incorporate the employees' activities and outcomes from their participation in professional organization(s) into the employee's performance achievement plan. 4. A team researches best practices for cross-training of employees and develops program that addresses knowledge transfer and work to be performed to ensure consistent service delivery when an employee is absent. 5. The job shadowing program is eliminated and a team develops a new program to provide 	Julie Prickett	<p>1st Q 2013: G. Harris and J. Prickett met and reviewed this step. Item 1 – occurs in Halogen thru goal-setting section of program. Item 2 – completed fall 2012. Item 3 – occurs in Halogen program (evaluation criteria and goal-setting section) Item 4 – occurring organically (e.g. finance department, Susan's function) Item 5 – question: Do we need this?? Item 6 – completed in 2012 JEP 5/2/13</p>	<p>Staff time Evelyn Dumont</p>	15 months	<p>09-2013 COMPLETE</p>

	meaningful mentoring and/or apprenticeships for employees. 6. Succession planning is implemented based on plan established by the Managers' Forum succession planning team.					
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Strategy 3: Research best practices and apply citizen input to create or sustain a resilient organizational structure that delivers essential services which are efficient, effective and within available resources.

Implementation Steps		Owner	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.3.1	<p>Research innovative organizational structures to identify best practices and/or models that enhance service delivery. (Link to 1.2.7, 4.3.1 & 4.3.3)</p> <p>This will include research from groups such as:</p> <ul style="list-style-type: none"> • AFI • ICMA • OCMA • CLG • SHRM • TechSolve • Chamber of Commerce • Community partners (i.e. Connect Montgomery, MCLA) • Private sector • Organizational theory (e.g. concentric circle organization chart) • Non-profits 	Greg Harris	<p>The Customer Service task team will review service areas at City Hall such as the front desk and finance and the front desk at the Safety Center to determine if there are opportunities for a more efficient logical and physical structure. The estimated completion date is the end of October 2012. MJV – 1/9/12</p> <p>Per AFI, we should look at these organizations. Ankeny, IA, Olathe, KS, Rock Hill, SC, and Downers Grove, IL. MJV – 3/27/12</p> <p>Alliance for Innovation has webinar on demand titled “New Organizational Models for Local Government”. Team may want to access this webinar? JEP 5/2/13</p>	Organizational structure team	6 months	<p>02-2012</p> <p>COMPLETE</p>
3.3.2	<p>Create a team to investigate and recommend potential technology enhancements to how we work within our organizational structure (see 3.4.1). Share with workforce team to include in the report in 3.3.3.</p>	Matthew Vanderhorst	<p>This step is on hold until the future organizational structure is identified. MJV – 07/11/2013</p> <p>The customer service department is working with the school district to connect the public works building to the city network via Sycamore’s fiber optic network. This will significantly increase network capacity and accommodate any additions that may come to public works. MJV – 2/18/2014</p> <p>Fiber optic site surveys have been accomplished. Network equipment has been specified. Sycamore Schools is close to finalizing a draft of a service level agreement. MJV 05/14/2014</p>	Staff time	3 months	<p>06-2013</p> <p>COMPLETE</p> <p>ONGOING</p>

			<p>EC Link has been contacted to assist in establishing remote access to the Mayor's Court Filebound program for the City Prosecutor. This will create efficiency by allowing the prosecutor live access to the court documents prior to the court date. Remote access to the security camera DVR is also being established to allow Lt. Crowell access outside of the City network. MJV 05/14/2014</p> <p>The pool end-of-day point of sale closeouts process has redesigned to allow the pool manager to conduct the close out and scan the files to a network drive for review by Julie Machon and Finance. This will save Julie at least 10 hours per week by not having to travel to the pool every day. MJV 05/14/2014</p>			
3.3.3	<p>The organizational structure and workforce team will lead a brainstorming session on developing a creative organizational structure. This team will include at least one member from each of the strategic plan goals teams and will provide an opportunity for community input.</p> <ol style="list-style-type: none"> 1. A report will be developed to identify these broader view concepts and potential opportunities for implementation into the City's organizational structure and presented to administration and City Council. 2. Based on actions from step 2 above, assemble community focus group to review proposed organizational structure and gather feedback on the proposed new methods of interfacing with the organization for value added business transactions. 3. Present final report and recommendation (which includes community feedback in step 3 above) to administration and City Council for their consideration. 	Jerry Beitman		Organizational structure team	18 months	<p>10- 2013</p> <p>COMPELTE</p>

Strategy 4: The City’s facilities complement the organizational structure in delivering essential services.

Implementation Steps		Owner	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
3.4.1	Investigate the utilization of nontraditional offices (i.e., mobile office, remote office, etc.) that support the overall organizational structure and service delivery. <i>Keep in mind that the form of the facilities follows the function of the services and organizational structure.</i> (Link to 6.3.1)	Matthew Vanderhorst	The Customer Service task team will determine if there are nontraditional office structures or organization that would make the ideas generated in 3.3.1 possible. MJV – 1/9/12 These opportunities will be addressed as they present themselves as the organizational restructure continue to take place. MJV 05/14/2014	Staff time Organizational Structure Team	3 months	04-2013 ONGOING
3.4.2	Present report created in 3.1.7 and 3.3.3 to finance and facilities goal teams in order to link with the work of these other goal teams. (Link to 6.3.6)	Paul Wright		Staff time including that of Finance and Facilities goal teams	2 months	03-2013

Goal 4: Montgomery has actively engaged citizens, an accessible local government and synergistic partnerships with organizations working together to build connection, ownership, pride and positive direction for the community.

(Team: Amber Morris (Matthew Vanderhorst), Julie Machon, Faith Dickerhoof (Lynch), Ryan Wesseling, Ray Kingsbury)

Strategy 1: The City engages citizens through the implementation of best practices in community engagement which includes educational and volunteer opportunities and the ability of its citizens to connect.

Implementation Steps		Owner	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
4.1.1	Collaborate with other communities with leading volunteer programs and with local organizations with volunteer programs to share ideas and resources to improve our retention, recruitment, recognition and development efforts with involved citizens. (Link to 6.3.2)	DeAnna Gross	<p>Researching other programs and organizations. Have the contacts to set up a meeting with Bethesda North and Twin Lakes Volunteer coordinators to share ideas. DG 11/8/11</p> <p>Met with Nancy Schwandner, Volunteer Manager at Twin Lakes on 1/17/12. Discussed collaboration, programs, volunteers and recruitment, retention and recognition, and volunteer opportunities for our employees. DG 1/17/12</p> <p>Met with Teresa Lock, volunteer coordinator at Bethesda on 1/26/12 and discussed collaboration, programs, recruitment, retention and recognition and practices and employee volunteer opportunities. DG</p> <p>1/27/12 Met with Peggy Behm, Blue Ash Volunteer Coordinator on 2/14/12 to discuss our volunteer programs, recruitment, retention and recognition, practices, and employee volunteer opportunities. DG 2/15/12</p> <p>Frequently touch base with Peggy, Teresa and Nancy regarding opportunities we can partner on and for their input on practices. COMPLETED and continued DG 7/20/12</p> <p>Contacted Nancy at Twin Lakes and Peggy at Blue Ash as well as Volunteer Coordinators for Madeira, Wyoming, Sharonville, Fairfield and Dublin regarding the use of volunteers and the utilization of wrist bands the week of 11/21/12. DG 12/31/12 <i>Montgomery Volunteer</i></p>	Staff Time, Team support, (\$300 for printing of promotional materials)	6 months	04-2012 COMPLETE

			<p><i>Involvement Opportunities</i> brochure given to UGIVE, Twin Lakes and Bethesda North. 4/4/13 DG</p> <p>Contacting Blue Ash, Evendale, Loveland, Madeira, Wyoming and Decatur, GA, regarding finding bench mark measures for the use of volunteers. DG 1/28/14</p> <p>Reached out to peers at various times to research volunteer issues and data. DG 5/23/2014</p>			
4.1.2	<p>Increase awareness and visibility of the range of volunteer opportunities for youth, adults, families, older adults, and groups utilizing a variety of forums including website, social media, events and traditional print.</p> <p>1. Establish measures to track both financial value and community value. Track results using online tools. Report monthly, both internally and externally, on value of new efforts.</p>	DeAnna Gross	<p>Brought information regarding the UGive organization to department meeting 9/21/11. Keeping City web page up to date regarding volunteer opportunities. Placing items in the calendar section of <i>Cincinnati Family Magazine</i> regarding volunteering as a family and otherwise. Looking into CAVA's offerings on workshops regarding use of social media to solicit volunteers. Utilizing personal connection opportunities, events, the Montgomery Bulletin and flyers in the Park information cases and at local sites to advertise volunteer opportunities. DG 11/8/11</p> <p>Flyers of Spring Volunteer Opportunities out to Bethesda Volunteer Office and Twin Lakes Volunteer Coordinator to post for their personnel and residents. 3/26/12 DG</p> <p>Will be utilizing Ugive, Sycamore Living Magazine and Schools for Spring Volunteer Opportunities starting April 2012. DG 3/26/12</p> <p>Ugive cannot be utilized because the City is not a 501 (C) (3) organization. DG 4/18/12</p> <p>Volunteer hours are continuously tracked using Volgistics, our online data base. Volunteer counts are reported in the Friday Update as they occur and in the Annual Report. DG 7/20/12</p> <p>Flyers for Volunteer Opportunities created and placed with Sycamore Junior and High schools, Moeller, Ursuline and CHCA, Boy Scouts, Girl Scouts, American Heritage Girls Troop #25, PNC and Pipkins' Public Bulletin Boards and Park Information Boards, City Web Site, New Resident events and City Information Booth at various events throughout the rest of year as the needs arise and change. Continuously recruit for upcoming events/projects at current events/projects. Volunteer opportunities are always placed in the monthly Montgomery Bulletin as well. Awareness and visibility of volunteer opportunities is working well as 100% of volunteer requests</p>	Staff Time, Team support, (\$2,000 for printing of promotional materials and ad space)	12 months	11-2012 COMPLETE

			<p>with adequate notice have been filled in 2012. COMPLETED and continuing with. Board and Commission expirations are gathered and in the process of being filled. DG 12/31/12</p> <p>Continue to publish volunteer results in Friday updates, City Memos regarding Board and Commission Candidates and Appointments and City Reports and as a Hats Off article in the Bulletin for the most recent event/project utilizing volunteers. Volunteer results data is usually available (entered into Volgistics) by the 15th of the following month. Periodically there is a delay as data has not been received and/or the events are too close together as to be able to get the event wrapped up and the data entered before starting on the next event. This is especially true April through August. Working on ways to streamline this as much as possible so as to get the data out there. Have tried utilizing the Sycamore Living publication for increasing the visibility and awareness of volunteer opportunities, but this publication is not a good fit for that as the deadlines are too far in advance, the information is not guaranteed to get into the publication and the circulation is small. DG 1/10/13 <i>Montgomery Volunteer Involvement Opportunities</i> brochure given to UGIVE, Twin Lakes and Bethesda North and available at City Hall. 4/4/13 DG</p> <p>Proposed two new volunteer recognition programs and discussed changes to volunteer dinner at Government Affairs in September 2013. 9/13 AM Yearly Walk of Fame recipients will receive a jacket with the City Logo and the words "Exceptional Volunteer" on it as a visible sign in the community of the City's volunteer program. DG 1/28/14</p> <p>Regarding creating a volunteer message/program or activity that engages young volunteers or families as a unit to build future volunteers in Montgomery: 2/27/13 added page to web site for volunteering as a family. Pictures added 10/30/13</p> <p>Recruit for Beautification Day, July 4th and Bastille touting them as great opportunities for families to volunteer together. Emails sent to all PTOs/PTA on 8/23 and 26 regarding City opportunities to volunteer as families or groups. No response from them. Had a mother and son volunteer at Harvest Moon and another set at Pumpkin Walk. Emails sent to all PTOs/PTA on 11/1 regarding Holiday City volunteer opportunities for parents and teens.</p>			
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			<p>Year's Results:</p> <p>Beautification Day – Montgomery Mom's bring their kids to help plant, Chris Hilsabeck brought his daughter Elana.</p> <p>July 4th – Tony, Peggy Platz and daughter Julie volunteer at the Parade line-up.</p> <p>Bastille Day – Moms and their kids: Dina and Eleanor Schmidt and Debbie and Jason Goldstein</p> <p>Harvest Moon – Jen Haggard and her three kids 10 and under helped with the old fashioned games. Luis Del Moral and his mom, Laura, volunteered.</p> <p>Pumpkin Walk – Elizabeth Hedrick and her son Jon volunteered</p> <p>Holiday in the Village – Jacquie Lombardi and he daughter signed up to volunteer but cancelled that week 2/4/14 DG</p> <p>Continue to tout volunteer opportunities for families and groups in all opportunities I put out. With how we are advertising our volunteer opportunities and relationships we have built, we have been able to fill all volunteer needs 100% or more for the last three years. With the restructuring of personnel at City Hall, reporting of volunteer data is done for my files monthly and reported every four months in the Friday Update. DG 5/22/2014</p> <p>Over the summer of 2014, Darla Hall and her son, Marshall, volunteered on the maintenance of the butterfly gardens at Pioneer Park. Since April of 2014, the Busdeker family picks up litter and branches at Weller Park. DG 2/26/2015</p>			
4.1.3	Utilize the ICMA Capstone Matrix to identify new community building opportunities and measures to gauge success. Collaborate with the leaders of those efforts to enhance our engagement efforts locally with new activities/service changes.	Ray Kingsbury	Researching the programs in the ICMA Capstone Matrix and other documents to find new opportunities for engagement. Will be identifying contact information on sponsors' web sites and communicating with appropriate parties. RK Nov 11	Staff Time, Budget Support for new efforts (\$1,000 per event)	6 months	12-2012 COMPLETE

