

# 2014 City of Montgomery, Ohio Annual Report

## Overview



## About this report

The annual report is a comprehensive document detailing the achievements across all City departments and includes a full financial record for 2014.

## Mission

“Providing superior services with integrity. Partnering with you to build a great community!” This report outlines how Montgomery City Council and City staff worked to deliver on this mission in 2014.

## About Montgomery



Contained in a land area of 5.3 square miles, the City of Montgomery is located in northeastern Hamilton County, 12 miles from Cincinnati. The community was settled in 1795-96 by residents from two New York towns, Montgomery and Hopewell. Since its founding, the community attracted additional residents, leading to its incorporation in 1910. Much of the community's growth has occurred in the last 35 years as development continued its northward advance along the interstate systems of southwest Ohio. Today, Montgomery has approximately 3,800 housing units and is home to 10,251 residents. Montgomery derives much of its operating revenue

from a one percent (1%) earnings tax to help fund a full range of City services, undertaken by 65 full-time and 40 part-time employees. Services provided by the City of Montgomery include: police and fire protection, development plan review and building inspections, recreational programming, maintenance of seven parks, street maintenance and snow/ice control of 92 lane-miles of roadway, as well as a host of other City programs. Montgomery is located in the Sycamore Community Schools district, which has drawn national recognition for academic excellence. Sycamore Community Schools operate four elementary schools, an intermediate school, a junior high school and a high school. Montgomery is home to a variety of commercial enterprises including: Bethesda North Hospital, Ohio National Financial Services, Columbia Chevrolet, Camargo Cadillac and many banking institutions just to name a few. In addition, the historic downtown is a thriving retail and dining area, including the famous Montgomery Inn Restaurant. The addition of the Triangle/Gateway Center development in 2007 brought several new businesses to the downtown area, including the very popular Stone Creek Dining Company. The City of Montgomery is also home to several churches of various denominations and other types of religious institutions.

## **Vision**

The community is unique and forward thinking, yet respects its rich history and tradition. Our citizens bring diversity in background, belief and talents, and recognize their essential role in the success of our community. We have unique and prosperous businesses, making us the leading destination for entertainment, shopping, medical, and professional services, and employment opportunities. The Heritage District is a vibrant reminder to residents and visitors alike of the importance of blending history with excitement for a prosperous future. City services are delivered by a responsive, transparent, and accessible local government providing high-quality, innovative programs, services, and facilities that are nationally recognized and financially self-sustainable. Our employees are our most valuable asset and represent the very best in public service. We work in partnership with our citizens, businesses, and organizations to create community, and benefit from their participation, contributions, and ownership. We respect and nurture our environment, natural resources, and urban forest for current and future generations. Our award winning City is recognized as THE place to live, work and play through diverse, high-quality housing options, safe neighborhoods, renowned schools, outstanding parks, unique special events, thriving businesses and most importantly – active engaged citizens!

**We are Montgomery!**

# Administration



The administration department is comprised of the city manager, the human resources manager and the clerk of council/administrative coordinator. Under the city manager, the administration department provides professional leadership in the execution of City Council policies and the day-to-day management of the City. The department is responsible for overseeing the coordination and direction of all City services on a daily basis, provides direct support to Montgomery City Council and serves as a liaison between the City of Montgomery and other organizations.

## Organizational Workforce and Structure

One of the biggest changes in 2014 was the retirement of personnel with significant years of work experience with the City. This list included: Frank Davis, community development director (14 years of service); Susan Hamm, clerk of council/administrative coordinator, who, in September of 2014, announced her plans to retire in February 2015 (31 years of service); and Dave Reuther, police officer, who also will retire in February of 2015 (25 years of service). Losing this level of experience can disrupt a small organization, but with succession planning in place, the City was prepared to fill each of the vacancies with trained and qualified staff, including Tracy Roblero as the community development director and Connie Gaylor as the clerk of council/administrative coordinator. In addition to the succession of personnel identified above, several staff members received promotions through hiring processes to fill vacancies in 2014. This list includes: John Crowell as the City's police lieutenant; Ben Shapiro as the City's assistant fire chief; and Kevin Gruber and Mike Davenport as the City's newest police sergeants. Finally, the City completed Goal #3 of the City's 2011 – 2016 Strategic Plan, Organizational Structure and Workforce. The City has undertaken several succession planning

steps including the consolidation of the community engagement and customer service departments as well as the public works department's absorption of the recreation function in the City's organizational structure. With these changes, the City has staff in the appropriate places for service delivery in both the short and long terms and for responsibility and opportunities for growth and development. The objective with this goal, as with any other action of the City, is to enhance value to the customers of the City.

## Gateway Redevelopment Area (GRA)



More will be reported throughout the 2014 Annual Report on the Gateway Redevelopment Area project; however, it is important to note that the City acquired 11.5 acres of land (2.7 acres of land are still in stages for the final transaction to be completed with Hamilton County) at the crossroads of Montgomery Road and Ronald Reagan Cross County Highway in three different land

transactions. These acquisitions served as the centerpiece of an Open House held in the month of November for Montgomery citizens. Combining citizen input with the vision of City Council, Planning Commission and Landmarks Commission led to a vision for an integrated, mixed-use project that is compatible and complementary in scale and design to the adjacent historic district and sensitive to the real estate market to ensure long-term viability. It is envisioned that the development will include some amount of structured parking, an emphasis on a pedestrian-oriented streetscape and a mix of two-to three-story office and commercial buildings, including family-friendly restaurants, with a complementary residential component. Some of the key milestones for this important project for the City are presented below:

- The purchase of the former Ford site (9260 Montgomery Road) was completed in April and a buyout of the William's Used Vehicles dealership lease was completed by year end.
- The City purchased the former Chevrolet building and property (9292 Montgomery Road) in June.
- On November 11, the City held an Open House to gather input and ideas regarding the Gateway Redevelopment Area from residents and others interested in the project with approximately 80 in attendance.
- Demolition of the Chevrolet site was expedited, and bid out, with Evans Landscaping being the contractor selected with a bid of \$62,800 (with \$15,000 in



contingencies). The demolition began on December 11, 2014 and was expected to be substantially completed in January 2015.

- The purchase of 2.7 acres from Hamilton County is still pending but is anticipated to be completed early in 2015.
- Staff also applied for Community Development Block Grant Funds and expects to hear on the awarding of these funds by the end of February 2015. If awarded, these funds may be used for the demolition of the Ford site.

## Visit from French Sister City: Neuilly-Plaisance



During the week of October 12 through 18, the City hosted 19 French delegates from Montgomery's Sister City, Neuilly-Plaisance, France. The delegates included four deputy mayors, two municipal councilors, a municipal advisor, two deputy general directors of city services, an educational advisor, a director and assistant director of culture and events, principal of agricultural college, an English professor at the College of Neuilly-Plaisance, an executive assistant to the secretary of the mayor, and the Graveleine family. The exchange delegates visited Sycamore Community Schools and University of Cincinnati Blue Ash as they participated in tours and conversations about area educational systems. They also learned about programs for our senior population during a visit to Twin Lakes. The French visitors were also treated to several cultural opportunities during their visit including a trip to Carillon Park in Dayton and a trip to Keeneland Race Track in Lexington. The visit was an overwhelming success for the representatives from Neuilly-Plaisance to

experience our great community and the part of America that is the southwest Ohio region.

