

**CITY MANAGER'S NEWSLETTER**  
**OCTOBER 27, 2023**

**IMPORTANT COUNCIL DATES:**

November 6, Monday, 6:30 p.m. – Regular Session (30 Park)  
November 20, Monday, 5 p.m. – Work Session (30 Park)  
November 28, Tuesday, 5:30 p.m. – BRC Meeting (30 Park)  
December 4, Monday, 6:30 p.m. – Regular Session (30 Park)  
December 10, Sunday, 6:30 p.m. – Holiday of Lights (Shafor Park)  
January 2, Tuesday, 6:30 p.m. – Regular Session (30 Park)  
January 22, Monday, 5 p.m. – Work Session (30 Park)  
February 5, Monday, 6:30 p.m. – Regular Session (30 Park)  
February 26, Monday, 5 p.m. – Work Session (30 Park)  
March 4, Monday, 6:30 p.m. – Regular Session (30 Park)  
March 18, Monday, 5 p.m. – Work Session (30 Park)

**BUSINESS UPDATE:**

- Trick-or-Treat: The event is from 6 – 8 p.m. on Tuesday, October 31. Enclosed is a *Register* article.
- Houk Stream Clean-up: Our annual volunteer event is from 9 – 11 a.m. on Saturday, November 4. Enclosed are the info flyer and a *Register* article.
- Water and Sanitary Sewer Rate Increases: Enclosed is a draft of the ordinance to raise the rates. We will conduct a first reading at the November 6 meeting and a second reading and vote at the December 4 meeting. Upon adoption, the new rates will take effect on January 1, 2024.
- Friends of Smith Gardens Poinsettia Sale: We are conducting a poinsettia sale again this year. We will take orders through the OCC until Friday, November 3, and will deliver the poinsettias the week of December 4. Details, including order forms, are available on our website.
- October 16 BRC Meeting: Enclosed are draft meeting minutes.
- Ohio Public Pension Funds: Enclosed is an email from the Ohio Public Employees Retirement System (OPERS) about the recommendation to raise the employer contribution to the OPERS pension fund from 14 % to 18%. The email states that this would be the first increase in nearly 50 years.
- Community Gem: Enclosed is a neat *DDN* article about Leigh Ann Fulford and her contributions to our local community.
- Mike Kelly Bench Dedication: Enclosed is a *Register* article about the dedication ceremony at Wright Library.
- Ohio Police and Fire Pension (OPFP) Fund: Enclosed is a *DDN* article about legislation introduced in Columbus to raise the employer contribution to the OPFP Fund.

- Five Points: Enclosed is a *Register* letter to the editor. Also enclosed is a comment form we received this week.
- Shafor Park Swings: The swing projected is completed.



HAVE A GREAT WEEKEND!

TRANSMITTALS NOTED WITHIN NEWSLETTER

*Register* article re: Trick-or-Treat  
Flyer & *Register* article re: Houk Stream Clean-up  
Water and Sanitary Sewer Rate Increases Draft Ordinance  
BRC Draft Minutes  
Ohio Public Pension Funds Email  
*DDN* article re: Community Gem  
*Register* article re: Mike Kelly Bench Dedication  
*DDN* article re: Ohio Police and Fire Pension (OPFP) Fund  
*Register* article re: Five Points  
Comment Form

## **Oakwood ghouls, goblins will Trick or Treat Tuesday, Oct. 31**

Oakwood's ghosts, ghouls, goblins, Barbies and Kens will take to the city streets and sidewalks for Trick-or-Treat from 6-8 p.m. on Tuesday, Oct. 31.

Motorists should watch for

children and exercise caution if driving during Halloween hours.

Any residents who plan to hand out Halloween treats are asked to turn on their porch or front door lights.

OR 10/25/23

**From:** City of Oakwood Department of Leisure Services <[occ+oakwoodohio.gov@ccsend.com](mailto:occ+oakwoodohio.gov@ccsend.com)>

**Sent:** Tuesday, October 24, 2023 11:30 AM

**To:** Klopsch, Norbert S. <[Klopsch@oakwood.oh.us](mailto:Klopsch@oakwood.oh.us)>

**Subject:** "Houk Stream Clean-Up Day! Saturday, November 4, 2023 from 9:00 A.M. - 11:00 A.M." Hope To See You There!!! 😊

*The City of Oakwood*

MONTGOMERY COUNTY, OHIO



**Houk Stream Clean-Up Day!**

**Saturday, November 4, 2023**

**from 9:00 A.M. - 11:00 A.M.**



FOR IMMEDIATE RELEASE

HOUK STREAM CLEAN-UP DAY  
SATURDAY, NOVEMBER 4, 2023

*Volunteers are needed! The City of Oakwood is planning a Houk Stream Clean-up Day on Saturday, November 4, 2023 from 9 a.m. to 11 a.m. Please join Oakwood City Staff Members and other groups by helping with this clean-up. Included in this community event is trash pick-up, removal of brush, honeysuckle, branches and other debris in this beautiful natural area.*