4.1.4	Retain and grow interest among citizens for involvement with the community through the development and implementation of a comprehensive recognition and reward program.	DeAnna Gross	<p>Gathering ideas for recognition chest for use by staff liaisons; working on gift in lieu of dinner in 2011 (as dinner will be in beginning of 2012) for board/commission members; planning of three recognition events for 2012; ordered supplies for thank you notes: looking into volunteer recognition piece for National Volunteer week in April 2012. DG 11/8/11.</p> <p>Montgomery pad folios presented at December meetings/get-togethers to all board/commission members as gift in lieu of 2011 dinner. DG 1/10/12</p> <p>Immediate Board/Commission member recognition bins for use by Staff Liaisons presented at 1/18 meeting w/ SLs re: use of volunteer forms introduced to SL and housed upstairs in City Hall. DG 1/24/12 I</p> <p>Presented our New Recognition Program starting 2012 at 2/6/12 Community Leadership Forum. Attendees given a taste of how "Pun" items in the Immediate Appreciation Reward Box work. DG 2/15/12</p> <p>Planning for the first recognition venue, a dinner for B/C members is ongoing. DG 2/15/12</p> <p>First Recognition event on 4/25/12 for Board and Commission members was well attended and received. Plans are under way for second Recognition event at the pool to be held 8/10 for all 2012 volunteers and plans for the third event, also for all volunteers, to be held 9/20, are just starting. Once all three are done, evaluation of each event and the Recognition Event Program overall will be reviewed. DG 7/20/12</p> <p>Second event at the Pool had low attendance as it was the coldest day of the summer. We did have 19 volunteers attend. It was a good recognition event and will be repeated next year for another try. The third event was a Scavenger Hunt and Ice Cream Treat at Swaim Park. It was well received and we had 33 attendees. It too with a different activity, will be repeated in 2013. Working on a written review for all three events. Working on "pushing the Thank You Box Items with Staff Liaisons. DG 12/31/12</p> <p>A review of the three volunteer recognition events has been completed. Continuing to push use of Thank You Box items. Starting work on another aspect of volunteer recognition based upon an award/reward</p>	Staff Time, Team support, (\$1,500 for printing of promotional materials and recognition and reward materials)	18 months	04-2013 COMPLETE
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		<p>for a set number of hours of service to be implemented in 2013. Another “push” for use of the Thank You Box items has been emailed to all Staff Liaisons. This recognition method will be reviewed for effectiveness in the near future. DG 1/10/13</p> <p>Recognition piece based upon an award/reward for a set number of hours of service left to complete yet. DG 2/14/13.</p> <p>Proposal for sent to Wayne Davis 1/23/13 for placement on Government Affairs agenda. On hold because of the Vintage Club development moving forward. Let Amber know there is no movement on this yet. 4/3/13 DG</p> <p>Proposed Exceptional Volunteer recognition and walk of fame, changes to create a tiered recognition of board and commission members resigning, and evaluate status of who is invited to the annual thank you dinner to Government Affairs in September 2013. DG 9/17/2013.</p> <p>Investigated volunteer hour cut offs for those volunteers to be added to Volunteer Dinner. Connie Gaylor and Susan Hamm combed through past Board and Commission listings to generate a list of all Board and Commission members and their service since 1987 in an effort to compile a list of volunteers to be “grandfathered” into the proposed Walk of Fame. DG 10/3/13. This resulted in 40 past volunteers to be included in the Walk of Fame as an inaugural group along with those current volunteers meeting the 250 hours of service mark for their total volunteer hours from 1/1/2011 (the beginning of the use of Volgistics). Twenty-four 2013 qualifying (25 volunteer hours or more for 2013) volunteers will be invited to the 2014 Volunteer Dinner. The gifts for resigning/retiring board/commission members have been reworked to reflect years of service with compounding levels of gifts. The Thank You Box items now include gift cards for local Montgomery businesses as well as the candy items that have been popular and the non-food items still remaining. For 2013, 483 volunteers volunteered for 5202 hours of service compared with 518 volunteers for 5037 hours of service in 2012, showing we used less volunteers in 2013 to fill more need. Hopefully, this is in part to good retention. Revising Dinner to include volunteers with 25 hours of service for 2013, revamping the volunteer recognition pool event to be more user friendly regarding volunteers’ schedules and the weather and tweaking the fall ice cream</p>			
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			<p>social to also serve the volunteers better. DG 1/28/14</p> <p>Volunteer Walk of Fame dedication to be held on 4/23/2014 at 6:30 pm. Plans are in the works for this event. The Volunteer Walk of Fame Dedication was held with a nice size crowd attending. Thirty-six invitations were sent with 19 indicating they would be attending and 15 guests would be joining them. Everyone was very appreciative of their name being added to the Volunteer Walk of Fame. The Board and Commission Dinner is now the Volunteer Dinner. Of the 24 volunteers meeting the 25-hour threshold to be invited, 13 attended (9 were teens) with two guests. The total number of attendees was 89. 20 were guests. Feedback was positive. Arbor Seedling Bag & Tag used seven teen volunteers from the Sycamore High School Environmental Science class. Beautification had 50 total volunteers. All volunteers were sent a personalized thank you note each. Due to low turnouts at both recognition events for the past two years, the second Volunteer Recognition Event at the Pool and the Fall Ice Cream Social are rolled into one event this year, 2014. All volunteers will receive two free one-day pool passes, an ice cream novelty coupon and a drink coupon to use at their discretion at the pool any time between August 1 and September 1, 2014. This way we are not affected by bad weather on a certain date and the volunteers are not asked to attend an event on a specific day/night with an already busy calendar. Attendance is solely at their discretion and the volunteers have a sense of control over when they can take advantage of being appreciated. If they are pool members, they can use their passes to bring additional guests. So the passes are a benefit to everyone who receives them, should they chose to use them. Passes are to be collected at the pool so we can get a count of how many volunteers are making use of them. Details are still being worked out as to the content of the passes and coupons and the logistics of putting them into play at the pool. The Thank You Boxes have been dismantled and just the \$5.00 or less gift cards are now available for spontaneous recognition of exceptional Board/Commission member work. Flowers have been eliminated from the retiring/resigning Board/Commission member recognitions. Note, involvement is not necessarily tied to recognition and reward, but rather to recruitment and relationships. DG 5/22/2014</p> <p>Volunteer Appreciation Days at the Pool 2014 went very well. Over the four-week period of August 1 through September 1, 160 volunteer/guest</p>			
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			<p>passes were used with 91 drink and 101 ice cream coupons also used. The comment that was heard over and over was that the volunteers appreciated being able to use the passes solely at their discretion, when it worked best for them. The expense this year was \$ 45.00 for the banner. The pool had enough ice cream novelties so no additional ones were ordered. There was no charge for the drinks. There was a small selection of novelties at one point, but this can be remedied next year for little cost. The check in for the swim team parent volunteers will be tweaked next year as any kind of physically checking off at the front desk just does not work. So a system will be used where there is no checking off. Otherwise there were no major glitches. The event was well attended. In the past attendance was low at the two recognition events, with the Day at the Pool event having 19 and 29 attendees in 2012 and 2013 and the Ice Cream Social having 29 and 28 attendees in 2012 and 2013. Combining the two events and offering openness to attend seems to be on the right track to increase the number of volunteers partaking in the recognition event. DG 9/23/2014</p> <p>Five exceptional volunteers will be added to the Volunteer Walk of Fame. These five volunteers have achieved 250+ volunteer hours as of December 31, 2014. These volunteers will be recognized at the April 1, 2015 council meeting with a certificate of appreciation and a fleece jacket with the City logo and the words "Exceptional Volunteer" embroidered upon it. Their bricks will have been placed in the Volunteer Walk of Fame by then as well. Going forward, this same process will take place every year at around the same time. Still pushing use of the gift cards for spontaneous thank you to board/commission members who go above and beyond, with no response. DG 2/26/2015</p>			
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Strategy 2: Through conscious efforts aimed at employee and organizational development, community engagement becomes the standard in how we conduct business.

<i>Implementation Steps</i>		<i>Owner</i>	<i>Work Completed To Date</i>	<i>Resource Needs</i>	<i>Estimated Task Time</i>	<i>Target Completion Date/Status</i>
4.2.1	<p>Create a community building resource library with complementing trainings on how to use these tools for increased engagement between departments/staff and community in two or more new efforts from each department. (Link to 3.2.2)</p> <ol style="list-style-type: none"> 1. Add to the resource library through attendance at local and national trainings/webinars/conferences with community building tracts/subject matter. 2. Lead a Montgomery Rap and Managers' Forum discussion on Community Engagement. 3. Measure changing knowledge and understood roles of staff related to community engagement as a way of doing work. 	Ray Kingsbury	<p>Investigating resource tools that can be used in the education of City staff. Developed and conducted pre-test regarding staff knowledge of citizen engagement. Community Engagement team led a Manager's Forum discussion about how to embed citizen engagement into City department's direct lines of service. A post-test will be conducted to gage impact of educational component. RK Nov 11</p> <p>Materials are maintained in a S drive file for easy reference by all staff titled Community Engagement Resource Library – 12 documents are in this file which includes articles from ICMA, Kettering Foundation, Peter Block and others. 9/13 AM</p>	Staff Time, Team support, Budget Support (\$1,000 for Organizational Memberships, webinars, books and other periodicals)	18 Months (includes training of departments)	12-2012 COMPLETE
4.2.2	<p>Learn from others through the creation of a "best practices in community building" workshop in partnership with an organization like AFI or ICMA to be hosted collaboratively with neighboring jurisdictions and inviting regional participation.</p> <ol style="list-style-type: none"> 1. Identify local and regional jurisdictions undertaking community building initiatives. 2. Brainstorm collaboratively with interested entities the logistics, plans and partners for hosting a workshop 3. Plan, organize and implement the workshop. 4. Measure the success of the workshop through a survey and determine interest in continuing this effort. 	Amber Morris (Matthew Vanderhorst)	<p>Budgeted for 2013. Initial discussions on interest, topics and regional focus have occurred. Goal to facilitate best practices round table speed-sharing is the focus. Location at Terwilliger. Target early fall or late November. 1-13 AM Work with Greg Stopka to secure November 21 speakers (Ray Kingsbury and Bill Muse) and invite AFI ambassadors plus staff from Blue Ash, Sharonville, Evandale, Madiera, Mason, West Chester, and Loveland. 9/13 AM</p> <p>This event was held in Blue Ash in March 2014. Follow up forums have been hosted by AFI in November 2014 and March 2015. MJV</p>	Staff Time, Budget support (\$2500 for speaker, location, promotions)	12 months of planning	09-2013 COMPLETE

4.2.3	<p>Promote local volunteer opportunities with other organizations to city employees to create/strengthen relationships with these community-building groups.</p> <ol style="list-style-type: none"> 1. Identify community groups/events with volunteer needs 2. Communicate options and requirements to city workforce 3. Track and promote awareness of city staff as volunteers in local efforts. 4. Use relationships built to identify additional partnering opportunities between the city and the other entity. 	DeAnna Gross	<p>Investigating local volunteer opportunities. Developing Employee survey regarding volunteer interest, interests in volunteering and current volunteering. DG 11/8/11</p> <p>Spoke with Bethesda (Teresa Lock) regarding City employees and volunteer opportunities at Bethesda. DG 1/26/12</p> <p>Spoke with Blue Ash (Peggy Behm) regarding City employees and volunteer opportunities. DG 2/14/12</p> <p>Gathered information of volunteer opportunities at Sycamore Center from Volunteer Coordinator (Cynthia Halloway). DG 2/15/12</p> <p>Sent email to all employees and had hard copies placed in lunchrooms of all three City buildings of volunteer opportunities available with other entities in our area. DG 3/15/12</p> <p>Added Ohio National's efforts with Habit for Humanity to the list of volunteer opportunities for employees. 3/30/12 DG</p> <p>In the next month, will be soliciting employees to gauge interest and utilization of volunteer opportunities presented to them. DG 7/20/12</p> <p>Surveyed employees for utilization of volunteer opportunities presented. Of all employees asked, 10 employees responded with all but one reporting a negative response. This does not appear to be a viable way to promote relationships and partnering opportunities in general. DG 1/10/13 COMPLETE</p> <p>All employees were solicited for Beautification Day planting. Two participated, Matthew Vanderhorst and Wayne Davis. DG 5/23/2014</p> <p>Employees have expressed that their personal time is utilized to be involved in "their community", which leaves no or very little time to be involved in the Montgomery area outside of City events. DG 5/23/2014</p>	Staff Time, Team support, Budget Support (\$300 for recognition materials)	12 months	08-2012 COMPLETE
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Strategy 3: The City facilitates effective partnerships and interconnections among local organizations, businesses and institutions to collaboratively contribute to the overall quality of the community.

