

February 3, 2023

TO: Lee Ann Bissmeyer, Chair
Planning, Zoning and Landmarks Committee of City Council

FROM: Brian K. Riblet, City Manager *BKR*

SUBJECT: Planning, Zoning and Landmarks Committee Meeting of Monday, February 6, 2023

As a reminder, the Planning, Zoning and Landmarks Committee is scheduled to meet on Monday, February 6, 2023 at 5:30 p.m. Items to be discussed include:

1. Community Comprehensive Plan RFP—Staff will be present to review the attached Community Comprehensive Plan RFP with the Committee and to obtain feedback from the Committee at the meeting.
2. Other Business — The purpose of this agenda item is to provide an opportunity to discuss any issues or ask questions that may be on your mind.

Also, attached are the minutes from the April 4, 2022 meeting of the Planning, Zoning and Landmarks Committee for review and approval at Tuesday's meeting.

Should you have any questions or concerns pertaining to the agenda topics or have additional items to be discussed at the meeting, please do not hesitate to contact me.

c: Mayor and City Council (4)
Connie Gaylor, Executive Assistant/Clerk of Council
Department Heads

AGENDA

February 6, 2023
Montgomery City Hall
10101 Montgomery Road

5:30 P.M.

1. Call to Order
2. Guests and Residents
3. Communications
4. New Business
 - a. Community Comprehensive Plan RFP
5. Approval of Minutes: April 4, 2022
6. Other Business
7. Adjournment

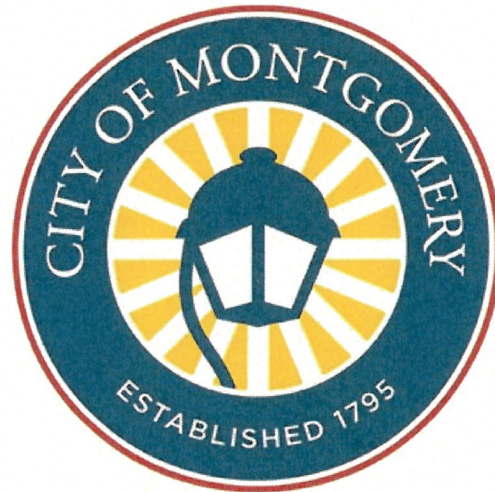
February 2, 2023

TO: Brian K. Riblet, City Manager
CC: Tracy Henao, Assistant City Manager
FROM: Kevin Chesar, Community Development Director
SUBJECT: Community Comprehensive Plan RFP

Please find the Community Comprehensive Plan Request for Proposal attached which we would like to receive feedback from the Planning, Zoning and Landmarks Committee of Council at their meeting on February 6, 2023. Staff will present and discuss the overall Community Comprehensive Plan Process, timing, and parameters for consultant assistance.

REQUEST FOR PROPOSAL

COMMUNITY
COMPREHENSIVE PLAN



City of Montgomery, Ohio

10101 Montgomery Road
Montgomery, Ohio 45242

www.montgomeryohio.gov

The City of Montgomery seeks a qualified planning consulting firm to provide professional services for the City of Montgomery Community Comprehensive Plan.

I. GENERAL BACKGROUND

Montgomery is a vibrant, high-quality, family-oriented suburb of approximately 11,000 people located northeast of Cincinnati, Ohio. The City embraces its future while valuing the traditions and history of its past. Founded in 1795, Montgomery was known for generations as a stopping point along the old “3-C” Highway (Cincinnati-Columbus-Cleveland). Montgomery is now easily accessible at the crossroads of I-275, I-71, Ronald Reagan Cross County Highway and US 22/Ohio 3, or locally known as Montgomery Road, the “main street” through town.

The colorful landscape, tree-lined streets, and miles of brick paver sidewalks in Montgomery lend themselves to the charming “Americana” feel of this well-preserved, historic community. It is home to wonderfully quaint old buildings that are a reminder of a quieter, slower time in the community. The treasured Montgomery Heritage District, located in and around Montgomery Road, is a diversified and unique destination for shopping, dining, and entertainment with storefront shops, nationally recognized and fine ethnic restaurants, galleries, services, and performance venues.