## Shared Service Opportunities

The City continued to pursue shared services opportunities in the following areas:

- The fiber optics partnership project with Sycamore Schools enhanced City computer and technology services for the Public Works facilities by connecting City Hall's IT infrastructure to Montgomery Elementary and then connecting the Public Works building to Sycamore High School. This project also added redundancy to the IT network for both organizations.
- [myCommuniTree.com](http://myCommuniTree.com) is another example of a shared service. This website was created as a joint social media communications portal between the City, Sycamore Community Schools and the City of Blue Ash and was presented as a case study at the 2014 Transforming Local Government Conference for the Alliance For Innovation (AFI).
- The City partnered with the City of Blue Ash for street maintenance and information sharing on winter weather operations.
- The Public Works Department also took on some of the maintenance at the I-275/Montgomery Road intersection. This effort was done in partnership with ODOT, Sycamore Township and Symmes Township to maintain the I-275 overpass area on Montgomery Road from Weller Road to Vintage Club Boulevard to include street sweeping, cleaning of medians and mowing of identified areas around the overpass.

The City's shared services pursuits demonstrate commitment to regional leadership and stewardship for all of the taxpayers in the region and the State.

## Strategic Planning

In 2014, steady progress was made on the City's 2011 – 2016 Strategic Plan. The five-year plan encompasses six major goal areas: Economic Development, Finance, Organizational Structure and Workforce, Community Engagement, Quality of Life and Facilities. Each major goal area is led by a team of "owners" from staff who are tasked with carrying out well-defined implementation steps designed to accomplish the goals and strategies. The City's progress on its Strategic Plan goals at the end of 2014 is summarized below:

- Goal 1 – 85% Complete
- Goal 2 – 85% Complete
- Goal 3 – 100% Complete
- Goal 4 – 75% Complete
- Goal 5 – 85 % Complete
- Goal 6 – 70 % Complete

Clearly Goal #3 has been completed and the remaining five goals are nearing completion as we head into the final 22 months of the City's plan, and as we begin the process for the City's 2016 – 2021 Plan. Some of the highlights of the accomplishments in 2014 include the following:

- Completion of organizational restructuring;
- Development of a draft of the City facilities master plan;
- Recommendation on financial management software;
- Continued successes with business calling, volunteerism and overall citizen engagement with the seventh Montgomery Citizens' Leadership Academy (MCLA) session, Community Emergency Response Team (CERT), Making a Difference Day, and support of the Montgomery Chamber of Commerce.

In 2014, the City also began preparations for the upcoming strategic planning process for the 2016 – 2021 Strategic Plan including a plan for its five-year survey of citizens.

## Community Engagement



As emphasized in the preceding section, community engagement continued to be a focus of the City of Montgomery. The Montgomery Citizens' Leadership Academy graduated its seventh class, reaching a total of 180 graduates since the Academy was initiated in 2008. In addition to the Academy, which continues to develop leaders and volunteers throughout the community, the City continued to call on local businesses, reaching

out to a total of 52 businesses in 2014 with meetings and 92 dental or medical practices received a business packet with up to 2 follow-up phone calls. City staff was also actively engaged with other institutions throughout the community including the Montgomery Farmers' Market, Sycamore Community Schools, the Montgomery Ministerial Association and the Montgomery Chamber of Commerce and a host of other civic organizations.

## Achievements

The City of Montgomery was formally recognized for a number of achievements in 2014. Highlights include the following: The Government Finance Officers

Association (GFOA) awarded the City the Certificate of Achievement for Excellence in Financial Reporting for its Comprehensive Annual Financial Report (CAFR) for the fiscal year ended December 31, 2013. This is a great honor for the City of Montgomery, as it is the highest form of recognition in governmental accounting and financial reporting. 2014 represents the 19<sup>th</sup> consecutive year the City has received this award. The City received the Hamilton County Recycling and Solid Waste District “Best Community Recycling Program” Award (more than 10,000 residents) for the fifth year in a row, reflecting the importance that the City, and the community’s citizens and businesses, place on recycling efforts, as well as indicating the City’s initiative to reduce waste and positively impact our environment. The Miami Valley Risk Management Association (MVRMA) completed the 2013/2014 Safety Performance Evaluation Checklist (SPEC) assessment of the City of Montgomery’s safety program and loss control measures resulting in a 100% compliance rating with the safety compliance checklist. Once again, the City received a Tree City USA Award and a Growth Award. This marks the 19<sup>th</sup> consecutive year for the Tree City USA recognition and the 16<sup>th</sup> Growth Award the City has received since 1998. For the fourth consecutive year, the City of Montgomery received the American Automobile Association’s (AAA) platinum award for “astounding” success within the area of traffic safety. In 2014, the City also continued its role in regards to leadership regionally, at the State level and nationally. To this end, several City staff members contributed and will continue to contribute their resources, over and above their primary job responsibilities, to a variety of professional organizations. The following is only a partial listing of the groups to which City staff contributed:

- Brian Riblet, public works director, is the 2nd Vice President of the Public Works Officers Association of Southwest Ohio (PWOSO);
- Paul Wright, fire chief, is the President of the Ohio Fire Chiefs Association (OFCA);
- Don Simpson, police chief, is the 1st Vice President of the Hamilton County Police Association (HCPA);
- Kelly Beach, assistant finance director/tax commissioner, is a member of the Southwest Ohio Tax Administrators Association (SWOTAA);
- Matthew Vanderhorst, community and information services director, provided a leadership role to the National Association of Government Web Professionals;
- John Crowell, police lieutenant, is Commander of the Special Weapons and Tactics (SWAT) Team in Hamilton County;
- Ben Shapiro, assistant fire chief, is Operations Officer for the Hamilton County Arson Investigation Unit; and
- Wayne Davis, city manager, is a board member for the Ohio City/County Management Association.

Clearly, 2014 continued the City’s trend of outstanding value for the community it serves. The City is positioned to carry forward its tradition of maintaining financial stability, fostering community engagement and seeking innovation in outstanding



customer service delivery – all with an eye on delivering value to our customers who are the citizens, businesses, visitors and institutions which make up our community.

## City Council

### 2014 Elected Officials

- Ann Combs
- Chris Dobrozsi
- Gerri Harbison
- Craig Margolis
- Lynda Roesch
- Todd Steinbrink
- Ken Suer



The City of Montgomery operates under a council-manager form of government with seven elected City Council members working with a city manager appointed by City Council with the support of a clerk of council and a law director. All City Council members are elected at large by a popular vote of residents for staggered terms of four years. Once seated, City Council members select the Mayor who serves for a two-year term. City Council is responsible for establishing policies and enacting legislation necessary for municipal operations.

