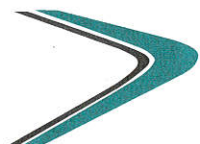
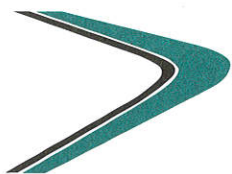

CITY OF MONTGOMERY

STRATEGIC PLAN

December 2001



MANAGEMENT PARTNERS
INCORPORATED



MANAGEMENT PARTNERS

INCORPORATED

December 26, 2001

Ms. Cheryl Hilvert
City Manager
City of Montgomery
10101 Montgomery Road
Montgomery, Ohio 45242

Dear Cheryl:

Management Partners is pleased to transmit the final Strategic Plan for the City of Montgomery to you. This plan is the result of your initiative to examine the important issues facing the city and identify how to keep it the strong, vibrant place it is today. The results of this process and the vision that has been articulated for the city should serve you well into the future.

We thoroughly enjoyed our work with the City Council and staff and we very much appreciate the collaboration that lead to this final product. Besides addressing the goals that were agreed upon by the city leadership, this report also includes an Implementation Action Plan that details each of the strategies necessary to realize the goals. We are confident that as the strategies are implemented, the city will reap the benefits of this work.

Management Partners stands ready to assist the city with implementation in any way that we can, and we wish you well in the future.

Sincerely,

Gerald E. Newfarmer
Chairman & CEO

CITY OF MONTGOMERY

STRATEGIC PLAN

December 2001

TABLE OF CONTENTS

Introduction	1
Strategic Planning Approach	1
Building on Montgomery's Strengths	3
Values	5
Vision	6
Mission Statement.....	6
Goals	7
City Services	
<i>Goal: Montgomery maintains the highest standards in public safety, customer service, transportation, infrastructure, and park/recreation services to serve the diverse needs of residents, customers and visitors</i>	8
City Finances	
<i>Goal: The city's tax base is broad and diverse, and excellence is exhibited in the areas of fiscal accountability, management, and reporting</i>	10
Communication and Collaboration	
<i>Goal: Open and free-flowing communication is a trademark of the City</i>	13
Community Aesthetics and Amenities	
<i>Goal: The aesthetic quality, physical characteristics, and accessibility of natural resources, parks and public spaces contribute to the uniquely desirable quality of life in Montgomery</i>	16
Community and Economic Development	
<i>Goal: The city engages in and encourages community and economic development that reflects quality design and compatibility with historic community assets, including a variety of housing types and choices</i>	19
Heritage District	
<i>Goal: The signature of our community is the Heritage District which is a local and regional destination for shopping, multi-cultural events and entertainment</i>	22
Implementation.....	26
Implementation Action Plan	

INTRODUCTION

This report is the final product resulting from an eight-month strategic planning process in the City of Montgomery. It represents the consensus that emerged from the collaborative efforts of the city leadership in the development of a future vision for the city. The process and approach that led to the development of this Strategic Plan is described below as a context for the conclusions that were reached and subsequently, the decisions that were made.

STRATEGIC PLANNING APPROACH

In early 2001, the City of Montgomery initiated a process to develop a strategic plan. Management Partners Inc was retained to assist the city in the process. The purpose of this effort was to identify current issues and potential future challenges facing the community and the city government and to develop strategies for addressing them.

As a first step, Management Partners interviewed each member of the city's leadership team (comprised of the City Council and management team) to identify emerging issues that were likely to affect the city in the future. These issues were summarized in preparation for a retreat. At the same time, an environmental scan was prepared to provide an overview of upcoming demographic, economic and other trends likely to affect the city during the next 5 to 10 years. Previous studies and reports, budget documents, city codes, and annual reports were also reviewed. Next, city management staff and City Council engaged in a retreat designed to develop the city's vision and values, and identify strategic plan issue areas and associated goals.

Citizen input was solicited in several ways. First, a work session of the Community Leadership Forum was structured to obtain perspectives on issues of importance to those representing a variety of citizen organizations. Second, all of the residents of the City of Montgomery were surveyed to obtain their input and attitudes about the community and city government, including satisfaction with services. The University of Cincinnati's Institute for Policy Research, a professional survey research firm, conducted a mail survey of all Montgomery households. The response rate of 49% indicates a high level of interest and participation.

Once the issues and challenges facing Montgomery were understood and defined, Management Partners facilitated a leadership team workshop to finalize the issue areas and goals. The following list was the result:

- City Services
- City Finances
- Communication and Collaboration
- Community Aesthetics and Amenities
- Community and Economic Development
- Heritage District

After the leadership team reached consensus on the goal for each of the issues, a series of strategies were then developed. The strategies build on current strengths, address weaknesses, and take advantage of opportunities. When implemented, the strategies are designed to reach the established goals for the city.

Management Partners also worked with city staff to develop an Implementation Action Plan that identifies the steps necessary to bring each strategic direction to fruition. The Action Plan is a companion document to the Strategic Plan, and is primarily designed as a blueprint for implementation by staff.

BUILDING ON MONTGOMERY'S STRENGTHS

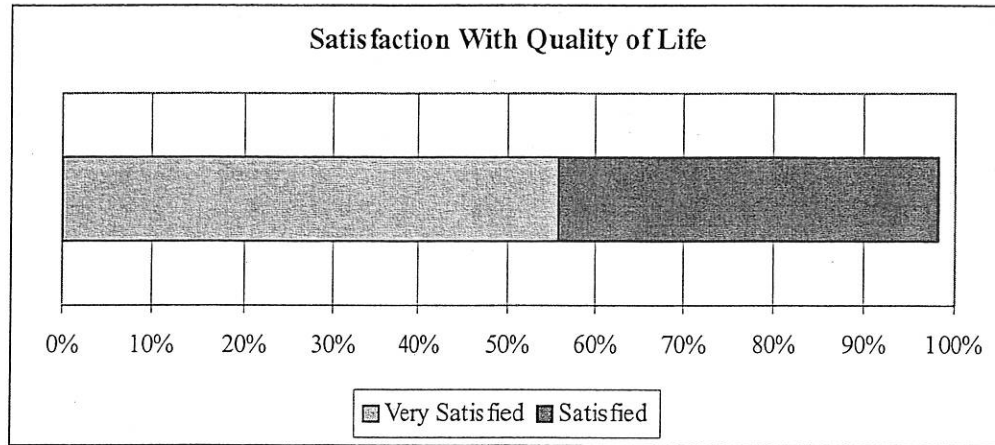
Montgomery is a city with a host of attributes that residents, council members, and staff are quick to mention when asked about the city's strengths. From high quality services to its special amenities like the park system, the historic district, brick sidewalks and flower plantings, Montgomery is special in many ways.

The early character and heritage of the city is well preserved and highly regarded through the efforts of the Montgomery Landmarks Commission. There are 33 buildings and properties designated as landmarks, eight of which are listed on the National Register of Historic Places. The city's open space further contributes to its quality character, providing a network of parks by following natural features that link the city's neighborhoods by pedestrian walkways.

Besides its physical strengths, Montgomery has a legacy of citizen involvement, that is characterized by numerous standing committees, as well as a broad corps of volunteers providing recreation events and activities. This level of involvement of interested, creative, and collaborative citizens contributes to making Montgomery unique from similarly situated suburbs.

During interviews and group discussions there was an extraordinary consistency in the perceived strengths of the City of Montgomery expressed by various individuals. Each group, from Council to staff to members of the various community organizations and boards, expressed very similar opinions about areas of strength and opportunity, as well as areas of concern and goals that the city should pursue for future. This consistency reflects a community generally united in purpose. Montgomery's strongest assets also include an excellent school system, its convenient location to highways and shopping, and its highly efficient city government.

Yet another strength is the perception of the city by its residents. The survey showed that Montgomery residents are pleased with the work the city is doing. An overwhelming 98% of respondents stated that they were satisfied (42.4%) or very satisfied (55.8%) with the quality of life in the City of Montgomery. In addition, 75% of households agree that "the municipal services provided to my household are a good value for the property tax dollars I/we pay." In all cases, a majority of residents also indicated they were satisfied or very satisfied with each of ten specific city services that were queried.



This Strategic Plan builds on the attributes identified by Montgomery's City Council, staff, residents and businesses. Its purpose is to help city policymakers and staff focus on key issues, plan strategies for achieving goals, and determine methods of measuring success well into the future.

VALUES

During the strategic planning process, Council and staff developed consensus on the following shared organizational values that guide the city's work and decision making:

WE VALUE ...

- ✓ *Our customers — the residents, business owners, visitors, and other stakeholders of our city, who make Montgomery a unique and special place to live, work, and conduct business*
- ✓ *Governance built on honesty, integrity, respect, initiative and involvement*
- ✓ *Commitment to responsive, high quality service delivery and employees at all levels of the organization who are leaders and have a sense of ownership in the community and the services we provide*
- ✓ *Decision-making based on creative problem solving through open and honest communication, collaboration and commitment to excellence*
- ✓ *An organization that promotes continuous improvement through the professional and personal development of our personnel*
- ✓ *Our employees, who are stewards of the whole, and not simply owners of their small piece of our city organization*

VISION

City Council and staff also engaged in a process of visioning to identify the most important and significant shared beliefs about the future, resulting in the following statement of the city's vision:

Montgomery is a premiere residential community of citizens, businesses, organizations and institutions who are committed partners with their local government in the care and support of our vibrant city. While respecting tradition, we are forward thinking, embrace change, and continuously seek opportunities for improvement. Parks, landmarks, pedestrian walkways, distinctive landscaping, and fountains contribute to the unique character and ambiance of our "Tree City." Our neighborhoods are well-maintained, reflect a diverse population and, architecturally, are a pleasing blend of old and new. Our business community is varied and well balanced and our historic Heritage District is the signature of the community. The city is fiscally sound and delivers high quality programs and services to our customers.