Newer developments have been planned for responsible growth to complement our community. Montgomery Quarter is a premier mixed-use development located adjacent to Historic Montgomery that includes a boutique hotel, meeting and event space, professional offices and a new community green. The Vintage Club, located on the northern end of the city, is a mixed-use village featuring single-family residential, luxury condos, medical office and commercial amenities. TriHealth has also invested in a new medical office building, The Thomas Comprehensive Care Center in recent years and is adding an 8th story on the Bethesda North Hospital.

II. SCOPE OF WORK

The latest Montgomery Community Comprehensive Plan was completed in 2007 and can be found at: <https://tinyurl.com/Montgomerycomplan>

While this document has served well as a guide for our community to follow, updated strategies are necessary to guide our direction into the future in a progressive, insightful way while honoring our historical and residential lifestyle.

The new Comprehensive Plan will identify community issues and concerns. This document will include policy statements, goals, objectives, guidelines, maps, illustrations, and graphics that will serve as a framework for the development

of land use policy, which will provide a solid rationale for any resulting updates to our zoning map. This framework will provide clear and predictable guidance to developers, stakeholders, and citizens. It will help the City to preserve cooperative relationships within the Montgomery community and with our neighbors, with whom we can establish policies and priorities for coordinated development.

The Comprehensive Plan will build upon the recently updated strategic plan (<https://www.montgomeryohio.gov/documents/2022-2026-strategic-plan/>) with additional strategies to encourage economic development, sustainability, and general improvements for the continued quality of life of our residents and businesses. The plan will also recognize the land use plans of our neighboring jurisdictions and work to create a compatible use.

The City of Montgomery is not committed to the concept of the style, layout, and design of the previous Comprehensive Plan. Inventive or original approaches for a document and/or digital avenues are welcome. It is anticipated that the updated policy development will generally have goals and objectives for each of the topic areas recommended by the OKI Regional Council of Governments Comprehensive Planning Guide .

However, Montgomery may not necessitate as much attention to all topic areas as many of our land uses are successfully established. Therefore, consultant resources are also expected to focus on small area studies as indicated in the **Development or Re-development Strategies** task within the overall following scope of work:

Background Research and Analysis:

1. Data inventory and analysis of the existing conditions of this community, as well as rational projection of the community through 2045.
2. The consultant should be knowledgeable with the history, social and land use development patterns, culture, environmental opportunities/challenges, development constraints, infrastructure, and fiscal issues regarding the City of Montgomery.

Public Participation Process

1. The consultant will be heavily relied upon to manage the public engagement activities and social media with the key city personnel, citizens, stakeholders, Planning Commission, and other community participants. The consultant shall design and implement a public participation process that ensures members of the public are actively involved in the planning effort. Methods that do not require long standing commitments of time by members of the public yet provide for meaningful input are expected. The use of charrettes/workshops, open

houses, work sessions, online web pages/surveys, focus groups and solicitation at various community events such as the Fourth of July, Bastille Day and Harvest Moon Festivals is anticipated.

2. In addition to any proposed steering committee meetings, it is anticipated that the consultant will provide technical assistance, materials, and professional facilitation for a series of six (6) to eight (8) engagement sessions targeting select stakeholder groups or segments. The consultant will also be required to undertake a series of presentations at various stages of the planning effort to the Planning Commission and City Council. The purpose of these presentations is to provide information and obtain feedback.
3. The consultant is also expected to present the plan when formally reviewed and considered by the Planning Commission and City Council. Presentations to other boards and commissions, such as the Planning, Zoning and Landmarks Council Committee, the Landmarks Commission, or the Board of Zoning Appeals may be required. A minimum of six (6) presentations should be included with the possibility of more to be negotiated.

Site Analysis and Identification of Issues and Concerns

1. Utilize information from background research, site visits, and constraints mapping to analyze, and create maps and analysis illustrating the City's existing conditions. The mapping and analysis shall include:
 - a. Brief Study Area Overview
 - b. Key Demographic Considerations (summary of existing demographic information such as population, employment, housing, and projections)
 - c. Existing Land Use(s)
 - d. Existing Zoning Land Use and Community Design (including density, layout, and form)
 - e. Housing
 - f. Mobility and Transportation Network, including parking
 - g. Infrastructure
 - h. Sustainability
 - i. Environmental Issues/Hazards
 - j. Public Facilities and Services
 - k. Recreation Facilities
 - l. Economic Development/Opportunities

Preparation of Goals, Objectives, and Recommendations

Based upon the information obtained in the previous tasks, the consultant shall collaborate with the community to develop goals, objectives, and recommendations.