	<i>Implementation Steps</i>	<i>Owner</i>	<i>Work Completed To Date</i>	<i>Resource Needs</i>	<i>Estimated Task Time</i>	<i>Target Completion Date/Status</i>
4.3.1	<p>Create an outreach and ongoing development program for MCLA alumni to stay engaged in the community and as volunteers with the City. (Link to 3.3.1)</p> <ol style="list-style-type: none"> 1. Establish measures that gauge community pride, trust in government, responsiveness and citizen efficacy and report progress annually. 2. Mobilize MCLA Alumni as a leading group in Connect Montgomery. 3. Identify MCLA class projects within the community that can be built on with alumni contribution. 4. Evaluate use/impact of the Reunion Summit and make changes to use this forum to strengthen alumni unity and community impact. 5. Evaluate interest and opportunity to involve MCLA alumni in “work teams” directly linked to city’s established priorities within the strategic plan. 	Faith Dickerhoof (Lynch)	<p>Regular representation of MCLA at Connect Montgomery meetings; incl 6 MCLA Alumni acting as leaders of Community Organizations involved in planning and executing Connect Montgomery’s Making a Difference Day. Department has met to explore, brainstorm and research ideas to strengthen Alumni unity and community impact. Also have discussed changes to MCLA Reunion Summit. Collected MCLA input to Strategic Plan and Financial outlook at MCLA Reunion Summit. Recruited Alumni to serve on work teams and funneled that information to Goal Leaders. FAD 11/3/2011</p> <p>Discussions for having MCLA alumni plan and run the reunion summit will be considered for the planning of the 2012 fall event. ADCM 11/11</p> <p>Faith recruited 3 Alumni to plan reunion, working on two more 2/2012 FD.</p> <p>Faith recruited 8 MCLA Alumni to plan reunion. Reunion will be held at ONFS on Sept. 13. Program to include update from City Manager and ONFS talking about their involvement in the community. Committee to meet to determine responsibilities and assignments. FAD 4/2012</p> <p>Reunion moved to Terwilliger Lodge, change format to dessert, coffee and limited presentation and conversation FAD 6/4/2012</p> <p>Bev Stull and Pam Schrenk represent MCLA Alumni on the 2012 Connect Montgomery MADD planning Committee. Denny Riedmiller and Lynn McNay also on the planning committee. FAD 4/2012</p>	Team support, Budget Support (\$3000 for incentives, pre and post survey, direct mail piece)	9 months to plan; ongoing every year to execute	01-2014 COMPLETE ONGOING

			<p>Goal 3 was given list of MCLA alumni to recruit to rate City Services 6/ 2012. Also provided list of MCLA Alumni who could be candidates for CERT to Paul Wright and Ryan Wesseling 6/2012</p> <p>Identified that MCLA Alumni could support Corn Roast at July 4 Festival and recruited 3 individuals to assist (M. Tisch, K White and J Margolis) FAD 7/2012</p> <p>Reunion Summit in late September was organized by a group of 8 Alumni. They opted for a social with dessert. While the event was well attended (58 RSVP, 50 Attended), the program including updates on Class projects with an appeal for help from the Farmers' Market and Adopt a Spot on Oct 13. Audience members who were on the Connect MADD organizing committee updated and recruited members for MADD project. Survey feedback was that the social was positive; several commented that they liked the social, hoped for more content next time, but alternating was desirable. Several members self-identified that they would like to be on the planning committee- Peggy Platz and Barbara White. 12/12</p> <p>MCLA Summit 2013 was organized by 9 MCLA Alumni. My role in the event was reduced with more responsibility placed on the graduates to develop the agenda, organize the meal and leading group discussions. FL 10/13</p> <p>MCLA Alumni were recruited to gather important Business Retention and Expansion information from surveys. The 13 volunteers met with and surveyed local business owners and managers in accordance with Goal 1. An additional task force gathered to review Montgomery's Marketing materials geared towards business. Two members of that 10-person panel were MCLA graduates, and the rest were local business owners or operators. These two "work teams" directly linked to the established priorities linked to Goal 1 of the</p>			
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			<p>Strategic Plan FL 1/14</p> <p>Two MCLA groups participated in the 2013 Making A Difference Day event. Class of 2011 organized their Adopt a Spot work for that Day and Class of 2013 worked on revitalizing the Tornado Memorial Site on the site of SHS. In addition, several MCLA graduates volunteered at Matthew 25 through the Rotary and their home churches as well as some were at Freestore Foodbank and Crayons to Computers. FL 1/2014</p> <p>MCLA Reunion Planning Committee for 2014 has been formed and team of 9 are working towards an Aug 14, 2014 reunion focused on development of business in Montgomery and why local business such as Intertech choose to locate their business to Montgomery during the recession. This Reunion will be very business-focused. Invitation to Chamber President Derek Tye has been extended for his involvement. They have done 100% of the planning thus far. Invite will be sent June 16. FL 5/2014</p> <p>MCLA focus group to consider graduate level course has been formed. Team met on June 26, 2014. FL 5/2014</p> <p>MCLA Class of 2014 has taken the lead on planning and organizing Connect Montgomery MADD for 2015. This is the second year an outside group has taken on the leadership of this event. MJV</p> <p>MCLA 2.0 was created to be a one-evening event that will be a deep-dive into an important topic in the community. The first class will be held on April 14, 2016 at Maple Dale Elementary School and the topic is housing. Liz Blume from Xavier University will facilitate the discussion and provide a national overview of housing trends. Tracy Roblero and Melissa Hays will share information about regional and local housing trends. MJV 3/17/2016</p>			
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4.3.2	<p>Identify opportunities for Connect Montgomery to work together to benefit the community and succeed as a collaborative effort while maintaining unique identities among member organizations.</p>	<p>Faith Dickerhoof (Lynch) Ray Kingsbury</p>	<p>Have recruited new members to Connect Montgomery through MAD Day incl. Montgomery Woods, Twin Lakes (volunteer component) and Operation Give Back. Connect Montgomery's Inaugural Making A Difference Day (MADD), Oct. 22, facilitated a purpose for the organizations to join and collaborate on community issues. Groups could determine their own projects (preserve their identity) while joining in the larger day of activities and Kick-off breakfast. The local business association (Chamber) participated in this day by providing balloons and goodie bags for the Kick-off breakfast. FAD 11/3/2011</p> <p>Meeting with Chad Planner for possible redesign of website as click through to group sites and as event listing. 1/12 AM</p> <p>Met with Connect who agreed to changes and set next Connect Montgomery MADD Day as October 13, 2012 2/12 FD</p> <p>Connect MADD Planning Committee composed of 6 community members, 4 of which are MCLA Alumni met and took responsibilities to outreach to community and recruit groups and volunteers. FAD 4/2012</p> <p>Redesign and Update web page and support Communications and recruitment for MADD FAD 8/2012</p> <p>MADD 2013- 400 participants, 26 different organizations, 1000 hours of service, 18 projects at 12 separate locations, 300 food items for NEEDS, 7000lbs of paper shredded. New recruits to Connect including Sycamore Senior Center and Montgomery Woman's Club for a total of 15. New targeted recruits incl. Matthew 25 Ministries, Blue Ash Lions Club, and JCRC and esp. NGHD Assns.</p> <p>Working to facilitate a second umbrella project in addition to MADD with local neighborhood. Brainstorming session is Jan 13 and may have a possible local business</p>	<p>Team support, Staff Time, Budget Support (\$3000 for Design and printed materials and signage at events)</p>	<p>6 months</p>	<p>08-2013 COMPLETE ONGOING</p>
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			<p>partner. 12/12 FD</p> <p>Supported the startup of Montgomery Food Share. Assisted with the grant request for \$1,000 and will manage the grant to support the work of the food share in spreading to other neighborhoods via the vote of Government Affairs. Government Affairs also approved the continuation of the CE grant for three additional years at \$5,000 per year. 9/13 AM</p> <p>Connect Montgomery is a facilitated meeting of 21 community organizations who gather quarterly to connect, network, communicate and collaborate. Their efforts include connectmontgomery.org and Making A Difference Day. This year 420 volunteers from 28 organizations participated dedicating over 1000 hours to 15 different project including business groups and local businesses taking food collections for NEEDs Pantry. Participation included groups from Greene Intermediate School and Sycamore Jr. High. For 2014 the group has identified the need to start a working group early on MADD for 2014 and a workshop to cover pertinent topics to the organization such as fundraising, communications and 501 c3 tax status. Finally, several new groups are participated in Connect through their involvement in the Montgomery Ministerial Association, an off-shoot of Connect. They include the Montgomery Assembly of God, Montgomery Presbyterian Church, The Community of the Good Shepherd, St Barnabas Church and New Church of Montgomery. Montgomery Historic Preservation Society also joined Connect to grow awareness of their organization. FL 1/2014</p> <p>Connect members informed that City staff will no longer be the facilitator for Connect. A working committee of Michelle Bacon, Joshua Howard and Michelle Brooker will meet and propose a plan of action for facilitating MADD, and possibly taking over mgmt. of website and educational forum. Give report at April meeting. Montgomery Moms has left the group. Their capacity has</p>			
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			<p>dwindled and membership does not have support among their board based on other activities needing their immediate attention 2/2014 FL</p> <p>St. Barnabas led by John Nolan has taken over the outreach and facilitation efforts for MADD, and has outreached to the past participating organizations to participate. Sycamore Jr. High will not participate as Oct 18 is the same day this year as Flight Fest.</p> <p>Connect Montgomery meetings continue with facilitation duties led by the hosting organization. 5/2014 FL</p> <p>This strategy did not take off as we hoped. No other meetings past a follow up to the 2014 MADD took place. MCLA Class of 2015 organized efforts for MADD but got little involvement with meeting participation. The connectmontgomery.org continues with updates made by participating organizations, but meetings have discontinued. FL 3/2016</p>			
4.3.3	<p>Partner with the local business association to identify opportunities that both benefit the community and provide a financial benefit to area business. (Link to 1.2.7, 1.3.2, 1.3.3, 1.3.5, 3.3.1, and 5.2.1)</p> <ol style="list-style-type: none"> 1. Recruit business representation in annual MCLA. 2. Engage local business association as a member organization of Connect Montgomery. 3. Collaborate on a buy local campaign. 4. Engage local businesses on a collaborative economic development task force. 5. Survey local business on our business calling efforts and enhance current efforts based on feedback. 	Faith Dickerhoof (Lynch)	<p>Chamber of Commerce is conducting a survey of downtown businesses to gauge their feedback and input on a buy local campaign. The Chamber is interested in conducting a First Friday event and looks for input from retailers and restaurateurs. MCLA class of 2012 includes business owner and Exec. Director of Chamber of Commerce. Business calling is currently outreaching to 60 local businesses and asking for their ideas and input on doing business with Montgomery and in the City of Montgomery. The information is shared in Business Calling Team meetings to identify opportunities and share new information. FAD 11/3/2011</p> <p>Business calling team has been collaborating on Goal 1 Strategy 3 and completed 1.3.1. Starting to identify candidates for Econ. Dev. Task Force. Chamber of Commerce and City are collaborating on a Shoppers Map</p>	Staff Team, Budget Support (\$2000 for printed materials for buy local campaign and Chamber membership)	6 months for each event/opportunity Buy Local campaign development is in 2012 (5.2.1)	10-2014 COMPLETE ONGOING

			<p>of City of Montgomery to tie in with Buy Local Message. 4/2012 FAD</p> <p>Recruiting candidates for Econ. Dev. Task Force and still working on shoppers guide due to Chamber delay 7/2012 FAD</p> <p>Four individuals associated with local business will be 2013 MCLA participants. Chamber of Commerce participated in MADD with project at RMCH and bags/balloons at Ascension Lutheran</p> <p>Completed and distributed 2012 Montgomery Shopping Guide with organizing assistance of Montgomery Chamber of Commerce 11/12 FD</p> <p>Working on Business Services guide with Mont Chamber 12/12 FD</p> <p>BRE TASK Force meets in January to finalize survey questions, determine timeline and recruit survey administrators. I will recommend some from MCLA Alumni FD 12/12</p> <p>BRE Survey was administered by 33 volunteers (13 of which were MCLA Alumni) to 120 Montgomery businesses. The survey was designed by volunteers and staff and administered over a two-month period, April – June of 2013. The results were shared with the volunteers and those surveyed by August 2013. In addition, per Goal 1 of the Strategic Plan, Faith facilitated a Marketing Review of city business related communications pieces for input from 8 local business representatives – evaluated the shoppers guide, Montgomery Light, Business packet, Realtor piece, Business page in the newsletter and business tab on the city website. Comments from the survey and from the roundtable discussion are considered when items need to be re-printed or designed. 9/13 FL</p> <p>Discussed Buy Local messaging, updates to the</p>			
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			<p>shopper's guide and the partnering opportunities at the annual meeting with the Chamber at Ohio National in September 2013. 9/13 AM</p> <p>For 2013, two Montgomery ministers and seven Montgomery business professionals will be participating in MCLA. FL 1/2014</p> <p>In 2014, 3 business owners/managers participated in MCLA. In 2014, 4 participated in MCLA. FL 3/2016</p> <p>The Business Calling team is currently surveying their business calling meetings as a follow-up. That information may be found here. S:/Task Teams/Business Calling/Completed business callings/2013 visits/Survey Results 2013.xls</p> <p>Other Business Calling performance measures found here. S:/Task Teams/Business Calling/Performance Measures/Business Calling Performance Measures.xls 1/2014 FL</p> <p>Spoke to Mary Jo Byrnes about Montgomery Shopping Guide printing and insertion in 2015 Calendar mailing. Montgomery Shopping Guide inserted in calendar mailing in 2015 5/2014 FL.</p> <p>Montgomery Shopping Guide was not done in 2015 due to lack of interest. Staff has approached Chamber representative in 2016 to ask if there is interest in a 2016 Shopping guide FL 3/2016</p> <p>City was a sponsor/participant in the 2014 Montgomery Road Rally sponsored by the Chamber of Commerce in Oct. 2014.</p> <p>Business Calling has experience statistically insignificant engagement with survey tool and engagement efforts have waned. Look to engage with businesses using a different survey tool in 2016. FL 3/2016.</p>			
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4.3.4	<p>Expand partnered efforts with the local schools to connect with local families, expand inclusive activities and programming. (Link to 5.5.4)</p> <ol style="list-style-type: none"> 1. Engage area partners and schools to create a youth council which engages in community building efforts. 2. Expand partnerships on events and programming to day cares and private schools. 3. Identify partnering opportunities within existing programming between schools and the city and work collaboratively on these efforts. 4. Engage local PTO/PTA as active members of Connect Montgomery. 5. Identify opportunities for youth to serve on City boards/commissions. Solicit involvement. 6. Recruit MCLA participation from local youth. 7. Identify outreach/education programs city staff can provide within the schools to build relationships with youth and the schools, understanding of government work and recruitment of youth engaged in the community. 	<p>Faith Dickerhoof (Lynch) Ryan Wesseling Paul Payne</p>	<p>CE Department and Sister Cities Chair met with Sycamore School officials to identify opportunities to work collaboratively on diversity events. Community Engagement continues to meet with Sycamore Schools to identify partnering opportunities incl. calendar and newsletter. Moeller HS participated in Connect Montgomery's MADD Day. Montgomery Elementary and PTO, EH Greene and PTO and Sycamore Jr, High all collaborated on MADD including planning, promotion and recruitment. We continue to recruit to keep these entities as active participants in Connect Montgomery. Second new resident meet and greet was held at Harvest Moon. 28 families attended and contact information for those who indicated they would like more information about volunteering has been shared with CIC. MCLA Class of 2012 includes a Sycamore HS Sophomore. Parks and Recreation Commission include two Sycamore HS Students. FD 11/3/2011</p> <p>Re: #2/daycares, Kidzwatch sponsored the Holiday in the Village craft. Kidzwatch is volunteering at the event booth and they are promoting the event to their families. JM 11/10/11</p> <p>Matthew is presenting with Sycamore at an AFI meeting on the shared services between the school and the city. Wayne, Matthew and Brian are discussing shared service opportunities with the school and the Superintendent is interested in continuing these discussions. AM 11/11</p> <p>Collaborated with Sycamore Schools on New resident welcome event on 4/14/2012 FAD</p> <p>Outreach ongoing to day cares, parochial schools and PTO/PTA chapters to participate in Connect Montgomery MADD Day 4/2012</p> <p>Working to develop Social media joint site with Sycamore Schools and Blue ash FAD 8/2012 City Managers signed contract with Oxiem 12/12 FD Launched</p>	<p>Staff time, Involvement of Commissions, Budget support (\$2500 for partnered activities)</p>	<p>12 months to identify options</p>	<p>09-2015 COMPLETE AD ONGOING</p>
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			<p>mycommunitree.com in October 2013. 9/13 AM</p> <p>Working with Sycamore and Blue Ash to redesign the “welcome connection” idea for new residents based on low attendance with the current format. New ideas to be implemented in 2014. 9/13 AM</p> <p>Due to changes in workforce and low attendance with welcome events, the 3 entities have decided to forgo joint welcome events in the future. The three entities have collaborated on an AFI presentation re: myCommunitree.com in April 2015. BA, Sycamore and Montgomery continue to discuss future opportunities for collaboration. The three entities recently collaborated on the Maple Dale dedication ceremony in early May of 2014. 5/2014 FL</p> <p>Montgomery and Blue Ash met with government teachers at SHS to investigate how to complement the full year government class mandate and assisting with building the curriculum around local government. Faith shared the Montgomery Our Town mock city council meeting curriculum to assist. Dec. 2014</p> <p>Sought partnership opportunity with the Schools on MCLA 2.0, but they deferred to after 2016 when their levy is on the ballot. FL 3/16</p>			
4.3.5	<p>Utilize the community engagement grant to support efforts to enhance community pride through collaborative engagement.</p> <ol style="list-style-type: none"> 1. Publicize grant funding opportunity. 2. Support projects that are both collaborative and have positive local impact. 3. Promote success of supported projects. 4. Evaluate ROI and determine if grant program should continue being funded if council supported. 	Amber Morris (Matthew Vanderhorst)	<p>Requested report from Mont. Farm Mkt on the \$2500 grant provided for 2011 Friends of the Market program. Valerie Taylor to work on report in November. As first project funded, this data will help adjust the program for future applicants. AM 11-11</p> <p>Suggested options for continuation of a Friends of the Market program, provided sponsorship contact at hospital foundation, and discussed a Farmers’ Feast event as fundraiser with MFM. 1-12 AM</p> <p>Organized a Farmers’ Market meeting to discuss the future of the market. Discussions considered the</p>	Staff time, Budget support (\$5000 per year for grant)	4 months Repeated annually as part of grant process	02-2012 COMPLETE