MISSION STATEMENT

The following mission statement was written by and expresses the sentiments of the city staff:

Taking responsibility together to provide superior services

GOALS

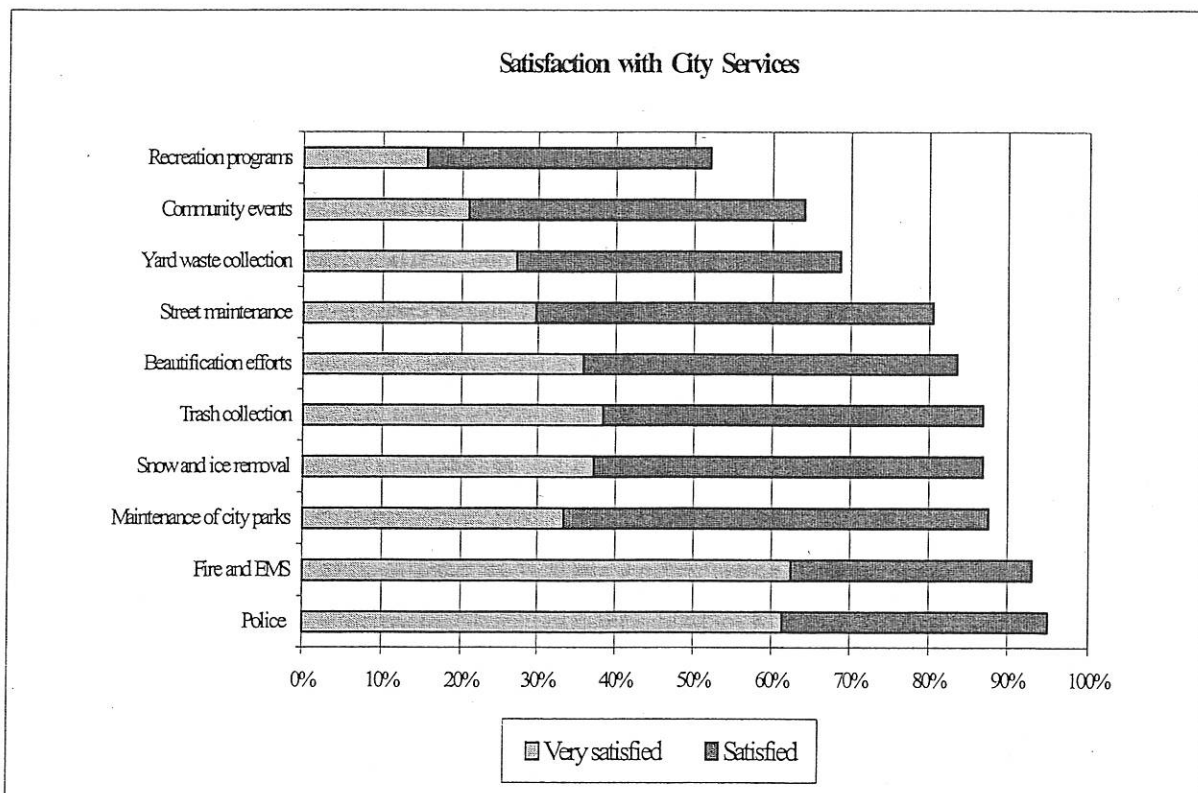
The Strategic Plan promotes the city's vision by establishing goals and strategic directions for each of the issue areas identified during the planning processes. The City of Montgomery has identified the following six goals to reflect the character of the community that is envisioned:

- Goal 1:** Montgomery maintains the highest standards in public safety, customer service, transportation, infrastructure, and park/recreation services to serve the diverse needs of residents, customers and visitors.
- Goal 2:** The city's tax base is broad and diverse, and excellence is exhibited in the areas of fiscal accountability, management, and reporting.
- Goal 3:** Open and free-flowing communication and collaboration is a trademark of the city.
- Goal 4:** The aesthetic quality, physical characteristics, and accessibility of natural resources, parks and public spaces contribute to the uniquely desirable quality of life in Montgomery.
- Goal 5:** The city engages in and encourages community and economic development that reflects quality design and compatibility with historic community assets, including a variety of housing types and choices.
- Goal 6:** The signature of our community is the Heritage District which is a local and regional destination for shopping, multi-cultural events and entertainment.

CITY SERVICES

GOAL: Montgomery maintains the highest standards in public safety, customer service, transportation, infrastructure, and park/recreation services to serve the diverse needs of residents, customers and visitors.

The City of Montgomery places a major emphasis on customer satisfaction in the delivery of service. Survey results clearly demonstrate that satisfaction with core city services in Montgomery is high. A majority of survey respondents report satisfaction (either satisfied or very satisfied) with each of the ten services presented in the survey. The highest ratings were given to the safety services, with police receiving 95% satisfaction and Fire and EMS receiving 93% satisfaction. Eighty-seven percent were satisfied with trash collection and 69% reported being satisfied with the city's yard waste collection.



Recreation programs received the lowest rating of all services by residents surveyed, and even so the majority (52%) were satisfied. This particular rating is not driven by

dissatisfaction (3%) with recreation programs, rather by the 45% that are neither satisfied nor dissatisfied. These ratings may reflect that there is less perceived need or importance attributed to recreation compared with other city services.

The City of Montgomery has developed four strategic directions to achieve the goal of maintaining high quality services and public facilities and infrastructure that are functional, aesthetically pleasing and in good condition.

Strategic Direction 1: Provide city services and service levels that are consistent with the desires and needs of the community

This strategic direction will require the city to identify and validate the demand for new or increased service levels in response to unmet needs. Customer feedback mechanisms such as citizen surveys will be used to gauge demand, as well as satisfaction. The city will also develop and implement a performance measurement system to monitor service levels and enhance or improve service quality. In addition, the city's human resources processes, including hiring and training, will be assessed to ensure employment and retention of high quality staff.

Strategic Direction 2: Provide facilities and infrastructure that are functional, aesthetically pleasing and well maintained

The development of master plans outlining short- and long-term infrastructure and facility improvements will be a first step in implementing this strategy. In addition, standards for maintenance and replacement of existing infrastructure will need to be incorporated into future capital planning mechanisms.

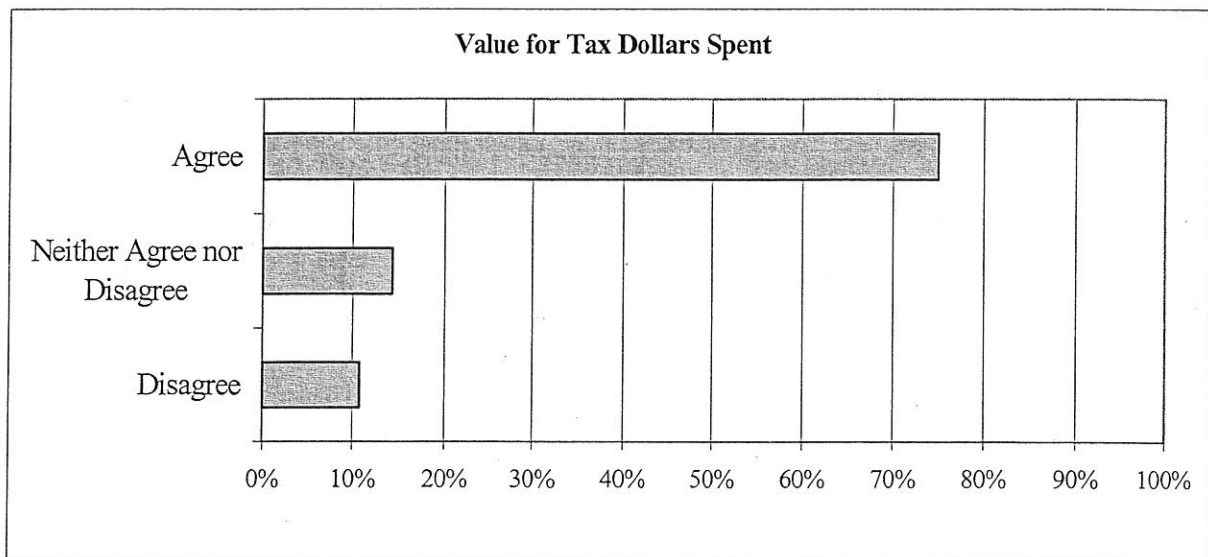
Strategic Direction 3: Secure and implement technological improvements to create more efficient systems throughout the city's services, facilities and infrastructure

A comprehensive citywide technology master plan will be developed and implemented. The plan will include technology elements from all city service areas, developed and presented as subsets of the overall plan to facilitate departmental implementation.