Development or Re-development Strategies

In addition, the consultant shall prepare an overall development and/or redevelopment strategy and more specific policies for the use of the land – utilization of city owned land, land acquisition and/or disposal strategies, infrastructure improvements, commercial areas, public open space, and facilities. From a residential perspective many of our older areas are experiencing successful teardown and redevelopment of individual single-family homes. The city has an interest in understanding future density options in undeveloped or underutilized areas that would provide for a diversity of housing options for all age groups.

Furthermore, specific areas studies for the best use should include:

- Former Montgomery Business Club Property and surrounding properties
- The Marketplace Property
- Enhanced Montgomery Road Corridor Streetscape/Design Guidelines with , appropriate scale and massing setbacks, density, building height and overall form Improvements,
- Potential development options for the remaining acreage at the Vintage Club
- Outer and Core Old Montgomery (Historic) Districts

Preparation of Future Growth and Development Alternatives

The consultant shall review projections of future population and economic growth and the resulting impact on land use and development patterns. Alternatives will include evaluation and discussion of future development, redevelopment, conservation practices, and impacts on public infrastructure. The alternatives shall be described in both a narrative and graphic/mapping manner. The purpose of these alternatives is to allow the public to become more aware of the impacts of future growth in Montgomery and to assist in developing goals, objectives, and recommendations. The identification of the most preferred development scenario is part of this task.

Recommendations for Implementation

Preparing recommendations for achieving the goals, objectives, and recommendations of the Comprehensive Plan Update. Standard implementation techniques such as zoning and subdivision regulation changes should be considered, as well as other techniques such as growth management, impact fees, encouraging walkable development centers or nodes, etc.

In addition, this task shall result in the following:

1. A timeframe for identified actions.
2. A table allocating responsibilities for actions among the various governmental agencies and where applicable, not-for-profit organizations having interests in conducting the programs.
3. A schedule of proposed Capital Improvement Projects.
4. A general description of any land use development regulations or incentives that may be adopted by the City to achieve the goals, policies, and guidelines set forth in the plan.
5. A description of other procedures that the City may use in monitoring and evaluating the implementation of the plan.
6. A statement describing proposed programs of public services or changes in existing programs to include estimates of the needed increase in personnel, equipment, supplies, and related matters.
7. The proposed development criteria to be incorporated into any recommended or existing land development regulations.
8. Identification of potential funding sources for projects or other issues identified during the planning process.
9. A description of measures to be implemented to promote economic, social, and environmental sustainability.

Final Plan

Draft a final Comprehensive Plan based on findings from the identified scope working closely with City staff and providing an opportunity for public review and comments on draft version(s).

The City is open to suggestions outside the items listed which the consultant believes will be of value to an effective comprehensive plan.

III. PROPOSAL REQUIREMENTS

Each proposal must adhere to the following format:

A. Proposal Content and Format

- a. Letter of Transmittal: This letter will summarize in a brief and concise manner, the firm's understanding of the Scope of Work. The letter must name all persons authorized to represent the firm,

and include the titles, addresses and telephone numbers of such persons. The official authorized to negotiate for the firm must sign the letter of transmittal;

- b. Organization profile and qualifications;
- c. Qualifications of key personnel;
- d. Experience and expertise;
- e. Work on current or pending assignments and personnel availability;

B. Scope of Services

- a. Statement of understanding;
- b. Methodology to complete tasks;

C. Fee/Proposal Cost- fee proposals must be submitted in a separate sealed envelope clearly marked "Fee Proposal Comprehensive Plan"

- a. Provide a schedule of fees broken down by work task;
- b. Include hourly rates for project personnel to be used as the basis for payment;
- c. Include a "not to exceed" total estimated cost for the work.
- d. List of all deliverables.

D. References

- a. Provide a minimum of three references for planning services comparable to this project. Include a contact person, title, address, telephone number and email address. In addition, provide the period when the services were rendered and a description of services rendered.

