

# 2016 Annual Report

## Overview



### **About this report**

The annual report is a comprehensive document detailing the achievements across all City departments and includes a full financial record for 2016. The annual report is 100 percent web-based and contains videos and interactive charts. In addition, each page is printer-friendly.

### **Mission**

“Providing superior services and engaging with you to enhance our community!”

This report outlines how Montgomery City Council and City staff worked to deliver on this mission in 2016.

### **About Montgomery**

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

Today, Montgomery has approximately 3,800 housing units and is home to 10,251 residents. Montgomery derives much of its operating revenue from a one percent (1%) earnings tax to help fund a full range of City services, undertaken by 65 full-time and 40 part-time employees. Services provided by the City of Montgomery include: police and fire protection, development plan review and building inspections, recreational programming, maintenance of seven parks, street maintenance and snow/ice control of 92 lane-miles of roadway, as well as a host of other City programs.

Montgomery is located in the Sycamore Community Schools district, which has drawn national recognition for academic excellence. Sycamore Community Schools operate four elementary schools, an intermediate school, a junior high school and a high school.

Montgomery is home to a variety of commercial enterprises including: Bethesda North Hospital, Ohio National Financial Services, Columbia Chevrolet, Camargo Cadillac and many banking institutions just to name a few. In addition, the historic downtown is a thriving retail and dining area, including the famous Montgomery Inn Restaurant. The addition of the Triangle/Gateway Center development in 2007 brought several new businesses to the downtown area, including the very popular Stone Creek Dining Company. The City of Montgomery is also home to several churches of various denominations and other types of religious institutions.



## Vision

Our efforts are focused on striving to attain...

1. A community that is forward thinking, yet respects its rich history and tradition and emphasizes the importance of blending history with innovation for a prosperous future.
2. Partnerships with citizens, businesses, and organizations who are engaged and bring diversity in background, beliefs and talents, and contribute to the success of our community.
3. Vibrant and prosperous businesses and organizations that make Montgomery a premier location for entertainment, shopping, and employment opportunities.
4. Diverse housing options, safe neighborhoods, renowned schools, outstanding parks, and hometown special events.

5. A City that delivers superior and innovative services and programs that are financially self-sustainable.
6. Employees who represent the very best in public service.
7. Stewardship of our environment.

**We are Montgomery!**

# City Council



## 2016 City Council



Mike Cappel



Ann Combs – resigned  
December 31, 2017



Mayor Chris Dobrozsi



Gerri Harbison



Chris Margolis



Ken Suer



Lynda Roesch

The City of Montgomery operates under a council-manager form of government with seven elected City Council members, working with a city manager appointed by City Council with the support of a clerk of council and a law director. All City Council members are elected at large



by a popular vote of residents for staggered terms of four years. Once seated, City Council members choose the Mayor who serves for a two-year term.

City Council is responsible for establishing policies and enacting legislation necessary for municipal operations. City Council appoints the city manager, law director and clerk of council. By charter, the city manager serves as the City's chief executive, administrative and law enforcement officer.

City Council operates with six standing committees: Financial Planning; Government Affairs; Law and Safety; Parks and Recreation; Planning, Zoning and Landmarks; and Public Works.

On December 31, 2016, Council Member Ann Combs resigned from her seat on City Council. Mrs. Combs served the City for three years before the sale of her home and subsequent move outside of the city.

In an effort to maintain communications between City Council and the boards, commissions and civic organizations, several initiatives were undertaken including:

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



*Montgomery Mayor Chris Dobrozsi thanks Ann Combs for her service to the community as a member of City Council.*

As part of City Council's responsibilities for establishing policies and enacting legislation, it oversaw operations and administration of a budget of \$28,199,651 and adopted 46 ordinances and resolutions, the highlights of which follow:

## 2016 Council Action

- Approving an Application for a Planned Development Overlay
- Approved an Ordinance Rezoning Property Located at 9876 Montgomery Road from 'GB' – General Business District to 'D-2' – Multi-Family Residential District
- Approved an Ordinance Amending Section 44.13 of the Code of Ordinances Concerning Appointment of the Board of Review
- Approved an Ordinance Modifying Section 30.03, Announcement of Public Meetings, of the Code of Ordinances
- Approved an Ordinance Establishing the Schedule of Municipal Compensation for Employees and Amending Section 32.01 of the Code of Ordinances
- Approved an Ordinance Modifying and Reaffirming Ordinance No. 3, 2015 Regarding the Acceptance of Dedicated Streets within the City
- Approved an Ordinance to Make Appropriations for Current Expenses and Other Expenditures of the City of Montgomery, State of Ohio, During the Fiscal Year Ending December 31, 2017
- Approved an Ordinance to Amend Appropriations for Current Expenses and other Expenditures of the City of Montgomery, State of Ohio, During the Fiscal Year Ending December 31, 2016
- Approved a Resolution Authorizing the City Manager to Enter into a Contract with CT Consultants, Inc. for Professional Services Related to General Engineering and Architectural Services for Calendar Year 2016
- Approved a Resolution Accepting a Bid and Authorizing the City Manager to Enter into a Contract with Elex, Inc. for the Ham-Var-Montgomery Signals Project PID #94300
- Approved a Resolution Authorizing Amendments to the City's Section 125 Premium Only Plan
- Approved a Resolution Authorizing the City Manager to Enter into a Contract with FYDA Freightliner Cincinnati, Inc. for the Purchase of a 2017 Freightliner M2 106 Dump Truck

- Approved a Resolution Establishing an Interim Development Control Overlay District to Define Sexual Encounter Establishments
- Approved a Resolution Reaffirming the City's Commitment to Non-Discrimination and Inclusion by Endorsing Guidelines Adopted by The Ohio-Kentucky-Indiana Regional Council of Governments for Title VI Compliance
- Approved a Resolution Recognizing the Month of May, 2016 as National Historic Preservation Month in the City of Montgomery
- Approved a Resolution Establishing Compensation for the City Manager
- Approved a Resolution Declaring a Moratorium on the Collection of Building and Zoning Permit Fees for Solar Installations
- Approved a Resolution Authorizing the City Manager to Contract with Frost Brown Todd, LLC to Provide Special Counsel Services
- Approved a Resolution Accepting a Bid and Authorizing the City Manager to Enter into A Contract with Strawser Construction, Inc. for The 2016 "Bituminous Black Mat" Project
- Approved a Resolution Accepting a Bid and Authorizing the City Manager to Enter into A Contract with Barrett Paving Materials, Inc. for The 2016 Street Resurfacing Program
- Approved a Resolution Extending an Interim Development Control Overlay District Within All Business Districts
- Approved a Resolution Accepting Annexation of Certain Property into the City of Montgomery, Ohio
- Approved a Resolution Accepting Annexation of Certain Property into the City of Montgomery, Ohio and Acknowledging any Zoning Issues
- Approved a Resolution Adopting a Tax Budget for 2017
- Approved a Resolution Delegating Authority to make Declarations of Official Intent and Allocations with Respect to Reimbursements of Temporary Advances During Fiscal Year 2016 made for Capital Improvements for the Vintage Club Project to be made from Subsequent Borrowings.
- Approved a Resolution Authorizing the City Manager to Enter into an Agreement with The Sycamore Community School District Board of Education to Assign a School Resource Officer
- Approved a Resolution to Adopt the Recommendation of the Montgomery Tax Incentive Review Council with Respect to the Compliance of All Tax Increment Financing Districts within the City of Montgomery