CITY FINANCES

GOAL: The city's tax base is broad and diverse, and excellence is exhibited in the areas of fiscal accountability, management, and reporting.

As a predominately residential community, the city's tax base is heavily reliant upon property and income tax from residents. Interestingly, very few of the survey respondents (only 8.2%) mentioned taxes as being the single most important issue facing the city over the next five years. This may be illustrative of the attitude of the majority of respondents: 75% responded that municipal services provided to their household are a good value for the tax dollars they pay.



The city is highly dependent on the taxes derived from a few major employers to offset the residential tax burden. Loss of any of one of the top ten employers could result in an estimated average decrease in revenues of \$150,000 annually.

Intergovernmental revenues have eroded over time and this trend is likely to continue. Decreasing revenue from state, federal and county governments, coupled with citizen opposition to increased taxes, could increase reliance on user fees, service charges, and alternative sources of revenue.

The city staff subscribes to the high performance government and embraces its theories as its operating philosophy. As a result, there is a strong emphasis on

leadership, productivity and maximizing quality. Rather than increasing staffing levels to meet growing service demands, the city has fostered a very active and committed cadre of volunteers to provide some of the amenities that set it apart from other neighboring jurisdictions.

Increasing the diversity of the tax base by attracting a broader mix of businesses was a distinct theme resulting from interviews with city officials and in focus groups with the Community Leadership Forum. The ability to maintain quality services and ensure continued excellence in financially managing the city's resources was linked with this concern.

Six strategic directions were identified to achieve the goal of expanding the tax base and exhibiting excellence in financial management.

Strategic Direction 1: Maintain sound financial position

The city will continue to build appropriate fund balances, develop a policy for contingency plan implementation, identify alternative revenue sources, and implement cost saving opportunities to promote this strategy. The city will also maintain its quality position within financial communities by continuing such activities as production of the Comprehensive Annual Financial Report (CAFR).

Strategic Direction 2: Maintain and enhance the city's tax base

To implement this strategy the city will make a concerted effort to attract professional services businesses to support and complement the current mix of medical and health related services. The city will also consider options for expansion of the city boundaries as well as the potential for usable space for new growth.

Strategic Direction 3: Systematically link the annual budget to a multi-year fiscal plan

Development of alternative multi-year budget projections, analysis of their implications, and development of policy responses relevant to the various funding scenarios will be performed to achieve this strategy.

Strategic Direction 4: Utilize creative and prudent financial incentives to encourage and promote redevelopment

To implement this strategy, the city will identify target markets and alternative financial incentives (such as use of tax increment financing), and perform cost/benefit analyses for each possible incentive, including budget implications.

Strategic Direction 5: Implement internal enhancements to improve purchasing, financial reporting, and accounting

The city will identify best national practices to emulate and will utilize training and improved technology for more efficient delivery of financial services.

Strategic Direction 6: Generate funds from grants

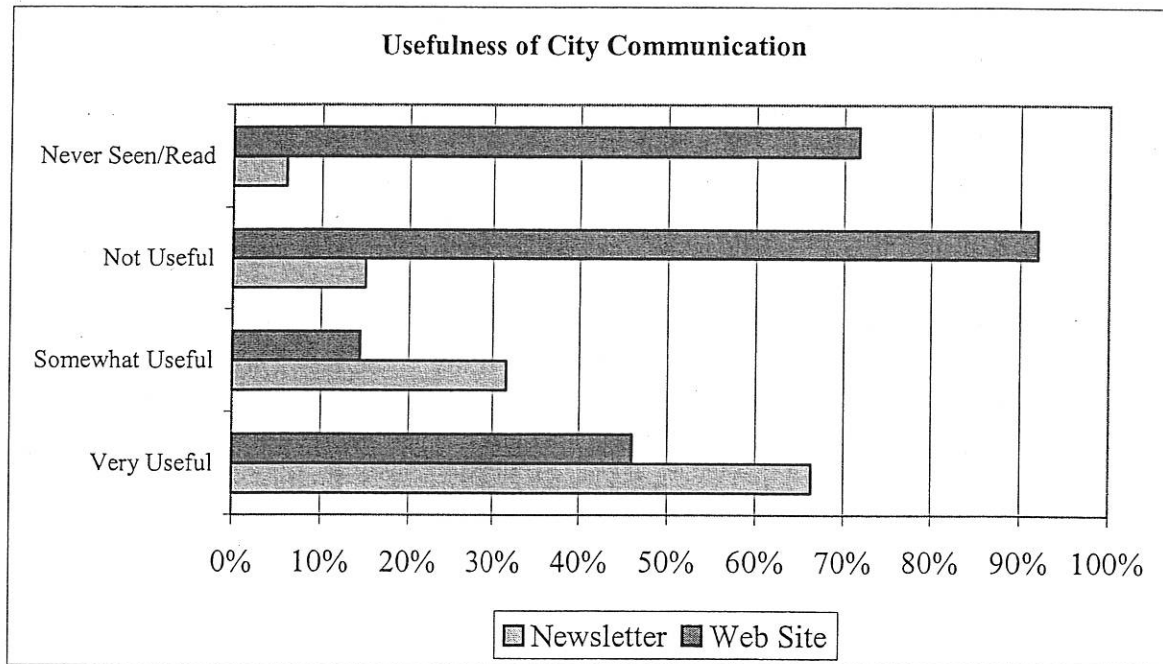
Departmental "grant specialists" will be selected and trained to identify grant sources, develop effective grant writing skills, and pursue funding.

COMMUNICATION AND COLLABORATION

GOAL: Open and free-flowing communication and collaboration is a trademark of the city.

Interviews with staff and Council as well as feedback received during the Community Leadership Forum revealed that increased and improved methods of communication are seen as both opportunities and challenges to be addressed.

Community input was sought through survey questions about the usefulness of the city's existing communications methods. While 98% of the residents surveyed rated the monthly newsletter as being useful, only 19% so rated the city's web site. This is attributed to the fact that 72% indicated that they had never seen the city's web site.



Importantly, the majority of households that contacted the city with a request for service or assistance felt that the city was responsive to their request. In addition, 74.9% felt that they were treated courteously.

Developing effective methods of communication that extend beyond residents to the business community, neighboring jurisdictions and the school system will result in collaborative relationships that will benefit all of the city's stakeholders. While the city has recently worked hard to portray an image as a good place to do business, it also

must balance the preservation of its historic character and physical attributes against the needs of the business community.

The Sycamore School District is an important asset to the community and was consistently identified as one of the city's strengths. City Council and staff appreciate that forging a collaborative relationship between the city and schools will create and enhance opportunities that benefit the entire community.

The City of Montgomery has developed the following strategic directions to achieve the goal of open and free-flowing communication and collaboration as a trademark of the city. These are as follows:

Strategic Direction 1: Processes are in place to ensure continuous, open, two-way communication between government and citizens

The city plans to use state of the art technology and media resources to provide 24-hour access to city services, local and regional information, as well as community resources and amenities. It will also continue to enhance and refine use of the intranet, internet and website, promoting its use as an information and communication resource with city hall.

Rapid advancements in computer technology will continue to be a revolutionary force in communicating and conducting business with citizens. Refinements in e-commerce will provide the city with opportunities for increased productivity and improved service delivery. Effective communication mechanisms will also continue to be critical to achieving success in reaching the city's strategic goals.

In addition to focusing on technology, staff will also enhance communication by developing collaborative processes that invite stakeholder participation in addressing problem areas or critical issues. Methods that encourage participation and collaboration will be identified.

Strategic Direction 2: Market the community and benefits of Montgomery living

Development of a marketing and public relations program to enhance Montgomery's visibility and bring business to the merchants and businesses will be the first step in implementing this strategic direction. A communications program that includes strong public relations and marketing components will create a better informed public. It will encourage dialogue between citizens, council and staff and will result in a better flow of information between staff, customers and stakeholders.

Strategic Direction 3: Develop and maintain a cooperative working relationship between the city and other local and regional agencies including the Sycamore School District

To implement this strategy the city will continue to develop partnerships with local and regional agencies and other jurisdictions for the purpose of communication, support and joint planning opportunities. The city will be represented in regional organizations through assignment of staff to participate on various boards, committees and task forces.

In addition, staff will develop a continuous program or avenue for communication between city and school officials, searching for collaborative opportunities such as recreational programming, educational programs, and sharing of resources and facilities. A practice of regular informal meetings to discuss and collaboratively solve issues and concerns will be a part of the implementation of this strategic direction.

Strategic Direction 4: A cooperative working relationship exists between the city and the local business community

The city will develop ongoing relationships with the business community by appointing staff representation to the business association, continuing the business calling program, and obtaining direct input from business owners by conducting a survey. As with Strategic Direction 3 above, a regular avenue of communication will be sought so that regular communication becomes the norm.

Strategic Direction 5: Enhance internal communication with elected and appointed officials and employees

To implement this strategy, the city will utilize electronic media more effectively by disseminating and receiving material electronically. In addition the management team will revisit and reinforce the city's mission, vision and values periodically.

COMMUNITY AESTHETICS AND AMENITIES

GOAL: The aesthetic quality, physical characteristics, and accessibility of natural resources, parks and public spaces contribute to the uniquely desirable quality of life in Montgomery.

