

2016-2021 Strategic Plan

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

Team: Wayne Davis, John Crowell, Brian Riblet, Kevin Gruber, Greg Harris, Julie Prickett, Mike Plaatje, Matthew Vanderhorst

Strategy 1: Align the critical, core and quality of life service index to properly reflect current stakeholder expectations, considering demographics and service inventory.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
1.1.1 Conduct an assessment of City services to update, redefine and categorize as critical, core and quality of life services in light of the changing environment including the impact of demographics, fiscal, political, technology, scrutiny by the public, safety, economy, and infrastructure.	Matthew Vanderhorst (Brian Riblet)		Service Inventory Database Staff Time	7 Months	11/2016
1.1.2 Develop service projections by identifying service drivers (i.e., current and proposed mandates, legal changes, GRA, etc.) and researching best practices. <i>Ref: Goal 3, Strategy 3</i>	Matthew Vanderhorst (Julie Prickett)		Staff Time	3 Months Review every six months or as appropriate	3/2018
1.1.3 Enhance and/or expand City services by strengthening City partnerships and service sharing efforts.	Wayne Davis		Staff Time	Continual process with updates provided as appropriate	3/2018

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
1.1.4 Assess the feasibility of sharing lobbyist services between communities and other political jurisdictions.	Wayne Davis		Staff Time Cost of lobbyist	12 Months	12/2017
1.1.5 Evaluate the use of resources, staffing, equipment and facilities for the above steps (1.1.1 - 1.1.4) to assess service delivery outcomes and efficiencies of the City's service delivery model.	Matthew Vanderhorst (Brian Riblet)		Service Inventory Database Staff Time	6 Months Update or request as appropriate based on service demands.	5/2020

Strategy 2: Evaluate the City's ability to positively impact local and regional traffic issues with an emphasis on maintaining a small-town feel.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
1.2.1 Establish and strengthen partnerships with local, regional, State and Federal organizations. (Ref: Goal 1.1.3)	Brian Riblet		Staff Time Lobbyist / Consultant / Legislators	Continual process with updates provided as appropriate	3/2018
1.2.2 Research best practices in traffic efficiency techniques and technology. Consider the potential of other influences (i.e. law changes, mandates, etc.) on traffic issues.	Gary Heitkamp		Staff Time Professional Development Costs Consultant / Vendors	3 Months Review every six months or as appropriate	3/2018
1.2.3 Develop a communication strategy to facilitate dialogue and educate the public about the City's ability to impact all traffic issues including traffic flow, potential traffic improvements and any applicable Ohio Department of Transportation requirements.	Mike Plaatje		Staff Time Community and Information Services Department Neighborhood Leadership Forums Bulletin Articles	12 Months or per project basis	3/2017

Strategy 3: Cultivate a progressive work culture that is responsive to customer service demands.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
1.3.1 Review and update current succession plans based on organizational changes implemented in 2013 (2011-2016 Strategic Plan, Goal 3) to ensure staff are in positions of leadership.	Julie Prickett		Staff Time	12 Months	3/2017
1.3.2 Develop a five year schedule to send staff to LEAD based on organizational needs and individual career development plans.	Julie Prickett		Staff Time Budget (\$5,500 per attendee)	1 Month	5/2016
1.3.3 Conduct joint training on HPO theory with Tony Gardner and Commonwealth Center for High Performance Government and City staff for the segment of the City workforce who have not experienced formal HPO training.	Wayne Davis		Staff Time Contract: \$5,000	1 Month	4/21/2016
1.3.4 Review organizational structure changes made as part of Goal 3 of the 2011-2016 Strategic Plan. - Assess impact of future projects on the organizational structure. - Recommend appropriate adjustments.	Greg Harris (Julie Prickett)		Staff Time	18 Months	10/2017

Strategy 4: Integrate performance measurement and benchmarking into the City's work culture

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
1.4.1 Incorporate performance measures and benchmarks in to the City's financial plans and budget process to assist in program and service financial analysis. Beginning with 2018 budget process.	Finance Director		Staff Time	2 Months	5/2017
1.4.2 Identify a set of core measures with comparable communities in the region to promote benchmarking.	Matthew Vanderhorst		Staff Time CLG Benchmarking Group	9 Months	12/2016
1.4.3 Use performance measures to assess and improve program and service efficiency.	Matthew Vanderhorst		Staff Time Efficiency and Effectiveness Team	29 Months	8/2018