- Approved a Resolution Establishing City Contributions for Employee Health Savings Accounts
- Approved a Resolution Extending City Contributions for Healthcare Benefits
- Approved a Resolution Accepting Annexation Plat to Annexed Property from Symmes Township into the City of Montgomery, Ohio
- Approved a Resolution Authorizing the City Manager to Enter into a Contract with Humana Health Plan of Ohio to Provide Medical Coverage and Life Insurance for Full-Time Employees
- Approved a Resolution Authorizing the City Manager to Enter into A Contract with Dental Care Plus, to Provide Dental Insurance Coverage for Full-Time Employees
- Approved a Resolution Authorizing Internet Auction of Surplus Personal Property Through Govdeals.com
- Approved a Resolution Authorizing the City Manager to Enter into A Labor Agreement with The Fraternal Order of Police Ohio Labor Council, Inc. for Wages and Benefits from July 1, 2016 through June 30, 2019
- Approved a Resolution Establishing City Contributions for Health Care Benefits
- Approved a Resolution Accepting the Amounts and Rates as Determined by the Budget Commission and Authorizing the Necessary Tax Levies and Certifying them to the County Auditor-Tax Budget
- Approved a Resolution Authorizing an Agreement with The Ohio Department of Transportation for Bridge Inspection Services
- Approved a Resolution Authorizing the City Manager to Prepare and Submit an Application to Participate in The Ohio Public Works Commission State Capital Improvement and/or Local Transportation Improvement Program(s) and to Execute Contracts as Required
- Approved a Resolution Authorizing the City Manager to Extend a Contract with SwimSafe Pool Management, Inc. for Professional Services Related to the Operation and Management of the Montgomery Municipal Pool
- Approved a Resolution Authorizing Purchase Agreement for the Sale of Montgomery Commons Real Estate
- Approved a Resolution Authorizing a Contract with Motorola for the Purchase of Replacement Radios
- Approved a Resolution Authorizing the City Manager to Enter into a Contract with Morton Salt, Inc. for the Purchase of De-Icing Rock Salt for the 2016-2017 Season



- Approved a Resolution Authorizing a Grant in the Amount of \$12,500 to the Center for Addiction Treatment
- Approved a Resolution Adopting a Five Year Capital Improvement Program for the City of Montgomery
- Approved a Resolution Authorizing the City Manager to Enter into an Agreement with The Sycamore Community School District Board of Education to Assign a School Resource Officer for School Year 2016-2017 for the Sycamore Junior High School
- Approved a Resolution Authorizing an Amendment to the Current Contract with Donnellon, Donnellon and Miller for Legal Services to the City of Montgomery

## Administration



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

### 2016-2021 Strategic Plan

City Council and City staff use strategic planning to set long-term goals which provide purposeful guidance and direction for the activities of the organization. Over the past 20 years, the City has undertaken strategic planning in five-year increments and in 2016, the City was in the first year of its current five-year strategic plan.

The 2016-2021 strategic plan consists of the following five goals:

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

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

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

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

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

Some of the implementation steps and tasks which were addressed throughout the first year include: creation of a new service inventory database to facilitate departmental review and updating of City services; High Performance Organization (HPO) training of staff; review of existing performance measures and creation of benchmarks; and a review of guiding documents used by the City.

## **Development Projects**

The City of Montgomery is fortunate to be the site of three significant development and redevelopment projects. When completed, these projects will contribute to the overall economic viability and quality of life for not just the City of Montgomery, but also for other surrounding communities in Hamilton County. Much staff time from administration, finance, community development and public works departments was devoted to these projects in 2016.

### ***Gateway Redevelopment Area (GRA)***

When completed, the Gateway Redevelopment Area (GRA) will transform property at the City's southern corporate line into a welcoming "gateway" to the community. An integrated Master Plan for the site will ensure that this mixed-use project is compatible in scale and design to the Historic District with an emphasis on a pedestrian-oriented lifestyle and parking needs. City staff worked closely with the Ohio Department of Transportation (ODOT) regarding modifications to the interchange of Ronald Reagan Cross County Highway and Montgomery Road to ensure efficient traffic flow.

### ***Twin Lakes Senior Living Community***

Twin Lakes will be expanding its main campus with the addition of 45 independent living apartments and a new club-like dining venue, which will be located adjacent to a new auditorium/community room. A retail component along Montgomery Road will also be added as a second phase. Plans also include construction of a Memory Support Assisted Living facility. Staff worked diligently with Twin Lakes

representatives to ensure that plans for this major expansion of facilities and services will be successful.

### ***Vintage Club of Montgomery***

Much staff time was devoted to efforts to bring plans for the final phase of this mixed-use project to fruition. The Village section of the Vintage Club will be an attractive mixed-use development with retail, office, restaurants and condominiums which will complement the existing homes and The Christ Hospital Health Network medical office building. Staff time was also devoted to planning for public improvements, including parking, streetscape and pedestrian gathering spaces, which will complement this final phase of development at the Vintage Club.

### **Sister Cities Exchanges**



Assistant Fire Chief Ben Shapiro, City Council Member Craig Margolis, and Sister Cities Chair Marcallene Shockey and Sister Cities Commission Member Jack Wild served as the 2016 City of Montgomery, OH delegation to Montgomery, NY.

Several representatives from the City of Montgomery visited the Village of Montgomery, New York, in support of the sister cities relationship created a number of years ago. Many original Montgomery, Ohio settlers originated from the Village of Montgomery, New York. Montgomery City Council and staff participated in the General Montgomery Day Parade on September 10, 2016, and met with several Village officials to develop a schedule for future interactions to build the relationship.

## Shared Service Opportunities

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

- The City continued its technology partnership with Sycamore Community Schools to share a telephone system which is managed by Sycamore Community Schools for the City of Montgomery.
- The City continued to partner with the City of Blue Ash for street maintenance and information sharing on winter weather operations.
- The public works department continues maintenance of the I-275/Montgomery Road intersection. This effort was accomplished in partnership with the Ohio Department of Transportation, Sycamore Township and Symmes Township to maintain the I-275 overpass area on Montgomery Road from Weller Road to Vintage Club Boulevard to include street sweeping, cleaning of medians and mowing of identified areas around the overpass.

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

## Staff: Local, Regional and National Organizational Leadership Roles

In 2015, the City continued its role in leading in regional, state and national organizations. To this end, several City staff members contributed and will continue to contribute their resources, over and above their primary job responsibilities, to a variety of professional organizations. Below is only a partial listing of the groups to which City staff contributed.

- Wayne Davis, city manager, is the Vice-President of the Ohio City/County Management Association and will assume the role as President on July 1, 2017;
- Connie Gaylor, administrative coordinator, is the President of the Greater Cincinnati Chapter of the American Society of Public Administrators and is a member of the Ohio Municipal Clerks Association;
- Brian Riblet, public works director, is the First Vice-President of the Public Works Officers Association of Southwest Ohio (PWOSO) and is a member of the American Public Works Association;

- Don Simpson, police chief, is the First Vice-President of the Hamilton County Police Association (HCPA) (through January 19, 2017) and Executive Board member of the Drug Abuse Reduction Task Force;
- Matthew Vanderhorst, community and information services director, serves on the Alliance for Innovation Advancing New Leader working group;
- Paul Wright, fire chief, is the chairman of the Ohio Fire and Emergency Services Foundation, and serves on the Cincinnati State Collect Emergency Medical Services Advisory Board, the Hamilton County BioWatch Committee, State of Ohio Medical Transportation Committee and the Ohio Fire Chiefs' Association Legislative Committee.
- Tracy Roblero, community development director, and Melissa Hays, zoning and code compliance officer, are members of the American Planners Association.
- John Crowell, assistant police chief, is the Assistant Commander of the Special Weapons and Tactics (SWAT) Team in Hamilton County;
- Ben Shapiro, assistant fire chief, is the Operations Officer for the Hamilton County Arson Investigation Unit, a member of the Greater Cincinnati Regional Arson and Fire Investigators Seminar Committee and Safe and Secure Schools;
- Paul Payne, Sycamore High School resource officer, is the President of the Ohio School Resource Officers Association;
- Ja'net Crawford, mayor's court clerk, is the Vice President of the State of Ohio Mayor's Court Clerk Association, the Vice President of the Southwest Ohio Mayor's Court Clerk Association and a member of the Ohio Municipal Court Clerk Association.
- Gary Heitkamp, assistant public works director, is a member of the Association of State Floodplain Managers and American Public Works Association.
- Julie Machon, recreation coordinator, and Sarah Fink, recreation specialist, are members of the Ohio Parks and Recreation Association, National Recreation and Parks Association and International Festival and Events Association.
- Julie Prickett, human resources manager, is a member of the Greater Cincinnati Human Resources Association (GCHRA), the Ohio Public Employer Labor Relations Association (OHPELRA), and the Society for Human Resource Management (SHRM).
- Faith Lynch, communications and engagement coordinator, is a member of the Public Relations Society of America-Cincinnati Chapter and serves on its programming committee.