City Council appoints the city manager, law director and clerk of council. By charter, the city manager serves as the City's chief executive, administrative and law enforcement officer. City Council operates with six standing committees: Financial Planning; Government Affairs; Law and Safety; Parks and Recreation; Planning,

Zoning and Landmarks and Public Works. While City Council members are very busy in their roles as elected officials, the work of City Council is largely centered in determination of policy.

During 2014, City Council conducted public meetings, regular meetings, special sessions and committee meetings. In an effort to maintain communications between City Council and the boards, commissions and civic organizations, several initiatives were undertaken including:

- Each board/commission chair was invited to attend a discussion meeting to update City Council on the activities and work of their respective board/commission for the previous year.
- City Council and the administration conducted an annual board and commission member orientation session.
- A Community Leadership Forum was held to provide an opportunity for volunteers, representatives of neighborhood associations, civic groups, local school officials , elected officials and City administration to discuss topics of interest.

As part of City Council's responsibilities for establishing policies and enacting legislation, it oversaw operations and administration of a cash budget of \$25,526,693 and adopted 63 ordinances and resolutions, the highlights of which follow:

## **2014 Council Action**

- Adopted a tax budget for 2015
- Adopted a five-year Capital Improvement Program for the City of Montgomery
- Adopted amendments to the Montgomery Zoning Code governing conditional uses
- Amended Resolution No. 19, 2007, establishing a Budgetary/Financial Policy for the City of Montgomery relative to targeted fund balances for effective planning and emergency financial needs
- Authorized the City Manager to enter into contracts with CDS Associates, Inc. for professional services related to general engineering and architectural services; with Construction Process Solutions, Ltd to provide construction consulting services; with Swimsafe Pool Management, Inc. to provide services related to the operation and management of the Montgomery Municipal Pool; with Frost Brown Todd, LLC to provide special counsel services; with Richard G. Gibson to serve as Magistrate for the Montgomery Mayor's Court; with Donnellon, Donnellon and Miller to provide legal services; and with the Sycamore Community School District Board of Education for the School Resource Officer to Sycamore High School for the school years 2014-2015
- Authorized the City Manager to enter into a labor agreement with the American Federation of State, County and Municipal Employees, Ohio Council 8, AFI-CIO for wages and benefits from September 1, 2014 through August 31, 2017
- Authorized the City Manager to enter into contracts with Barrett Paving Materials, Inc. for the 2014 Street Resurfacing Program; with American Pavements, Inc. for the

2014 Bituminous “Black Mat’ Surfacing Project; with Evans Landscaping, Inc. for the demolition of the former Chevrolet Dealership property; and with North American Salt Company for the purchase of de-icing rock salt for the 2015 season

- Authorized the purchase of real estate with the Board of County Commissioners of Hamilton County, Ohio
- Authorized an Agreement with MCDC Holdings, LLC to acquire real property at 9292 Montgomery Road
- Authorized an application to the Hamilton County Department of Community Development For Block Grant Funds for the fiscal years 2015, 2016 and 2017
- Opposed the passage of House Bill 5 by the Ohio General Assembly and encouraged the adoption of the changes recommended by the Ohio Municipal League
- Provided for the Issuance of not to exceed \$2,800,000 of notes by the City of Montgomery for the purpose of purchasing real estate
- Established the Community and Information Services Department
- Declared a moratorium on the collection of building and zoning permit fees for solar installations

## Community Development



The community development department is in charge of administering the building and zoning codes of the City as well as property maintenance code enforcement. The department was re-organized in 2014 and now consists of three full-time staff, which includes a director, zoning and code compliance officer and a building and development office manager, with support from the customer service staff and an inspector in the public works department. The City contracts for building, electrical and plumbing plan review and inspections with outside agencies. In addition to building permitting, the community development department is also responsible for strategic and long-range planning, economic and business development and general community development projects. It provides staff support

to the Planning Commission, Landmarks Commission and the Board of Zoning Appeals.

## Development Activity

The new Christ Hospital Outpatient Center and medical offices on the southwest portion of the Vintage Club property is nearing completion. A new 80,000 square foot building and a 20,000 square foot building were built by the developer, Brandicorp, with the City committing to construct a 321-space parking garage under a portion of the larger building. These medical office buildings will open in May of 2015.



The community development department continued discussions with the developer regarding future plans for the rest of the commercial section of the property. At the other end of Montgomery Road, the City acquired approximately 11.5 acres of property known as the Gateway Redevelopment Area (GRA) at the northeast corner of Montgomery Road and Ronald Reagan Cross County Highway. The site consists

of the former Chevrolet dealership at 9292 Montgomery Road and the former Ford dealership at 9260 Montgomery Road as well as approximately 2.5 acres of land purchased from Hamilton County abutting Ronald Reagan Cross County Highway. The City demolished the former Chevrolet dealership building and plans to issue a Request for Qualifications in 2015 in order to partner with a high quality development team on an integrated, mixed-use project that is complementary in scale and design to the adjacent historic district and sensitive to the real estate market. Ohio National Financial Services completed work on the addition to its parking garage in 2014.

Efficiencies in building design allowed them to add more employees within their existing building; however, the existing parking garage was not large enough to handle the additional staff. An additional 202 parking spaces were added to the garage. There were other positive developments in the City during the year, including the opening of fifteen new businesses. The long-vacant First Financial Bank building at 9360 Montgomery Road was occupied by a wealth management company. Work was completed on Montgomery Hill, the ten-unit condominium townhouse project at Main Street and Remington Road that had been stalled for many years by the downturn in the housing market.





The builder for Montgomery Hill applied for and received approval for an additional three-unit building across the street from Montgomery Hill at 7925 Remington Road. Work had begun on this project at the end of 2014. Only three commercial building permits for new construction and expansion were issued in 2014, which is significantly lower than the 18 permits issued in 2013; however, the total

value of improvements in 2014 was also lower than in 2013.

The total value of new commercial, commercial additions and alterations was \$12.8 million in 2014 versus \$17.1 million in 2013. The residential sector was busy in 2014 with the building department issuing 39 permits for new homes and 97 permits for residential remodeling/room additions. The total value of residential construction was estimated at \$21.5 million. The number of teardowns also increased dramatically in 2014.

The City issued 30 demolition permits in 2014, which is the largest number of residential demolition permits issued in a single year. The number of residential demolition permits was significantly higher than in past years, with the exception of 2013 and 2005, which saw 22 teardowns each. Since 2001, there have been a total of 186 teardowns in the City.

## Community and Information Services



The community and information services department is responsible for the planning and implementation of community engagement efforts, volunteer coordination,

information technology services, front desk customer services and administrative support and services. The department also serves as the focal point for all City communications, both internal and external. The department is managed by a community and information services director, an administrative coordinator, a communications and engagement coordinator, a customer service representative and a volunteer coordinator. The department also works with a contracted director of citizen engagement. It is the daily goal of these staff members to deliver services that meet the City's mission, with actions and behaviors consistent with the City's values and leadership philosophy.

