

GOAL 1: Montgomery delivers core services through innovation and partnerships consistent with our vision by assessing changes in customer demands, demographics and the environment.

SUMMARY: Six separate strategies have been developed to achieve this goal.

1. Align the critical, core and quality of life service index to properly reflect current stakeholder expectations, considering demographics and service inventory.
2. Evaluate the City's ability to positively impact local and regional traffic issues with an emphasis on maintaining a small-town feel.
3. Cultivate a progressive work culture that is responsive to customer service demands.
4. Integrate performance measurement and benchmarking into the City's work culture.
5. Review guiding documents (e.g., City Charter, Code of Ordinances, personnel manual, collective bargaining agreements and standard operating procedures) to assure they match the City's service delivery model.
6. Evaluate the City's infrastructure to ensure it meets current and future needs of the community.

CURRENT ACTIVITIES

- Staff has completed a re-assessment of all City services and a new service inventory has been created on the intranet and is more user-friendly.
- An initial communication strategy has been developed to provide information about our ability/effort to impact traffic, both locally and regionally, with an emphasis on maintaining a small town feel.
- HPO refresher for existing employees and exposure to newer employees was conducted by Tony Gardner from April 19-21, 2016.
- Staff has conducted a review of our succession planning efforts and exposure to LEAD for employees who may be in a position to grow within our organization. A proposed five (5) year list of candidates who have demonstrated an interest in attending LEAD has been developed.
- Performance measures and benchmarks for winter operations, finance, and police are being benchmarked to comparable communities.
- An inventory of the City's guiding documents has been compiled and will be reviewed to evaluate compatibility with the City's service delivery model and operating equipment.

WHAT'S COMING UP (6 MONTHS)

- Staff will identify 20-40 City services from the database to complete a thorough review (hours, financial). Initial review and consideration to incorporate service costs into the City's budget document will begin.
- Montgomery Bulletin, social media, open houses, neighborhood leadership forums are all avenues to share traffic related impacts both currently and associated with the GRA.

- Initial review of the City's organizational structure to assess how things are working from changes made as part of Goal 3 of the 2011-2016 strategic plan and assess future needs based on upcoming projects.
- Review of Government Accounting Standards Board (GASB) 34 to assure all City infrastructure is accounted for and begin determining future needs.
- The Efficiencies and Effectiveness Team is working with the Managers' Forum Culture Team to develop ways to measure values such as leadership, work culture, etc.

CHALLENGES

- May be difficult to begin assessing and recommending future infrastructure and organizational structure needs until we understand the full build out of proposed projects such as the Gateway Redevelopment Area and Vintage Club North and the impacts they may have on the City.
- Performance measures on leadership and work culture may be difficult to benchmark with other entities.

GOAL 2: Montgomery has a quality of life that makes it a premier community.

SUMMARY: Five separate strategies have been developed to achieve this goal.

1. Cultivate and support effective partnerships and relationships among local organizations, residents, partners, stakeholders and employees to collaboratively build connection, ownership and pride for the community.
2. Use a variety of methods to communicate information based on the needs of the target audiences.
3. Identify and provide a variety of recreation programs and events to meet the needs of the community.
4. Provide a healthy and beautiful environment by building on past successes.
5. Improve high levels of customer satisfaction with City services that meet the needs of current and future residents.

CURRENT ACTIVITIES

- An age analysis was completed on all recreation programs and all events in 2015 and 2016 and will occur again as part of a larger recreation survey this fall. One of the results of earlier assessments was the addition of chair yoga. Staff will review the survey results this fall to determine if any further changes need to be made.
- A survey was completed in 2015-2016, and another survey will be completed in the fall of 2017 to determine interest and need for instruction and recreation programming in general. Staff determined that more information is necessary.
- Pickleball offerings are being planned for fall of 2017 such as instructional days and open play court times for older adults. An instructional program or league is being planned for 2018. Equipment and program grants are being researched.
- The Community and Information Service Department is working on an employee development curriculum regarding the concepts of citizen engagement. The deadline is not until the end of the year, however; Ray Kingsbury has already conducted training in 2016 with staff about “The Ideal MCLA Session” focusing on foundations of citizen engagement.
- The Community and Information Service Department has researched social media trends to ensure we effectively reach and engage our local audience. As a result, the City has adopted Instagram, Nextdoor.com, and incorporated more videos in the social media feeds including a ten-minute video of the July 4 parade in 2016 and the Holiday Tree Lighting in December 2016. Also, all of the Former Mayors’ Roundtable Discussion videos were shared on social media and will be shared on the City’s podcast.
- To encourage tree planting and preservation on private property, Terry and Faith have produced the “Terry’s Favorite Tree” series starting with the March 2017 Bulletin and this will appear as an ongoing series that will run through February 2018. Also, through a partnership with Natorp’s, a voucher program was created for discounted pricing on selected ‘Terry’s Favorite Tree’ varieties.
- The City is nearing the end of the current WeThrive! two-year plan and wrapping up the implementation.