## Grants

Staff continually seeks out grant funding sources from State and local levels that aid the City in completing its many capital improvement and equipment replacement programs. For specific information regarding grants received, please refer to the department sections within this report.

## Achievements

The City of Montgomery was formally recognized for a number of achievements in 2016.

The Government Finance Officers Association (GFOA) awarded the City the Certificate of Achievement for Excellence in Financial Reporting for its Comprehensive Annual Financial Report (CAFR) for the fiscal year ending December 31, 2016. This is a great honor for the City of Montgomery, as it is the highest form of recognition in governmental accounting and financial reporting. The year 2016 represents the 21st consecutive year the City has received this award.

The Miami Valley Risk Management Association (MVRMA) completed the 2015/2016 Safety Performance Evaluation Checklist (SPEC) assessment of the City of Montgomery's safety program and loss control measures resulting in a 100% compliance rating with the safety compliance checklist.

The City received a Tree City USA Award and a Growth Award, marking the 20th consecutive year for the Tree City USA recognition and the 17th Growth Award the City has received since 1998.

For the sixth consecutive year, the City of Montgomery received the American Automobile Association's (AAA) platinum award for success within the area of traffic safety.

The City of Montgomery was named a finalist among 28 greater Cincinnati companies/organizations for the "2016 Healthiest Employer Awards" recognized by the Cincinnati Business Courier.

The City of Montgomery was awarded the Gold Level Award as a Healthy Ohio Healthy Worksite by the Ohio Department of Health and the Healthy Ohio Business Council.

Clearly, 2016 continued the City's trend of outstanding value for the community it serves. The City is positioned to carry forward its tradition of maintaining financial stability, fostering community engagement and seeking innovation in outstanding

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

# Community Development



The community development department is responsible for administering the City's building and zoning codes as well as property maintenance code enforcement. The department consists of three full-time staff, which includes a director, a zoning and code compliance officer and a building and development office manager. In addition, there is a part-time special projects coordinator as well as support from the community and information services staff and an inspector in the public works department. The City contracts for building, engineering, electrical and plumbing plan review and inspections with outside agencies. In addition to building permitting, the community development department is also responsible for strategic and long-range planning, economic and business development and general community development projects. It provides staff support to the Planning Commission, Landmarks Commission and the Board of Zoning Appeals.

## Development Activity

An updated General Development Plan for the Village Section of the Vintage Club of Montgomery was approved by the Planning Commission in May of 2016. The City originally approved the establishment of the Vintage Club Planned Development in 2006 for approximately 15 acres along Montgomery Road north of I-275 to allow the creation of a mixed-use village with residential and commercial uses. The updated General Development Plan is a reflection of months of work by the developer in order to meet the expectations of the City and the residents of the Vintage Club while working with the current market conditions. The final product will be an attractive mixed-use development with retail, office, restaurants and condominiums

that will complement the existing homes and The Christ Hospital Health Network medical office building.

On the southern end of the City, work continues on the planning of the Gateway Redevelopment Area (GRA). This mixed-use project will feature a unique blend of an urban-suburban lifestyle and will include professional office, boutique hotel, condominiums and a restaurant row built around a new community green. As part of the project, the Ohio-Kentucky-Indiana Regional Council of Governments (OKI) approved and awarded funding for a grant application submitted by the City for an Interchange Modification Project at Montgomery Road and Ronald Reagan Cross County Highway. The project includes construction of a modified two-lane roundabout, the installation of a traffic signal in and around the interchange and would also include demolition of the existing bridge at this location. The project would have a safe and positive impact on traffic while opening up more land for redevelopment. The OKI grant of \$6,000,000 represents approximately 70 percent of the total estimated construction cost of \$8,600,000 and the project is currently programmed in the Ohio Department of Transportation (ODOT) fiscal year 2020.



Camden Homes' Orchard Trail subdivision will feature high-end, empty-nester type housing with a pocket park and a walking trail.

Twin Lakes Senior Living Community began work on a building addition to the main campus, 9840 Montgomery Road, in 2016. The addition will include 45 additional independent living apartments and a new club-like dining venue, which will be located adjacent to a new auditorium/community room. A retail component along Montgomery Road will be added as a second phase and could include a restaurant/retail site along the Montgomery Road entrance to the Twin Lakes campus, which was approved by the Planning Commission in December. Twin Lakes is hopeful that construction on the main campus expansion will be completed by fall 2017. A new residential subdivision, Orchard Trail, began construction in

2016. The new 29 lot, single-family, detached subdivision is on the site of the former Montgomery Swim and Tennis Club on Orchard Club Drive. Camden Homes will be developing the site and building the homes. The new subdivision will feature high-end, empty-nester type housing with a pocket park and a walking trail.

There were other positive developments in the City during the year, including the opening of ten new businesses. Construction of a new pre-owned vehicle sales building for Columbia Acura/Hyundai was also completed in 2016. The new building will allow for Columbia Hyundai to begin sales of the new Genesis brand at the store located at 10987 Montgomery Road. Skyward Academy located at the Montgomery Presbyterian Church at 9994 Zig Zag Road will also be expanding their student enrollment from 45 to 60 students. Skyward Academy is a private school designed to address the academic and independent living skills of students on the autism spectrum and/or with other learning issues.



Construction of a new pre-owned vehicle sales building for Columbia Acura/Hyundai was completed in 2016.

Four commercial building permits for new construction and expansion were issued in 2016; however, two of these building permits were for additions to existing multi-family residential units at Twin Lakes. One new building permit was issued for the construction of the new pre-owned vehicle building for Columbia Acura/Hyundai. The final commercial building permit for new construction was issued for the addition to the Main Campus at Twin Lakes. The total value of improvements for new commercial construction, expansion and additions was significantly higher than in 2015 due in large part to the building addition at Twin Lakes Main Campus. The total value of new commercial, commercial additions and alterations was \$31.7 million in 2016 versus \$9.7 million in 2015.

The residential sector was busy in 2016 with the building department issuing 34 permits for new homes and 78 permits for residential remodeling/room additions.

The total value of residential construction was estimated at \$22.4 million. The City issued 24 demolition permits in 2016, which nearly mirrors the number of demolition permits issued in 2015 of 23 permits. A record 30 residential demolition permits were issued in 2014. Since 2001, there have been a total of 233 teardowns in the City.



## Community and Information Services



The MCLA Alumni gathered at Maple Dale Elementary for the first-ever MCLA 2.0 “a graduate-level course” on April 14.

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

## Community Engagement

The Montgomery Citizens’ Leadership Academy (MCLA) continued to be a popular activity for some of our most engaged citizens. Twenty-three residents became highly engaged citizens over the course of twelve weeks by diving deep into issues of local importance and gaining first-hand knowledge of the inner workings of local government and each of our partners: Sycamore Community Schools, Bethesda North Hospital, Twin Lakes Senior Living Community, and Ohio National Financial Services.



Montgomery Mayor Chris Dobrozsi (right) presents the Service to the Community Grant to Montgomery Farmers' Market Board President Marian Dickinson

The MCLA Alumni gathered for the first-ever MCLA 2.0, “a graduate-level course” on April 14, 2016, at Maple Dale Elementary. With the assistance of Xavier University’s Community Building Institute, the City of Montgomery hosted 65 MCLA Alumni, Sycamore Community Schools’ officials, City Council members, and City staff to discuss the multiple, critical components involved in nationwide trends in housing including shared housing, inter-generational housing, and national best practices. City staff did a ‘deep-dive’ into Montgomery, regional, state and national demographics and how these changes impact future land use and the housing market. Input was gathered from the assembled group and integrated into the 2016-2021 Strategic Plan housing strategy.

In 2016, the newly-enhanced Service to the Community Grant was awarded to the Montgomery Farmers’ Market to create engaging programming for the many residents and visitors who shop locally at the Saturday morning Farmers’ Market. A second grant was awarded to Operation Give Back to expand the education programs to the Montgomery parents of the students they serve. These programs reinforce learning on life skills, self-help, goal setting, and achievement.