## **2014, a Year of Change**

The year 2014 was one of great change for the community engagement and customer service departments. When the City's current strategic plan was created in 2011, a goal was developed to study the organizational structure and workforce to ensure it remains a national leader in the delivery of services and meets the essential needs of the community in an efficient and financially-sustainable manner. An outcome of this goal was the consolidation of the community engagement and customer service departments into one department, the community and information services department. The second major change was to realign community pool, recreation programming and special event activities, which were previously under the community engagement department, to be under the public works department to realize work process and management efficiencies. There was no increase in the number of positions as part of this recommendation; however, a senior management position was eliminated and a frontline position was added.

## **Community Engagement**



The Montgomery Citizens' Leadership Academy (MCLA) continued to be oversubscribed in its seventh year. At the conclusion of the 2014 class, 26 highly-engaged citizens graduated resulting in an Alumni group now topping 180.

The MCLA Alumni Reunion Summit, led by Barbara White and a team of seven alumni, was held on Thursday, August 14 at Terwilliger Lodge. The event was

planned, organized and executed by the MCLA alumni team with some oversight by community engagement staff. Over the last few years, staff has worked to build the capacity of this group to allow for the ownership and success of this event by MCLA alumni.

In 2013, the Community Engagement Grant was awarded to Montgomery Food Share for the purchase of 1,000 reusable bags embossed with the Montgomery Food Share logo. Since the award of this grant, all 1,000 bags have been distributed in thirteen organized neighborhoods. A total of 20,380 lbs. of food was collected in 2014 resulting in 16,985 meals being provided to families in need. Connect Montgomery has grown to a group of 21 community organizations dedicated to working collaboratively on shared service projects and effective communications. In 2014, Connect Montgomery's Making A Difference Day was organized by John Nolan and Jeff Boyle of St. Barnabas Episcopal Church. Not only has ownership of this important yearly event shifted to another community group, members of Connect Montgomery, including several ministers of the Montgomery Ministerial Association, have taken on more leadership and responsibility for the direction and facilitation of Connect Montgomery.

In April of 2014, the Alliance for Innovation invited the City of Montgomery to present a case study about myCommuniTree.com during its national conference as an example of a shared service that could be easily utilized by other communities across the country. This social media aggregator and event calendar was designed to be a one-stop communications hub for residents to view similar event and meeting information from the Cities of Montgomery and Blue Ash and the Sycamore Community Schools.

The engagement staff, with participation from other key City staff members, hosted two Neighborhood Leaders Forums, one in May and a second in November. The May forum focused on management of urban wildlife as taught by Naturalist Carol Mundy of Great Parks of Hamilton County and the second forum focused on training and education on EMS SignPost, and an update from the Community Emergency Response Team, while also providing the opportunity for attendees to provide input on the Gateway Redevelopment Area.

## **Sister Cities Commission**



The City of Montgomery marked twenty-five years of friendship with Sister City Neuilly-Plaisance, France in 2014. To commemorate the anniversary, a 3D street mural was commissioned to be created during the Bastille Day Celebration held on July 19. The mural was visible for many months on Ted Gregory Lane next to Montgomery Cyclery.





During the week of October 12 through 18, the Sister Cities Commission and the City of Montgomery hosted 19 French delegates from Montgomery's Sister City, Neuilly-Plaisance, France. The delegates included four deputy mayors, two municipal councilors, a municipal advisor, two deputy general directors of city services, an educational advisor, a director and assistant director of culture and events, the principal of the agricultural college, an English professor at the College of Neuilly-Plaisance, an executive assistant to the secretary of the mayor, and the Graveleine family whose 14-year-old daughter, Madeline, had previously been hosted by the Blomberg family. Madeline was honored with a proclamation during the 2014 Bastille Day Celebration.

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The exchange was made possible through the support of several volunteer interpreters and thirteen host families who opened up their homes and provided transportation, meals, and, most of all, warm hospitality. In addition, many cultural events were made possible through the generous contributions of several area sponsors.

## Customer Service

In January of 2014 a computerized Point of Sale system was installed at the front desk. This new process of central payments has established yet another control measure of accountability and security. Sales history and detailed reporting allows for historical data that was not available through the manual cash register previously used.



In 2014 the revised lodge rental rate and park shelter reservation rules took effect. A non-resident rate was added to the Terwilliger Lodge and Swaim Lodge fee schedules to account for increasing maintenance costs. The addition of the non-resident rate had minimal impact on the number of lodge reservations throughout the year.

## Finance Department



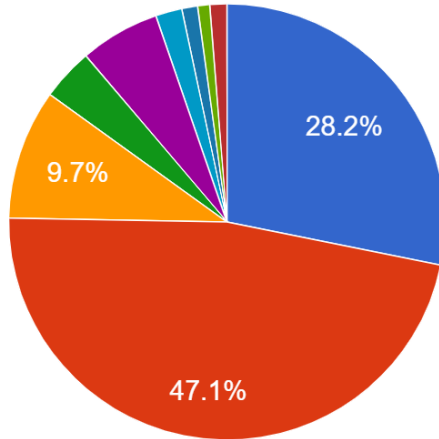
The finance department is responsible for preparing and maintaining the operating and capital budgets, cash management and investments, purchasing, payroll and income tax collections. The finance department consists of two offices, income tax and accounting. In 2014, Montgomery's operating budget totaled \$15.1 million. In addition to the operating budget, the City's finance department administers a capital budget, with a four-year cash forecast. In 2014, the finance department continued its participation in the City's performance measurement process. This effort involves the tracking and collection of performance measurement data, which will ultimately be used by the department and the City to benchmark against finance departments in other municipalities.

## Revenue and Expenditures

The charts titled "Where the Money Comes From" and "Where the Money Goes" provide a snapshot of how resources are collected and programmed for expenditures. In 2014, the finance department was responsible for the collection of approximately \$8.4 million in income tax revenues and \$5.0 million in property tax revenues. In addition, the department is responsible for managing an investment portfolio of more than \$20 million, which generated investment income of approximately \$353,613. As with most municipalities, public safety, property

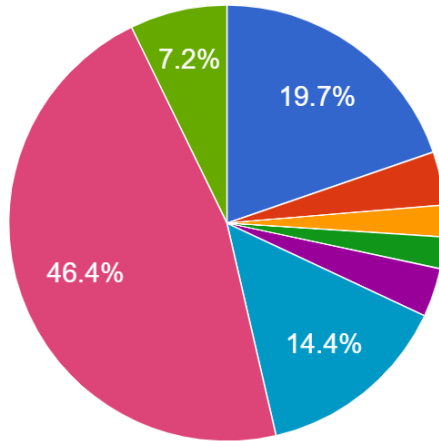
protection and emergency services are the foremost governmental functions. General government and public works, including solid waste and recycling, account for over 20% of the remaining expenditures.