Each proposal shall state that it is valid for a period of one hundred twenty (120) calendar days from the date of submission.

IV. ADDITIONAL INSIGHTS

To refine responsibilities, the City expects that:

- A. The consultant will perform all technical and GIS related analysis (ESRI format). GIS data can be made available from CAGIS (Cincinnati Area Geographic Information System).
- B. The Montgomery Road Corridor Streetscape Plan is expected to focus on pedestrian enhancements, linkages, and beatification possibilities with an emphasis on presenting the ideas with conceptual streetscape cross-section renderings and designs.
- C. The use of visuals and images illustrating polices are desired.

V. ANTICIPATED TIMELINE

- City of Montgomery publishes RFP February 27, 2023
- Response to RFP due to City of Montgomery March 20, 2023
- Selection of consultant by City April 17, 2023
- Execution of contract for services May 4, 2023
- Initial meeting with steering committee May 22, 2023
- Submit/present first draft for review June 2024
- Final presentation to the steering committee and Planning Commission July 2024
- Presentation to City Council August 2024
- All work products due September 2024

VI. SUBMITTAL OF PROPOSAL

Interested firms shall submit eight (8) paper copies and one electronic copy of proposal to the following address:

City of Montgomery Planning & Zoning Department
ATTN: Kevin Chesar, Community Development Director
"Proposal for Comprehensive Community Plan Update"
10101 Montgomery Road, Ohio 45242

Proposals are to be received by the City no later than 4:00 p.m. March 20, 2023.

Questions regarding this Request for Proposal may be directed at kchesar@montgomeryohio.gov in compliance with the format specified in the "Contact/Information Section" below.

VII. SELECTION PROCESS

The City of Montgomery will select a consultant based upon a review of the proposal's merits including their ability to best meet overall City expectations including but not limited to the consultant qualifications, proposed plan methodology, understanding of the RFP, adherence to the timeline, knowledge of the city and cost of services. After initial evaluation, the City will select the top 2-3 consultants for interviews with **key consultant members that are directly responsible for the work performed.**

Note: Selection is not based on the lowest cost proposal.

VIII. TERMS AND CONDITIONS

- **Late Proposals:** Proposals received after submission deadline will be considered void or unacceptable. The City of Montgomery is not responsible for lateness such as the non-delivery of U.S. mail or by carrier. The date/time stamp in the Department of Development shall be the official time of receipt.
- **Altering Proposals:** Proposals cannot be altered or amended after the submission deadline. Any interlineations, alteration, or erasure made before the opening time of proposals must be initialed by the signer of the proposal, guaranteeing authenticity.
- **Withdrawal of Proposal:** A proposal may not be withdrawn or canceled by the offering consultant without written permission of the City of Montgomery.
- **Conflict Of Interest:** No public official shall have interest in the contract.
- **Ethics:** The consultant shall not offer or accept gifts of value nor enter into any business arrangement with any employee, official or agent of the City of Montgomery.
- **Addenda:** Any interpretations, corrections, or changes to the RFP will be made by addenda. Sole issuing authority of agenda shall be vested in the City of Montgomery City Manager. Addenda will be mailed (U. S. Mail or electronic mail) to all who are known to have received a copy of this RFP. Submitting parties shall acknowledge receipt of all addenda by email to kchesar@montgomeryohio.gov.
- **Law Compliance:** Proposals must comply with all federal, state, county and local laws concerning this type of project.
- **Required Documentation:** The submitting consultant shall provide all documentation required by this RFP. The City of Montgomery reserves the right to require such additional and supplemental information from interested parties as the City believes is necessary and appropriate to accomplish the City's objectives. Failure to provide this information may result in rejection of the party proposal.
- **Indemnification:** The successful proposer shall defend, indemnify and save harmless the City of Montgomery and all its officers, agents, employees and volunteers from all suits, actions or other claims of any character, name, and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligence, or act or fault of the successful proposer, or any agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from the proposal award. The successful proposer shall pay any judgment with costs that may be obtained against the City of Montgomery growing out of such injury or damages.