Strategy 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.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
1.5.1 Develop a list of "guiding documents" within the City.	Faith Lynch		Staff Time John Crowell, Paul Wright, Connie Gaylor, Ben Shapiro, Greg Harris	2 Months	5/2016
1.5.2 Develop a team and conduct a review of City documents and identify other factors to evaluate compatibility with the City's service delivery model and operating environment.	John Crowell (Faith Lynch)		Staff Time	6 Months	3/2018
1.5.3 Recommend changes to align guiding documents and the service delivery model.	John Crowell (Faith Lynch)		Staff Time	1 Month	4/2018

Strategy 6: Evaluate the City’s infrastructure to ensure it meets current and future needs of the community.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
1.6.1 Partner with the Finance Department to review and assess City infrastructure, including items listed in Government Accounting Standards Board (GASB) 34.	Brian Riblet (John Crowell)		Staff Time Finance Department	12 Months	3/2017
1.6.2 Conduct site visits and reviews with other communities regarding strategic plans and the management practices for infrastructure maintenance and implementation in the short and long term.	Brian Riblet (John Crowell)		Staff Time	24 Months	3/2018
1.6.3 Create a master plan of infrastructure improvements based on results of steps 1 and 2. Include the improvements in the City's budget planning process as appropriate.	Brian Riblet (John Crowell)		Staff Time	12 Months	3/2019

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

Team: Matthew Vanderhorst, Connie Gaylor, Faith Lynch, Julie Machon, Sarah Fink, Terry Willenbrink

Strategy 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.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
<p>2.1.1 Develop an employee training curriculum for community engagement with the goal of making engagement a core expectation.</p> <ul style="list-style-type: none"> - Review with staff the relationship between HPO and community engagement. (Ref: 1.3) - Create task team that will develop recommended wording for front-line, mid-level and department head appraisal forms. (Review with bargaining units if necessary.) - Conduct community engagement training/awareness in each department. 	Faith Lynch		Staff Time	6 Months	12/2017
<p>2.1.2 Identify and assess current and future partnerships.</p> <ul style="list-style-type: none"> - Analyze effectiveness of current partnerships and recommend improvements, where appropriate. - Identify potential new partnerships. 	Matthew Vanderhorst		Community and Information Services Staff	4 Months	12/2019

Strategy 2: Use a variety of methods to communicate information based on the needs of the target audiences.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
2.2.1	Research and analyze social media trends to ensure we effectively reach and engage our local audience.	Faith Lynch (Mike Davenport and James Martin)		Staff Time Training, software	6 Months	12/2016
2.2.2	<p>Analyze the communication preferences of different demographic groups to ensure information is disseminated to meet the widest audience. Recommend and implement changes where necessary.</p> <ul style="list-style-type: none"> - Develop an inventory of tools and a schedule of City communication opportunities. - Assess communication needs of City departments and ensure that needs are being fulfilled. - Develop a manual for communication tools and practices for all staff. - Conduct a round-table discussion among MCLA graduates to identify ideas to improve readership and comprehension of City communications. (Ref: Goal 3, strategy 4) - Conduct a targeted and brief survey of City communications. - Review best communication practices in industry and government. 	Matthew Vanderhorst (Faith Lynch)		Staff Time	12 Months	6/2018

Strategy 3: Identify and provide a variety of recreation programs and events to meet the needs of the community.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
2.3.1	Analyze events and program offerings to determine the right mix for targeted age groups.	Sarah Fink (Julie Machon)		Staff Time	5 Months Reviewed annually	12/2017
2.3.2	Research sports instruction and recreational leagues and make recommendations based on findings.	Sarah Fink (Julie Machon and Terry Willenbrink)		Staff Time Budget forecast	6 Months	12/2018