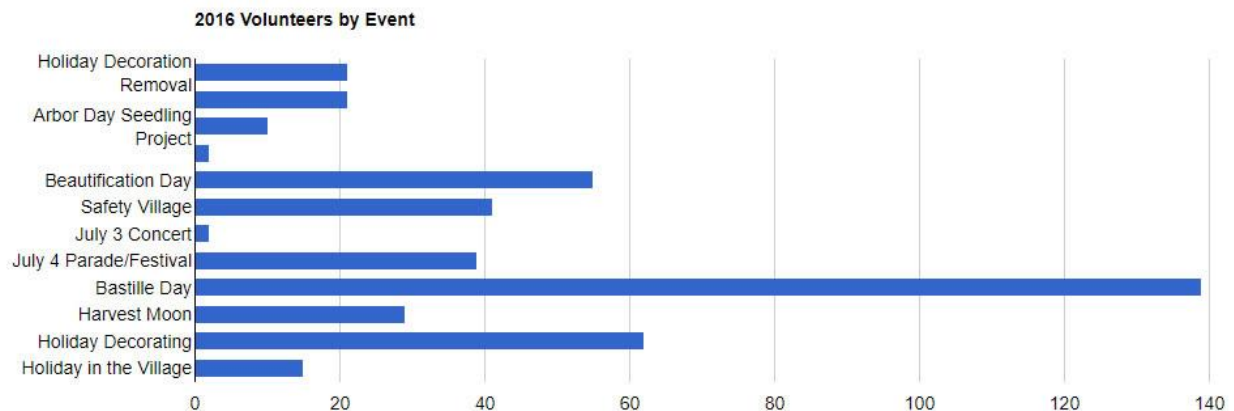
The community and information services staff, with participation from members of the police, fire, and community development departments, hosted two Neighborhood Leaders Forums, one in May and a second in October. The May forum focused on ‘aging in place’ and the services available to those who want to stay in Montgomery as they age. The October forum included a discussion on the many nationwide trends in housing including shared housing, intergenerational housing, and national best practices. Information was also shared about Montgomery, regional, state and national demographics and how these variables impact the housing market. This housing forum used much of the same information that was shared at the April MCLA 2.0 session but was made available to a wider audience.

## Customer Service

In 2016, Swaim Lodge underwent a kitchen remodeling project that added amenities such as updated appliances and additional counter space to create a much more functional and aesthetically pleasing kitchen. The meeting room and restrooms were updated with ceramic tile and new carpet. This remodeling project created added appeal for prospective renters and staff received much positive feedback.



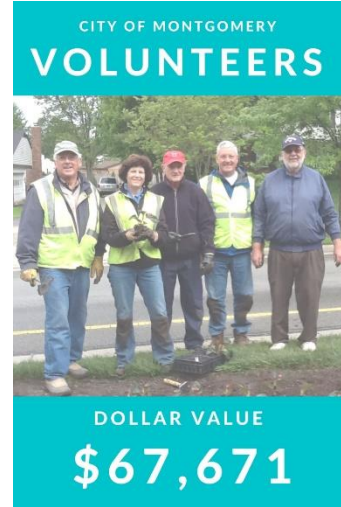
## Volunteerism



In January of 2016, 21 volunteers prepared the holiday decorations for storage. In April, 21 volunteers assisted with basket planting, ten volunteers helped with the Arbor Day seedling bag and tag project and two volunteers assisted with tax office activities. In May, 55 volunteers participated in Beautification Day, and during two weeks in June, 41 volunteers helped make Safety Village a success for the future citizens of Montgomery. In July, 178 volunteers contributed hundreds of hours towards the success of the July 3 concert, July 4 festivities and Bastille Day, making these events the most successful events to date. The year was rounded out with 29 volunteers donating their time at Harvest Moon Festival, 62 volunteers assisted with the Holiday Decorating Workshop and Decorating Day and 15 volunteers helped with the Holiday in the Village event. In addition to all of these special events,

volunteers also helped with weeding the butterfly garden in Pioneer Park, various front desk coverage needs, and office tasks.

In April of 2016, four exceptional volunteers were added to the Volunteer Walk of Fame. These honorees were Kathy Lonneman, Nancy Nolan, Todd Steinbrink and Jack Wild. This brick path, located in Montgomery Park, was created to recognize volunteers who have made substantial contributions to the City through their volunteer service.



## Information Technology

The City continued to invest in improving its information technology infrastructure in 2016. In 2014, a partnership was created with Sycamore Community Schools to provide wide area network infrastructure and network engineering support. This partnership continues to grow as both organizations have discovered that they have similar technological challenges. For most of 2016, both organizations discussed common needs and the possibilities for growth regarding shared backup circuits to the Internet, shared staffing in the model of the School Resource Officer, application development, expanding broadband access to students in need, and other potential projects. These ideas will be vetted and prioritized in 2017 to allow for proper planning and budgeting.

During the summer of 2016, the City of Montgomery partnered with Protocol Communications to install fiber optic cabling to the Montgomery Community Pool and the Recreation Annex. This project has increased network reliability, bandwidth and has provided the opportunity to expand the security camera system to the Annex parking lot, a known trouble area.



## Finance



The finance department is responsible for preparing and maintaining the operating and capital budgets, cash management and investments, purchasing, payroll and income tax collections. The finance department consists of two offices, income tax and accounting.

In 2016, Montgomery's operating budget totaled \$20.5 million. In addition to the operating budget, the City's finance department administers a capital budget, with a four-year cash forecast.

In 2016, the finance department continued its participation in the City's performance measurement process. This effort involves the tracking and collection of performance measurement data, which will ultimately be used by the department and the City to benchmark against finance departments in other municipalities.

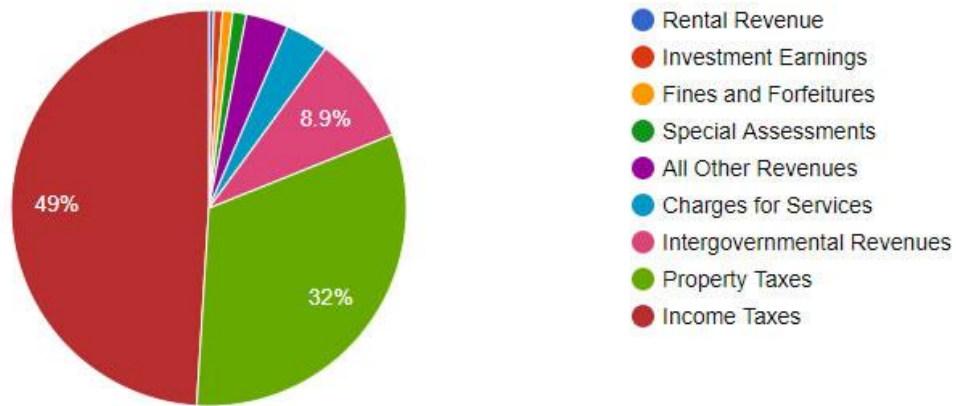
## Revenue and Expenditures

The charts titled "Where the Money Comes From" and "Where the Money Goes" provide a snapshot of how resources are collected and programmed for expenditures. In 2016, the finance department was responsible for the collection of approximately \$8.8 million in income tax revenues and \$5.6 million in property tax revenues. In addition, the department is responsible for managing an investment portfolio of more than \$18.5 million.

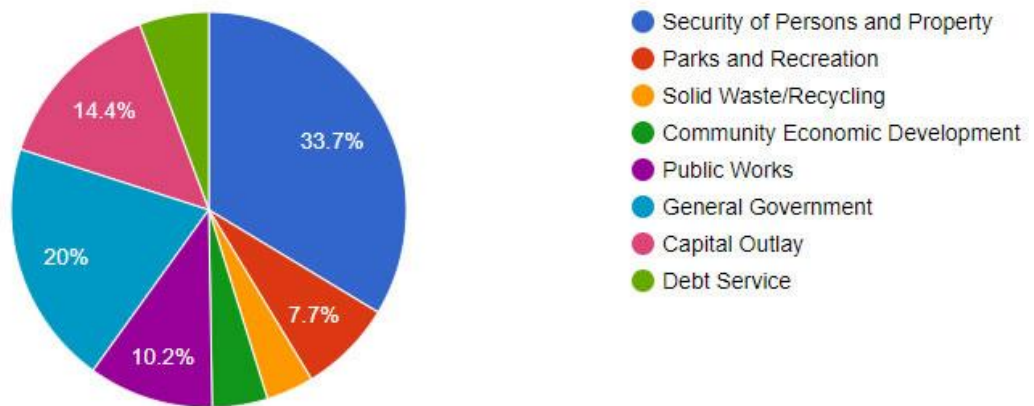
As with most municipalities, public safety, property protection and emergency services are the largest governmental functions. General government and public works, including solid waste and recycling, account for over 34 percent of the remaining expenditures.