**Where the Money Comes From**



- Property Taxes
- Income Taxes
- Intergovernmental Revenues
- Rental Revenue
- Charges for Services
- Investment Earnings
- Special Assessments
- Fines and Forfeitures
- All Other Revenues

**Where the Money Goes**



- Security of Persons and Property
- Parks and Recreation
- Solid Waste/Recycl...
- Community Econo...
- Public Works
- General Government
- Capital Outlay
- Debt Service

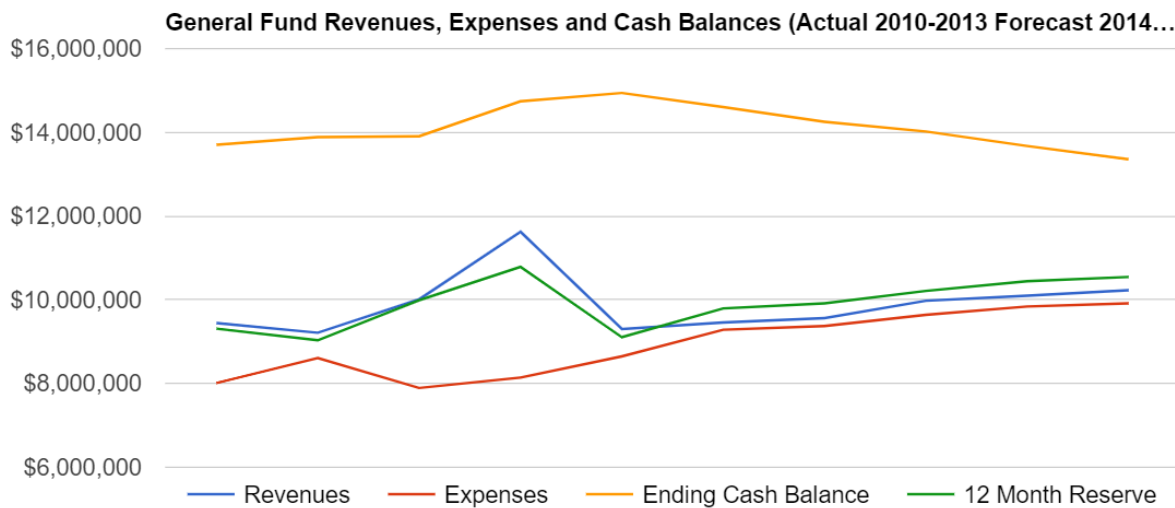
The finance department prepares quarterly and annual reports including the Comprehensive Annual Financial Report (CAFR). In 2014, for the nineteenth consecutive year, the City was awarded the Government Finance Officers Association (GFOA) Certificate of Achievement for Excellence in Financial Reporting for the City's 2013 CAFR. Moody's Investor Services continues to recognize the City's creditworthiness by assigning an Aaa credit rating to our debt. Montgomery is one of only 16 communities in the State of Ohio to be rated in this category.

## Income Tax Revenue

As depicted in the graph to the right, income tax collections rose dramatically in 2008 from 2007, as a result of construction activity with one of the City's major employers; however, in 2009, income tax revenues decreased 10% from the amount collected in 2008. Income tax revenues have been increasing each year since the 2009 downturn; in 2014 revenues exceeded collections from 2008 by 8.3%. For purposes of balancing operations with capital investments and related debt service, income tax revenues are distributed into three funds according to the following allocation: 76% to the General Fund; 20% to the Capital Improvement Fund; and 4% to the Debt Retirement Fund.

## Total Revenues and Expenditures

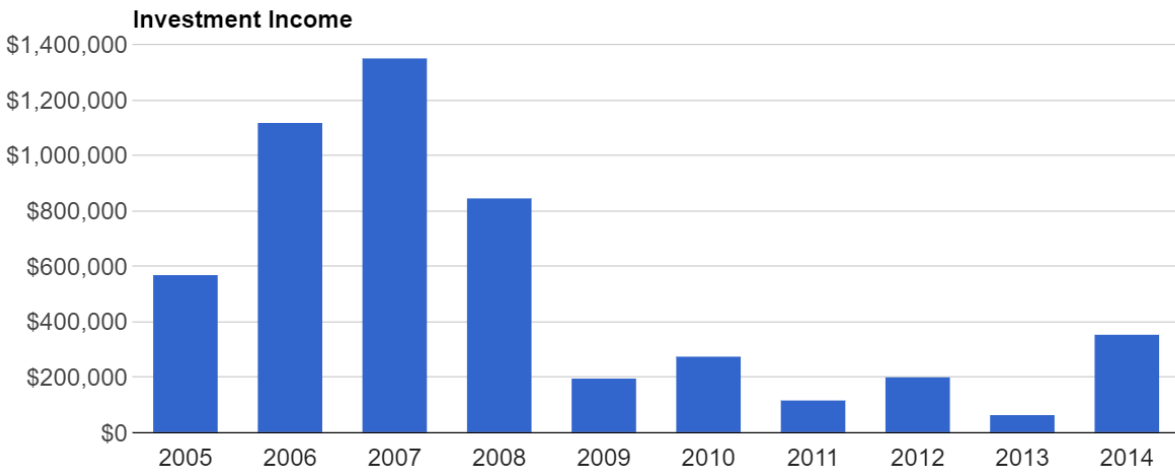
The line chart titled "Total Revenues and Expenditures including General Fund 2005-2014" provides a historical perspective of the City's ability to program and budget services, capital improvements and related debt service within the resources provided through the annual budget process.



## Sound Financial Policies

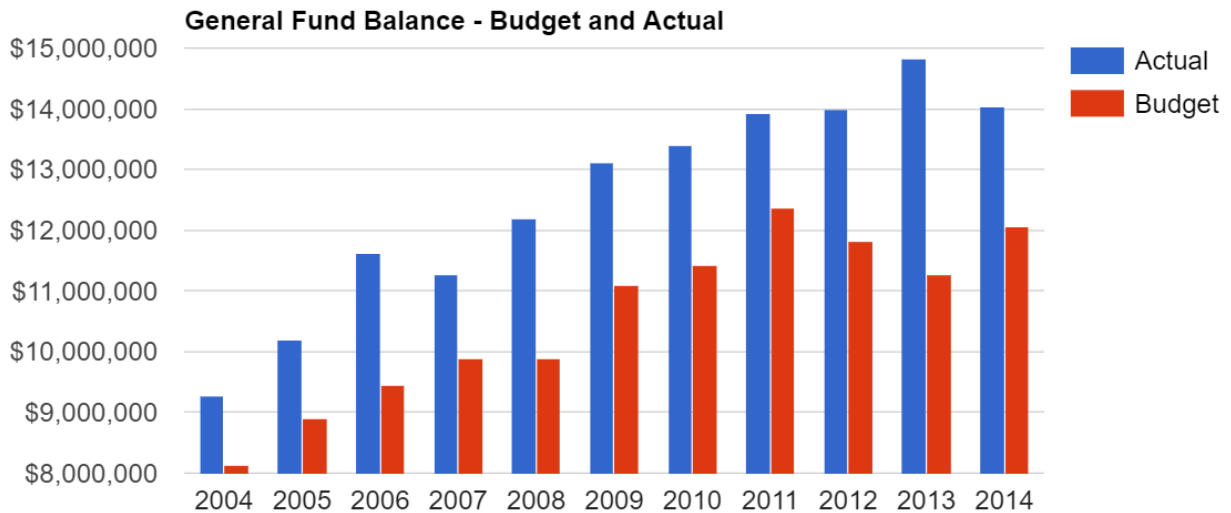
In order to maintain a sound fiscal environment, City Council has adopted an array of financial policies: **Investment Policy** The graph titled "Investment Income" reflects revenues which range from \$568,358 in 2005 to \$353,613 in 2014. City Council adopted an investment policy which applies to cash management and investment activities of the City of Montgomery. The policy is reviewed periodically and updates are adopted by City Council. The primary objective of the City's investment activities

is the preservation of capital and liquidity, maximizing investment income and conforming to State laws governing the investment of public funds.