The image and feel of Montgomery as a place is determined to a great extent by the visual character encountered upon entering the community. The city places a major emphasis on preserving its historic character as well as beautification through extensive flower planting in street medians, parks, and in hanging baskets throughout the Heritage District. Since 1997 the city has been designated a Tree City USA. Improvements to pedestrian and vehicular traffic flow and streetscape aesthetics have been made through signage, street lamps and beautification planters.

The city's natural resources include a highly prized community asset and amenity of 84.1 acres of land devoted to active recreation and passive parks and open space. Bike paths and sidewalks are connected to parks and other city amenities. This park system is unique and differentiates the city from other jurisdictions.

Other amenities arise from the offering of a number of unique special events and activities provided by the city in conjunction with numerous volunteers. Sensory Sundays Jazz series, the Arts Commission annual photo contest, the July 4th Parade and Festival, Bastille Day and Holiday in the Village all contribute to the character and ambiance that is unique to the city. These also create a strong sense of community.

Concerns and challenges expressed during the planning process included the need to exercise vigilance in the preservation of the existing open space, as well as developing environmental controls to protect the watershed. While zoning requirements have maintained a spacious wooded environment, the lack of buildable land within the city may result in opposing pressures for development, and are viewed as a potential threat to the environment.

Survey results show that a high majority of residents (94%) feel that beautification efforts (plantings, flowers, roadway medians, downtown entryways) are important, and 84% report that they are satisfied with the city's beautification efforts. In addition, 79% indicated that maintenance of the parks is important and 88% reported that they are satisfied with the city's efforts.

Strategic directions identified to ensure that the aesthetic quality, physical characteristics, and accessibility of natural resources, parks, and public spaces contribute to the uniquely desirable quality of life in Montgomery follow.

Strategic Direction 1: Assist pedestrians, enhance accessibility, and visually link public spaces and uses

This strategy will be implemented by developing and executing a plan to visually link the city's public spaces and uses by incorporating public art, water features, street banners, signs and lighting into the streetscape and public right-of-way to strengthen connections that provide a comfortable pedestrian environment. Removal of physical impediments to access in city parks and public spaces will be performed in conjunction with these visual linkages of spaces and uses to further connect the community neighborhoods.

Strategic Direction 2: Provide special events, recreation service, city activities, historic resources and other amenities that distinguish the city from other jurisdictions and retain competitiveness with newer suburbs

Services, programs, and facilities provided by neighboring jurisdictions will be assessed and compared to determine the city's relative competitiveness. In addition, input will be solicited from residents to identify the amenities that are needed and desired. The city will work with the business community and other stakeholders to develop and implement ideas.

Strategic Direction 3: Enhance the appearance of all city gateways/entryways to create a distinct feeling upon entering the community

A design plan to establish a consistent "look" or distinctive appearance that is readily identified as uniquely Montgomery will be developed and implemented to execute this strategy.

Strategic Direction 4: Protect existing green space in residential neighborhoods

Establishment of a green areas trust will enable the city to encourage conservation easements or dedication of greenbelt areas by property owners. The trustees will work to identify and map property prospects to create a Green Areas property donation plan. In addition, land preservation or dedication requirements will be incorporated into the city's Development Plan ordinance.

In addition, the staff will develop cooperative relationships with regional agencies to plan for and address issues of open space preservation and maintenance through participation in regional organizations such as the Hillside Trust, OKI, and the Hamilton County Planning Partnership.

Strategic Direction 5: Use green space to enhance public spaces throughout the city including downtown, gateways, pocket parks, streetscapes and rights-of-way

A comprehensive program for the installation of streetscapes and street trees along major corridors will be developed in conjunction with the staff and Beautification and Tree Commission. Planting partnerships with residents and businesses will be developed to assist in executing this program.

COMMUNITY AND ECONOMIC DEVELOPMENT

GOAL: The city engages in and encourages community and economic development that reflects quality design and compatibility with historic community assets, including a variety of housing types and choices.

The city's relative position in the region has changed as population has migrated north. Previously a relatively isolated suburb, Montgomery is now a city close to downtown and surrounded largely by developing and rapidly growing jurisdictions. Lack of buildable land makes quality and design considerations and zoning controls critical to future development projects. This is especially true for the Montgomery Road corridor.

Future population growth is restricted due to the lack of buildable land unless additional land is acquired or higher density zoning is adopted. Although some growth will occur as empty-nesters sell their homes to families with children, this will be minimal.

The ease of design and compatibility of future economic development and re-development in Montgomery's downtown, commercial and residential areas will be largely influenced by the city's new zoning code. The document is in the final stages of completion with public information sessions and public hearings on the text and map components of the plan completed.

Montgomery's location relative to Interstates 71 and 275, as well as the community demographics, contributes to its desirability as a place to do business. However, perceived weaknesses and challenges identified by community leaders include the need to maintain and enhance the current businesses; control retail development without discouraging it; prevent potential loss of large employers; improve relationships with businesses; improve parking and traffic in the central business district; increase economic diversity; and effectively compete to be a quality place to live and do business.

Six strategic directions have been developed to achieve the goal of city engagement in and encouragement of community and economic development that reflects quality design and compatibility with historic community assets, including a variety of housing types and choices.

Strategic Direction 1: Enhance and preserve pedestrian linkages between residential and commercial areas

This strategy is closely tied to the implementation of the Pedestrian/Non-Motorized Master Plan. The city's existing map of bike routes will serve as a starting point to plan for and execute additional and enhanced pedestrian linkages to the current sidewalk system. The existing system will be evaluated to assess improvements required to facilitate pedestrian travel.

Strategic Direction 2: Ensure aesthetic compatibility as development or redevelopment occurs

Development design standards will be established for office and commercial uses, as well as for new residential development. These design standards will increase compatibility with existing neighborhoods and result in improved aesthetics.

Strategic Direction 3: Encourage a balanced mix of established upscale retailers and high-end offices to relocate to Montgomery

The city will identify potential upscale retail and high-end office markets and develop a targeted marketing list. As the target list is being completed, appropriate incentives for both attraction of new businesses and retention of existing retailers and offices will be developed.

Strategic Direction 4: Address the pattern of development along the Montgomery Road corridor

A Corridor Use Plan, including zoning designations, new development, redevelopment targets, and streetscape treatments will be developed to create appropriate transitions and establish the Montgomery character along this important street.

Strategic Direction 5: Partner with local businesses and civic organizations to provide special activities that promote both the city and the businesses

The city will partner with businesses and civic organizations in a variety of ways. Event sponsorships that support and target the market for local merchants will be used to promote both the city and local business. In addition, businesses and civic organizations will be asked to participate actively in identifying and planning these events—not just providing sponsorships.

Strategic Direction 6: Encourage appropriate alternative housing options

The survey results reflect that further research and community involvement is required to assess the feasibility and desirability of encouraging development of housing for smaller households. A majority of respondents (54%) do not perceive there is a need for additional housing in the City of Montgomery designed specifically for smaller households, despite the lack of options that exist. Geographical areas of the city will be identified and evaluated for alternative housing market potential for higher density in consultation with appropriate neighborhood organizations.

HERITAGE DISTRICT

GOAL: The signature of our community is the Heritage District which is a local and regional destination for shopping, multi-cultural events and entertainment.

The Heritage District is a primary component of the city's image, an important city asset, and a regional destination. The District consists of numerous historic structures whose preservation commemorates the city's historical beginnings, unique image and character, and provides a highly walkable place for social interaction.

The City of Montgomery retained the consulting firm of McBride, Dale, Clarion to complete a land use and design study for the Heritage District. The study addresses design, directional/informational signage, and land-use recommendations. Planning issues addressed as a part of this effort include:

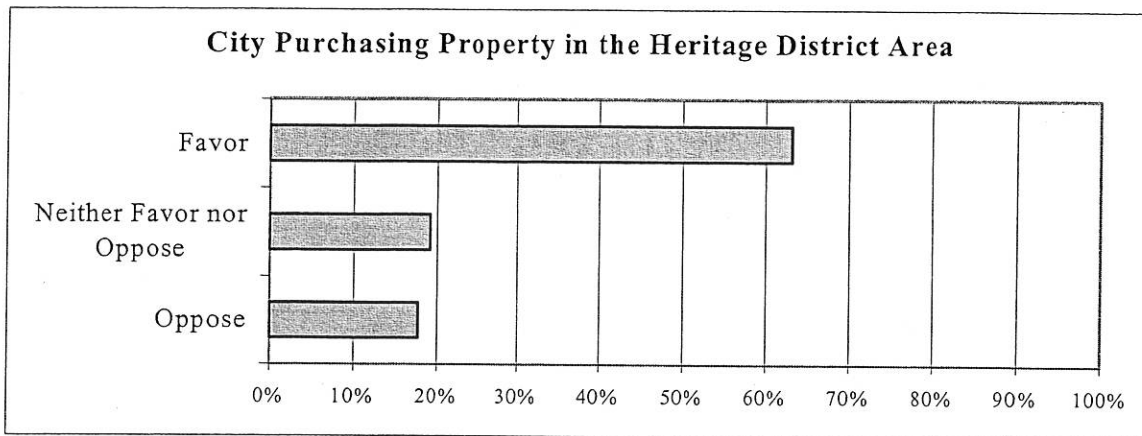
- The Montgomery Elementary School focus area
- Public parking focus area east
- Public parking focus area west
- The Triangle focus area
- Mixed use focus area
- Cooper Road residential focus area
- Redevelopment focus area
- Significant public spaces
- Staff estimates that 80-85% of the retail/commercial space is occupied