Strategy 4: Provide a healthy and beautiful environment by building on past successes.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
2.4.1	Review Public Works job descriptions and develop a succession plan for the City Arborist responsibilities to ensure the City still meets the qualifications for Tree City.	Terry Willenbrink		Staff Time	6 Months	12/2016
2.4.2	Develop a plan to educate, market, and encourage tree planting and preservation on private property. Example: Partner with local tree nursery to provide discounts and access to specific tree species for Montgomery residents and businesses.	Terry Willenbrink		Staff Time Budget forecast	12 Months	12/2017
2.4.3	Seek out grants to support tree growth in Montgomery and to qualify for the Tree City Growth Award.	Terry Willenbrink		Staff Time	2 Years	3/2018
2.4.4	Implement chronic disease objectives from the WeThrive! Community Action Plan and other wellness and well-being initiatives focused on improving health and welfare for a premier community.	Connie Gaylor (Sarah Fink)		Staff Time	2 Years	12/2018
2.4.5	Develop a menu and implementation schedule for creating welcoming entryways and improving the streetscape aesthetics to visually highlight the Montgomery image. Examples: GRA right-of-way, medians, lamp posts at entryways and bridges, brick columns used throughout city like those in Parrot Alley, plentiful trees and beautification efforts.	Terry Willenbrink		Staff Time Budget forecast	5 Years	12/2021

Strategy 5: Improve high levels of customer satisfaction with City services that meet the needs of current and future residents.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
2.5.1	<p>Define and create customer service standards. Example: http://www.arlingtonwa.gov/Modules/ShowDocument.aspx?documentID=1245</p> <ul style="list-style-type: none"> - Consider response times, customer feedback, and asking "Are we doing the right "what"?" - How do we provide customer service in a technology-driven world? 	Matthew Vanderhorst		Staff Time	6 Months	9/2017
2.5.2	<p>Inventory our services to ensure we are reaching and meeting the needs of our current and future age demographics.</p> <ul style="list-style-type: none"> - Safety services (core police and fire functions) - Parks (Wider paths, ADA, amenities, etc.) - Recreation (Ref: 2.3) - Communications (Ref: 2.2) - Infrastructure (Automatic ADA accessible doors in City facilities where appropriate.) - Outreach (Home safety checks, EMS SignPost, Neighborhood Leaders Forum, etc.) 	Connie Gaylor		Staff Time	2 Years	12/2020

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

Team: Tracy Roblero, Wayne Davis, Julie Prickett, Mark Stagge, Ben Shapiro, Finance Director

Strategy 1: Work with developers to complete development/redevelopment of underutilized and/or vacant properties in the City.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.1.1 Work with the Preferred Developer to create a vision and receive approvals from appropriate City Commissions for the Gateway Redevelopment Area.	Tracy Roblero (Frank Davis)		Staff time	18 months	1/2018
3.1.2 Work with Life Enriching Properties to complete approvals for the building expansion of the main campus and any proposed projects on their property on Montgomery Road south of the Safety Center.	Tracy Roblero		Staff time	12 months	1/2017
3.1.3 Work with the developers of the Vintage Club to complete approvals for the remaining properties in the Village Section of the Vintage Club.	Tracy Roblero		Staff time	12 months	9/2016
3.1.4 Meet with officials of TriHealth to determine if there are any plans for developing the vacant property at the front of TriHealth Fitness Pavilion and if the City can help market the site.	Tracy Roblero (Wayne Davis)		Staff time	2 months	1/2017
3.1.5 Develop a list of vacant or underutilized properties that if developed or redeveloped would enhance the community.	Tracy Roblero		Staff time	2 months	1/2017

Strategy 2: Provide physical infrastructure to enhance and sustain commerce in the City.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.2.1	Partner with the Chamber of Commerce to conduct a survey of businesses to assess their current and future needs and to solicit feedback on traffic concerns.	Faith Lynch (Tracy Roblero and Mark Stagge)		Business Calling Team	3 months	7/2017
3.2.2	Conduct a downtown parking study to determine the impact of the development of the Gateway Redevelopment Area on public parking and future needs and possibilities in the Heritage District.	Tracy Roblero		Staff Time	3 months	1/2019
3.2.3	Conduct a pedestrian connection study to and around the commercial districts to identify opportunities and challenges to pedestrian connectivity between neighborhoods and the commercials districts.	Gary Heitkamp		Staff Time	2 months	1/2018
3.2.4	Develop a system to manager and prioritize property maintenance issues of City owned property.	Brian Riblet		Staff Time	3 months	7/2019
3.2.4	Consolidate information gathered in Implementation Steps 3.2.1 – 3.2.3 into an infrastructure master plan specific to commercial areas, including maintenance of property within the right-of-way. The master plan will be implemented via Goal 1.	Gary Heitkamp		Staff Time	3 months	4/2018