WHAT’S COMING UP (6 MONTHS)

- Continued development of a citizen engagement curriculum. A training session is being planned for a 2017 Managers' Forum.
- The current WeThrive! plan is just about complete. The team will be meeting over the next few months to develop the next two-year plan.
- Analyze the communication preferences of different demographic groups to ensure information is disseminated to meet the widest audience. The completion date for this is not scheduled until June 2018 but Faith and Matthew have decided to start working on it this summer and fall since it's such an important and all-encompassing implementation step.
- The Community and Information Services Department will be creating a proposal to define customer service standards for all City staff. Items to be considered are response times, customer feedback, service in a technology-driven World, and asking "Are we doing the right "What"?"

CHALLENGES

- Generating quality survey instruments and avoiding society's general 'survey fatigue' and ensure that statistically significant data is collected for decision-making.

Goal 3: Montgomery attracts and retains businesses that contribute to the long-term stability of the City, while maintaining our small town historic feel.

SUMMARY: Seven separate strategies have been developed to meet this goal, as shown below:

1. Work with developers to complete development/redevelopment of underutilized and/or vacant properties in the City.
2. Provide physical infrastructure to enhance and sustain commerce in the City.
3. Create an environment in the Heritage District and Old Montgomery Gateway District that attracts a sustainable retail/restaurant mix that caters to employees and residents.
4. Redefine and update the Montgomery brand by implementing a marketing and image campaign.
5. Create a redevelopment vision for the Montgomery Road Commercial Corridor from Main Street to City Hall.
6. Define great gateways into the City that are worthy of our community.
7. Evaluate development opportunities with surrounding communities to determine if partnerships with the City would advance our strategic goals of broadening the employment base, diversifying housing stock, enhancing infrastructure and creating gateways into the City.

CURRENT ACTIVITIES

- The business community continued to do well in 2016 with numerous new businesses moving into the community. The Christ Hospital Surgery Center also opened at the Vintage Club. Construction of a new pre-owned vehicle sales building for Columbia Acura/Hyundai was also completed in 2016. The new building will allow for Columbia Hyundai to begin sales of the new Genesis brand at the store located at 10987 Montgomery Road.
- On the southern end of the City, work continues on the planning of the Gateway Redevelopment Area (GRA). As part of the project, the Ohio-Kentucky-Indiana Regional Council of Governments (OKI) approved and awarded funding for a grant application submitted by the City for an Interchange Modification Project at Montgomery Road and Ronald Reagan Cross County Highway. The project includes construction of a modified two-lane roundabout, the installation of a traffic signal in and around the interchange and would also include demolition of the existing bridge at this location. The project would have a safe and positive impact on traffic while opening up more land for redevelopment. The OKI grant of \$6,000,000 represents approximately 70% of the total estimated construction cost of \$8,600,000 and the project is currently programmed in Ohio Department of Transportation (ODOT) fiscal year 2020. Staff will continue to work with Gateway Partners to negotiate a preferred developer agreement, refine the site plan and identify funding sources for the project. The City was awarded the Frank F. Ferris Planning Award by the Hamilton County Planning Partnership in March of 2017 for the work thus far at the GRA.
- An updated General Development Plan for the Village Section of the Vintage Club of Montgomery was approved by the Planning Commission in May of 2016. The updated General Development Plan reflects months of work by the developer in order to meet the expectations of the City and the residents of the Vintage Club while working with the current market

conditions. Staff continues discussions with developers for the north portion at the Vintage Club and is hopeful that construction can begin in 2017 once agreement on the purchase price of the land and public financing has been reached.