*Please bring work gloves, pruners, loppers, shovels and garden rakes, if you can. Parking is available along Runnymede and Ridgeway Roads and Oakwood Avenue. Please follow the signs to the work area. Please dress accordingly.*

*Please contact the Oakwood Community Center at 937-298-0775 if you have questions.*

*Prepared by  
Carol Collins  
Director of Leisure Services  
City of Oakwood  
[Collins@oakwood.oh.us](mailto:Collins@oakwood.oh.us)  
937-298-0775  
October 2023*





# Houk Stream Clean-Up Day!

**Saturday, November 4th**

**9:00 A.M. ~ 11:00 A.M**

Please help clean-up Houk Stream by volunteering with trash pickup, removal of brush, honeysuckle, branches and other debris in this beautiful natural area. Please dress accordingly!



- ☀ Oakwood Rotary Club Members
- ☀ Scout Troops
- ☀ Oakwood Residents and Friends



- ☀ Work gloves
- ☀ Pruners, loppers, shovels and garden rakes (optional)



- ☀ Parking along Runnymede Road, Ridgeway Road and Oakwood Avenue



Please contact the  
Oakwood Community Center at 937-298-0775.



## ADMINISTRATION OFFICES

30 Park Avenue  
Oakwood, OH 45419  
(937) 298-0600

[www.oakwoodohio.gov](http://www.oakwoodohio.gov)



## OAKWOOD COMMUNITY CENTER

105 Patterson Road  
Oakwood, OH 45419  
(937) 298-0775

[OakwoodLeisureServices.com](http://OakwoodLeisureServices.com)



## PUBLIC WORKS CENTER

210 Shafor Boulevard  
Oakwood, OH 45419  
(937) 298-0777

[www.oakwoodohio.gov](http://www.oakwoodohio.gov)

# **Volunteers needed for Houk Stream Clean-Up Day Nov. 4**

Volunteers are needed as Oakwood sponsors the annual Houk Stream Clean-up Day from 9-11 a.m. Saturday, Nov. 4.

Volunteers will join Oakwood City staff members and other groups helping with the clean-up. Included in this community event is trash pick-up, removal of brush, honeysuckle, branches and other debris from the natural area.

Please bring work gloves, pruners, loppers, shovels and garden rakes, if you can. Parking is available along Runnymede and Ridgeway Roads and Oakwood Avenue. Please follow the signs to the work area. Please dress accordingly for weather and work conditions.

Contact the Oakwood Community Center at (937) 298-0775 for more information.

THE OAKWOOD REGISTER October 25, 2023

AN ORDINANCE

BY: \_\_\_\_\_ NO. \_\_\_\_\_

AN ORDINANCE TO AMEND “APPENDIX A – PUBLIC SERVICES RATE SHEET” OF THE OAKWOOD STREETS AND PUBLIC SERVICES CODE TO INCREASE THE WATER SERVICE RATES AND THE SANITARY SEWER UTILITY RATES.

WHEREAS, the City of Oakwood operates three (3) enterprise utility services (water, sanitary sewer, and stormwater) and one (1) quasi-utility service (refuse), for a total of four (4) city services (collectively, “city utilities”), each of which is supported primarily by user fees and not by general tax revenues; and

WHEREAS, as enterprise utility operations, all costs of the Sanitary Sewer Utility and Water Utility are built into the rates charged to Oakwood residents for those services; and

WHEREAS, for its Sanitary Sewer Utility, the city of Oakwood incurs outside costs because it contracts for the use of sewer pipes and wastewater treatment infrastructure operated by the city of Dayton and by Montgomery County; and

WHEREAS, the costs of city personnel and infrastructure maintenance account for approximately 37% of Sanitary Sewer Utility rates charged to Oakwood residents, while the outside costs of contracting services from the city of Dayton and Montgomery County account for approximately 63% of those rates; and

WHEREAS, Oakwood has absorbed sanitary sewer rate increases by Dayton and Montgomery County since 2018 and expects additional increases in both 2024 and 2025; and

WHEREAS, the City Manager has determined that the Sanitary Sewer Utility cannot sustain further increases in these outside costs without an adjustment to Oakwood’s rate, and has proposed an increase to the Sanitary Sewer Utility base rates including both the minimum use charges and the standard consumption rates; and

WHEREAS, in addition, the City Manager has determined that the Water Utility rates must also be increased, including both the minimum use charges and the standard consumption rates, in order to meet operational and anticipated capital needs; and

WHEREAS, rates were last increased for water in 2017 and for sanitary sewer services in 2018; and

WHEREAS, the City Manager presented the recommended rate increases to the citizen Budget Review Committee (“BRC”) as part of the 2023 budget briefings on September 12, 2023 and on October 17, 2023; and

WHEREAS, Council, based on the positive response from the BRC and its own study of the matter, finds that the recommended changes are justified and necessary, and will benefit the general health, safety and welfare of the citizens of Oakwood, and desires to implement the same;

NOW, THEREFORE, BE IT ORDAINED BY THE COUNCIL OF THE CITY OF OAKWOOD, STATE OF OHIO, THAT:

SECTION I.