Strategy 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.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
3.3.1 Identify and study comparable small town business districts to identify amenities and best practices that make them successful.	Tracy Roblero (Ben Shapiro)		Staff Time AFI	6 months	1/2019
3.3.2 Contact Community and Economic Development Directors in comparable cities to solicit feedback on what they believe makes their downtowns successful and the challenges to maintaining that success.	Tracy Roblero		Staff Time	3 months	1/2019
3.3.3 Identify and prioritize a list of locations in the Heritage District and Old Montgomery Gateway District that could be used as pedestrian gathering places to enhance the pedestrian experience and increase foot traffic.	Tracy Roblero (Brian Riblet)	Wayne Davis met with Tom Gregory, Montgomery Inn, on 1/19/16 to discuss potential outdoor dining. Tracy Roblero met with Tom Gregory and contractors to discuss the outdoor dining design for Ted Gregory Alley on 3/29/16.	Staff Time MCLA grads	3 months	3/2019
3.3.4 Review the Heritage District Audit and Analysis created by Kolar Design, Inc. and Human Nature in 1997 to determine if any of the suggestions have been implemented and/or would still apply today.	Tracy Roblero Frank Davis		Staff Time	3 month	3/2019
3.3.5 Conduct a roundtable with MCLA grads to solicit feedback on impediments to visiting the downtown and potential solutions to encourage residents to frequent the downtown.	Faith Lynch (Tracy Roblero)		Staff Time MCLA Grads	3 month	3/2019

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.3.6 Develop a list of best practices and amenities that could be implemented in the Heritage District and Old Montgomery Gateway District to increase foot traffic and attract a sustainable retail/restaurant mix while maintaining a small town feel based on feedback received from various input gathering sessions and research.	Tracy Roblero (Frank Davis)		Staff Time	3 months	3/2019
3.3.7 Consolidate information gathered in Implementation Steps 3.3.1 – 3.3.6 into a Heritage and Old Montgomery Gateway District Master Plan and vision for the future. This plan to be implemented via Goal 1.6.3	Tracy Roblero (Frank Davis)		Staff Time	3 months	3/2019

Strategy 4: Redefine and update the Montgomery brand by implementing a marketing and image campaign.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.4.1 Examine the feasibility of hiring a consultant to conduct focus group discussions with key stakeholder groups regarding the Montgomery image and solicit feedback for updating the Montgomery brand.	Wayne Davis (Matthew Vanderhorst and Faith Lynch)		Staff Time	1 month	1/2019
3.4.2 Work with a consultant and utilizing feedback from input gathering sessions, enhance the Montgomery brand through a comprehensive image campaign considering both residential and business desirability. (Ref: 3.7.4)	Matthew Vanderhorst (Faith Lynch)		Staff Time Funding for Consultant \$25,000	3 months	4/2019
3.4.3 Implement the new Montgomery brand on all City materials, social media et al. to ensure a consistent message and image is being used all platforms.	Matthew Vanderhorst (Faith Lynch)		Staff Time	3 months	9/2019
3.4.4 Investigate partnerships with the Montgomery Chamber of Commerce, other civic groups and businesses to promote the Montgomery brand and image.	Wayne Davis (Faith Lynch)		Staff Time	3 months	9/2019

Strategy 5: Create a redevelopment vision for the Montgomery Road Commercial Corridor from Main Street to City Hall.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.5.1 Complete a comprehensive study of the properties located in the Montgomery Road Commercial Corridor to identify the challenges and opportunities in the Corridor.	Tracy Roblero (Melissa Hays)		Staff Time	3 months	8/2017
3.5.2 Convene and facilitate a joint meeting with City Council and the Planning Commission to discuss the results of the study and the long term vision for the Commercial Corridor.	Tracy Roblero (Wayne Davis)		Staff Time	2 months	10/2017
3.5.3 Convene and facilitate input gathering sessions regarding the long term vision for the Commercial Corridor with key stakeholder groups (i.e. residents, MCLA graduates, business owners, Chamber, etc.)	Tracy Roblero		Staff Time	3 months	10/2017
3.5.4 Conduct a review of the Montgomery Road Commercial Corridor Design Guidelines to identify areas that need to be modified to achieve the long-term vision.	Tracy Roblero (Melissa Hays)		Staff Time	3 months	1/2018
3.5.5 Compile a summary of the input gathering discussions and make a recommendation to the Planning Commission on text amendments to the Zoning Code and the Montgomery Road Commercial Corridor Design Guidelines based on the long term vision of City Council for the Commercial Corridor.	Tracy Roblero		Staff Time	3 months	3/2018