The finance department prepares quarterly and annual reports including the Comprehensive Annual Financial Report (CAFR). In 2016, for the 21st consecutive year, the City was awarded the Government Finance Officers Association (GFOA) Certificate of Achievement for Excellence in Financial Reporting for the City's 2015 CAFR. Moody's Investor Services continues to recognize the City's credit worthiness by assigning an Aaa credit rating to our debt. Montgomery is one of only 10 communities in the State of Ohio to be rated in this category.

**2016 Where the Money Comes From**



**2016 Where the Money Goes**

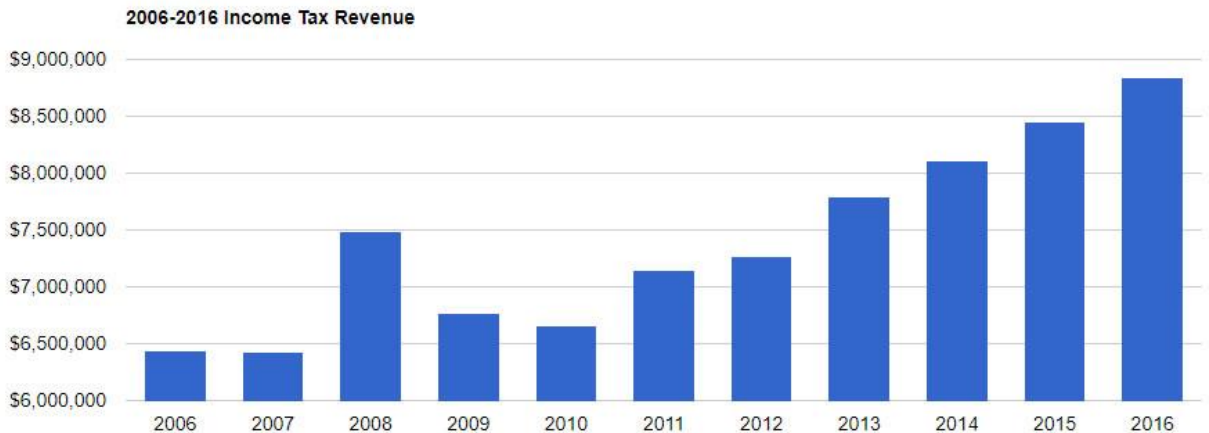




## Income Tax Revenue

As depicted in the graph, income tax collections rose dramatically in 2008 from 2007, as a result of construction activity with one of the City's major employers; however, in 2009, income tax revenues decreased 10 percent from the amount collected in 2008. Income tax revenues have been increasing each year since the 2009 economic downturn; with 2016 revenues exceeded collections from 2008 by 18.1 percent.

For purposes of balancing operations with capital investments and related debt service, income tax revenues are distributed into three funds according to the following allocation: 76 percent to the General Fund; 20 percent to the Capital Improvement Fund; and 4 percent to the Debt Retirement Fund.



## Total Revenues and Expenditures

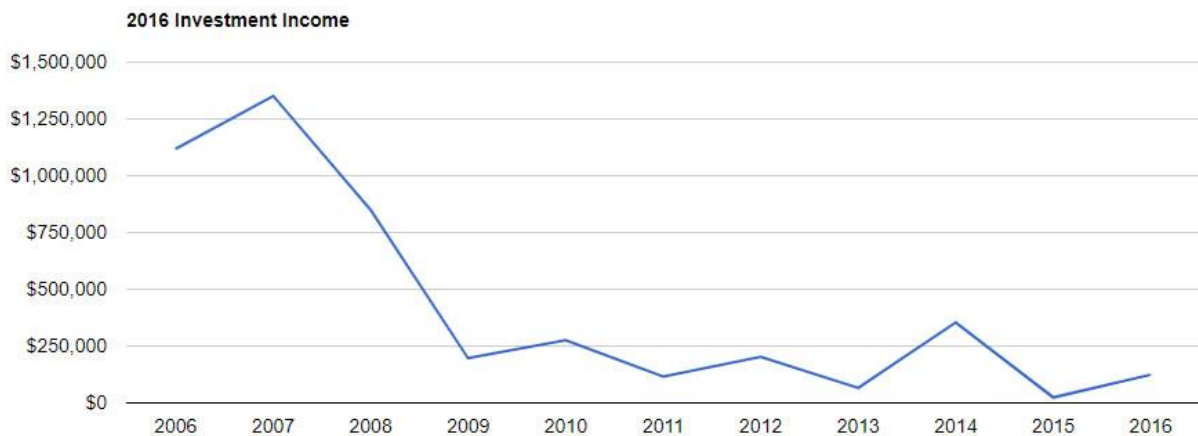
The line chart titled "Total Revenues and Expenditures including General Fund 2006-2016" provides an historical perspective of the City's ability to program and budget services, capital improvements and related debt service within the resources provided through the annual budget process.

### Sound Financial Policies

In order to maintain a sound fiscal environment, City Council has adopted an array of financial policies:

## *Investment Policy*

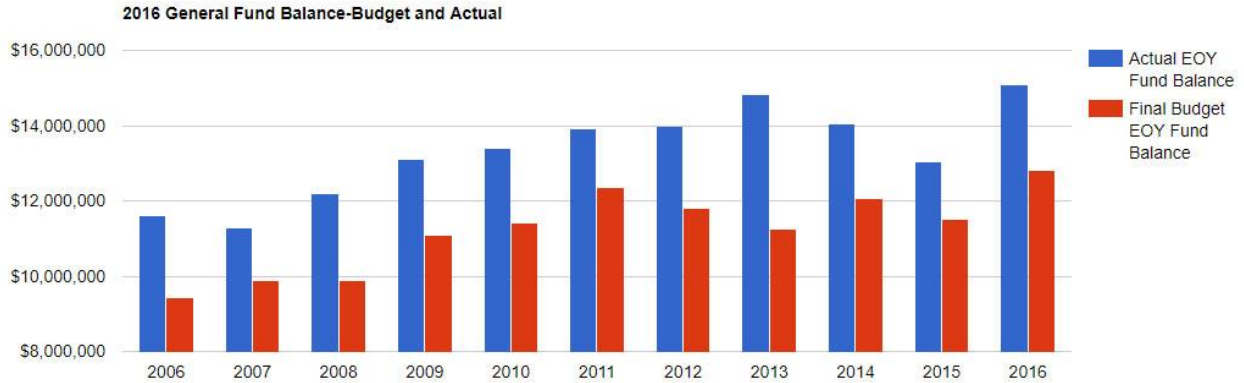
The graph titled “Investment Income” reflects revenues which range from \$568,358 in 2005 to \$124,366 in 2016. City Council adopted a conservative investment policy which applies to cash management and investment activities of the City of Montgomery. The policy is reviewed periodically and updates are adopted by City Council. The primary objective of the City’s investment activities is the preservation of capital and liquidity, maximizing investment income and conforming to State laws governing the investment of public funds.



## *Fund Balance Policy*

The fund balance is a key measure of the City’s overall financial health. City Council adopted a policy requiring maintenance of a six to twelve-month reserve of operating expenditures for both the General Fund and Fire/EMS Levy fund, a minimum cash balance of \$1,000,000 in the Capital Improvement Fund and one year of debt service payments in the General Bond Retirement Fund.

The graph titled “General Fund Balance – Budget and Actual” depicts that actual year-end fund balances have exceeded budget estimates.