			<p>opportunities within the scope of the engagement grant funds. Paperwork and process were given upon request to Stuart Zanger for the 2013 market season. 1-13 AM</p> <p>Working with Montgomery Food Share for grant award of \$1,000 in September 2013. 9-13 AM</p> <p>Grant was approved for three additional years at \$5,000 per year through Government Affairs in September 2013.</p> <p>Montgomery Farmers Market was awarded a \$2500 grant for 2014 for engagement purposes. Montgomery Food Share decided to forgo a grant this year to be able to apply next year. One cannot receive grant more than 2 years in a row. 5/2014 FL</p> <p>2015 the Community Engagement grant was awarded to the MFM. City Council changed the rules of the grant to allow for three years to receive award only if in the 3rd year another group did not apply. 3/16/16</p> <p>The grant was expanded to the Service to the Community Grant allowing for more inclusive projects and ideas. Grant will be awarded in May 2016 FL 3/16</p>			
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Strategy 4: Develop the systems and structures that give people multiple options to connect.

Implementation Steps		Owner	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
4.4.1	Establish a well-connected central meeting place for community to gather. (Link to 6.2.5)	Amber Morris (Matthew Vanderhorst)	There are several potential possibilities on the horizon. The proposed Twin Lakes expansion on the old Honda dealership site indicates that a large community meeting area is being planned. In addition, the GRA development may present an opportunity for an outdoor venue. Both of these projects are in the early conceptual stages and will not be realized for a few more years. MJV 3/17/2016	Staff Time, Facility and Budget support (To be determined for location, cost)	24 months	10-2015 OBE
4.4.2	Conduct a connectivity study to identify the needs to better connect people throughout sections of Montgomery and neighboring communities.	Tracy Roblero	<p>Much of this work has been completed by the Public Works Department in identifying future sidewalk projects. Suggestions were made to Bob Nikula for other projects which could be included in the long-range plan; however, this project needs to be re-visited with the appointment of Brian Riblet as Public Works Director.</p> <p>Meeting was set for August 2012 with Frank and Tracy to discuss suggestions for connectivity; however, this has been delayed due to large development projects. It is anticipated that Frank and Tracy will meet in February of 2013 before meeting with Brian Riblet and Gary Heitkamp to discuss further. TR 1-13</p> <p>Frank and Tracy met with Brian Riblet and Gary Heitkamp to discuss ideas for sidewalk extensions that would help provide pedestrian connections to neighborhoods, parks and neighboring communities. These ideas were captured and included in the potential future sidewalk projects kept by Public Works. TR 1-14</p>	Staff Time	12 months	12-2012 COMPLETE
4.4.3	Utilize events as opportunities to increase face-to-face connections. <i>Examples: Volunteer recruitment and opportunities, government staff with name tags or ask me buttons/shirts, MCLA representation at events, Connect Montgomery representation at events</i>	DeAnna Gross / Faith Dickerhoof (Lynch)	<p>Events that include MCLA representation: Safety Center Open House, Farmers' Market, July 4th and Bastille Day information booths and Make a Difference Day. The new resident meet and greets (May and October) included surveys which collected names and contact information of those interested in volunteering. DeAnna is using that list for volunteer recruitment. This list will grow as we continue to do these events and make face-to-face connections. FD 11/3/2011</p> <p>Present at events and meetings to make face-to-face connections: Bag</p>	<p>Staff Time</p> <p>Promotional signage and printing</p>	6 months; prep time for each event	09-2012 COMPLETE

			<p>& Tag, Beautification, Safety Center Open House, Beautification, Plant Swap, Safety Village (attended orientation and both last days), Twin Lakes Flower Show, July 4 Parade and Festival, Harvest Moon, Pumpkin Walk, Holiday Decorating Workshop as well as Arts, Beautification & Tree, Board of Zoning Appeals, Environmental Advisory, Landmarks, Parks & Recreation, Planning and Sister Cities Commission (and Bastille Committee), Connect Montgomery and MCLA Alumni meetings. Wear name tag at all listed. Pursuing recruitment information collected for volunteers. DG 11/8/11</p> <p>Attended Ohio National's Health Benefits Fair on 11/16 with Julie Machon. I utilized the face-to-face opportunity to promote Volunteer Opportunities with the City. DG12/12/11</p> <p>Present at Holiday in the Village, Holiday Decorating Day and Take Down Day (working closely with the Montgomery Woman's Club). Attended 1/5 MCLA class to learn names and faces and to put my name and face as the volunteer coordinator out to this class. DG 1/10/12</p> <p>I presented our New Recognition Program starting 2012 at 2/6/12 Community Leadership Forum. Attendees given a taste of how "Pun" items in the Immediate Appreciation Reward Box work. DG 2/15/12</p> <p>Planning for the first recognition venue, a dinner for B/C members is ongoing. DG 2/15/12</p> <p>Collaborated with Sycamore Schools and Blue Ash on new resident welcome event on 4/14/2012 at Cooper Creek Event Center 4/16/2012 FAD</p> <p>MCLA and I were heavily involved in Info Booth at July 3/4 Festival FD 7/2012</p> <p>Present at Holiday Take Down Day, Basket Planting, Bag and Tag, Beautification Day, Safety Village for pictures, July 4th Parade and Festival pieces and Bastille Day. Have built a great rapport with our volunteers by seeing them face to face at projects and events. Also, communicating with many of them frequently between the May-July projects/events of Beautification Day, Safety Village, July 4th and Bastille Day has led to a great relationship with the volunteers. I had</p>			
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			<p>volunteers bring substitute and extra volunteers with completed paper work to Bastille Day. DG 7/12/2012 COMPLETE and continued.</p> <p>Was present at all volunteer utilizing events and projects but DogFest and Harvest Moon event to strengthen face to face contact with volunteers. Took pictures at each Safety Village week and was present on last days and interacted with teen volunteers to increase rapport (as I am not present at this project otherwise). Had good volunteering by those teens then at later events. Acquiring volunteers for events/projects is all about making the calls and connecting with the volunteers at that first volunteer incident. Then capitalizing on this and carrying the relationship between the volunteer and the coordinator forward. Our teen volunteers are good repeat volunteers and appear to feel appreciated just by the fact that I keep calling them. DG 12/31/12</p> <p>Will continue to utilize events as opportunities to increase face-to-face connections with all City events/projects as 2013 begins. This was done most recently with the Montgomery Woman's Club and individual volunteers at the Holiday Decoration Takedown and Storage Project day, 1/4/13. DG 1/10/13</p> <p>Efforts continue into 2014. I have good relationships with all of our volunteers, past and recent, all ages, which is reflected in our ability to fill all of our volunteer requests. DG 5/23/2104</p> <p>MADD 2012 had 23 organizations participate with 400 volunteers serving 17 projects, resulting in 7 collaborations. 10/13/2012 FD</p> <p>MADD 2013 had 28 organizations and 420 individuals involved. 10/13 AM</p> <p>MADD 2014 (organized by St. Barnabas) has 14 groups participating, 240 individuals, 12 groups were served with 2 collaborations and 1 group joined Connect.</p> <p>MADD 2015 (organized by MCLA 2015) had an appreciation cookout at Swaim Lodge. 15 groups participated with 200 participants, 7 groups were served and 2 collaborations resulted.</p> <p>Continue to strive to make our volunteers feel appreciated and not like just a body to fill a volunteer's spot. I am personable with all of our</p>			
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			<p>volunteers and try to have a good relationship with all of our volunteers by really being interested in them as people. This means having conversations at events with them, really making that face-to-face connection. A happy, appreciated volunteer is a repeat volunteer and a great ambassador for our volunteer program. This is always my goal! DG 1/28/14.</p> <p>Suggest not referring to volunteers' service as numbers of hours and dollars as this belittles their contributions. They are not just numbers, but the means to helping the City put on its events/projects/programs. Without our volunteers, those things would not happen. DG 2.26.2015</p> <p>Three Neighborhood Leaders forums to this point. Fall 2012 focus was Harden the Target, Spring 2013 was property maintenance. Fall 2013 focused on CERT. Spring 2014 focus is urban wildlife management. These forums provide opportunities to make connections with key neighborhood leaders and provide messages to key leaders to share with other neighbors. 2-2014 FL</p> <p>Fall 2014 seminar consisted of a presentation on EMS signpost and the GRA, Spring 2015 updated the residents on the heroin epidemic, fall 2015 was on property maintenance and development, Spring 2016 will be on aging in place. Unfortunately, we have seen stagnant turnout. We will use Nextdoor and mailing to all MCLA alumni to market and drive participation. FL 3/16</p>			
4.4.4	Utilize technology to extend social connections online. <i>Examples: Wi-Fi, internet kiosks at events, online brainstorming session, webinars for public input within the city, MCLA session videos for public review</i>	Faith Dickerhoof (Lynch) Social Media Team	<p>Created a volunteer video, a Connect Montgomery MADD video, a fire department trench training video, a swim team video and a Dog Fest video in fall 2011 through new site. Promoted videos on You Tube, on our website pages and on Facebook. AM 11-11</p> <p>Working with Blue Ash and Sycamore Schools to create joint social media site FAD 8/2012</p> <p>Reviewed the proposal with Government Affairs committee for approval on idea. Budgeted to implement the idea as a shared service. AM 8-12</p> <p>Contract signed by three entities with Oxiem 12/12 FD</p> <p>Evaluating the use of Vine and Instagram for city use. 9/13 AM</p>	Social Media Team, Training (\$2000), Technology, Technical consultant	7 months for planning, 2 month development for each technology	10-2014 COMPLETE

			<p>Launched mycommunitree.com in October 2013. Working on a social media contest with BA & Sycamore to drive traffic to social media sites and myCommunitree.com. FL 1/2014</p> <p>Presented myCommuniTree.com collaboration at AFI Conference in Denver in April of 2014. 5/2014 FL</p> <p>After many conversations between the City of Blue Ash and Sycamore Community Schools, it was decided that we shelve the myCommunitree.com project due to their lack of interest in continuing the project. 3/2016 FL</p>			
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Strategy 5: Host unique events that build community.