Community Leadership Forum members, Council and staff identified very similar strengths and opportunities, as well as weaknesses and challenges in the Heritage District. These include parking, traffic, business signage and visibility, design controls, and the economic viability of the businesses. Shared key successes for these groups include:

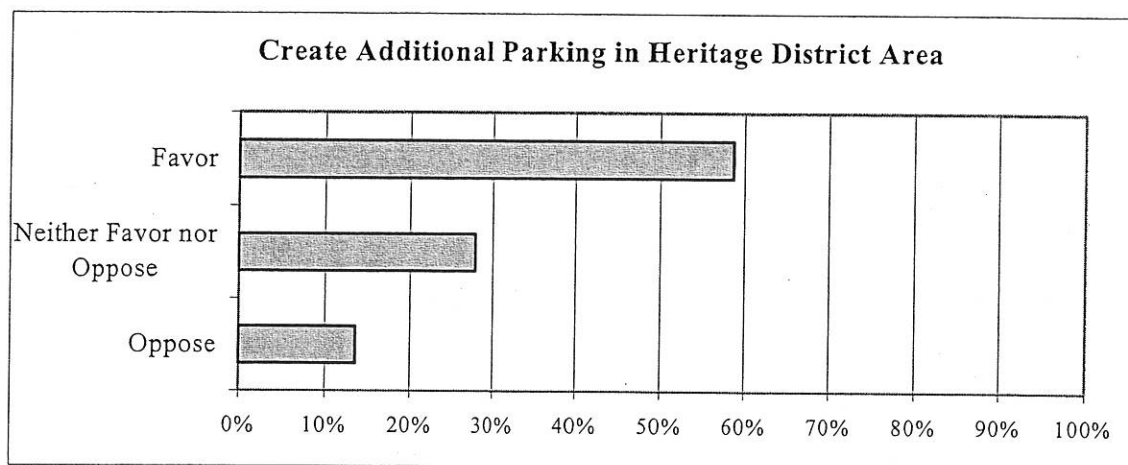
- Reuse of the "Point"
- More residential and mixed uses
- Enhance key gateways to the city and the Heritage District
- Continued development and preservation of the District
- Improved District parking situation

Residents were asked their opinions about a series of development options for downtown Montgomery's Heritage District. Far more respondents favor than oppose the following options:

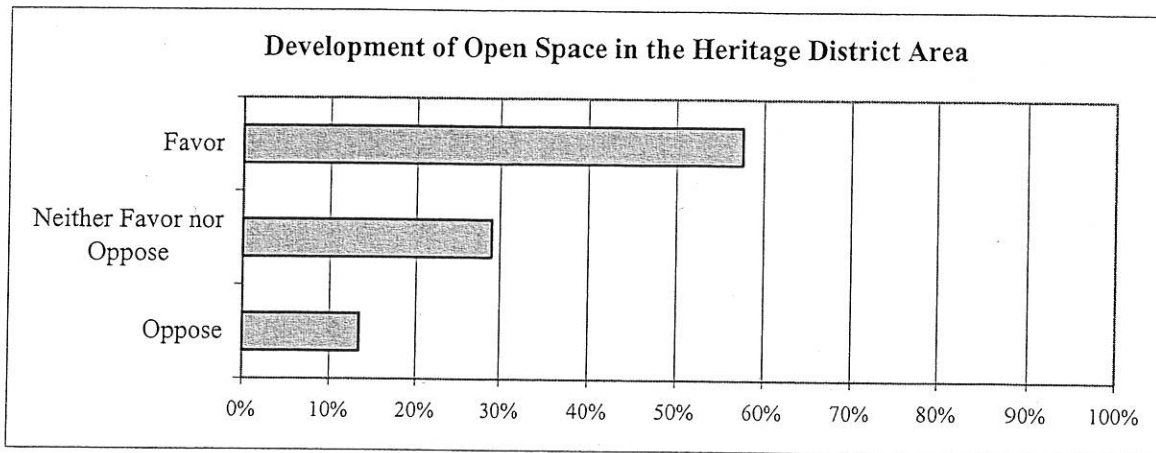
- 63.2% of survey respondents favor the city purchase of property in the Heritage District to ensure that future development is consistent with the character of the District. 19.1% neither favor nor oppose, while 17.7% oppose.



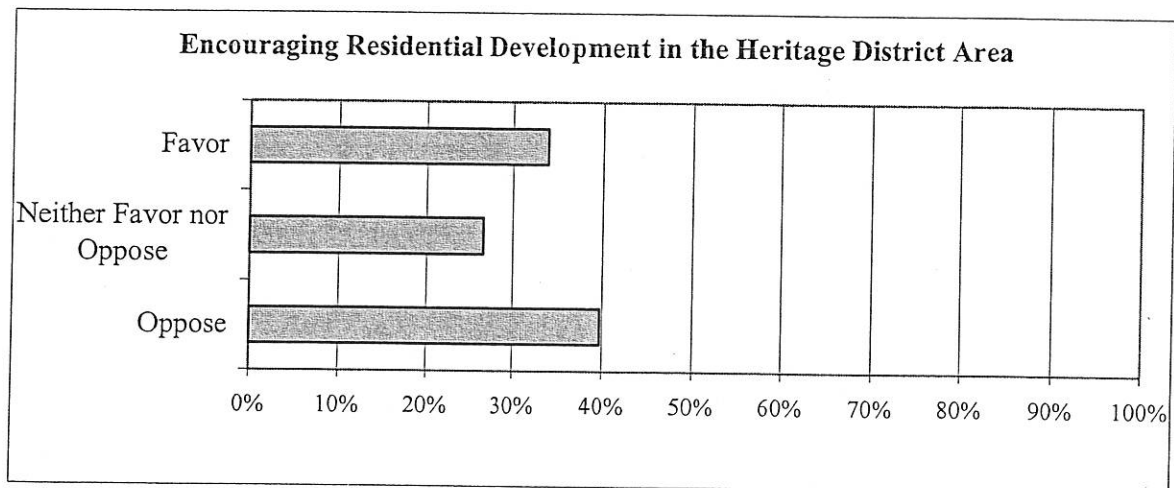
- 58.7% of survey respondents favor the creation of additional parking in the Heritage District area, while only 13.6% oppose creating additional parking.



- 57.6% of survey respondents favor developing open space in the Heritage District for public gatherings and community events. While 29% neither favor nor oppose, 13.4% oppose developing open space in the District for this purpose.



The survey also asked residents if they favor or oppose "encouraging residential development in and around the Heritage District including cluster homes or town houses." Forty percent oppose this development option, 26% neither favor nor oppose, and 34% favor this option.



To keep the area vibrant, a mix of land uses, including quality commercial businesses, distinctive stores and restaurants, appropriate housing, and a town center, should be explored for the future. The national and local economy will impact the viability of the Heritage District and existing businesses, emphasizing the importance of diversity in the area. Bringing residents to the immediate vicinity will help support the retail businesses while the proximity of neighborhood services will make housing more desirable to target populations. One of the weaknesses of the area is its inability to function as an effective town center.

Five strategic directions were established to achieve the goal of developing the Heritage District as a local and regional destination for shopping, multi-cultural events and entertainment:

Strategic Direction 1: Examine critical areas of the Heritage District, identify property redevelopment opportunities, and develop and execute plans

The first step in implementing this strategy will be to identify and designate urban renewal project areas and plans for underutilized properties. The renewal and redevelopment provisions of the city code (Chapter 155) enumerate the actions and authorizations required to prevent or eliminate blight or blighting influences. The triangle site, at the entrance to Montgomery's southern gateway, has been identified as a substantial detraction and negative influence upon the character and appearance of the area. The city will redevelop this site as an attractive gateway business opportunity.

Strategic Direction 2: Make public improvements to the appearance and functionality in Heritage District and adjacent transitional areas to stimulate and support the community

A major component of this strategy is the development of a public plaza or gathering area in the Historic District that encourages and fosters community interaction. In addition, implementation calls for enhancing the attractiveness of the city gateways, streetscapes and public and pedestrian spaces within the District. The city will also incorporate public art in the district, and implement the Heritage District Design Study parking improvement alternatives.

Strategic Direction 3: Market the Heritage District and businesses to increase public awareness and attract patrons

Community events that encourage social and civic interaction will continue to be planned and staged in the Heritage District. The city will also promote the area by providing information about the Heritage District and its merchants.

Strategic Direction 4: Incorporate appropriate housing into the Heritage District and adjacent transitional areas

Housing mixed with retail will fill unmet market niches and support the retail area. The implementation of this strategic direction will begin with an evaluation of the desirability and feasibility of housing development by conducting a market demand analysis of the area.

Strategic Direction 5: Enhance efforts toward retention and expansion of business opportunities in the Heritage District and adjacent transitional areas

The implementation of this strategic direction will focus the City's efforts into the marketing of the Heritage District area to targeted upscale retailers and offices uses. To encourage these marketing efforts, staff will also investigate incentives that can be utilized by the City to encourage business retention and attraction.