## Fund Balance Policy

The fund balance is a key measure of the City’s overall financial health. City Council adopted a policy requiring maintenance of a six to twelve-month reserve of operating expenditures for both the General Fund and Fire/EMS Levy fund, a minimum cash balance of \$1,000,000 in the Capital Improvement Fund and one year of debt service payments in the General Bond Retirement Fund. The graph titled “General Fund Balance – Budget and Actual” depicts that actual year-end fund balances have exceeded budget estimates.





## Debt

On December 31, 2014, the City had \$17,095,399 of bonded debt; of this amount \$2,800,000 is general obligation debt, \$13,265,000 is special obligation debt and \$1,030,399 is special assessment debt. In May of 2013, the City issued \$13,265,000 of special obligation bonds to finance public improvements which consist of constructing a roadway and public garage at the commercial/residential development known as the Vintage Club. The repayment of the bonds is secured by payments in lieu of taxes generated within the tax increment financing district which encompasses the entire Vintage Club development. The development includes a high-end housing development, two medical office buildings consisting of 100,000 square feet occupied by the Christ Hospital Health Network and plans for future commercial development in the northern section. The \$2,800,000 general obligation debt was issued as a one-year note for real estate acquisition of the former Ford dealership at the Gateway Redevelopment Area and will be paid off in June 2015. As a result, the City's outstanding debt per capita increased from \$845 in 2005 to \$1,174 in 2014. The chart below depicts the total outstanding debt for the City over the last ten years.

## Financial Activity and Position Statements

Readers of the City of Montgomery's Financial Activity Statement and Financial Position Statement should keep in mind that both statements are presented in conformance with Generally Accepted Accounting Principles or (GAAP) basis. The amounts shown employ the same method of accounting and are summarized from the audited financial statements within each respective Comprehensive Annual Financial Report. The following is a summary of the financial activity and financial position of the City: Financial Activity Statement For the years ending December 31 (in thousands)

SOURCES OF REVENUES	2014	2013
Property Taxes	\$5,032	\$5,109
Income Taxes	\$8,439	\$7,564
Other Local Taxes	\$8	\$1,651
Intergovernment Revenues	\$1,733	\$1,285

<b>SOURCES OF REVENUES</b>	<b>2014</b>	<b>2013</b>
Charges for Services	\$1,910	\$1,337
Investment Earnings	\$354	\$66
All Other Revenues	\$225	\$509
<b>TOTAL SOURCES</b>	<b>\$17,701</b>	<b>\$17,421</b>
<b>USES AND EXPENSES</b>		
Security of Persons and Property	\$5,525	\$5,527
Parks and Recreation	\$1,207	\$1,323
Community Environment	\$683	\$661
Public Works	\$2,528	\$2,457
General Government	\$4,535	\$4,798
Interest and Fiscal Charges	\$646	\$421
<b>TOTAL USES</b>	<b>\$15,124</b>	<b>\$15,187</b>
<b>TOTAL SOURCES OVER USES</b>	<b>\$2,577</b>	<b>\$2,234</b>

The Financial Activity Statement, known in accounting terms as the “Income Statement”, provides a summary of the sources (revenues) and services (expenditures/expenses) of the City. **Financial Position Statement** For the years ending December 31 (in thousands)

<b>FINANCIAL BENEFITS</b>	<b>2014</b>	<b>2013</b>
Cash	\$11,390	\$13,539
Investments	\$23,484	\$27,697
Receivables	\$9,319	\$9,155
Property and Equipment	\$55,034	\$44,999

<b>FINANCIAL BENEFITS</b>	<b>2014</b>	<b>2013</b>
Other Benefits	\$58	\$44
<b>TOTAL FINANCIAL BENEFITS</b>	<b>\$17,701</b>	<b>\$17,421</b>
<b>FINANCIAL DETRIMENTS</b>		
Amounts Owed to Vendors	\$176	\$184
Amounts Owed to Employees	\$412	\$384
Accrued Interest	\$61	\$51
Long-Term Debt	\$14,482	\$15,571
Other Liabilities	\$8,791	\$6,455
<b>TOTAL USES</b>	<b>\$23,922</b>	<b>\$22,645</b>
<b>TOTAL BENEFITS OVER DETRIMENT</b>	<b>\$75,363</b>	<b>\$72,789</b>

The Financial Position Statement, known in accounting terms as the “Balance Sheet”, reports the benefits (assets) available to provide services while detriments (liabilities) are the amounts for which the City must pay in the future. Benefits over Detriments represents the difference between the financial assets and liabilities of the City providing the net worth of Montgomery.

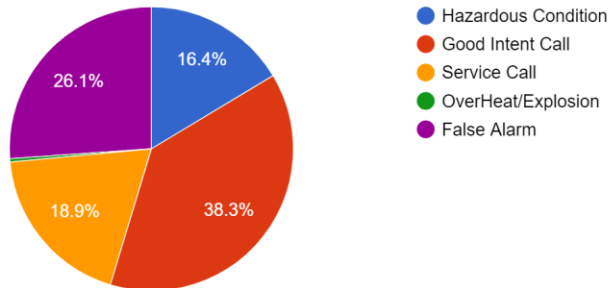
## Fire/EMS



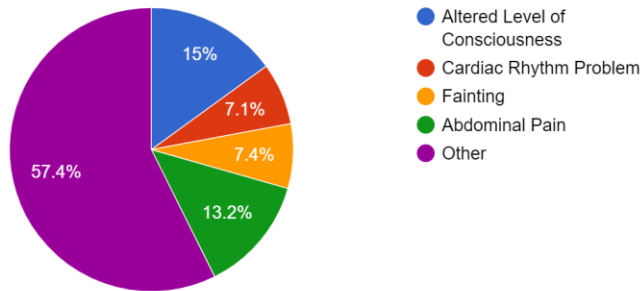
The staff consists of nine full-time firefighter/paramedics, one administrative aide and thirty five part-time firefighter/paramedic/EMTs. The department staffs the fire station with dedicated and professional personnel 24-hours per day at the Safety Center. This station houses two medic ambulances, one rescue pumper, one fire engine, one quint fire truck and one support/hydrant maintenance vehicle.