Strategy 6: Define and create gateways into the City that are worthy of our community.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.6.1	Identify the points of entry into the City and create an inventory of the existing gateway features at these locations.	Brian Riblet		Staff Time	1 month	1/2020
3.6.2	Identify other successful small town communities and create an inventory of the gateways features into these communities. Link to 3.3.1	Tracy Roblero (Ben Shapiro)		Staff Time	3 months	2/2020
3.6.3	Work with City Council to prioritize gateway improvement areas.	Brian Riblet (Wayne Davis)		Staff Time	3 months	2/2020
3.6.4	Work with a consultant to create a long-term vision for the gateways into the City.	Brian Riblet (Tracy Roblero and Wayne Davis)		Staff Time Funding for Consultant \$25,000	3 months	5/2020
3.6.5	Identify funding resources and schedule enhancements to the gateways.	Tracy Roblero		Staff Time Funding for enhancements	3 months	8/2020

Strategy 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.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
3.7.1	Complete a comprehensive study of the land uses adjacent to jurisdictional boundaries and identify shared service opportunities across jurisdictions.	Melissa Hays (Tracy Roblero)		Staff Time	3 months	1/2018
3.7.2	Establish the criteria for accepting additional properties based on advancement of the City's strategic goals, while taking into consideration required resource and staffing needs.	Tracy Roblero (Wayne Davis and Finance Director)	City staff is discussion opportunities for the addition of land at the GRA from Hamilton County	Staff Time	2 months	3/2018
3.7.3	Create an inventory of properties at the jurisdictional boundaries that could satisfy the criteria established in the above implementation step.	Tracy Roblero (Melissa Hays)		Staff Time	1 month	4/2018
3.7.4	Create a brochure summarizing the benefits of being located within the City and share with property owners and businesses considering Montgomery for their operations. (Ref: 3.4.2)	Tracy Roblero (Faith Lynch)		Staff Time	1 month	4/2018

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.

Team: Melissa Hays, Gary Heitkamp, Mike Davenport, Greg Vondenbenken, Evelyn Dumont

Strategy 1: Create a housing strategy based on changing housing demands and the market and include input from residents, builders, Planning Commission and City Council.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
4.1.1 Partner with the Community Building Institute (Xavier University) to hold MCLA 2.0 and solicit feedback from MCLA graduates.	Tracy Roblero (Melissa Hays and Faith Lynch)		\$2,000 plus staff time	3 months	5/1/2016
4.1.2 Review results of the 2015 Residents Survey to extract information pertaining to residential housing concerns and create a summary report.	Melissa Hays		Staff time	1 month	5/1/2016
4.1.3 Solicit feedback about housing options from residents.	Tracy Roblero (Melissa Hays)		\$10,000 for consultant Staff Time	3 months	1/1/2017
4.1.4 Partner with the Ohio Builder's Association to solicit feedback from local builders about market demand and impediments to meeting market demand in Montgomery.	Tracy Roblero (Melissa Hays)		Staff time	2 months	4/1/2017
4.1.5 Develop an inventory of locations for potential higher density residential development/redevelopment within the City	Tracy Roblero (Melissa Hays)		Staff time	2 months	4/1/2017

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
4.1.6 Conduct a joint meeting with Planning Commission and City Council to solicit feedback regarding the vision for the future of housing opportunities in the City.	Tracy Roblero (Melissa Hays and Wayne Davis)		Staff time	2 months	5/1/2017
4.1.7 Work with Planning Commission to create a housing strategy, taking into account input from stakeholders, and present to City Council for consideration.	Tracy Roblero (Melissa Hays)		Staff time	2 months	8/1/2017