IMPLEMENTATION

The following recommendations are offered as a means of integrating the new Strategic Plan into the fiber of the city organization, and to make it a blueprint for how business is conducted on a regular basis.

- *Provide a copy of the Strategic Plan to every city employee and provide a forum to answer employee questions and to emphasize the Plan's importance.*
- *Keep the Mayor and County, city employees and residents apprised of the achievement of Plan goals by providing information regularly.*
- *Add a category linking agenda items to the Strategic Plan to the Council Staff Report format.*
- *Conduct periodic City Council and management team meetings to review the Strategic Plan document, review progress made toward strategic goals, and make any necessary revisions or amendments.*
- *Annually or biennially, conduct a scientific survey of residents to gauge satisfaction and progress made toward strategic goals.*
- *Make the city's Mission Statement and Values Statement highly visible.*

The Strategic Plan represents Montgomery's road map to achieving its future vision. As such, the Strategic Plan may serve as a guide to city officials when considering allocating resources. It is possible that some priority items identified in the Plan will take precedence over other items which may have been priorities in the past. As a tool, the Plan should be reviewed routinely and adjusted if results fall short of their targets or conditions dictate a need for change.

CITY OF MONTGOMERY

IMPLEMENTATION ACTION PLAN

December 2001

CITY SERVICES

Goal Statement: *Montgomery maintains the highest standards in public safety, customer service, transportation, infrastructure, and park/recreation services to serve the diverse needs of residents, customers and visitors.*

Strategic Direction 1: Provide city services and service levels that are consistent with the desires and needs of the community

Strategy: *Identify potential new services(s) and/or modification of existing service(s) and monitor trends and satisfaction levels to enhance or improve service delivery*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Define wants versus needs through a detailed review of the 2001 Citizen Survey	Cheryl Hilvert	4/02	II	
2. Finalization of Core, Critical and Discretionary Services Listing	Paul Wright	3/02	II	Also the responsibility of the entire Management Team with approval from the Government Affairs Committee.
3. Use customer surveys, complaint tracking and service requests, and other feedback measures regularly to identify unmet needs	Matthew Vanderhorst	6/03	III	Also Customer Service Tiger Team
4. Utilize benchmarking, performance measures and/or identify best practices for improving service delivery, where appropriate	Wayne Davis		IV	Create Performance Measurement Team
5. Develop quality assurance methodology to assure that service levels are maintained	Paul Wright	12/04	IV	Will work with Customer Service Tiger Team and Performance Measurement Team
6. Develop a plan and a process to identify opportunities to create or expand service levels and including a feasibility study for the implementation of any new or expanded service(s)	Cheryl Hilvert	12/02	II	Also the responsibility of the entire Management Team.
7. Utilize annual Departmental Planning and Goal Setting to identify new services and services modifications	Paul Wright	12/02	II	Also the responsibility of the entire Management Team.
8. Implement customer service committee to monitor recommended improvements for provision of services to citizens	Matthew Vanderhorst	10/01	I	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategy: Employ and retain high quality staff

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Evaluate recruiting and advertising efforts	Kate Earley	3/02	II	
2. Evaluate competitiveness of compensation package	Cheryl Hilvert	Complete	I	Evaluate task for repeat in 2004
3. Explore creative alternatives to include in employment package (monetary and/or non-monetary incentives)	Kate Earley	12/02	II	
4. Create an organizational training philosophy and develop a catalog of training experience and opportunities to promote and encourage professional development opportunities	Kate Earley	6/02	II	Annually
5. Conduct a review and develop a plan for the enhancement of the City's Human Resources function	Kate Earley	6/02	II	
6. Implement High Performance Organization strategies through education and communication	Cheryl Hilvert	6/02	I	

Strategic Direction 2: Provide facilities and infrastructure that are functional, aesthetically pleasing and well maintained

Strategy: Develop master plans outlining short- and long-term infrastructure and facility improvements and maintain high standards for existing infrastructure

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Annually review and update Infrastructure Wish List	Bob Nikula	5/02	II	Annually
2. Determine feasibility of proposed projects	Bob Nikula	6/02	II+	Annually
3. Incorporate into annual budget, capital improvement program, and four year forecast as appropriate	Wayne Davis	8/02	II+	Annually
4. Expand term of CIP for key infrastructure and City facilities	Bob Nikula	4/03	III	
5. Develop a short and long-term inspection and maintenance program for all City facilities and infrastructure	Jesse Bundy	2/03	III	
6. Develop a GIS based system for monitoring and tracking the City's infrastructure and its schedule for maintenance, projected cost and residual value.	Bob Nikula	9/03	III	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 3: Secure and implement technological improvements to create more efficient systems and processes throughout the city's services, facilities and infrastructure

Strategy: Develop and implement a comprehensive technology master plan

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Establish a Technology Committee to develop and monitor a master plan to provide the appropriate technology tools, to develop and support the strategies contained in this plan	Matthew Vanderhorst	3/02	II	
2. Develop and maintain an IT inventory through a centralized purchasing and replacement schedule with administration of the schedule through the IT Department.	Matthew Vanderhorst	6/02	II	Inventory complete
3. Assess current technologies, identify opportunities and develop goals in all Departments	Matthew Vanderhorst	6/03	I+	Formally reviewed on an annual basis for budget preparation
4. Develop a program for the training and education of employees on technology issues	Matthew Vanderhorst	6/02	II+	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

CITY FINANCES

Goal Statement: *The city's tax base is broad and diverse, and excellence is exhibited in the areas of fiscal accountability, management, and reporting.*

Strategic Direction 1: Maintain sound financial position

Strategy: Build appropriate fund balances

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop, update and review methodology and policy annually	Wayne Davis	6/02	I+	Annually
2. Conduct historical, current and future analysis of funds	Wayne Davis	6/03	III+	

Strategy: Develop policy for contingency plan implementation

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop process, identify targets and prioritize potential budget reductions	Wayne Davis	6/02	II+	
2. Establish and maintain adequate fund balances to allow for contingency plan implementation	Wayne Davis	6/02	II+	

Strategy: Identify alternative revenue sources

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Maintain awareness of economic trends and other opportunities	Frank Davis	On-going	I+	
2. Monitor and analyze the impact of legislation on City revenues	Cheryl Hilvert, Wayne Davis	On-going	I+	An annual review which is also responsibility of entire Management Team
3. Monitor earnings tax collections, trends and impact on City finances	Becki Wellbrock	6/02	I+	Semi-annual summary of status

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategy: Identify alternative revenue sources

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
4. Identify and analyze alternate revenue sources	Wayne Davis	6/02	II+	
5. Update Building and Zoning Fee Schedule	Frank Davis	5/02	II	
6. Evaluate and identify fees and charges for various recreation programs and lodge rental fees	Amber Morris	12/02	II+	

Strategy: Identify cost saving opportunities

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify and analyze efficiencies in processes: <i>Telecommuting, enhanced maintenance/cost savings</i>	Wayne Davis	11/02	II+	Also responsibility of entire Management Team
2. Identify successful practices used in other communities	Wayne Davis	11/02	II+	
3. Conduct analysis and identify cost savings to be gained by using greater economies of scale and/or to assure discounts through timely payments when purchasing	Wayne Davis, Susan Hamm	2/03	III+	Annually - This is an on-going process that is also the responsibility of entire Management Team

Strategy: Maintain quality position within financial communities

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Present and report the city's financial condition and commitment to financial excellence by producing financial reporting documents (CAFR, Annual Budget Presentation, Annual Tax Budget, etc.)	Wayne Davis	Annually according to submission requirements	I+	
2. Publish annual report on web site	Matthew Vanderhorst	3/02	II+	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 2: Maintain and enhance the city's tax base

Strategy: Attract professional services to expand beyond the current mix of medical and health related services

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify potential professional services not currently represented in the City	Frank Davis	12/02	II	
2. Develop a Strategy and Market available properties to prospects	Frank Davis	12/04	IV+	
3. Develop strategic working relationship with Bethesda North Hospital for coordinated development of the hospital campus	Frank Davis, Cheryl Hilvert	6/02	II	

Strategy: Consider expansion of city boundaries and usable space for new growth

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Review and/or develop annexation policy	Frank Davis	12/05	V	

Strategic Direction 3: Systematically link the annual budget to a multi-year fiscal plan

Strategy: Analyze implications of alternative budget scenarios and develop policy responses

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop revenue and expenditure assumptions and projections with fund balance implications, and apply alternative budget scenarios	Wayne Davis	Annually	I+	
2. Develop policy options relevant to various funding scenarios	Wayne Davis	Annually	I+	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 4: Utilize creative and prudent financial incentives to encourage and promote redevelopment

Strategy: Identify alternative financial incentives, including use of TIFs

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify available programs	Frank Davis	9/02	II	
2. Identify target areas (including downtown and Main Street)	Frank Davis	5/02	II	
3. Perform cost/benefit analysis for each possible incentive, including budget implications	Wayne Davis	12/02	II	

HIP Program ABES

Strategic Direction 5: Implement internal enhancements to improve purchasing, financial reporting, and accounting