Emergency medical service incidents continued to be one of the priorities of the department and were responsible for 62% of the total incident volume. Total loss from fire in the community was \$86,400. The department attributes the low number of fire incidents to fire prevention efforts and the fire inspections conducted by fire safety staff. In a modern fire service, preventing the outbreak and serious spread of fire is considered as essential to public safety as proficiency in fighting fires.

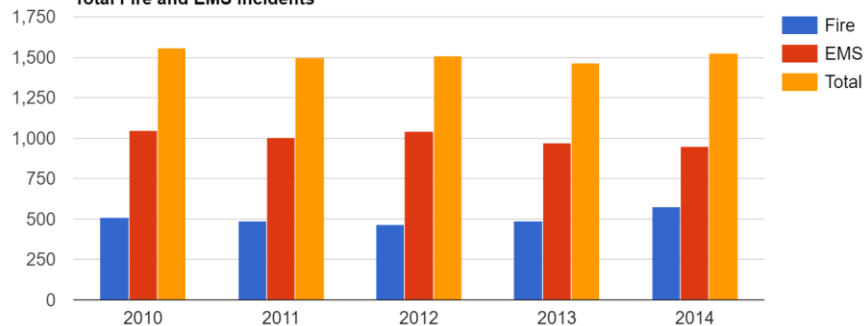
**Fire Incidents**



**EMS Incidents**



**Total Fire and EMS Incidents**





## ISO Rating

The department received an Insurance Services Office (ISO) rating of two as a result of the review of the department's operations. The ISO rating system uses a scale of one to nine for its rating system. If a city has a score of nine, its residents will pay a much higher premium than a city with a lower score. Montgomery's previous ISO score was a three. Current data show there are 2,836 communities in the State of Ohio, of which no community has a score of one and only thirty-two have a score of two.

## Fire Department Funding

A 5.5 mil levy was approved by the community in 1999 to fund the operations of the fire department. The levy was projected to last ten years, or until 2009. Through careful planning and budget controls, the current levy should fund the department through 2017, or eight years beyond the projected life of the levy. The department also receives revenue through the billing of EMS patients who are not property owners in the City.

## Public Education

Public education programs are a critical component of a modern fire department. The fire department provided tours of the Safety Center, taught CPR classes and coordinated Fire Prevention Week activities. Forty eight individual programs were offered to 1,474 participants, as the department strived to prevent injuries and accidents from occurring in the community. The Child Car Seat Safety Program taught 214 citizens how to properly use and place their children in car seats in 2014. Since the beginning of this program in 1999, the department has instructed over 2,770 individuals in the proper installation of child car seats.



## CERT

A Citizen Emergency Response Team (CERT) was organized in 2012 and educated 28 residents on how to handle emergencies in the event they are first on the scene in their neighborhood. The CERT members are dedicated to assisting emergency services in responding to large scale emergencies that affect the region when local resources are exhausted and awaiting regional, state and federal resources. Such

large scale emergencies include tornados, long-term power outages, winter storms and other natural disasters. Additionally, CERT members are responsible to assist with public education as they work with their neighbors in preparation of disasters and emergencies. In 2014, CERT members also assisted the department with traffic management during the July 4th parade, shared CPR information at the Bastille Day Celebration, and role-played victims in mock disaster drills.

## EMS Signpost

In early 2014 the department launched a new web-based program that is available to the residents of Montgomery. Once a resident registers on the secure website, the City's paramedics are able to use a smart phone to quickly, reliably, and securely access the resident's health history to aid in providing emergency care during a 911 response. EMS SignPost is an abbreviated version of a person's health history stored on a personal secure web page. It includes items such as medications, persistent health conditions, allergies, and doctor's contact information. A special access code to each individual's personal web page is stored on a refrigerator via a magnetic ID card that the City supplies to the resident free of charge.

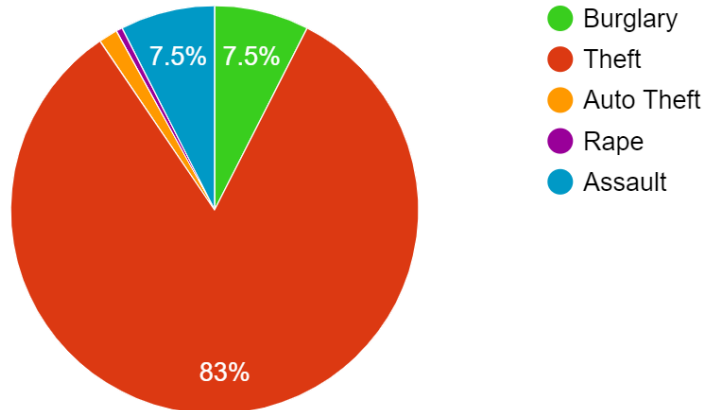
## Police



The police department is comprised of 22 full-time officers, two clerks and one mayor's court clerk. Of the 22 full-time officers, there is one chief, one lieutenant,

five sergeants, two detectives, one officer assigned to the Drug Abuse Reduction Taskforce (DART), one school resource officer (SRO), one traffic safety officer, and ten patrol officers. In 2014, officers handled 8,872 incidents, made 278 adult arrests, 91 juvenile arrests, and issued 2,048 citations.

**Reported Crimes**



## Community Engagement

The annual Safety Awareness Day was held at the Safety Center on April 26. A large number of visitors stopped by to see the many public safety exhibits that included a University of Cincinnati Hospital air care helicopter and the Hamilton County Police Association SWAT Mobile Command Center. Many area businesses assisted in sponsoring the event, which was free of charge. The event provided community



members the opportunity to interact with the public safety personnel and to view facilities and equipment. In addition to the open house, the department held its fifth Prescription Drug Take Back Event at Bethesda North Hospital. This effort, in partnership with the U.S. Drug Enforcement Agency, netted the largest volume of prescription drugs of any collection site within Hamilton County.



The police department continued its public education efforts by conducting the annual Safety Village program for five- and six-year-old children. The program teaches children about school bus safety, animal safety, stranger safety and other safety-related topics. The program is offered

over a two-week period in the month of June, and the children attend a morning or afternoon session for a period of one week. Other public education programs included crime prevention training, bike safety classes, Internet safety, and addressing neighborhood associations and other groups on a variety of other issues.

In the area of homeland security, the police department assigns an officer as a liaison to the Terrorism Early Warning Group (TEWG). The TEWG is a regional cooperative effort among public safety and health agencies throughout the greater Cincinnati area to address potential terrorist activity. Increased information and resource sharing among local, state and federal law enforcement agencies continues to improve the overall effort of combating terrorism.

The department continued to support the Drug Abuse Reduction Task Force (DART). Montgomery is a founding member of the task force formed in 1988, and periodically assigns officers to the task force. DART is comprised of approximately 15 local law enforcement agencies that primarily address drug enforcement at the local level. The task force also has a pharmaceutical diversion unit that investigates physicians, nursing staff and pharmacy staff suspected of abusing drugs, forging, altering or writing illegal prescriptions or trafficking in drugs.