Strategy 2: Identify tools to encourage the diversification of housing stock based on the Housing Strategy.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
4.2.1	Conduct a review of the Zoning Code to determine potential obstacles preventing diversification of housing stock.	Melissa Hays		Staff time	2 months	1/1/2018
4.2.2	Study the benefits and challenges of modifying the Zoning Code to allow for higher density in multi-family districts in order to increase the availability of multi-family units and potentially expand the options for price points within the City.	Tracy Roblero (Melissa Hays)		Staff time	3 months	3/1/2018
4.2.3	Assess the benefits and challenges of modifying the Zoning Code to allow for accessory dwelling units in single family residential zoning.	Melissa Hays		Staff time	1 month	3/1/2018
4.2.4	Examine the benefits and challenges of setting maximum and/or minimum square footage requirements for single family residential.	Melissa Hays		Staff time	1 month	3/1/2018
4.2.5	Create an inventory of potential Zoning Code modifications and/or incentives to encourage diversification of residential price point within the City.	Melissa Hays		Staff time	1 month	4/1/2018
4.2.6	Create a comprehensive report of the finding from Implementation Steps 4.2.1 – 4.2.5 and present to the Planning, Zoning and Landmarks Committee of City Council to determine if any of the recommended changes should be considered.	Melissa Hays (Tracy Roblero)		Staff time	2 months	6/1/2018

Strategy 3: Review and update the Comprehensive Plan and Zoning Code based upon the housing strategy.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
4.3.1	Work with Planning Commission to update the Comprehensive Community Plan to ensure that it reflects the housing strategy.	Tracy Roblero (Melissa Hays)		Staff Time \$20,000 potential consultant	8 months	3/2019
4.3.2	Work with Planning Commission to modify the Zoning Code to ensure the regulations are in-line with the housing strategy, the updated Comprehensive Community Plan and/or any text amendments identified in Strategy 4.2.5.	Tracy Roblero (Melissa Hays)		Staff time	8 months	3/2019

Strategy 4: Review policies to mitigate the physical impacts of infill development and evaluate changes in the fabric of neighborhoods resulting from infill development.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
4.4.1 Review and update the Teardown White Paper completed in 2007, including a section on the physical impacts of teardowns.	Melissa Hays (Gary Heitkamp)		Staff time	3 months	1/2017
4.4.2 Conduct an Open House to solicit feedback from residents on the benefits and challenges of teardowns on the neighborhood,	Tracy Roblero (Melissa Hays and Gary Heitkamp)		Staff Time \$2,000 for potential consultant	2 months	4/2017
4.4.3 Partner with Home Builders Association to solicit feedback on the market demands for teardowns, the impediments to building in Montgomery and on the process of building within the City.	Tracy Roblero (Melissa Hays)		Staff time	2 months	7/2017
4.4.4 Meet with Development Departments in comparable communities to determine physical impacts resulting from infill development and identify best practices for mitigating said impacts.	Tracy Roblero (Melissa Hays)		Staff time	4 months	12/2017
4.4.5 Create a comprehensive report detailing the concerns associated with residential infill development, issues with current processes and policies and best practices from other comparable jurisdictions based on input from Implementation Steps 4.4.2 – 4.4.4.	Melissa Hays (Gary Heitkamp)		Staff time	3 months	3/2018

Strategy 5: Identify new tools, policies and procedures to mitigate the impacts of single family infill development.

	Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
4.5.1	Compile a list of common issues associated with single family infill development for future homeowners.	Melissa Hays (Gary Heitkamp and Jesse Bundy)		Staff time	2 months	8/2016
4.5.2	Review the engineering submittal requirements and process and make update, if necessary, perhaps using Lean process improvement.	Melissa Hays (Gary Heitkamp and Jesse Bundy)		Staff Time CT Consultants	2 months	8/2016
4.5.3	Create a list of frequently asked questions for single family infill development for inclusion on the City's website.	Melissa Hays (Gary Heitkamp and Jesse Bundy)		Staff time	2 months	8/2016
4.5.4	Evaluate the benefits and challenges associated with adopting a tree conservation policy for redeveloped single family residential properties. (Ref: 2.4.2)	Melissa Hays (Terry Willenbrink)		Staff time	2 months	7/2018
4.5.5	Evaluate the benefits and challenges associated with requiring storm water detention/retention on redeveloped single family residential properties.	Melissa Hays (Gary Heitkamp)		Staff time	2 months	7/2018
4.5.6	Evaluate the benefits and challenges associated with adopting architectural review design guidelines for redeveloped single family residential properties	Tracy Roblero (Melissa Hays)		Staff time	2 months	7/2018