Strategy: Identify best practices and utilize technology for more efficient delivery of financial services

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop and maintain networks with professional peers to identify best practices IT Per Group; GFOA	Wayne Davis, Matthew Vanderhorst	On-going	I+	Best Practices
2. Provide additional training for all staff and identify service enhancements	Wayne Davis	9/02	II+	
3. Develop on-line budget monitoring and purchasing process for requisitions, purchase orders, etc.	Wayne Davis, Matthew Vanderhorst	12/03	III	

Strategic Direction 6: Generate funds from grants

Strategy: Develop effective grant writing skills, identify and pursue grant sources

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify individuals as departmental "grant specialists"	Kate Earley	6/02	II	Also responsibility of entire Management Team
2. Coordinate and offer training for department representatives	Kate Earley	6/03	III	
3. Conduct research on grant sources	Kate Earley	6/02	I+	Annually, Also responsibility of entire Management Team
4. Publish/list grants received	Kate Earley	6/02	II+	Annual publication

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

COMMUNICATION AND COLLABORATION

Goal Statement: *Open and free-flowing communication and collaboration is a trademark of the city.*

Strategic Direction 1: Processes are in place to ensure continuous, open, two-way communication between government and citizens

Strategy: *Provide 24-hour access to city services, local and regional information, as well as community resources and amenities available through the use of state-of-the-art technology and media resources*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Study other communities and learn from their experiences	Matthew Vanderhorst	2/02	II	
2. Continue to enhance website and promote its use as an information, communication resource with city hall.	Matthew Vanderhorst	3/02	II	
3. Create links to other electronic media for educational and informational services	Matthew Vanderhorst	3/02	II	

Strategy: *Expand and refine the city's use of the Internet and intranet to enhance communication*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Investigate alternative ways of communicating with residents such as e-mail, complaint tracking system, web site, push technology, etc.	Matthew Vanderhorst	3/02	II	
2. Develop and offer e-business alternatives for businesses and residents to obtain information, services, or do business, such as registration, bill payment, tax filing.	Matthew Vanderhorst	3/03	III	

Strategy: *Invite stakeholders to participate in addressing problem areas or critical issues*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop collaborative approach or process for addressing important issues	Paul Wright	3/04	IV	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 2: Market the community and benefits of Montgomery living

Strategy: Create marketing/public relations programs to enhance visibility of Montgomery and bring business to the merchants/businesses

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop public relations and information packets about the community and ensure that they are readily available	Kate Earley, Frank Davis	12/02	II	
2. Partner with community organizations, local and regional agencies to produce educational and informational programs	Kate Earley, Frank Davis	6/05	V	
3. Use the web site to provide an electronic library of city/regional information and resources	Matthew Vanderhorst	3/02	II	Part of the project identified in Strategic Direction 1
4. Consider use of electronic informational kiosks at critical locations throughout the community including downtown, major retailers, outside city hall, etc.	Frank Davis	6/04	IV	

Strategic Direction 3: Develop and maintain a cooperative working relationship between the city and other local and regional agencies including the Sycamore School District

Strategy: Develop partnerships for the purpose of communication, support and joint planning opportunities

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. NPDES Phase II requirements through Hamilton County Storm water Management Steering Committee	Bob Nikula	3/03	III	
2. Actively participate in HCRPC, Planning Partnership Initiatives, OKI, First Suburbs Consortium	Frank Davis	12/01	I+	On-going
3. Support and enhance Mutual Aid Agreements	Cheryl Hilvert	Annually	I+	
4. Identify other opportunities with other cities and regional agencies	Cheryl Hilvert	On-going	II+	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategy: Develop a continuous program/avenue for communication between city and school officials

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Search for opportunities for the city and schools to work together, e.g., recreational programming , educational programs, sharing of resources and facilities <i>showing love + facilities</i>	Amber Morris	10/03	III	
2. Partner with Sycamore Community School District in the development of a multi-year capital improvement program <i>• sports capital facility strategy team</i>	Bob Nikula	3/04	IV	

Strategic Direction 4: Develop and maintain a cooperative working relationship between the city and the local business community

Strategy: Develop ongoing relationships with the business community

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Appoint staff representative to continue interface with the Downtown Merchant's Association, the Business Association and other business groups	Frank Davis	12/01	I	Currently performed by Community and Economic Development Director
2. Continue the business calling program	Cheryl Hilvert	12/02	II+	
3. Identify opportunities for management team to work with business groups	Cheryl Hilvert	12/02	II+	

Strategic Direction 5: Enhance internal communication with elected and appointed officials and employees

Strategy: Utilize electronic media more effectively

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Explore dissemination of materials electronically, i.e. document sharing	Susan Hamm	6/03	III	
2. Encourage feedback electronically	Susan Hamm	12/02	II	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

COMMUNITY AESTHETICS AND AMENITIES

Goal Statement: *The aesthetic quality, physical characteristics, and accessibility of natural resources, parks and public spaces contribute to the uniquely desirable quality of life in Montgomery.*

Strategic Direction 1: Assist pedestrians, enhance accessibility, and visually link public spaces and uses

Strategy: Enhance accessibility to public spaces for all people including those with disabilities

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Address physical impediments to access (e.g. curb cuts) in city parks, public spaces and recreational events	Bob Nikula	4/03	III	

Strategy: Develop a plan to visually link public spaces and uses

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Incorporate public art, water features, street furniture, banners, identification signs, lighting or other design features into the streetscape and public right-of-way	Frank Davis	12/04	IV	
2. Identify areas for pocket parks and enhanced green space throughout the community	Bob Nikula	4/05	V	
3. Develop and incorporate into Budget and Capital Improvement Plan	Frank Davis, Bob Nikula	5/05	V	

Strategic Direction 2: Provide special events, recreation services, city activities, historic resources and other amenities that distinguish the city from other jurisdictions and retain competitiveness with newer suburbs

Strategy: Identify the amenities that are needed and desired by the community

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Continue to plan, conduct and evaluate current annual events	Amber Morris	Annually	I+	
2. Solicit ideas for new events and amenities from community senior trips; teen camps.	Amber Morris	10/03	III+	On-going

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategy: Identify the amenities that are needed and desired by the community

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
3. Assess competition by comparing services, programs, facilities with like communities	Kate Earley	3/03	III+	Annually
4. Work with business community, civic organizations and schools for support and the implementation of ideas	Joyce Yock	12/03	III+	

Strategic Direction 3: Enhance the appearance of all city gateways/entry ways to create a distinct “feeling” upon entering the community

Strategy: Develop a plan for a consistent “look”

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Retain consultant to assist with the development of a plan to provide a consistent look throughout the community	Bob Nikula	3/04	IV	
2. Photograph gateway areas for planning purposes	Bob Nikula	12/03	III	
3. Research best practices in other communities	Bob Nikula	3/03	III	

Strategic Direction 4: Protect existing green space in residential neighborhoods

Strategy: Establish green areas trust and encourage dedication of greenbelt areas by property owners

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Review city's current Greenbelt legislation and Greenbelt Area programs of other communities	Susan Hamm	12/04	IV	
2. Identify target areas for potential dedication/conservation easements	Susan Hamm	12/04	IV	
3. Determine practicality of implementing expanded Program	Susan Hamm	4/05	V	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategy: Incorporate land preservation/dedication requirement in Development Plan ordinance

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Review existing code requirements	Frank Davis	12/04	IV	
2. Benchmark with other jurisdictions	Frank Davis	12/04	IV	

Strategy: Develop cooperative relationships with regional agencies to plan for and address issues of open space preservation and maintenance (i.e. air quality, etc.)

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Participate in regional groups such as OKI, Hamilton County Planning Partnership and others	Frank Davis	12/01	I	On-going

Strategy: Develop environmentally "friendly" standards for maintenance of city parks and other public spaces

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Obtain standards and recommendations from environmental and safety agencies and organizations	Amber Morris, Bob Nikula	5/04	IV	
2. Assess feasibility and impacts upon current property maintenance code provisions	Bob Nikula	12/04	IV	

Strategic Direction 5: Use green space to enhance public spaces throughout the city including: downtown, gateways, pocket parks, streetscapes and right-of-ways

Strategy: Develop program for the installation of streetscape/street trees along major corridors and in partnership with residents/businesses

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Inventory and regularly update existing street trees and other amenities, by location, type, and condition	Terry Willenbrink	4/03	III	Bi-annually
2. Develop and implement a planting and replacement plan	Terry Willenbrink	5/04	IV+	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + – Indicates an action that is ongoing beyond the priority level established.