- **Patents/Copyrights:** The successful proposer agrees to protect the City of Montgomery from claims involving infringements of patents or copyrights.
- **Contract Administrator:** The City of Montgomery's contract administrator is the City Director of Development with designated responsibility to ensure compliance with contract requirements. The contract administrator will serve as liaison between the City of Montgomery and the successful proposer.
- **Public Record:** All submitted information relating to this proposal shall become part of the public record. Submitting parties may identify in their proposals what information they deem to be proprietary information. The final determination of whether information is subject to the Ohio Open Records Act shall be made by the City's legal counsel.
- **Incurring Costs:** Any costs incurred by interested parties in preparing responses to the City's Request for Proposals and in carrying out negotiations with the City are the sole responsibility of the submitting party and not the City.
- **Equal Employment Opportunity Statement:** The City of Montgomery is committed to providing equal opportunity in employment and it is expected that the selected consultant will adhere to the same. No person is to be discriminated against on the basis of race, color, religion, sex, age, national origin, disability, military status or veteran status.
- **Contact Information/Questions:** Any questions concerning information included in the RFP must be submitted via e-mail to kchesar@montgomeryohio.gov no later than March 9, 2023 with the subject line: MONTGOMERY COMPRESHENSIVE PLAN. All questions will be responded to via e-mail no later than March 14, 2022 and responses will be forwarded to all persons who requested a copy of the RFP (if identifiable by the city).

The City of Montgomery reserves the right to waive any irregularities or informalities, and the right to accept or reject any and all proposals including, but not limited to, any proposal which does not meet the stated requirements, or any proposal which does not furnish the quality or offer the availability of materials, equipment or services as required by the specifications, description or scope of services, or proposals from an offer or who lacks experience or financial responsibility, or proposals which are not made to form. The City of Montgomery reserves the right not to award a contract to the lowest and most responsive offer or and may require a new contract. The City of Montgomery may rescind the award of any proposal within one week when the public interest will be served thereby. Only sealed proposals received by the City of Montgomery will be accepted. Proposals submitted by telephone, email or facsimile machines are not acceptable.

These Minutes are a draft of the proposed minutes from the Planning, Zoning and Landmarks Committee of City Council meeting. They do not represent the official record of proceedings until formally adopted by the Planning, Zoning and Landmarks Committee of City Council. Formal adoption is noted by signature of the Chair within the minutes.

City of Montgomery
Planning, Zoning and Landmarks Committee
April 4, 2022

Staff Present

Brian Riblet, City Manager
Tracy Henao, Asst. City Manager
Melissa Hays, Zoning Code and Compliance Officer
Kevin Chesar, Community Development Director
Connie Gaylor, Clerk of Council

Council Committee Members Present

Lee Ann Bissmeyer, Chair
Ken Suer
Ron Messer

The meeting of the Planning, Zoning and Landmarks Committee of City Council convened in Council Chambers at 5:30 p.m., with Mrs. Bissmeyer presiding.

New Business

2021 Annual Housing Report

Ms. Hays stated In 2021, the acceleration of home values continued to see substantial increases. According to the National Association of Realtors, the median sales price increased 16.9% in 2021, to a new record high of \$346,900.

Ms. Hays reported that while sales volume is down slightly, the median sales price has increased considerably within the City of Montgomery. This report also shows that while housing sales are well-distributed throughout the community, median sale prices are impacted by housing type and location within the city. The number of homes being sold in 2021, the new construction on Orchard Trail, zero foreclosures and the continued interest in teardown/rebuilds illustrates that the housing market in the city continues an upward momentum.

Ms. Hays stated there was a decrease in the number of units sold in 2021 from 181 in 2020 to 152 in 2021. The median sale price was up dramatically by 21% from \$425,000 in 2020 to \$512,500 in 2021, which was greater than the national rise in sales price. The median number of days on the market decreased significantly to only 6 days, which is a record breaking low.

Ms. Hays explained that different types of housing can greatly affect the median list price, sale price and the number of days on the market. Condominium units sell for significantly less than a traditional single family detached structure. As shown in Table 2, the median sale price for a condominium was \$175,500 in 2021, while the median sale price of a single family detached house was \$523,000. The median sale price of single-family homes in the city increased \$75,000 from 2020 to 2021. The median days on the market for condominiums in 2021 continued to be very low; however, the median sales price decreased from the year prior by \$2,500.