<i>Implementation Steps</i>		<i>Owner</i>	<i>Work Completed To Date</i>	<i>Resource Needs</i>	<i>Estimated Task Time</i>	<i>Target Completion Date/Status</i>
4.5.1	Grow and optimize commission and City events, including efforts to create potential partnerships, to increase attendance.	Amber Morris (Matthew Vanderhorst)	<p>Submitted Holiday in the Village collaborative effort for an award through OPRA in October 2011. AM 11-11</p> <p>Suggested opportunity for the Arts to work with Beautification on a combined art event with All Fired Up in Swaim Park. 1-12 AM</p> <p>Suggested link with Twin Lakes and EAC, ARTS and Twin Lakes and Beautification and Twin Lakes –evolved to a partnership with a community wide garage sale and Whale of a Sale event. AM 5-12.</p> <p>EAC involved with July 3 with a collection booth, a game at July 4 and added French category to recycling sculpture contest. AM 7-12</p> <p>Attended Twin Lakes meeting on other interests in engaging residents in the broader community. Generated links to other service organizations in the community including the BAMSO, Sycamore High school athletic boosters and Operation Give Back based on areas of interest they provided. 11-12 AM</p> <p>Faith shared links for other sister city type diversity celebrations with the Montgomery Sister City commission to consider for International Reception which includes potential links with BA Sister City, the JCC and a Korean Society event. 1-13 AM</p> <p>Budgeted for additional economic impact event at the 25th anniversary of Bastille Day in 2014. The proposal at the moment is to look for a 3D artist to create a work at the event that is marketed as a draw for the following 2-3 months. <i>Second event for economic impact is the replication of the MELTDOWN done in 1954.</i></p> <p>Bastille Committee to be represented at the Best of the North event in October 2013 as Bastille Day is a finalist in the event category. 9/13 AM</p> <p>Bastille Day and Swaim Park were represented at the Best of the North</p>	Staff Time, Budget Support for collaboration (\$2000 for new inter-related efforts.)	18 months	03-2013 COMPLETE

			<p>again in October 2014. Several commission members and staff worked hard to create engaging event booths. It was decided by the Sister Cities Commission to not participate again in 2015 as the reward for participating was far below the effort and expense it took to represent the City. MJV 10/2015</p> <p>Over the past two Bastille Day events, the Sister Cities Commission has partnered with Julie Machon and Sarah Fink from Public Works to bring their expertise to planning and organizing the event. Because of their participation, the event has run the smoothest it has run and some of the most creative ideas are being implemented. MJV 3/2016</p>			
4.5.2	<p>Research cultural options in the region and identify events to fill gaps with expanded events/activities in Montgomery. Use stakeholder focus groups to narrow options to meet niches in Montgomery. (Link to 6.2.5) <i>Example ideas: cruise-in, Montgomery Idol, Battle of the Bands, Amazing Race, Business Scavenger Hunt, Pub Crawl, Pioneer Days, Sculpture event, Ice sculptures, Soapbox Derby, Unique Montgomery ticketed tour, Go Green event, Progressive Dinner.</i></p>	Julie Machon	<p>Arts Commission members planned a Live at the Uni event “Improv Show” linking Arts Commission with Sycamore Schools and filling a demographic age gap with having high school age performers. 11-12. JM</p> <p>Arts Commission members have researched and discussed kids programming at several meetings throughout 2012. Identifying current programming in the area and identifying gaps has been the main discussion. 12-12 JM.</p> <p>Shoppers’ guides were given out to hotels in the Mason area during the tennis tournament.</p> <p>A survey asking residents to assess the cultural arts in Montgomery occurred in Dec 2013 through Jan 2014. The survey deadline is Jan 31, 2014 and 100+ surveys have been received. The Arts Commission will analyze the results at a future meeting. Jan 2014. JM</p>	Staff time, Budget support (\$2000 to promote and implement event)	9 months	12-2014 COMPLETE
4.5.3	<p>Evaluate and improve current policies and processes to encourage other entities to offer events in Montgomery. Create new policies and processes if needed.</p>	Julie Machon Ryan Wesseling	<p>Quarterly meetings were held with key staff throughout 2012 to discuss current processes and policies and look for improvements. New processes and forms created. 1-12 AM</p> <p>Sycamore 5k Flight Fest used the form to test the process for their event in 2013.</p> <p>A group tested out our process and used our new forms for hosting a new event. We plan to utilize the new form and process. 2013. JM</p>	Staff time, Team	12 months	12-2016 COMPLETE

4.5.4	Identify facilities needed to host unique Montgomery events and cultural activities. (Link to 6.2.6)	Amber Morris (Matthew Vanderhorst)	<p>Farmers' Feast idea at old Business Club site with possible use of Stir as part of opening social. Asked Germano's about use of the whole restaurant for events like the volunteer dinner. Suggested moving graduation ceremony out of city hall for MCLA – going to be at Stone Creek in 2012. 1-12 AM</p> <p>ARTS Commission is expanding the use of Universalist Church in a showcase event of the Sycamore HS Improv group in January 2013. 11-12 AM</p> <p>Utilizing Three Chimney's Clubhouse as a venue for MCLA graduation. Montgomery Elementary, TriHealth Pavilion and Assembly of God offered locations for the Community Leadership Forum. 1-13 AM</p>	Staff Time, Input from Connect participants, Input from stakeholders with sites. Share information and timeline with facilities goal work.	6 months	10-2012 COMPLETE
4.5.5	Partner with regional and national event/associations/organizations to link to city events for increased publicity and participation. <i>Example: Arts Commission Photo Contest with PhotoFest 2012 or Environmental Commission programs with Earth Day.</i>	Julie Machon	<p>Had three phone conversations with local leaders of the World Choir games and requested that Sycamore Jr. High, who is competing in the games, sing at our tree lighting ceremony in December 2011. Unfortunately, the choir was not available for the tree lighting and during the third conversation with them, the ruling came that day that the choir is not booking appearances that have crowds that are less than 1,000 people. I have other partnering ideas that I will work on in the future. October 2011 JM.</p> <p>Held a meeting in November 2011 and in January 2012 with Terry Willenbrink, Susan Hamm, Amber Morris (Matthew Vanderhorst) and Julie Machon. Brainstormed and planned Arbor Day Program (link to National Observance) and Community Garage Sale (link with Environmental Commission). Montgomery Moms was asked to partner with Recreation Kids Garage Sale (linking with a local group). Other ideas were investigated which included: Quilt Convention was investigated to link to our local quilt shop. Big Pig Gig was suggested to Arts Commission. Fotofocus was researched to link to Photo Contest, Twin Lakes Flower Show. JM.</p> <p>Linked to local daycare, Kidzwatch, to sponsor Holiday in the Village. 11-12. JM</p> <p>Linked to local daycare, All About Kids, to sponsor kid's area at Bastille Day. 7-12. JM</p>	Staff time, Budget Support (\$2000 promotional materials)	6 months	12-2012 COMPLETE

Goal 5: The City has a quality of life and image that makes Montgomery the community of choice to live, work and play.

(Team: Tracy Roblero, Faith Lynch, Brian Riblet, Gary Heitkamp, Ray Kingsbury, Julie Machon, Mike Plaatje)

Strategy 1: Promote Montgomery’s image and develop a utilization plan to position Montgomery as the community of choice to live, work and play.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
5.1.1	Examine the feasibility of hiring a consultant to conduct focus group discussions regarding the Montgomery image and how to best promote this image for the betterment of the community.	Faith Lynch	<p>On hold till we have a economic development consultant or staff person in place per goal 1. 12-11 AM</p> <p>This goal has changed since we are not on track to hire a consultant. Collaboration with the Chamber on buy local marketing as well as with the schools and Blue Ash on joint communications and an image for a joint web presence through social media is helping up develop and promote an image as both commercially supportive and residentially responsive as a local government. 1-13 AM</p> <p>We look to update design in 2015/2016 after the Strategic plan process. FL 1/2015.</p> <p>This has been determined to take place in 2019. FL 3/2016</p>	Staff Time, Consultant (\$75,000)	12 months	09-2012 COMPLETE
5.1.2	Utilizing the materials developed with Impact Group as a base, enhance the promotion of Montgomery’s image as the community of choice to live, work and play through a comprehensive image campaign considering both residential and business desirability. (Link to 1.2.2)	Faith Lynch	<p>Some changes are being made to the business calling materials to enhance the image and address feedback received from the calling program. 12-11 AM</p> <p>Created logos for buy local message. Created a Montgomery by the Numbers information sheet as insert. Faith is updating business pamphlet with “action items” checklist per feedback from Business Calling team. 8-12 AM</p> <p>Added a ‘It’s Your Business’ page to the city bulletin to promote buy local messages and the awareness of options in various business niches covered in Montgomery. Government Affairs approved the page in</p>	Staff Time, Photography (\$1,500) Materials (\$10,000) Design (\$25,000) advertising (\$25,000) – to be determined by outcomes of 5.1.1	12 months	09-2012 COMPLETE

*** The first name listed in the Owner column is the primary owner of that Implementation Step.

			<p>Dec 2012. First article is in February 2013 with new masthead for the page. Shows benefits of working and locating in Montgomery. 1-13 AM</p> <p>Based on feedback from BRE Survey, marketing material roundtable and other resources, the Services to Local Businesses and TO Do List to help your business pieces were updated and printed. Additional Montgomery Lights were also printed to be included in New Business and New Resident packets. Step sheets in new resident packets were updated and printed. Since so many folders were still on hand we chose to update and reprint rather than redesign the step sheets.</p> <p>We look to update design in 2015/2016 after the Strategic plan process. 5/2014 FL</p> <p>This has been determined to take place in 2019.</p>			
5.1.3	<p>Establish relationships with local businesses and tag onto their advertising and other resources to help promote the Montgomery image that draws people to the community. (Link to 1.3.6)</p>	Tracy Roblero	<p>This goal has changed since we are not on track to hire a consultant. Results of the survey from the BRE task team may lead to new marketing materials. The Business Calling Team will also be working on reviewing the marketing materials in 2013 and will have a discussion on cross marketing with existing businesses. TR 1-13</p> <p>This will be carried forward to the upcoming strategic plan as part of the economic development plan. TR 3/2016</p>	<p>Staff Time (\$25,000) as noted above.</p>	12 months	<p>09-2013</p> <p>Carried forward to Economic Development goal in upcoming strategic plan</p>
5.1.4	<p>Create welcoming entryways and improve the streetscape aesthetics to visually amplify the Montgomery image. <i>Examples: lamp posts at entryways and bridges, brick columns used throughout city like those in Parrot Alley, plentiful trees and beautification efforts.</i></p>	Brian Riblet/Gary Heitkamp	<p>Staff has added decorative planters, streetscape, trees, and streetlights in front of Delicio's Pizza. Staff has also extended Holiday Decorating further south on Montgomery Road approaching SR126.</p> <p>In 2014, staff worked with officials from ODOT, Sycamore Twp., and Symmes Twp. to reach an agreement to maintain the I-275 overpass area on Montgomery Road from Weller Road to Vintage Club</p>	<p>Staff Time, Budget support to make modifications in line with proposed image(Amount to be determined based on concepts)</p>	24 months	<p>12-2014</p> <p>COMPLETE</p>

			<p>Boulevard to include street sweeping, cleaning of medians, and mowing identified areas around the overpass.</p> <p>Staff is in preliminary discussions with ODOT to enhance the ODOT R-O-W at I-7 & Pfeiffer Road which would allow us to enhance with landscaping efforts.</p> <p>Funds were budgeted in 2015 (\$12,500) to develop conceptual designs for Montgomery & Pfeiffer Road intersection improvements in 2016 after the completion of the Montgomery & Pfeiffer Road Improvements Project in 2015.</p>			
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Strategy 2: Showcase the variety of businesses and residential options that contribute to making Montgomery as the community of choice to live, work and play.

<i>Implementation Steps</i>		<i>Owner***</i>	<i>Work Completed To Date</i>	<i>Resource Needs</i>	<i>Estimated Task Time</i>	<i>Target Completion Date/Status</i>
5.2.1	Coordinate with the business association to create a buy local campaign that involves Connect organizations and other partners in the promotion and support of the campaign. (Link to 4.3.3)	Faith Lynch	<p>The Chamber of Commerce is conducting a survey of local businesses asking them what they would like in a buy local campaign and a First Friday type of monthly event. Mary Jo Byrnes, Chamber Development and Communications Officer, is researching a loyalty perks program sponsored by the Chamber of Commerce urging consumers to shop locally. 11/28/2011 FAD</p> <p>Asked Chamber of Commerce to design marketing piece with map for promotions of local businesses with a buy local angle. FD 2/2012 Still in development due to Chamber delay FAD 7/2012 Created logos for the brochure 8-12 AM</p> <p>Montgomery Shopping Guide distributed to all residents, business and some community organizations.11/12. Working with Chamber on a Business services guide. BRE survey will include a questions about business interest in a Buy Local Campaign 12/12FD</p> <p>Shoppers guide included in the 2013 calendar mailing and internal page of calendar contained the buy local message. 11/12 AM</p> <p>Started a business page February 2013 in the Montgomery bulletin. 2/13 AM</p> <p>Revising business guide for fall 2013 to include walking tour app, updates to promotions, Montgomery images on cover and possible stand up holder with buy local message for local distributors of message. 10/13 AM</p>	Staff time, budget support (\$2,500 for promotional materials), partnered support	6 months	11-2012 COMPLETE