- Twin Lakes Senior Living Community began work on a building addition to the main campus, 9840 Montgomery Road, in 2016. The addition will include 45 additional independent living apartments and a new club-like dining venue, which will be located adjacent to a new auditorium/community room. A retail component along Montgomery Road will be added as a second phase and will include a restaurant/retail site along the Montgomery Road entrance to the Twin Lakes campus.
- Twin Lakes has also received approval for a memory care assisted living facility on the east side of Montgomery Road at the intersection of Montgomery Road and Schoolhouse Lane. The project will also include the extension of Schoolhouse Lane with the new facility accessing Montgomery Road and the existing traffic signal. Staff is also working with Twin Lakes on proposed Villa Homes on Montgomery Road just south of the Safety Center. These homes would be accessed from the existing north campus off of Hopewell Road. Twin Lakes has indicated that they would like to submit for Planning Commission approval in April of 2017.
- A new residential subdivision, Orchard Trail, began construction in 2016. The new 29 lot single family, detached subdivision is located at the location of the former Montgomery Swim and Tennis Club on Orchard Club Drive. Camden Homes will be developing the site and building the homes. The new subdivision will feature high-end, empty-nester type housing with a pocket park and a walking trail.
- Staff has continued to encourage the development of underutilized spaces and has met with key representatives of Tri-Health to discuss the potential for an office building on the vacant parcel in front of the Tri-Health Fitness Pavilion off of Pfeiffer Road. Staff has also met with representatives from the Gregory family to discuss the potential for outdoor dining at Montgomery Inn. Staff has had several conversations with developers regarding the potential for multi-family residential projects on different properties within the City, including, the Marketplace and on the west side of Montgomery Road between Deerfield and Pfeiffer Roads.
- Conduct MCLA 2.0 session and other input gathering sessions with residents, business owners and property owners within the Montgomery Road Commercial Corridor to provide feedback to the Planning Commission and City Council on potential changes to the Zoning Code and Montgomery Road Commercial Corridor Design Guidelines.
- Partnerships/relationship building has been accomplished through the business calling effort, intensive conversations with the owners/developers of the Vintage Club, lunch meetings with commercial realtors and numerous conversations with developers and consultants regarding the Gateway Redevelopment Area.

WHAT'S COMING UP (6 MONTHS)

- Move forward with the process at the Gateway Redevelopment Area, including negotiating a preferred developer agreement with Gateway Partners, work with Sycamore Community Schools to create a Tax Increment Finance District, suggest modifications to the Old Montgomery Gateway District zoning regulations, host an open house for the general public and work with the Planning Commission and Landmarks Commission on preliminary approvals.
- Creation of an entertainment district including downtown and the Gateway Redevelopment Area.

- Continue to work with the developer to work through financing issues at the Vintage Club, work with staff on bidding, approval and construction of public improvements and work with the developer on approval of Final Development Site plans.
- Planning Commission and staff to work with Twin Lakes on development plans for the proposed villa homes along Montgomery Road just south of the Safety Center.
- Staff and Planning Commission to work with the property owners for a potential new medical office building in the Hospital Corridor.
- Staff and Planning Commission to work with the property owner on the approval of a body shop addition at Camargo Cadillac.
- Business Calling Team will partner with the Chamber of Commerce to conduct a survey of businesses to assess their current and future needs and to solicit feedback on how the City can help provide physical infrastructure to enhance and sustain commerce in the City.
- Staff will propose the reinstatement of the zoning and building permit waiver for solar installations to Planning, Zoning and Landmarks Committee of Council in April in partnership with the Environmental Advisory Commission.

CHALLENGES

- Numerous projects happening at once, including the GRA, Vintage Club, Twin Lakes expansion, a potential new medical office building and Orchard Trail.
- The process for financing and approvals from Planning Commission and Landmarks Commission for the GRA could be long and may cause potential larger employers to look at other available sites.
- Issues regarding the purchase price of the Vintage Club have delayed submission of the Final Development Plans for the north section to the Planning Commission. These issues also delayed construction of public improvements at the site.
- There is a lack of quality restaurant space available for sale or lease; however, there will be a need to backfill the space vacated by Stone Creek Dining Company when they make the move up the street to the new retail building in front of Twin Lakes Main Campus.
- There is a lack of quality office space for sale or lease in the 5,000-20,000 square foot range.
- Most of the City's vacant spaces are being absorbed creating a lack of options for new/expanding businesses; however, there are still several underutilized and/or vacant properties remaining in the Commercial Corridor.

Goal 4: Montgomery will retain and attract quality and diverse housing options while maintaining a small town feel and effectively managing the infrastructure impacts of redevelopment.

SUMMARY: Five separate strategies have been developed to meet this goal, as shown below:

1. Create a housing strategy based on changing housing demands and the market and include input from residents, builders, Planning Commission and City Council.
2. Identify tools to encourage the diversification of housing stock based on the Housing Strategy.
3. Review and update the Comprehensive Community Plan and Zoning Code based on the Housing Strategy.
4. Review policies to mitigate the physical impacts of infill development and evaluate changes in the fabric of neighborhoods resulting from infill development.
5. Identify new tools, policies and procedures to mitigate the impacts of single family infill development

CURRENT ACTIVITIES

- Community Development and Community and Information Services Department partnered with the Community Building Institute to hold the first MCLA 2.0 in April of 2016. The topic was housing trends and 48 MCLA graduates were given the opportunity to provide feedback on the current housing mix in the community and discuss if the City should use zoning to try to encourage a more diverse mix of housing stock.
- Staff presented information on housing to the Neighborhood Leaders Forum in the fall of 2016 and included an article regarding housing in the Montgomery Bulletin.
- Staff is working with local realtor groups and the Home Builders Association to set up meetings to obtain feedback from these groups on the housing stock within the City.
- Staff completed a review of the 2015 Residents Survey to extract information pertaining to residential housing concerns and a summary of these concerns will be included in a White Paper to be presented to the Planning Commission and City Council.