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
4.5.7 Research new tools, policies and/or procedures for mitigating impacts of redeveloped single family residential properties to determine if these could be useful.	Melissa Hays		Staff time	2 months	9/2018
4.5.8 Create a comprehensive report on the concerns associated with residential infill development, issues with current processes and policies and best practices from other comparable jurisdictions based on input from Implementation Steps 4.4.2 – 4.4.4 and Steps 4.5.4 – 4.5.7.	Melissa Hays		Staff time	3 months	11/2018
4.5.9 Make appropriate changes to the policies and procedures, including the Zoning Code, based on recommendations of the report generated in Implementation Step 4.5.8.	Tracy Roblero (Melissa Hays)		Staff time	7 months	5/2019
4.5.10 Create an inventory of existing public storm water infrastructure and a system for tracking maintenance and replacement.	Gary Heitkamp		Staff time	24 months	7/2021

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.

Team: Finance Director, Assistant Finance Director, Paul Wright, Tom Wolf

Strategy 1: Enhance the City’s financial position and operations by identifying and implementing new financial tools and adopting policies and procedures which promote efficiencies and effectiveness.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
5.1.1 Establish debt policy (G.O. debt per capita, uses, percent of revenues, etc.)	Finance Director		Staff Time	6 months	6/2018
5.1.2 Schedule staggered ongoing user fee reviews to ensure fees are assessed on a rotating basis for comparison against neighboring communities and/or to evaluate cost recovery, if applicable.	Tom Wolf		Service Inventory Database/ Staff Time	3 months	8/2016
5.1.3 Investigate the potential for creating an event support policy that uses a pre-determined pool of money to issue grants to special events through a review panel.	Finance Director		Government Affairs Committee/ Staff Time	13 months	3/2020
5.1.4 Develop and implement a grant strategy (use grant funds to replace City funds) - How/when to use - Identify services - Educate public - Develop a system for access to frequently used data for grant applications	Paul Wright		Staff Time	6 months	12/2017

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
5.1.5 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.	Finance Director		Financial Planning Committee Time	Annual and ongoing Work will continue in this area throughout the Strategic Plan period.	12/2021
5.1.6 Develop a finance technology plan to improve productivity and enable timely decision-making. 1. Purchase new financial software 2. Provide technology improvements which may benefit all departments 3. Ensure that software selected allows for use and access by other City departments (Carryover from 2011 strategic plan)	Finance Director		Finance Director Software Proposals	36 months	Stage 1: 12/2016 Stage 2: 12/2017 Stage 3: 12/2018
5.1.7 Incorporate Performance Measures into annual budget process and presentation.	Finance Director		Finance Director	6 months	6/2021

Strategy 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.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/Status
5.2.1 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 Manager and City Council on the appropriate course of action.	Finance Director		Staff Time	3 months	12/2019
5.2.2 Plan for the fire tax levy based on forecasted budget.	Paul Wright		Staff Time	9 months	12/2016
5.2.3 Develop a plan for income tax losses of approximately 25% if State of Ohio passes proposed tax legislation.	Finance Director		Staff Time	6 months	12/2018
5.2.4 Work with City's finance partners to identify significant areas of risk liability in the City's 5 year plans.	Finance Director		Staff Time Financial Planning Committee Time	Annual and ongoing Work will continue in this area throughout the Strategic Plan period.	12/2021

Strategy 3: In the spirit of good stewardship educate residents, state legislators and other stakeholders on financial and tax related concepts that affect the City.

Implementation Step	Owner	Progress Update	Resources Needed	Estimated Task Time	Target/ Status
5.3.1 Create a communications plan to educate taxpayers on property taxes and the value taxpayers receive for their tax payment.	Finance Director		Staff Time	3 months	8/2017
5.3.2 Annually communicate with local representatives at the State on financial issues.	Finance Director		Council Time	Regular and ongoing	8/2019