The partnership between the police department and Sycamore Community Schools. The School Resource Officer (SRO) at Sycamore High School continued to work with students and staff to provide a safe and secure learning environment. The SRO position is funded through a partnership with Sycamore Community Schools with the district paying 60% of the officer's salary. In addition to the day-to-day activities, the SRO attended many extracurricular activities, such as dances, athletic events and meetings.



Officers also presented a seat belt safety program to third graders at Montgomery Elementary School.

## **Mayor's/Juvenile Court**

The Montgomery Mayor's Court hears most of the City's misdemeanor and traffic cases, including first offenses of driving under the influence of alcohol and driving under suspension. In 2014, the Court heard cases involving over 1,647 offenses resulting in \$203,099.51 in fines, court costs and computer fund charges. After assessing the required State fees, the City's portion of the fund was \$151,207.51. The Montgomery Juvenile Court, with Referee Terry Donnellon presiding, heard 67 criminal cases. The disposition of these cases often resulted in community service



being performed by the offender. Serious criminal cases, second offenders, and all juvenile traffic cases are sent directly to the Hamilton County Juvenile Court system and are heard by a Juvenile Court Judge.

## Awards

For the fourth year in a row, the police department received the American Automobile Association's Platinum Award. The Platinum Award is the highest award given by the association to agencies demonstrating outstanding success in addressing community traffic safety issues. Montgomery was one of a few communities within the greater Cincinnati region to receive the award. In addition, the department received a silver award from the Hamilton County OVI Task Force for its participation in working within the region to combat driving while intoxicated.

## Public Works



The public works department is responsible for the maintenance of buildings and grounds including four landmark buildings, 47 centerline miles of public streets, the storm sewer system in the public rights-of-way, City parks, City pool, special events, all recreational events, fleet maintenance and operation of the Hopewell Cemetery. The department oversees the City's beautification efforts throughout the community,



including Montgomery's Heritage District. Department staff inspects and administers construction and maintenance of the City's infrastructure through publicly bid contracts as well as through project coordination with other public agencies and utilities.

The public works department strives to provide high-quality, cost-effective, timely and sustainable services focused on maintaining safe and reliable infrastructure. The public works department focuses on improving public safety by providing for safe and orderly movement of people and products throughout the community while simultaneously seeking opportunities to protect the environment and improve the quality of life for present and future residents and businesses.

## 2014 Accomplishments

The year 2014 was one of transition for the public works department. When the City's five-year strategic plan was created in 2011, a goal was developed to study the organizational structure and workforce to ensure it remains a national leader in the delivery of services and meets the essential needs of the community in an efficient and financially-sustainable manner. Management of the community pool, recreation programming and special event activities, which were previously under the community engagement department, were merged with the public works department to realize work process and management efficiencies.



The public works staff coordinated the completion of major infrastructure repairs and rehabilitation of approximately 2.34 centerline miles of roadway resurfacing all or portions of ten streets including Croton Drive, Traverse Court, Trabant Drive, Mellon Drive, Higgins Court, Pfeiffer Road, Peachtree Lane, Londonridge Court, Grandoaks Lane and Bookmark Place.

Staff also coordinated the replacement of 23 of the 704 total fire hydrants within the City. This work was done in conjunction with the Street Resurfacing Program and was the first year of a multi-year comprehensive plan to address the aging fire hydrants in the community.



The 2014 Bituminous Black Mat (Microsurfacing) Project was completed as public works staff coordinated repairs and microsurfacing to approximately 0.340 centerline miles of roadway on Montgomery Road from Bethesda North Hospital to Sycamore Creek. The asphalt surfacing material is used primarily on Class II roadways within Montgomery and provides five to seven years of asphalt preventative maintenance.

The public works department continued oversight of construction associated with the Vintage Club development which includes public funding for a two-story underground parking garage complete with a plaza deck level. Public funding was also used for the construction and completion of Vintage Club Boulevard, entryway enhancements, landscaping, lighting, and modifications to create a roundabout adjacent to the Three Chimneys Clubhouse. Staff will continue oversight of this project, in conjunction with Construction Process Solutions, Ltd through completion anticipated for early 2015.

The public works department began work in 2014 on a five year plan to repair and replace identified sections of guardrail to assure compliance with safety standards set forth by the Ohio Department of Transportation. In 2014, approximately 700 feet of guardrail replacement was completed on East Kemper Road between Terwilligers Run Drive and Hightower Court.

The City was again recognized with a Tree City USA Award for the 19th year and also a Tree City USA Growth Award for the 16th year for an ongoing commitment and action focused on environmental stewardship through care of public trees in the City's urban forest. This continues recognition received in 2009 when Montgomery was recognized by the Arbor Day Foundation as a "Sterling" Tree City USA which at the time recognized Montgomery as just the sixth community in Ohio to earn this prestigious honor.

## **Recreation**

Summer mini-camps help keep kids active in the summer. Seven weeks of camps were planned and implemented which included Theater Camp, Mobile Application Development Technology Camp, Tennis for Pee Wees and Juniors and Madscience Madness Camp to name a few. School's Out Days, including the annual Paintball

trip in October, are always a hit. Fitness classes such as Tai Chi, Pilates and 20-20-20 classes are offered on an ongoing basis throughout the year.



It was a record-setting year for the Montgomery Community Pool with much of the success being attributed to the addition of the pool heater. In the past five years, memberships averaged 519, while in 2014, there were 666 memberships sold. This represents a 13% increase in pool memberships as compared to 2013. Daily attendance skyrocketed with a whopping 19,763 pool patrons who visited the pool in 2014 which is an increase of

89% as compared to 2013. Ten items are measured on the annual pool member survey and a score of 90% or higher was achieved on nine out of ten areas. Pool management and pool front desk staff received a 100% on the survey with members saying they “meet” or “exceed” expectations. The number of kids in swim lessons rose 16% with 312 kids learning to swim as compared to 268 in 2013. The Makos Swim Team reached a maximum number of kids on the team with 141 kids competing in this summer league. The Luau parties, Dive-in Movies and Fun Tuesdays continue to be favorites for pool members.

Americana hometown special events help make Montgomery unique and help to make Montgomery a great place to live, work and play. These events include: the annual Independence Day activities with the July 3 Blue Ash Montgomery Symphony Orchestra concert, the traditional July 4th Parade and Festival, Touch A Truck, Dog Fest & K-9 Kerplunk, Car Show, Harvest Moon and the Tree Lighting and Holiday in the Village event. Local sponsors continue to add to the revenues generated for events including the July 3 Patriotic Concert, Dog Fest and the Car Show.



The Arts and Amenities budget supports the work of the Arts Commission and the Sister Cities Commission. Both of these commissions are active in supporting several recreational events including the annual Photo Contest, Live at the Uni concert series, International Reception, Bastille Day and the July 3 Concert.