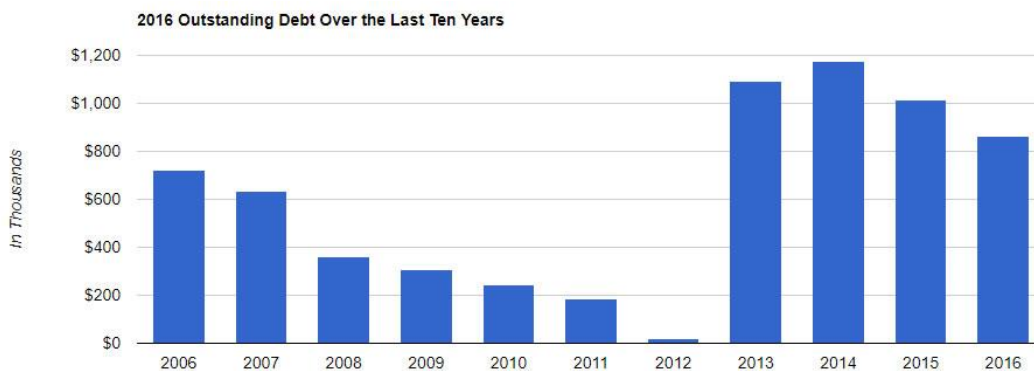


## Debt

On December 31, 2016, the City had \$13,680,633 of bonded debt; of this amount \$12,965,000 is special obligation debt and \$715,633 is special assessment debt.

In May of 2013, the City issued \$13,265,000 of special obligation bonds to finance public improvements which consisted of constructing a roadway and public garage at the commercial/residential development known as the Vintage Club. The repayment of the bonds is secured by payments in lieu of taxes generated within the tax increment financing district which encompasses the entire Vintage Club development. The development includes a high-end housing development, two medical office buildings consisting of 100,000 square feet occupied by the Christ Hospital Health Network and plans for future commercial development in the undeveloped parcels in both the north and south sections.

The chart below depicts the total outstanding debt for the City over the last ten years.



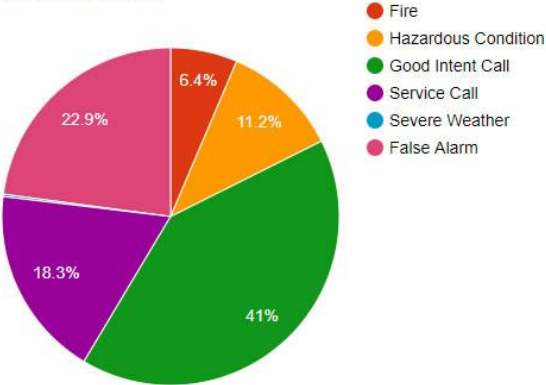
# Fire/EMS



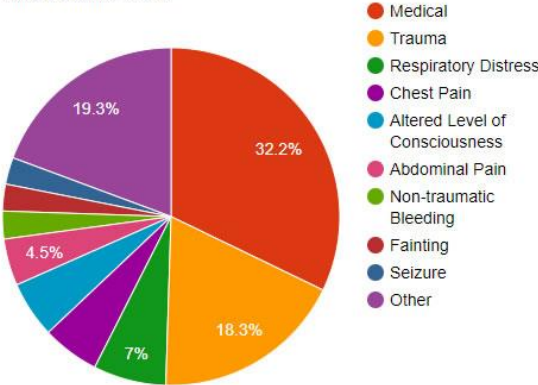
The fire department staffs the fire station with dedicated and professional personnel 24-hours per day. The staff consists of nine full-time firefighter/paramedics, one part-time customer service representative and 35 part-time firefighter/paramedic/EMTs. The station houses two medic ambulances, one rescue pumper, one fire engine, one Quint fire truck and one support/hydrant maintenance vehicle.

Emergency medical service incidents continued to be one of the priorities of the department and represented 71 percent of the total incident volume. Total loss from fire in the community was \$470,300. The department attributes the low number of fire incidents to fire prevention efforts and the fire inspections conducted by fire safety staff. In a modern fire service, preventing the outbreak and serious spread of fire is considered as essential to public safety as proficiency in fighting fires.

Fire Incidents - 2016



EMS Incidents - 2016



## ISO Rating

The department received an Insurance Services Office (ISO) rating of Class 2 as a result of the review of the department's operations. The ISO rating system uses a scale of 1 to 10 for its rating system. If a community has a score of 10, its residents will pay a much higher premium than a community with a lower score.

*Current data show there are 48,754 fire departments across the country. In 2016, 132 departments were rated Class 1 and only 1,060 departments were rated as Class 2. The other 47,562 fire departments were a Class 3 or higher resulting in those communities seeing higher insurance costs for their businesses and residents.*

## Fire Department Funding

A 5.5 mil levy was approved by the community in 1999 to fund the operations of the fire department. The levy was projected to last ten years, or until 2009. Through careful planning and budget controls, the current levy should fund the department through 2018, or eight years beyond the projected life of the levy. The department also receives revenue through the billing of EMS patients who are not property owners in the city.

## Public Education

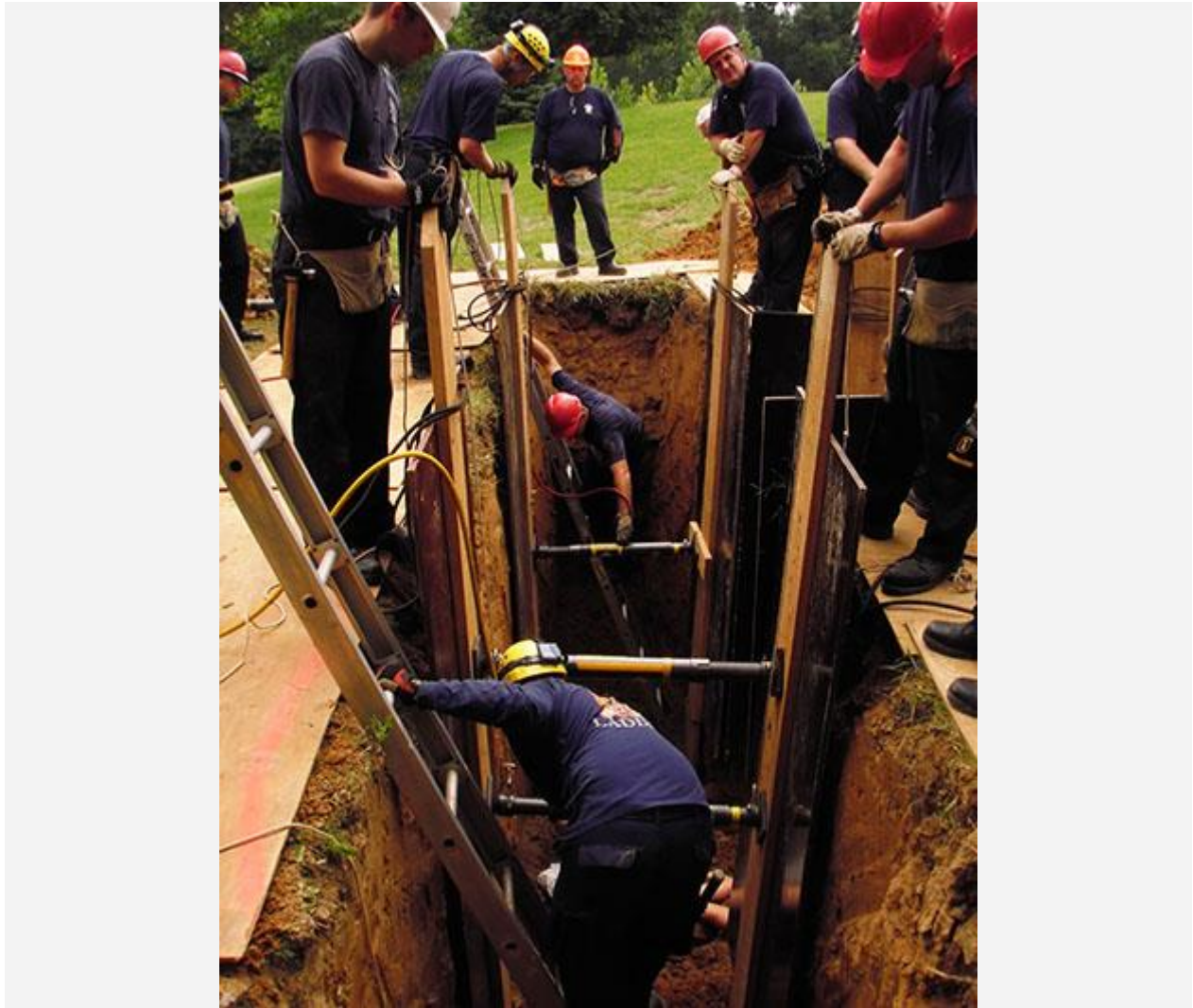
Public education programs are a critical component of a modern fire department as the department strives to prevent injuries and accidents from occurring in the community. The fire department provided tours of the Safety Center, taught CPR classes and coordinated Fire Prevention Week activities. Fifty-four individual safety programs were offered to 1,212 participants.