			<p>Collected feedback from Marketing Materials Roundtable discussion from 9/2013 to inform the redesign of several marketing pieces including the Montgomery Shopping Guide, business page in Montgomery Bulletin, Business pages on City's website, new business packet, services to local businesses etc. With the printing update to the new resident packet, a buy local image and message was incorporated in the step sheets. The Montgomery Shopping Guide is included in the packet. 1/14 FL</p> <p>Buy Local message featured in Feb, March, April, June, Sept., Oct, Nov, Dec 2013, Jan 2014 Bulletins. Shopping Guide were also included in the Yearly Calendar mailing 1/14 FL</p> <p>Supporting the Montgomery Map project with supporting letter signed by Mayor. 1/14 FL</p> <p>The Montgomery Shopping Guide printed and included in calendar mailing. Buy local messaging in newsletter continued with featured articles on Business page. 1/15 FL</p> <p>Ongoing and Complete 1/15 FL</p>			
5.2.2	Partner with the business association to utilize large regional events/attractions to market options in Montgomery for complementary services. <i>Example: Visitors to the ATP, Volleyball, Golf events, Kings Island, professional and collegiate sports events receive information about dining, shopping, nightlife in Montgomery.</i>	Faith Lynch	<p>Partnering with Lavender Street Quilt Shop and Chamber of Commerce (Mary Jo Byrnes) to market Montgomery as a day trip spot during the Quilts.com convention set for 4/2012. FD 11/28/2011</p> <p>Lavender street owner would like to continue relationship but 2012 would be her first year on the tour. She wanted to devote all her time to this year's event and expand on in the future. Mary Jo Byrnes is reaching out to businesses asking for them to donate items or give coupons to Quilters who come to Lavender Street Shop on 4/13 during the day activity. FD 2/2012</p>	Staff time, budget support (\$2,000 for promotional materials)	8 months	05-2013 COMPLETE

			<p>Distributed shoppers guide to local hotels during the Western Southern tournament. 8/13 AM</p> <p>Staff researched All Star Game 2015 related-activities and discovered the event falls at a time when staff is devoting the majority of their time to July 4 and Bastille events and determined it would be improbable to coordinate successfully. JM 1/2015</p>			
5.2.3	Create Montgomery clear way-finding signage directing people to key locations in the community.	Brian Riblet	Public Parking Way-Finding signage was the main focus with staff identifying all current sign locations and worked to implement a project to replace and upgrade all public parking way-finding signage. The installation of signage has been completed with the contractor returning in the Spring of 2015 to perform sign post painting and touch ups.	Staff Time, Budget support (\$10,000 materials)	10 months	01-2014 COMPLETE
5.2.4	Explore and create a business recognition program that awards longevity, services that meet daily needs, community-mindedness, and environmental stewardship which adds to the quality of life in Montgomery. (Link 1.3.8)	Tracy Roblero	<p>Business Calling Team is currently tracking when businesses were established in Montgomery and will discuss the Business Longevity program with the Chamber of Commerce. Business anniversaries are being highlighted in Montgomery Bulletin when we are made aware by the business. 1/2015 FL</p> <p>Tracy and Faith met with the Chamber on March 13, 2015 to talk about the idea. Carol Gorley surveyed her members to determine dates that their business started and said that she would proceed from there. MJV</p>	Staff Time, Budget Support (\$2,500 for recognition event, awards. Expect to partner)	12 months	03-2013 COMPLETE
5.2.5	Partner with the business association to create multiple events designed to have an economic impact and bring foot traffic to the downtown. <i>Example: Create a heritage day event with tours into local shops housed in historic sites</i> (Link to 1.1.4)	Julie Machon	<p>Brainstormed ideas in December 2012 and plan to discuss with other internal staff in February 2013.</p> <p>Completed 3D art project for 25th anniversary of Bastille Day.</p> <p>Conversations and research into the duplication of the ICE MELT event of 1954 to include the Lincoln dealership, A Kid Again and Avalanche Ice company. Logistics didn't work out.</p> <p>Worked with Elyse Jarard, owner of Venus for Her, to implement a kids triathlon training program. 9 kids</p>	Staff time, Team, (\$1,000) promotional materials per event, partnered support	9 months	12-2013 COMPLETE AND ONGOING

		<p>participated in the summer of 2013 and a good relationship was established with Elyse and Recreation.</p> <p>Worked with Montgomery Inn on Live at the Uni receptions. They sponsored all 3 post concert receptions. As a result, a good majority of the Live at the Uni crowd left Universalist Church and walked to the Montgomery Inn after each concert. I have followed up with the catering manager, Liz Winner, twice since the sponsorship to establish a relationship with her and Montgomery Inn. In addition, the Arts Commission ate dinner at the Montgomery Inn to show appreciation of their support. While we were dining we thanked Liz Winner and also purchased a gift certificate as a prize for the arts survey. Sept - Dec 2014. JM.</p> <p>During a car show meeting, Faith Taylor, Myers Y Cooper, and I discussed ideas to work together. I followed up and forwarded 2 ideas to Faith Taylor regarding activities for the Montgomery Square Plaza. Ideas included other places that implemented a Halloween themed 'candy walk' and a winter holiday 'chocolate walk'.</p> <p>Many of our current events such as Holiday in the Village, Photo Contest, Improv Show and Car Show that are held downtown helps bring awareness to the downtown area.</p> <p>Investigated the possibility to have an Art Fair in the downtown area but due to logistics, we were unable to proceed.</p> <p>The Chamber of Commerce along with the City of Montgomery held a Road Rally in October 2014. A dozen of participants completed the activity.</p> <p>The Chamber of Commerce and City Staff are working together on the 12 Days of Montgomery activity idea to be held in December 2015.</p>			
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5.2.6	Promote the diversity of housing options that are attractive to varying and evolving audiences.	Tracy Roblero	<p>10-16-13: Completion date has been changed in anticipation of new multi-family at Vintage Club and/or car dealership sites.</p> <p>This implementation step was intended to provide awareness of new multi-family available at the Vintage Club and/or GRA; however, new multi-family has not come on-line. Articles will be written when/if new multi-family development is constructed. 1-2015 TR</p> <p>Housing Goal was identified for the upcoming strategic plan. Articles will be written when/if new multi-family development is constructed at GRA and/or Vintage Club. Article was done on the Camden Homes development at the former Montgomery Swim and Tennis Club site. TR 3/2016</p>	Staff Time, Inclusion in communications tools	Each month	<p>12-2015</p> <p>Carried forward to housing goal in new strategic plan</p>
5.2.7	Assess opportunities to add connections from residential neighborhoods to services and key community locations to add to the desirability of living in Montgomery.	Brian Riblet	<p>This implementation step focused on sidewalk installation opportunities. Staff created a list of additional potential locations for sidewalks as the Master Sidewalk program defined in 2002 has been completed. Concrete sidewalk segments have been installed on Cornell Road from Sycamore H.S. west to the I-71 Overpass providing connection to Blue Ash, on Cornell Road from Valleystream Drive to just west of the I-275 completing Phase I with Phase II targeted for 2015 to connect over I-275 to Sycamore Twp., at Deerfield Road & Ivy Gate to provide access to Hopewell Cemetery, and in 2015 funds are budgeted for sidewalk on Ross Ave.</p> <p>As part of the Montgomery & Pfeiffer Road Improvement project sidewalk will be installed on the west side of Montgomery Road from Radabaugh Drive to the main entrance of Bethesda Hospital.</p> <p>Staff also applied and received grant funding for a sidewalk project to install sidewalk on the west side of Montgomery Road from Weller Road to the main</p>	Staff time, installation/plan costs to be determined	12 months	<p>12-2015</p> <p>COMPLETE</p>

			entrance of Bethesda North. This project is currently scheduled in ODOT fiscal year 2017.			
5.2.8	Explore logistics, other requirements as well as community support for food vending carts as options to draw people to the downtown.	Tracy Roblero	At this time there is not a demand for food carts in the downtown. There was discussion internally on how the City would handle a request, if a vendor would approach us; however, at this time no requests have been made.	Staff time	12 months	10-2015 COMPLETE

Strategy 3: Create an environment that supports an active, healthy lifestyle.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
5.3.1	Investigate options and support for a local par (fitness and exercise) course. Consider how the course could create connection between neighborhoods or parks.	Julie Machon	Staff will explore this idea. Staff has explored this idea and trends are going away from the par courses. Technology has provided other alternative options.	Staff time, (\$1,000 for printing) Additional expense if to be purchased and installed (\$20,000)	18 months	12-2015 COMPLETE
5.3.2	Evaluate and assess financial support for a Recreation Center. (Link to 6.2.5 and 6.4.3)	Amber Morris	Presented concept and premises for 2013 MCLA class and opened for discussion. Conclusion is not enough need for price tag as general consensus of participants – what do we forgo in order to have this? 3/13 AM	Staff Time, Stakeholder meetings, Budget support (\$2,000 Survey mailer and meeting materials)	9 months	09-2015 COMPLETE
5.3.3	Further develop options to create biking/walking connection to Sharon Woods and Little Miami Bike trail.	Brian Riblet	Continuing our involvement with the Connecting Active Communities Coalition (CACC) in which the group has reached a point to begin pursuing grant funding for potential linkages between communities.	Staff Time, Budget Support (to be determined with consideration for grants and partnerships)	24 months	12-2016 IN PROGRESS
5.3.4	Create a partnership with neighboring communities or local entities to offer a 5k/10k or a triathlon type event. (Link to 6.2.6) <i>Example is the Fleet Feet Turkey Trot done at Swaim Park on Thanksgiving or new idea for BAMSO fundraiser.</i>	Julie Machon	Elyse from Venus for Her approached us asking to work together to implement a triathlon. Staff including police, public works and citizen engagement met with her to discuss her proposal. Unfortunately, we are unable to proceed with working with her due to parking issues at the pool. We suggested the pool at Sycamore High School. Elyse said she would be interested in working with us in the future on a road race. JM 12-2011 Meetings were held with internal staff to evaluate our forms and processes for approving events in the city. A new process and forms were created and is being used. JM 01-2015	Staff time, partners, (\$3,500)	18 months	12-2013 COMPLETE
5.3.5	Create an Active Montgomery page on the City website to promote awareness of active/healthy options in the community. <i>Examples: include park paths, walking maps, active local events, videos of City events, options and activities.</i>	Julie Machon/ Matthew Vanderhorst	An Active Montgomery webpage has been created and is on our website. Site includes: Active Healthy Options in Montgomery, Health-related businesses in Montgomery and Other Health Links. Page is listed under the “Things To Do” tab. JM 12-12.	Staff time	6 months	12-2012 COMPLETE

5.3.6	Assess interest and community support to plan and host recreation, sporting or tournament events to increase the use of underutilized park fields and courts. <i>Example: Sand Volleyball tournament at Weller Park. (Link to 6.3.2)</i>	Julie Machon	A resident suggested we implement pickleball so staff researched the sport and assessed the need with a survey. 30 residents have responded, staff discussed with the Parks and Recreation Commission and staff are obtaining costs to stripe two tennis courts at Dulle Park. JM 01-2015 Staff implemented pickleball courts in 2015 in Dulle Park. Staff will implement a survey to assess interest in leagues in 2016.	Staff time,(\$3,500 to implement two to three options)	12 months	12-2014 COMPLETE
5.3.7	Assess feasibility and interest in expanded lap pool or splash play elements at the pool for added activity, staff cost-savings and sponsor support opportunities. (Link to 6.3.1)	Julie Machon	Julie Machon attended an Aquatics conference in February 2014 and talked to vendors and analyzed elements. JM Staff obtained a lower cost of heating the pool and this project became the priority. It is recommended by staff to focus on the basic upgrades at the pool which include updating the restrooms and expanding the concession menu. JM 01-2015	Staff time, Survey, Budget support (to be determined based on outcome of survey and space analysis)	24 months	09-2015 COMPLETE

Strategy 4: Ensure all City services, facilities and activities are inclusive and welcoming.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
5.4.1	<p>Identify opportunities to enhance welcoming and inclusive entry points at City facilities. (Link to 6.4.3)</p> <p><i>Examples: signage for easy identification and way-finding, counter heights, organic textures, soothing colors, comfortable seating.</i></p>	Connie Gaylor	<p>Pending review of the Goal 6-Facilities Team, any changes to the entryway will be on hold until final determinations of employee placement is made.</p> <p>City Hall Monument sign currently under review of the Planning, Zoning and Landmarks Committee of Council Tracy Roblero. 3-2016</p> <p>The replacement of the front doors with automatic ADA doors will be quoted and listed in the 2017 public works budget.</p>	Team time, Budget Support (\$5,000 to implement recommendations at each building. May change if new facilities added)	24 months	<p>9-2014</p> <p>ONGOING</p>
5.4.2	<p>Promote current services that are inclusive of a diverse population. <i>Examples: ADA access options in parks, large print or language translator on city website, safety services to help people age in place, cultural events.</i> (Link to 6.3.1)</p>	Julie Machon	<p>An article about the new ADA ramp in Montgomery Pool was published in the December 2012 Bulletin. JM. 12-12.</p> <p>An accessible ramp was fabricated and installed at Universalist Church.</p>	Staff time, (\$2,000 printing or signage)	12 months	<p>12-2015</p> <p>COMPLETE</p>