COMMUNITY AND ECONOMIC DEVELOPMENT

Goal Statement: *The city engages in and encourages community and economic development that reflects quality design and compatibility with historic community assets, including a variety of housing types and choices.*

Strategic Direction 1: Enhance and preserve pedestrian linkages between residential and commercial areas

Strategy: *Design a pedestrian/non-motorized master plan*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Map and update existing bike routes, sidewalks, walkways	Susan Hamm	3/02	II	
2. Mark distances on paths/trails/routes	Bob Nikula	12/02	II	
3. Design brochure with maps, to encourage pedestrian use	Susan Hamm	5/03	III	Incorporate into Web Site
4. Identify unlinked streets and evaluate extensions of sidewalks and bike paths	Bob Nikula	5/06	VI	In conjunction with #1 above
5. Partner with other communities and organizations to link Montgomery with regional routes.	Bob Nikula, Frank Davis	5/06	VI	
6. Identify Grant/Funding Sources for Pedestrian Enhancement, i.e. Rails-to-Trails, ODOT Initiatives	Bob Nikula, Frank Davis	12/03	III	

Strategic Direction 2: Ensure aesthetic and use compatibility as development or redevelopment occurs

Strategy: *Create development/design standards for office and commercial uses, and new residential development to increase compatibility with existing neighborhoods*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Evaluate desirability/feasibility of creating residential design standards	Frank Davis	12/03	III	
2. Conduct best practice survey of design standards and draft recommended standards (including signs and landscape buffering elements)	Frank Davis	12/03	III	
3. Consult with business community leaders	Frank Davis	6/04	IV	
4. Draft new Planned Unit Development ordinance	Frank Davis	12/02	II	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategy: Create development/design standards for office and commercial uses, and new residential development to increase compatibility with existing neighborhoods

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
5. Finalize zoning code revisions	Frank Davis	12/03	III	
6. Adopt new subdivision regulations	Frank Davis	4/02	II	
7. Review and Update Comprehensive Master Plan	Frank Davis	12/06	VI	

Strategic Direction 3: Encourage a balanced mix of established upscale retailers and high-end offices to locate and remain in Montgomery

Strategy: Market/advertise with upscale retail focus

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop comprehensive listing of underutilized and vacant property and prepare a database	Frank Davis	12/04	IV	Work with Tax Office
2. Identify types of retail/offices that would complement existing businesses	Frank Davis	12/04	IV	
3. Develop marketing plan	Frank Davis	6/05	V	
4. Prepare and update marketing packages for distribution to the real estate community	Frank Davis	6/05	V	

Strategy: Use incentives to attract and retain retailers

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Conduct a best practices analysis of incentive programs available in other cities	Frank Davis	12/03	III	
2. Discuss partnerships with local lending institutions	Frank Davis	5/04	IV	
3. Develop incentive package and engage in discussions with prospective retailers/tenants	Frank Davis	9/04	IV	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 4: Address the pattern of development along the Montgomery Road corridor

Strategy: Develop Corridor Use Plan, including zoning, new development, redevelopment, streetscape treatments, etc.

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Study land use and market concentrations for full length of Montgomery Road corridor	Frank Davis	6/05	V	
2. Design ideal plan, including use of specific parcels	Frank Davis	9/05	V	
3. Develop Master Plan for redevelopment	Frank Davis	10/05	V	
4. Determine tools needed to execute plan	Frank Davis	10/05	V	Consider Environmental Quality District overlay

Strategic Direction 5: Partner with local businesses and civic organizations to support city events and sponsor new private activities to promote both the city and the business community

Strategy: Work with businesses as potential event sponsors to identify and plan events and activities that support/target the market for local merchants

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Meet with businesses and civic organizations individually and as groups to discuss concept and review of existing city events	Amber Morris	12/04	IV	
2. Identify desirable types of events	Amber Morris	12/04	IV	
3. Work with businesses to develop calendar and implement	Amber Morris	12/04	IV	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 6: Encourage appropriate alternative housing options

Strategy: Identify geographical areas in the city for increased housing density using various housing types

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Analyze existing densities and market forces for potential changes	Frank Davis	9/02	II	
2. Investigate potential for housing in and around the Heritage District	Frank Davis	9/02	II	
3. Work with realtors and/or builders to identify various types of housing and to assess whether the market exists	Frank Davis	6/03	III	
4. Prepare zoning that will permit "cluster" or zero lot line single family residential development and present to Council	Frank Davis	12/02	II	
5. Study impact on areas including parking, access issues and safety concerns	Kirk Nordbloom	9/02	II	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

HERITAGE DISTRICT

Goal Statement: *The signature of our community is the Heritage District, which is a local and regional destination for shopping, multi-cultural events and entertainment.*

Strategic Direction 1: Examine critical areas of the Heritage District, identify property redevelopment opportunities, and develop and execute plans.

Strategy: *Develop urban renewal/project area plan for designated areas*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify properties/areas with incompatible land uses, non-conforming land uses, lack of adequate parking facilities, faulty street arrangements, lack of maintenance and repair	Frank Davis	12/04	IV	
2. Propose urban renewal areas/project areas to Council	Frank Davis	6/05	V	
3. Develop short-, mid- and long-range plans for project areas	Frank Davis	6/05	V	
4. Develop a strategy for key property acquisition where needed to execute plan	Wayne Davis	6/05	V	

Strategy: *Redevelop the triangle site as an attractive gateway/business opportunity to the city*

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Adopt Urban Renewal Plan	Frank Davis	3/02	II	
2. Develop financing plan, including possible purchase of site	Wayne Davis	9/02	II	
3. Develop use and design plan	Frank Davis	6/03	III	
4. Seek proposals for preferred developer (including owners) to execute plan	Frank Davis	6/04	IV	Based on Environmental Assessment
5. Develop concept for public enhancements to site	Bob Nikula	6/03	III	
6. Market portions of site for sale	Frank Davis	8/04	IV	

Priority Levels are defined as I – 2001, II – 2002, III – 2003, IV – 2004, V – 2005, VI – 2006, + - Indicates an action that is ongoing beyond the priority level established.

Strategic Direction 2: Make public improvements to the appearance and functionality in the Heritage District and adjacent transitional areas to stimulate and support the community.

Strategy: Enhance the attractiveness of gateways, streetscapes and public and pedestrian spaces within the district

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Retain consultant to develop cohesive plan for common areas throughout the Heritage District and adjacent transitional areas including pedestrian walkways and gathering areas	Frank Davis	5/02	II	
2. Identify creative/aesthetic improvements to enhance pedestrian experience	Frank Davis	11/02	II	
3. Install traffic devices and streetscape amenities that create a pedestrian-friendly environment	Bob Nikula	12/04	IV	

Strategy: Investigate creating a public plaza/gathering area in the Historic District

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify key purposes and necessary features for the plaza	Cheryl Hilvert			
2. Study potential locations and develop alternative design plans	Frank Davis	11/02	II	
3. Conduct feasibility analysis	Frank Davis	8/03	III	

Strategy: Add public art in the district

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Interface public art project with common area study	Frank Davis	6/03	III	
2. Work with Arts Commission and Public Art Project Committee to make recommendations	Kate Earley	6/03	III+	On-going
3. Evaluate all public art locations	Kate Earley	6/05	V	
4. Identify funds and fund-raising opportunities	Kate Earley	8/03	III+	On-going
5. Identify City funded companion projects to supplement public art and enhance the overall district	Kate Earley	12/06	VI	

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Strategy: Implement the Heritage District Design Study parking improvement alternatives

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Enhance identity of public parking	Frank Davis	12/02	II	
2. Examine pedestrian linkages between parking area and shopping and office destinations	Frank Davis	12/02	II	
3. Investigate feasibility and desirability of decked parking structure	Frank Davis	5/04	IV	
4. Review adequacy of development plan requirements for parking	Frank Davis	12/02	II	

Strategic Direction 3: Market the Heritage District and businesses to increase public awareness and attract patrons

Strategy: Stage community events in the Heritage District

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Identify existing and potential cooperative events for the Heritage District	Amber Morris	12/04	IV	
2. Collaborate with businesses about enhancement, sponsorships and involvement in events	Amber Morris	12/04	IV	

Strategy: Provide information about the Heritage District and merchants

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Work with the Historic Montgomery Business Association to develop literature displays, kiosks and a link to the City's web page	Frank Davis	6/04	IV	
2. Work jointly with the Montgomery Historic Preservation Association to provide downtown walking tours, brochures, programs, etc.	Frank Davis	6/03	III	

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Strategic Direction 4: Incorporate appropriate housing into the Heritage District and adjacent transitional areas

Strategy: Evaluate feasibility (market/demand study) and desirability

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Review McBride, Dale, Clarion study for possible sites.	Frank Davis	9/02	II	
2. Work with realtors and/or builders to identify different types of housing and assess the market	Frank Davis	6/03	III	
3. Draft changes to density provisions of the zoning code	Frank Davis	12/02	II	

Strategic Direction 5: Enhance efforts toward retention and expansion of business opportunities in the Heritage District and adjacent transitional areas

Strategy: Market/advertise with upscale retail/office focus

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Develop comprehensive listing of underutilized and vacant property and prepare a database	Frank Davis	12/04	IV	
2. Identify types of retail/offices that would complement existing businesses	Frank Davis	12/04	IV	
4. Develop marketing plan	Frank Davis	6/05	V	
3. Prepare and update marketing packages for distribution to the real estate community	Frank Davis	6/05	V	

Strategy: Use incentives to attract and retain businesses

Implementation Steps	Owner	Targeted Completion Date	Priority	Comments
1. Conduct a best practices analysis of incentive programs available in other cities	Frank Davis	12/03	III	
2. Discuss partnerships with local lending institutions	Frank Davis	5/04	IV	
3. Develop incentive package and engage in discussions with prospective retailers/tenants	Frank Davis	9/04	IV	

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