WHAT'S COMING UP (6 MONTHS)

- Staff will complete a White Paper on the existing housing stock within the City which will include summaries of information gathered from MCLA graduates, residents, realtors and builders.
- Staff will facilitate a joint meeting with the Planning Commission and City Council to present the results of the White Paper and to solicit feedback from both groups regarding the vision for the future housing opportunities in the City.
- Staff will work with the Planning Commission to create a housing strategy, taking into account input from stakeholders, and present this to City Council for consideration.
- Staff will update the Teardown White Paper completed in 2007, including a section on the physical and financial impacts of teardowns.
- Staff will solicit feedback from residents on the benefits and challenges of teardowns on neighborhoods.

- We will partners with the Home Builders Association to solicit feedback on the market demands for teardowns, the impediments and/or challenges to building within the City and the process for building.
- Staff will also be creating a list of frequently asked questions for single family infill development for inclusion on the City's website.
- The Public Works Department and Community Development Department will revisit the performance bond requirements and make a recommendation to the City Manager for Committee consideration by the Planning, Zoning and Landmarks Committee of Council on any proposed changes by the end of the year.

CHALLENGES

- Changes in the priority of the Montgomery Road Commercial Corridor Design Guidelines update and economic development activities have caused the Housing Strategy White Paper to be delayed.
- Increasing concern regarding the numerous teardowns within the City regarding the architecture, size, stormwater runoff, excess trash to the landfills and noise. Managing the perceived negative impacts of infill development while allowing for property owners to update properties is a delicate balancing act.
- New concern from residents regarding infill development started in the 2014 – 2015 timeframe regarding the reduction in starter homes and/or empty nester homes and the increasing price point of housing in the community. This was reflected in the results of the 2015 Resident Survey as well as during MCLA 2.0 and Neighborhood Leaders Forum.
- Changes in the Federal interest rate could significantly change the housing market, especially in regards to infill development. Teardowns are strongly related to the Federal interest rate and if it increases, it is likely the City will see a decrease in teardowns.
- There is a large interest by developers for multi-family residential projects within the City with proposed densities that exceed what is allowed by the Zoning Code.

Goal 5: Montgomery’s fiscal plan supports City operations consistent with policy, while managing risk to provide services in the most efficient and effective manner.

SUMMARY: Three separate strategies have been developed to meet this goal.

1. Enhance the City’s financial position and operations by identifying and implementing new financial tools and adopting policies and procedures which promote efficiency and effectiveness.
2. Assess potential changes in revenue as a result of internal and/or external economic factors and plan for possible future impacts in order to remain fiscally viable. Through risk management practices, identify and assess operational decisions which may impact the City’s future financial condition and take appropriate measures to remain financially secure.
3. In the spirit of good stewardship educate residents, state legislators and other stakeholders on financial and tax related concepts that affect the City.

CURRENT ACTIVITIES

- Developing a sound financial plan to assist in the development of the Gateway Redevelopment Area (GRA) which may involve the creation of a new tax increment financing district for 30 years.
- Developing a sound financial plan to assist in development of the north portion of the Vintage Club which incorporates the remaining portion of Traditions property bordering Christ Hospital and the north portion to be developed by Brandicorp.
- Complete the land purchase of 10.3 acres from Hamilton County to secure the additional acreage necessary for the intersection modification in the Gateway Redevelopment Area.
- Finalize a Tax Increment Financing (TIF) agreement with the Sycamore School District that ensures reasonable compensation and the long-term success of the project.
- Continue to educate residents, state legislators and other stakeholders on financial and tax related concepts that affect the City.

WHAT’S COMING UP (6 MONTHS)

- Assemble a task team to research and implement a financial software package to replace existing applications for budget, accounting, tax and payroll.
- Finalize budget and cash flow analysis for upcoming fire tax levy.
- Pursuit of grants and other funding for the Gateway Redevelopment Area.
- Prepare financial presentation in anticipation of future bond rating associated with the Gateway Redevelopment Area.
- Finalize income tax Ordinance which fully complies with language required in House Bill 5 passed by the Ohio legislature in 2014.
- Preparation of the tax budget and operating budget incorporating a possible income tax reallocation in 2018 to provide additional revenues for funding any additional capital or operating expenditures as a result of economic development initiatives.

CHALLENGES

- That the transition within the finance department with potential changes in software, budgets capital financing and personnel will be done with little disruption in operations.