The Child Car Seat Safety Program taught 157 citizens how to properly place their children in car seats and properly install the car seats in vehicles. Since the beginning of this program in 1999, the department has instructed over 3,144 individuals in the proper installation of child car seats.



Beginning in 2016, the department partnered with the American Red Cross with a program that supplied and installed free photoelectric smoke alarms to residents that either did not have any alarms or whose alarms were outdated. The program also offered a home safety check. To date 165 smoke alarms have been installed in 53 homes.

## CERT



Setting side panel supports during a trench drill.

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



are exhausted and awaiting regional, state and federal resources. Such large scale emergencies include tornados, long-term power outages, winter storms and other natural disasters. Additionally, CERT members are responsible for assisting with public education as they work with their neighbors in preparation of disasters and emergencies. In 2016, CERT members also assisted the department with traffic management during the Independence Day Parade and in mock disaster drills.

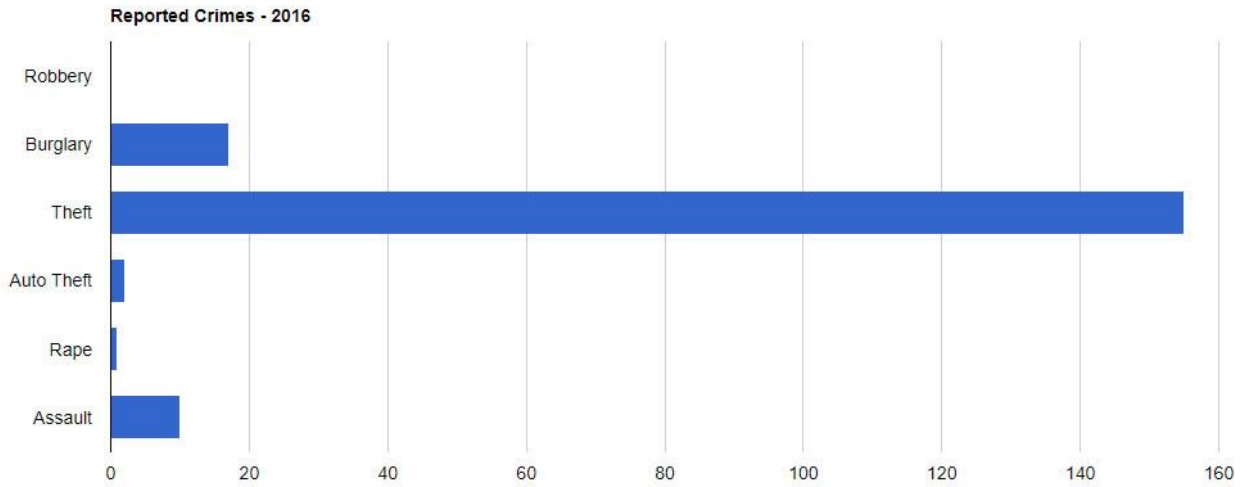
## EMS Signpost

EMS Signpost is a web-based program available to the residents of Montgomery to assist with information that is needed during an EMS emergency. Once a resident registers on the secure website through this [link](#) on the City website, the City's paramedics are able to use a smart phone to quickly, reliably, and securely access the resident's health history to aid in providing emergency care during a 911 response. EMS SignPost is an abbreviated version of a person's health history stored on a personal, secure webpage. It includes items such as medications, chronic health conditions, allergies, and doctor's contact information. A special access code to each individual's personal webpage is stored on a refrigerator via a magnetic ID card that the City supplies to the resident free of charge.

# Police



The police department is responsible for providing safety services to the community including crime prevention and education. The police department is comprised of 22 full-time officers, two full-time customer service representatives and one full-time mayor’s court clerk. Of the 22 full-time officers, there is one chief, one assistant chief (captain), five sergeants, two detectives, one officer assigned to the Drug Abuse Reduction Taskforce (DART), one school resource officer (SRO), one traffic safety officer, and ten patrol officers. In 2016, officers handled 11,719 incidents, made 239 adult arrests and 47 juvenile arrests, and issued 1,700 citations.



## *Community Engagement*

In 2016, the Police and Fire Department hosted a session of the Montgomery Citizens' Leadership Academy at the Montgomery Safety Center. In the past, this session was held at the Hamilton County Regional Emergency Operations Center. The event provided community members the opportunity to interact with the public safety personnel and to view facilities and equipment. New to the session for 2016 was the addition of the Firearms Training Simulator or FATS machine. Several class participants experienced the challenge of deciding when to use deadly force or not while in several scenarios. The class received very positive reviews and high marks for interaction.

In February, the department added an Internet Purchase/Exchange Zone in the Safety Center parking lot for residents to utilize when meeting sellers or buyers. The area is under 24-hour video surveillance and provides a safer area to meet and conduct sales.



The police department continued its public education efforts by conducting the annual Safety Village program for five- and six-year-old children. The program teaches children about school bus safety, animal safety, stranger safety and other safety-related topics. The program is offered over a two-week period in the month of June, and the children attend a morning or afternoon





session for a period of one week. Other public education programs included crime prevention training, bike safety classes, internet safety, and addressing neighborhood associations and other groups on a variety of other issues.

After many years of use, the Ford Fairlane vintage police car utilized by the police department for community relations was decommissioned. The vehicle was declared un-roadworthy by a certified mechanic. In an effort to extend the life of the vehicle it was donated to the Greater Cincinnati Police Historical Society where it will be used as a static display and will maintain the Montgomery logo.

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

The department continued to support the Drug Abuse Reduction Task Force (DART). Montgomery is a founding member of the task force formed in 1988, and periodically assigns officers to the task force. DART is comprised of approximately 14 local law enforcement agencies that primarily address drug enforcement at the local level. The task force also has a pharmaceutical diversion unit that investigates physicians, nursing staff and pharmacy staff suspected of abusing drugs, forging, altering or writing illegal prescriptions or trafficking in drugs.



The police department added a Ford truck to their fleet in 2016.

The partnership between the police department and Sycamore Community Schools continued in 2016. The School Resource Officer (SRO) at Sycamore High School worked with students and staff to provide a safe and secure learning environment. The SRO position is funded through a partnership with Sycamore Community Schools with the district paying 60 percent of the officer's salary. In addition to the day-to-day activities, the SRO attended many extracurricular activities, such as dances, athletic events and meetings. Officers also presented a seat belt safety program to third graders at Montgomery Elementary School.

During the fall of 2016, City Manager Wayne Davis, Chief Don Simpson and Assistant Chief John Crowell met with Sycamore administrators and discussed an additional SRO program at the Sycamore Junior High School. After several meetings, a part-time SRO program was established. The program was set to begin in January of 2017 with an officer spending 20 hours per week at the Junior High. Cost sharing was agreed upon and the program will be evaluated at the end of the 2016-2017 school year.

### *Mayor's/Juvenile Court*

The Montgomery Mayor's Court hears most of the City's misdemeanor and traffic cases, including first offenses of driving under the influence of alcohol and driving under suspension. In 2016, the Court heard cases involving over 1,497 offenses resulting in \$184,851 in fines, court costs and computer fund charges. After assessing the required State fees, the City's portion of the fund was \$139,476.