Strategy 5: Create community art/cultural opportunities that encourage active participation and contributions by citizens.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
5.5.1	Consider and evaluate requirements for new business construction that would require funding or in-kind support for inclusion of art in the community.	Tracy Roblero	It was determined that regulations could not be instituted to require new business construction to provide funding or in-kind support for art in the community. 1-2015 TR	Staff Time	12 months	01-2015 COMPLETE
5.5.2	Modify Universalist Church to hold more events such as art shows and other cultural events should the assessment of facilities indicate this to be a needed option. (Link to 6.3.6 and 6.4.3)	Brian Riblet	Staff has reviewed options to replace the existing furnace and to add air conditioning for Universalist Church. Concerns from the Landmarks Commission and MHPA have been expressed and staff will continue to review before making a final decision. A purchase order is in place for \$20,000 to perform this work if deemed appropriate. Public works staff addressed ADA concerns at Universalist Church by constructing a portable ADA ramp. Focus of funds have somewhat been transferred to the GRA project. The Landmarks Committee recommended to not alter the character of the building with the installation of a new HVAC system.	Possible costs: Conceptual design (\$5,000) public discussion and meetings, and if approved architectural design (\$15,000) plus construction costs of (\$75-100,000)	24 months	12-2015 COMPLETE
5.5.3	Create arts and sculpture guidelines, through a consultant if needed, the Arts Commission and community input, that would include permanent and temporary exhibits as well as complementing events and host facilities. (Link to 5.5.6)	Julie Machon	A subgroup committee of the Arts Commission created the guidelines. The draft of the Arts Guidelines has been reviewed by Staff twice and then forwarded to the Finance Director and the Law Director. Staff will review the updated version with the Arts Commission during the February Arts Commission meeting. JM 01-2015 Arts Guidelines were approved and have been implemented. 2015	Time, Arts Commission time, possible consultant (\$10,000)	18 months	12-2014 COMPLETE
5.5.4	Partner with local organizations to build upon the cultural options currently offered in Montgomery and weave them into a community arts lineup. <i>Examples: School</i>	Julie Machon	Arts Commission members created a Live at the Uni Improv Night which linked the Arts Commission to Sycamore Schools. 11-12. JM. Amber Morris organized a meeting to discuss the arts in Montgomery and to become aware of what each other does and ideas on how to work together. The Montgomery Arts Commission,	Staff time, team, partners, supplies for multiple events(\$3,500)	12 months	12-2014 COMPLETE

	<i>Theater, Woman's Club lecture series, school bands. (Link to 6.3.2 and 4.3.4)</i>		Sycamore Schools and the cities of Montgomery and Blue Ash attended in January 2014. JM			
5.5.5	Feature local art in city facilities.	Julie Machon	<p>After the Public Art Guidelines have been finalized, staff can explore this. JM 01-2015</p> <p>The Arts Commission is working to identify public art locations. 3-2016</p>	Staff time, Arts Commission time, Budget support (\$2,500 per year)	6 months (process repeated annually)	<p>12-2016</p> <p>IN PROGRESS</p>
5.5.6	Actively recruit financial support for the Arts and Amenities Fund and the Arts Master Plan. (Link to 2.2.7 and 5.5.3)	Julie Machon Arts Commission	<p>Arts Commission members actively sought donations via email to Live at the Uni participants and verbally at check in at each of the three Live at the Uni concerts. \$950 in donations was raised from the 3 concerts. Sept-Oct 2013. JM</p> <p>Staff created the option to donate online to the Arts and Amenities Fund. The link is located at the city's website under 'services' and 'gifting opportunities'. December 2014 JM</p> <p>A sponsorship packet was created and it will be implemented in 2016.</p>	Staff time, Arts Commission time, (\$2,000) printing	6 months (Initial efforts 2012 and again after the Arts Master Plan is complete)	<p>06-2014</p> <p>IN PROGRESS</p>

Strategy 6: Position ourselves as a recognized role model for environmentally sustainable practices.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
5.6.1	Generate and implement ideas to reduce the City's carbon footprint and use of energy in city facilities. <i>Examples: Geo-thermal heating, alternative energy options, non-metered uses for solar energy backup, alternative funding sources for green efforts.</i>	Tracy Roblero Green Team	The Sustainability Team was not able to meet as regularly as anticipated in 2012. The team is scheduled to discuss this goal at their October 2013 meeting. TR 8-13. Monies put into 2014 budget to allow for study on City buildings to be conducted by CDS to determine if the roof of any City owned facilities would be able to structurally support a green roof, solar panels or a white roof TR 10-13 Gary Heitkamp will be discussing the study with CDS and bringing back a quote to the Green Team at their February 2014 meeting. TR 1-14 The Community Development Department proposed a program that would waive building permit fees to residents who install solar panels on their home as part of an educational program to the Planning, Zoning, Landmarks Sub-committee of Council in March. Frank will be meeting with the Environmental Advisory Commission to discuss this program and get feedback on how to proceed in March. The solar incentive was instituted in 2014 and 2015. The Planning, Zoning and Landmarks Committee of Council met in March of 2016 and recommended approval of continuing the incentive program for 2016. TR 3/2016	Staff Time, Team, Consultant, (\$5,000)	12 months	01-2014 COMPLETE
5.6.2	Evaluate an option for a recycling program to extend to multi-family units and businesses. (Link to 2.1.5)	Susan Hamm	The Hamilton County Recycling and Solid Waste District has a multi-family recycling program. Condominium associations, property managers, and those living in an apartment, condominium, or other multi-family dwelling can receive free assistance from the District to start a recycling program. The District works with the waste hauler to coordinate the easiest and most efficient recycling plan for the property and pays for the first year of the recycling contract. The property owner must agree to pay for the next two years. Staff has referred several properties to the District. The Saturday Drop Off has been expanded to include the drop off of recycling items collect by the multi-family residents and businesses.	Staff time, legal costs (\$5,000) annual cost of program (\$10,000)	18 months	12-2015 COMPLETE

5.6.3	Create "Go Green" events using partnerships with the schools, Montgomery Farmers' Market, Rumpke or others and coordinated by EAC to learn and share best practices.	Susan Hamm Environmental Advisory Commission	<p>The City of Montgomery Environmental Advisory Commission in partnership with the Montgomery Farmers' Market presented an educational film series entitled Farm to Fork. The series is comprised of two independent documentary films that depict our food system from the farms where our food is grown and harvested to the markets where they are sold. The films chosen for the series were: <i>Fresh, the Movie</i> (April 25th) and <i>Ingredients</i> (May 23rd). Following the showing of was on hand for a Q&A session and discussion</p> <p>Residents are requesting additional, convenient opportunities for reuse and recycling. To accommodate the needs of residents the City of Montgomery offered it's first ever Reuse and Recycle Fair on September 21, 2013 from 10:00 a.m. to 1:00 p.m. The City of Montgomery invites several nonprofit organizations to participate. Participating organizations included Matthew 25, Goodwill, Crayons to Computers, and 2TRG.</p>	Staff and volunteer time, (\$1,500 per event) for supplies and contracts	18 months	12-2013 COMPLETE ON-GOING
5.6.4	Create a "green" page on the city website to promote opportunities that support "green" initiatives, environmental training, city projects and services and incentives for environmentally sustainable practices.	Tracy Roblero/ Matthew Vanderhorst	Initial meeting with Brian and Susan to discuss "green" page on the website. Green Team met to discuss initial ideas at their July 2013 meeting. Tracy will be meeting with EAC in August 2013 to get their input and will take those ideas back to the Green Team in August. TR 8-13 Tracy, Susan and Brian were in attendance at the September EAC meeting to get ideas for the green website. 10-16-13 Green Team met with Matthew to discuss ideas for green website from EAC and Green Team, as part of the new website design. Ideas will be added to the website and the green page will be moved to be more readily accessed. TR 1-14	Staff Time	6 months	09-2013 COMPLETE
5.6.5	Research and develop "green" applications throughout the community. <i>Examples: Use solar compacting trash containers, recycle bins with each community trash can, and park further green stalls in parking lots, walk and enjoy signage, bike racks at key locations for alternative transportation options, and an eco-shuttle.</i>	Brian Riblet Environmental Advisory Commission	<p>Staff submitted a grant application to the Hamilton County Solid Waste District for \$5,000 to purchase recycling containers to be placed in public spaces. This grant was approved in November 2011 and funds will be available in 2012 to purchase and place containers in various locations.</p> <p>Staff reviewed potential ODNR grant funding for "green" roof application for the Annex Building. After consulting with a structural engineer it was decided that the costs to upgrade the roof to sustain the additional weight of a "green" roof was not in our best interest.</p> <p>Bike racks have been installed at various locations.</p> <p>EAC is currently exploring the installation of a rain barrel at the Public Works Building as well as the installation of identified "plug share"</p>	Staff and volunteer time (material and equipment costs \$5,000 annually)	24 months	12- 2013 COMPLETE

			<p>locations within the Heritage District for motorists with alternative vehicles.</p> <p>Plug share was installed in the first row of the Shelly Lane parking lot during the summer of 2015. An article was run in the Montgomery Bulletin and a promotional video was crated for YouTube. MJV</p>			
5.6.6	Involve high school environmental club in the work of the Environmental Advisory Commission for additional perspective and energy.	Susan Hamm Environmental Advisory Commission	Several member of the Environmental Commission has visited with the Teacher and the environmental club. The Club was invited to participate and events and activities. To date we have not had any participation from the club. Members of the Commission will continue to make contact and encourage participation.	Staff time to recruit	6 months	06-2013 COMPLETE

Goal 6: Montgomery partners with the community to utilize, re-purpose or build facilities that meet the changing needs of our community and city operations, creating a comprehensive master plan for facilities needs and uses that will satisfy both community and government needs into the future.

(Team: Don Simpson, Susan Hamm, Mark Stagge, Greg Vondenbenken, Terry Willenbrink, Dianne Smith, Jesse Bundy)

Strategy 1: Complete a comprehensive inventory of all current city-owned facilities/properties, including office facilities, the public works garage, the recreational annex, lodges, historical buildings and vacant properties identifying current uses and any areas of underutilization not meeting the needs of the community and local government organization. The review will include a review of the recommendations of the Park Master Plan pertaining to the Recreational Annex and Swaim Lodge facilities, the Heritage District Master Plan, as well as other facility studies. Additionally, the review will include an assessment of possible re-purposing or reuse of underutilized sites or facilities.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.1.1	Complete a strategic assessment using a team and/or consultant that takes a coordinated and comprehensive look at all existing city-owned facilities/properties reviewing those facilities current usage for office space, general operations, meeting space for both internal and community needs, storage capabilities, recreational offerings, events, emergency backup, and parking.	Brian Riblet	Data has been gathered on all city owned facilities and grounds to include square footage, current usages, and future demands. Information was documented and put into a report by the Facilities Team.	Staff Time Consultant Facilities Team	9 months	04-2012 COMPLETE
6.1.2	Review existing plans for city facilities any additional detailed information on facilities such as the comprehensive park study, tech solve energy audit, Capital Improvement Program, and any other studies to consolidate and identify an inventory of current facilities noting sq footage, age, expected life span, cost to maintain, as well as any planned capital or operational/maintenance expenditures that are currently budgeted or planned.	Brian Riblet	This implementation step is running parallel to 6.1.1 Upgraded parking lot poles and LED lighting has been installed at Weller Park, Swaim Park, and Pioneer Park. Dulle Park is anticipated to be completed by the end of 2012. A 30% reduction in utility costs is expected with these upgrades. All City parking lots with the exception of the downtown lot have been upgraded. Future opportunities may result as an outcome of the final facilities team report.	Staff Time Susan Hamm	9 months	04-2012 COMPLETE
6.1.3	Conduct an analysis of current revenue generating facilities to include a cost/benefit analysis of each facility and alternative or enhanced revenue generating opportunities. (Link to 2.1.5)	Jim Hanson	The analysis of the cemetery and lodges and their associated rates was conducted by finance and customer service staff. The rates were evaluated and adjusted accordingly.	Staff Time Matthew Vanderhorst	6 months	06-2012 COMPLETE

*** The first name listed in the Owner column is the primary owner of that Implementation Step.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.1.4	Identify underutilized or unutilized facilities/properties. <ul style="list-style-type: none"> Tours of all facilities/properties have staff discussion of usage, maintenance, capital needs and design layout appropriateness. 	Terry Willenbrink	Data has been gathered on all city owned facilities and grounds to identify current usages, and future demands. Information was documented and put into a report by the Facilities Team.	Staff and Consultant Frank Davis	8 months	08-2012 COMPLETE

Strategy 2: Identify immediate and future public facilities needs that will address the capacity to support current services as well as support strategic plan goals, strategies and programs through forward thinking, financially responsible approaches that meet the need of the community and consider the possibility of partnerships with other community-related organizations and entities.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.2.1	Examine current city programs and services and identify the effectiveness of the facilities used to support these efforts. Identify functions that may be limited by the City's current facility inventory.	Julie Machon	Attachment	Staff Time Efficiencies & Effectiveness Team	4 months	04-2013 COMPLETE
6.2.2	Benchmark City facilities/properties and their usage as they compare to other area and regional municipalities or local government entities. This may include investigations into local, regional and national best practices and trends public/private operations and initiatives in comparable cities.	Susan Hamm	A review of the Park Shelters and Lodges and Church rental policies of the city were done. A rate comparison, as well as a facility operation cost comparison was conducted to benchmark how the city compared to our neighboring communities. RESULTS- Changed the fee for return checks from \$15.00 to \$25.00. Establish a Non-Resident rental rate for Terwilliger Lodge and Swaim Lodge Rental rates were not changed were made to the Universalist Church.	Efficiencies & Effectiveness Team	18 months	03-2013 COMPLETE
6.2.3	Identify current and future City needs in terms of facilities that support event/community meeting execution; i.e. Community Leadership Forum; educational events; MCLA; special events, etc.	Faith Dickerhoof	Developed a matrix of Churches, Restaurants, and other facilities, which contains - contact person, phone number and email. If they will rent to Public, Civic Organizations or Members only. Costs associated with rental for City, for non-profit and Types of Space available to rent. Attachment	Staff Time	12 months	04-2013 COMPLETE
6.2.4	Utilize employee team "Space Cadets" to identify current and future storage space /records retention needs.	Dianne Smith	Team met in August and November of 2012 to identify current and future storage space / records retention needs. The various departments compiled what records and where their records were kept and determined if they had adequate space. Discussions on looking into an off-site place was discussed for permanent records due to climate control and fire safety of the records. We have determined that our storage space for the time being is adequate, since a large majority of our records are being stored electronically. Costs to store permanent records off site will be investigated if it is determined to be a need. Permanent Documents will be stored off site.	Staff Time Space Cadets Team	9 months	03-2013 COMPLETE