Ms. Henao explained that the information reported comes from the real estate multiple listings and would not capture private transfers.

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Planning, Zoning & Landmarks Committee Minutes

April 4, 2022

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Ms. Hays stated the number of teardowns remained the same in 2021, with 11 houses being demolished. Table 10 lists the addresses of the teardowns, the builder, the year the existing structure was built and the square footage of the existing home. The median square footage of the homes torn down in 2021 was 1,720 square feet and the median year built was 1957. Since 2002, there have been a total of 313 teardowns in the city. Teardowns make up approximately 7% of the total housing stock in Montgomery.

Ms. Hayes explained that the Orchard Trail subdivision is located just off Orchard Club Drive, at the site of the former Montgomery Swim and Tennis Club. The subdivision was approved for 29 single family patio style homes. While the original developer was Camden Homes, it has since been sold to Daley Design Build. Following the transition of ownership, Daley Design Build sold multiple lots to several different builders. This is a significant change in the development, as it was originally intended for all the houses to be built by the same builder. According to the MLS, in 2021, two homes were sold with a sales price ranging from \$765,000 to \$799,000.

Ms. Hayes reported that the Robert Lucke Group was approved by Planning Commission in 2018 for 12 ranch-style villa homes along Montgomery Road named The Villas of Montgomery. Three of the six buildings are complete, with two units sold in 2021 for \$788,441 and \$821,613. This brings the total number of units sold to six.

Ms. Hays stated that there were no residences within the city were foreclosed on in 2021. The number of foreclosures over the past few years has remained relatively flat and significantly less than the peak immediately following the recession. This is the fourth year in a row since the City began tracking the data in 2001 that there were zero foreclosures.

Ms. Hays stated in conclusion, this report has shown that there was a significant increase in the sales price of homes within Montgomery. The median sales price in Montgomery for a single-family residence was \$523,000; over double the average sales price in Hamilton County at \$220,000 (realtor.com) and \$171,600 greater than the national average sales price of \$346,900. A highlight of this report is that there were no foreclosures, for the fourth year in a row, within the city in 2021. The continued increase of home and condominium sale prices, the continued construction of a new subdivision (Orchard Trail), decline in foreclosures, shows the strong upward momentum of the housing market within the city.

Mr. Messer asked how many apartments were within the city.

Ms. Henao replied that there were only around 150, most of which were located at Mayfair of Montgomery.

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April 4, 2022
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Customer Satisfaction Survey

Ms. Hays explained that the customer satisfaction survey was sent out to 197 applicants for building and/or electrical permits for calendar year 2021 to allow for the Community Development Department to receive valuable input from our customers. To date, 12 surveys have been returned for the building department survey, which represents a 6% response rate. This survey has been sent out to all applicants for building/electrical permits since 2008. The following table lists the question as it was posed on the survey and the percent of respondents that agree or strongly agree with the question over the past 10 years. The survey used a 5-point scale with 5 being strongly agree and 1 being strongly disagree.

Ms. Hays explained the overall responses for 2021 were positive; apart from a comment regarding being unable to pay for a building permit fee in advance of the review. Staff continued with the electronic permitting process established during the pandemic in 2020 with great success and positive feedback from contractors and homeowners.

2021 Property Maintenance Violations

Ms. Hays reported that a total of 87 Property Maintenance violations were issued in 2021. A majority of these were regarding dead trees, tall grass and debris located on the property. Many of the dead trees required to be removed were ash trees and various pine trees, due to the Emerald Ash Borer and Rhizosphaera needle cast. The number of violations issued in 2021 was significantly up from 2020. It should be noted that during the peak of the pandemic in 2020, Staff took a more reactive approach to zoning and property maintenance violations. Throughout 2021, Staff was back to normal operations, with proactive enforcement.

Minutes

Mr. Messer moved to adopt the minutes of the November 1, 2021 meeting of the Planning, Zoning and Landmarks Committee. Mr. Suer seconded. The Committee unanimously agreed.

Adjournment

Mr. Messer moved for adjournment. Mr. Suer seconded. The Committee unanimously agreed.

The Planning, Zoning and Landmarks Committee meeting adjourned at 6:09 p.m.

Chair