The Montgomery Juvenile Court, with Referee Terry Donnellon presiding, heard 21 criminal cases involving 29 juveniles. The disposition

of these cases often resulted in community service being performed by the offender. Serious criminal cases, second offenders, and all juvenile traffic cases are sent directly to the Hamilton County Juvenile Court system and are heard by a Juvenile Court Judge. One case was transferred to Hamilton County Court during 2016 at the request of the parents.

### *Awards*

The police department received the American Automobile Association's Platinum Award. The Platinum Award is an award given by the Association to agencies demonstrating outstanding success in addressing community traffic safety issues. The City of Montgomery was one of a few jurisdictions within the greater Cincinnati



region to receive the award. In addition, the department received a silver award from the Hamilton County OVI Task Force for its participation in working within the region to combat driving while intoxicated.



## Public Works



The public works department is responsible for the maintenance of buildings and grounds including four landmark buildings, 47.5 centerline miles of public streets, the storm sewer system in the public rights-of-way, City parks, City pool, special events, all recreational events, fleet maintenance and operation of the Hopewell Cemetery. The department oversees the City's beautification efforts throughout the community including Montgomery's Heritage District. Department staff inspects and administers construction and maintenance of the City's infrastructure through publicly bid contracts as well as through project coordination with other public agencies and utilities. The department is led by the director with assistance from the assistant director, public works department supervisor, recreation coordinator, recreation specialist, zoning and construction compliance officer and nine service worker II and one service worker I.

### **2016 Accomplishments**

The public works staff coordinated the completion of major infrastructure repairs and rehabilitation of approximately 2.01 centerline miles of roadway, resurfacing all or portions of six streets including Barnsley Court, Cooper Lane, E. Kemper Road, Tanagerwoods Drive, Acrewood Drive and Escondido Drive. The City Hall parking lot was also resurfaced in 2016 as part of major infrastructure repairs.



In 2016, 27 of the 704 fire hydrants were replaced within the City. This work was done in conjunction with the street resurfacing program and was the third year of a multi-year comprehensive plan to address the aging fire hydrants in the community.

Coordinated repairs and Bituminous Black Mat (microsurfacing) was performed by the public works staff to approximately 0.75 centerline miles of roadway on Zig Zag Road from Monte Drive (north) to the west corporation limit. The asphalt surfacing material is used primarily on Class II roadways within Montgomery and provides five to seven years of asphalt preventative maintenance.

The public works department continued work in 2016 on a five-year plan to repair and replace identified sections of guardrail to assure compliance with safety standards set forth by the Ohio Department of Transportation. In 2016, approximately 430 feet of guardrail replacement was completed on East Kemper Road between Terwilliger's Run Drive and Hightower Court and approximately 220 feet on Remington Road east of Main Street.

In 2016, the City was again recognized with a Tree City USA Award for the 20th year and also a Tree City USA Growth Award for the 17th year for its ongoing commitment and action focused on environmental stewardship through care of public trees in the City's urban forest.

### ***HAM-VAR-Montgomery Signals Project***

The 2016 HAM-VAR-Montgomery Signals Project was completed by Elex, Inc. The project consisted of upgrading the existing copper wire interconnection system to fiber optic cable and upgrades to traffic control equipment at all signalized intersections within the City of



Montgomery. Traffic management cameras were installed at eight identified locations providing the ability to observe traffic patterns and operations remotely and make adjustments as needed. The traffic signal system at the intersection of Cooper Road and Delray Drive was reconstructed including decorative poles and mast arms, a UPS/generator, and a new school flasher system. In addition, the new traffic signal system now accommodates a left-turn signal for westbound traffic at the intersection.

The \$764,000 project was primarily funded through a grant received from the Ohio Kentucky Indiana Regional Council of Governments (OKI) with the City being responsible for 20 percent of the total construction costs.

### ***Public Works Storm Water Project***

In 2016, the public works department received a grant from the Hamilton County Storm Water District (HCWSD) in the amount of \$69,184 for the installation of a rain harvest system and conversion of a detention basin to a retention pond at the public works facility. The rain harvest system included the installation of a 5,000 gallon water tank that captures rain water runoff from approximately 5,700 square feet of roof area and is used to make salt brine for winter operations during the winter months and to water the annual flowers and hanging baskets during the summer months. The rain harvest system also eliminates the current rain water runoff that would normally be routed to a detention basin near the front of the facility resulting in a positive impact to the drainage system as it moves downstream.



The conversion of the detention basin to a retention pond included excavation of approximately 2,400 cubic yards of earth material to convert the existing basin to a pond. The retention pond will reduce the amount of volume of stormwater release during rain events and reduce the amount and volume of stormwater runoff to the downstream tributary.

### ***Securing Grant Funds***

OKI approved and awarded funding for a Surface Transportation Program (STP) grant application submitted by the City for an Interchange Modification Project at Montgomery Road and Ronald Reagan Cross County Highway. The project includes construction of a modified two-lane roundabout, the installation of a traffic signal in and around the interchange, and would also include demolition of the existing bridge at this location. The project will have a safe and positive impact on traffic while opening up more land for redevelopment. The OKI

## **\$ Securing Grant Funds**

### **OKI Grant – \$6,000,000**

Interchange Modification Project at Montgomery Road & Cross County HWY

### **OKI Grant – \$611,200**

HAM-VAR Montgomery Signals Project

### **OKI Grant – \$386,680**

East Side Montgomery Road Sidewalk Project

### **HCSWD Grant – \$69,184**

Montgomery Storm Water Project



grant of \$6,000,000 represents approximately 70 percent of the total estimated construction cost of \$8,600,000, and the project is currently programmed in the Ohio Department of Transportation (ODOT) fiscal year 2020.

OKI approved and awarded funding for a Transportation Alternative (TA) grant application submitted by the City for the Phase II Montgomery Road Sidewalk project. The project includes construction of a concrete sidewalk on the east side of Montgomery Road from Radabaugh Drive to the southern limits of the Safety Center property at 10150 Montgomery Road. The OKI grant of \$386,680 represents 80 percent of the total estimated construction cost of \$483,350 and the project is currently programmed in the Ohio Department of Transportation (ODOT) fiscal year 2021.

### ***Recreation and Events***

Due to the Recreation Annex building renovation that occurred in 2015 and the addition of new fitness equipment, the City's fitness programming saw increased participation in 2016. Six new classes were added in 2016 to expand the variety of classes offered which included; step, meditation, beginner level yoga, mixed level yoga, kids yoga and chair yoga. Tai chi, Pilates and 20/20/20 continued on an ongoing basis throughout 2016. In 2016, the number of participants skyrocketed 270 percent. In 2016, there were 668 enrolled participants, which is 421 more participants as compared to 2015. The Annex Building renovation and the addition of new classes and equipment provided the community with an environment that motivates the community to engage in healthy activities.



Attendance continues to increase at the Montgomery Community Pool, with much of the success being attributed to the addition of the pool heater in 2014. In the past five years, attendance averaged 16,732; in 2016, there were 23,070 visits which is 2,497 more visits as compared to 2015. In the past five years, memberships averaged 627; in 2016, there were 684 memberships sold which is 32 more memberships as compared to 2015. The luau parties, dive in movies and fun Tuesday programs continue to be favorites for pool members. 251 kids learned the lifelong skill of swimming by participating in swim lessons. Approximately 124 swimmers were a part of the Makos Swim Team.

Americana-themed special events help make Montgomery unique and provide memorable experiences. These events include the annual Independence Day activities, with the July 3 Blue Ash Montgomery Symphony Orchestra concert, and the traditional July 4 Parade and Festival. Other events include Bastille Day, Touch-a-Truck, Dog Fest and K-9 Kerplunk, Montgomery Car Show, Harvest Moon and the tree lighting and Holiday in the Village event.



The City's youth programming helped keep kids active and engaged during the summer and during School's Out Days. Nine weeks of camps were planned and implemented in 2016, which included theater camp, mobile application development technology camp, tennis for pee wees and juniors and sports camps, to name a few. In 2016, new camps such as 3D printing camp and a painting and drawing camp that focused on learning a new skill or technology were implemented. School's Out Days, including the annual paintball trip in October, were a hit as always.