6.2.5	Survey community groups/entities; i.e. neighborhood groups, civic organizations, service clubs, Chamber of Commerce, etc. to determine facility needs for meeting/event space as well as any opportunities for collaboration with the City. Conduct focus groups of general citizens to capture those who are not members of these established community groups. (Link to 4.4.1, 4.5.2 and 5.3.2)	Amber Morris	While a survey was not completed, it is generally understood that there is a current lack of public facilities that could accommodate large groups. The City has used local churches and schools at times but they bring a different set of problems. The City has had some success with the facilities at Bethesda North and plans to take advantage of them for future community gatherings. The Chamber has outgrown their space at Wright Brothers and is not meeting at Twin Lakes. Twin Lakes does have a plan to include a large meeting center as part of their future development plans. MJV 3/31/16	Staff Time (\$2000 to promote and implement event)	12 months	03-2013 COMPLETE ONGOING
6.2.6	Identify programs/services that are not possible or that are under performing in terms of revenue generating potential that may be foregone as a result of limitations of current facilities; i.e. current limitation on recreational programming space, limitation on use of church due to no restroom facilities, vacant lot on site of former Businessmen's Club site, etc. (Link to 3.1.4, 4.5.4 and 5.3.4)	Susan Hamm	The recreation annex was completely remodeled with a new exercise specific flooring, painted interior, new ceiling with new lighting that was repurposed from the former Ford dealership site, new sound system and new exercise equipment. A computer network connection will be installed in the spring of 2016. All of these changes have significantly increase the options for use and the comfort and satisfaction of our customers. Changes to the Universalist Church are being considered to make it more useful to renters (see 5.5.2). The kitchen area in Swaim Lodge was brought up to current standards and other minor updates were accomplished in early 2016 to make it more useable. As a result, the non-resident rate was increased. MJV 3/31/2016	Staff Time	18 months	06-2013 COMPLETE ONGOING
6.2.7	Conduct an analysis of future staffing and facilities needs for all departments considering: <ul style="list-style-type: none"> the potential for more shared services/staff between departments; the needs of a cross-functional team approach to work vs. the current departmentally structured organization within facilities currently; i.e. could clerical staff sharing between departments/buildings, etc.(Link to 3.3.3) 	Don Simpson	<p>November of 2013 Goal #3 team completed its work and presented ideas to council for general feedback and direction. The city manager is meeting individually with all department heads for feedback during November of 2013. Additional meetings with each department will follow and any changes to the organizational structure will be announced following these meetings 11/13 DS</p> <p>Chief Simpson and Chief Hartinger of Blue Ash PD have met with Management Partners to discuss the possibilities of sharing services in some areas. Work continues in this area as of 11/13 with a follow up meeting planned for the last week of November 2013. DS</p> <p>11/13 Senior staff discussion with regards to current staffing levels in city departments. are not expected to significantly increase or decrease in the next 5 years. Discussion from results of goal 3 team work suggest current facilities be maintained with some</p>	Staff Time Senior Staff Organizational Structure Team	18 months	10-2013 COMPLETE

			improvements or re-purposing of offices. General discussion of moving Finance/Tax to street level and/or moving Community Development closer to current customer service area. Additional Facility enhancements of physical security to be considered during any remodeling or facility re-purposing.			
6.2.8	Identify any privately owned properties that may represent strategic acquisitions for the City for future economic development needs such as in the case of the Triangle Property, Business Club, etc. that would generate ability to guide/control development in the future and or represent opportunities to address community needs in the future. (Link to 1.2.8 and 1.4.1)	Frank Davis	List of Vacant/Underutilized Properties Properties of Interest	Staff Time Tracy Roblero	3 months	10-2011 COMPLETE

Strategy 3: Examine the gap between the current facilities inventory identified in Strategy 1 and the needs identified in Strategy 2 and formulate a comprehensive master plan to identify possible future facility repurposing, property enhancement, redistribution of staff work/programming/services, capital improvement projects, potential property acquisition and/or sale/disposal of current assets.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.3.1	Critically review the inventory of facilities identified in Strategy 1 with the needs identified in Strategy 2 and formulates a plan for addressing the City's facility needs given existing City facilities. Identify if there are inabilities to meet needs of the City and/or community using current City facilities and alternatives as to how those needs can best be met including capital improvement projects and/or acquisition of additional space. (Link to 3.1.7, 3.4.1, 5.3.7 and 5.4.2)	Brian Riblet/Gary Heitkamp	<p>This work needs to follow 6.2.7</p> <p>In 2015 a project to increase parking capacity at the Safety Center was completed to allow for 19 additional spaces.</p> <p>A placeholder has been included in the 2016/2017 budget for design services and modifications to the Public Works Facility.</p> <p>A placeholder has been included in the 2018 budget for upgrades to Council Chambers at City Hall.</p> <p>Review of final facilities team report may result in additional requests for facility enhancements modifications.</p>	<p>Staff Time</p> <p>Jim Hanson</p> <p>Susan Hamm</p> <p>Brian Riblet</p>	7 months	<p>03-2013</p> <p>COMPLETE</p>
6.3.2	Look at opportunities to collaborate in service delivery and facilities with other communities and organizations i.e. Blue Ash, Tri Health, Sycamore Schools, etc and other service providers. (Link to 3.1.7, 4.1.1, 5.3.6 and 5.5.4)	Greg Vondenbenken	<p>Shared Public Safety items:</p> <ol style="list-style-type: none"> 1. Hamilton County Police Association SWAT team, Dive team, OVI Task Force, and Honor Guard. 2. Auto Accident Reconstruction Team with Blue Ash PD. 3. Fire Service hose testing with other area departments and the Arson Task Force. 4. FATS firearm training shared with 13 other local police departments. <p>Service related items:</p> <ol style="list-style-type: none"> 1. Road salt purchasing with City of Cincinnati. 2. Blacktopping services shared with Amberley Village. <p>Current Administrative related items:</p> <ol style="list-style-type: none"> 1. Joint newsletter with Sycamore Community Schools which include cost sharing. 	<p>Staff Time</p> <p>Brian Riblet</p> <p>Greg Harris</p>	18 months	<p>12-2012</p> <p>COMPLETE</p>

			<p>2. Investigation of potential grant funding through Local Government Innovation Fund.</p> <p>3. City leaders in attendance at Greater Cincinnati Shared Services Summit, which is hosted by Hamilton County Planning Partnership and Center for Local Government.</p> <p>4. Ongoing community roundtables with Blue Ash, Symmes, and Sycamore Community Schools for possible shared opportunities.</p>			
6.3.3	Identify any repurposing/reuse opportunities for existing City facilities.	Gary Heitkamp	Repurposing of lighting, furnaces, garage door openers were salvaged from the former Ford Dealership and utilized at the Annex Building as well as the Public Works Building and Park Facilities.	Staff Time	8 months	02-2013 COMPLETE
6.3.4	Develop a plan to enhance the revenue-generating capacity of city-owned rental/lease facilities including lodges, the Universalist Church and historic buildings in the Heritage District. (Link to 2.1.5)	Natasha Dempsey	A review of the Park Shelters and Lodges and Church rental policies of the city where done. A rate comparison, as well as a facility operation cost comparison was conducted to benchmark how the city compared to our neighboring communities. RESULTS-Changed the fee for return checks from \$15.00 to \$25.00. Establish a Non-Resident rental rate for Terwilliger Lodge and Swaim Lodge Rental rates were not changed. A rate comparison as well as a facility operation cost comparison was conducted to benchmark how the Universalist Church compared to neighboring communities. RESULTS- The rules were revised. The fee remained the same.	Staff Time Matthew Vanderhorst Frank Davis	6 months	06-2012 COMPLETE
6.3.5	Develop a plan for the former Business Club property.	Frank Davis	Most of the attention has been focused on the GRA and Vintage Club developments, however, City staff continually monitor the availability of other properties in the downtown area. The Business Club property may play role as part of a larger project. MJV 3/31/2016	Staff Time	18 months	09-2012 ONGOING
6.3.6	Prepare a written master plan document describing the findings of the above investigations and recommendations for future directions scope and initiatives. Create goals and implementation steps to address needs identified in the master plan as well as suggested timetables and financing sources, if necessary, based upon a gap analysis comparing current facilities and the needs of the community/local government operation. (Link to 3.4.2 and 5.5.2)	Susan Hamm	See Facilities summary created and presented to Council.	Staff Time Consultant Facilities Team	12 months	07-2013 COMPLETE

Strategy 4: Based upon input regularly and repeatedly received from citizens through community surveys, focus groups, etc. on their desire for a recreation center, arts/cultural and community center, establish a plan to involve residents and stakeholders in the final determination of whether such a facility/facilities should be built in the community including, the costs associated with such a project and the development of a funding plan to finance the construction of such facility/facilities.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.4.1	Conduct a dialogue with City Council to discuss this strategy to determine if it wishes to pose this issue to the community to decide if a recreation/ community center is a viable option for the City or if it is a facility that will not be considered in the future.	Wayne Davis	Presented concept and premises during 2013 MCLA class and opened for discussion. The general consensus of the participants was that the cost outweighed any need. 3/13 AM In addition to the MCLA feedback, other research was conducted and the conclusion was that the cost of the facility and the lack of available space made it infeasible. However, there is the possibility of a large community meeting space being included in future Twin Lakes development which would address the most pressing need. MJV 3/31/2016	Staff Time	6 months	06-2014 COMPLETE
6.4.2	If it is in the community's interest to pursue this question, create a plan containing cost analysis, possible location the construction of the facility and operation of this type of a facility, as well as a detailed financing plan identifying a funding source (through property tax levy) for such an improvement.	Wayne Davis	Kept materials for Madeira's discussions on financing a recreation center in 2012. They postponed due to current and future city finances needing support before an additional levy. 8-12 AM See 6.4.1. MJV 3/31/2016	Staff Time Jim Hanson Consultant	6 months	12-2014 COMPLETE
6.4.3	Utilize tools such as focus groups, open houses, surveys, e-gov, Open City Hall to evaluate the community's true interest and support for a community recreation center/ arts center/community center, and other such facilities given the costs associated with such a facility and the additional revenues that will have to be generated to construct and operate such a facility. (Link to 5.3.2, 5.4.1 and 5.5.2)	Wayne Davis	See 6.4.1. and 6.4.2. MJV 3/31/2016	Staff Time	9 months	09-2015 COMPLETE

Strategy 5: Construct a detailed financial plan to implement any supported facility study recommendations.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.5.1	<p>Utilize the comprehensive master plan for City facilities as developed in Strategy 3 to develop a report of estimated financial impact of suggested or desired facilities</p> <ul style="list-style-type: none"> • Prepare cost estimates for all recommendations, capital improvements and acquisitions. • Prepare a matrix of alternative funding and grant sources for initiatives recommended in the study. 	Susan Hamm	Needs to follow 6.2.7. This was included in the 2016-2021 budget proposal by staff and City Council in the fall of 2015. Estimates for City Hall Renovations, New Salt Storage bin, additional parking at the Safety Center, additional room at Public Works were all discussed and included (as place holders in some cases) in the budget plan	Staff Time Consultant Jim Hanson	6 months	06-2013 COMPLETE
6.5.2	Prepare an analysis of methods the City can use to maximize its revenue-generating capability of properties such as the lodges, Universalist Church and leased office space.	Susan Hamm	A review of the Park Shelters and Lodges and Church rental policies of the city where done. A rate comparison, as well as a facility operation cost comparison was conducted to benchmark how the city compared to our neighboring communities. RESULTS-Changed the fee for return checks from \$15.00 to \$25.00. Establish a Non-Resident rental rate for Terwilliger Lodge and Swaim Lodge Rental rates were not changed. A rate comparison as well as a facility operation cost comparison was conducted to benchmark how the Universalist Church compared to neighboring communities. RESULTS- The rules were revised. The fee remained the same.	Staff Time	6 months	12-2015 COMPLETE

Strategy 6: Develop a comprehensive communications strategy to solicit input from and educate the public on the recommendations of Comprehensive Facilities Master Plan.

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.6.1	Conduct focus groups on preliminary findings of investigation into current facilities and local government and community needs and solicit input from the public, and incorporate a review of the report in 3.1.7 and the work of the City team in Goal area 3 to develop the Comprehensive Facilities Master Plan (Link to 3.1.7)	Amber Morris	Reference 4.4.1, 4.5.4 and 6.2.5. MJV 3/31/2016	Staff Time	2 months	02-2014 COMPLETE
6.6.2	Once completed, create a comprehensive communications plan to educate/inform residents of the findings and content of the Comprehensive Facilities Master Plan including use of newsletter, website, social media, etc. once the plan has completed.	Amber Morris	Reference 6.6.1.	Staff Time	2 months	04-2014 COMPLETE

Strategy 7: Implement final decisions reached through the Master Plan process

Implementation Steps		Owner***	Work Completed To Date	Resource Needs	Estimated Task Time	Target Completion Date/Status
6.7.1	Approval/Acceptance of Master Plan <ul style="list-style-type: none"> • Presentation to City Council • Approval by City Council 	Don Simpson	This was presented to City Council as a Facilities Study in 2015. Several of the suggested projects or study recommendations were included in the 2016-2021 budget request. Council accepted the facilities study as a resource for planning and plans to reference it during the upcoming strategic plan.	Staff Time	2 months	12-2014 COMPLETE
6.7.2	Create an action plan/time line of actions necessary to complete goals and objectives of the master plan	Don Simpson	See the Facilities Study for suggested time lines and possible budgetary impacts.	Staff Time	2 months	06-2014 COMPLETE
6.7.3	Develop Capital Improvement Plan recommendations and funding plan	Jim Hanson	During the 2015 and 2016 budget process, facility recommendations were planned throughout future years as to not overburden one particular year. Recommendations have been included in the capital budget. MJV 3/31/2016	Staff Time	2 months	08-2014 COMPLETE
6.7.4	Construct/Repurpose any recommendations.	Brian Riblet/Gary Heitkamp	Final review of Facilities Team Master Document may result in additional opportunities.	Staff Time Funding	6 months – 5 years	12-2016 IN PROGRESS