Appendix A to the Streets and Public Services Code, which is incorporated by reference in the ordinances governing the city’s water, sanitary sewer, stormwater, and refuse utility programs, is hereby amended as shown on the attached exhibit to reflect increases in the minimum use charges and the standard consumption rates for both water and sanitary sewer utilities.

SECTION II.

The rate increases set forth herein shall be effective as of January 1, 2024.

SECTION III.

It is hereby found and determined that all formal actions of this Council concerning and relating to the passage of this ordinance were adopted in an open meeting of this Council, and that all deliberations of Council and any of its committees that resulted in that formal action were in meetings open to the public to the extent required by law.

SECTION IV.

This ordinance, as an ordinance to raise revenue, shall take effect upon passage as provided by Section 3.04 of the City Charter.

PASSED BY COUNCIL OF THE CITY OF OAKWOOD, this \_\_\_\_ day of December, 2023.

\_\_\_\_\_  
Mayor William D. Duncan

ATTEST:

\_\_\_\_\_  
Clerk of Council

TO THE CLERK:

Please publish the foregoing by incorporating the same into the Codified Ordinances of the city.

\_\_\_\_\_  
City Attorney Robert F. Jacques



CITY OF OAKWOOD, 30 PARK AVENUE, OAKWOOD, OHIO 45419

**APPENDIX A -- PUBLIC SERVICES RATE SHEET****WATER UTILITY RATES****RATES FOR WATER INSIDE THE CITY**

1. Minimum charge per month according to size of meter:
- |                       |       |              |        |
|-----------------------|-------|--------------|--------|
| 5/8" or smaller . . . | 15.00 | 2" . . . . . | 81.17  |
| 3/4" . . . . .        | 18.65 | 3" . . . . . | 162.33 |
| 1" . . . . .          | 29.30 | 4" . . . . . | 244.79 |
| 1 1/2" . . . . .      | 48.72 | 6" . . . . . | 421.70 |
2. Consumption rate, per 100 cu.ft. . . . . 2.64

All bills due by last day of month. THEREAFTER a 10% charge on past due amount.

1 1/2% per month interest begins 30 days after due date.

**RATES FOR WATER OUTSIDE THE CITY**

Including \$0.10 per hundred cu. ft. Well Field Protection Fee and \$1.321 fixed fee

1. Minimum charge per month according to size of meter:
- |                       |       |              |        |
|-----------------------|-------|--------------|--------|
| 5/8" or smaller . . . | 33.50 | 2" . . . . . | 142.70 |
| 3/4" . . . . .        | 39.51 | 3" . . . . . | 276.59 |
| 1" . . . . .          | 57.11 | 4" . . . . . | 412.59 |
| 1 1/2" . . . . .      | 89.12 | 6" . . . . . | 704.55 |
2. Consumption rate, per 100 cu.ft. . . . . 4.50

**HYDRANTS**

1. Fire hydrants inside city per month, per hydrant . . . . . 12.50
2. Fire hydrants outside city per month, per hydrant . . . . . 25.00

**FIRE LINES**

For the furnishing of water service to fire lines within the boundaries of the City of Oakwood, the rates shall be \$21.00 per month, and for the furnishing of water service to fire lines beyond the boundaries of the City of Oakwood, the rate shall be \$31.50 per month.

**SANITARY SEWAGE RATES**

1. Minimum charge per month according to size of meter:
- | <u>Meter Size</u>      | <u>Inside City Rates</u> | <u>Outside City Rates<br/>(25% surcharge)</u> |
|------------------------|--------------------------|---|
| 5/8" or 3/4" . . . . . | 26.50                    | 33.13   |
| 1" . . . . .           | 27.21                    | 34.01   |
| 1 1/2" . . . . .       | 27.91                    | 34.90   |
| 2" . . . . .           | 28.49                    | 35.61   |
| 3" . . . . .           | 29.34                    | 36.66   |
| 4" . . . . .           | 30.04                    | 37.55   |
| 6" . . . . .           | 30.99                    | 38.75   |
2. Consumption rate, per 100 cu.ft. . . . . 4.409 5.511

**MONTHLY REFUSE COLLECTION & DISPOSAL RATES**

SINGLE FAMILY HOME	30.00
DUPLEX	60.00
TRIPLEX	90.00
FOUR-UNIT	120.00
MORE THAN FOUR UNITS	30.00 per unit

**MONTHLY STORMWATER MANAGEMENT RATES**

SINGLE FAMILY HOME	10.00
DUPLEX	10.00
TRIPLEX	10.00
EQUIVALENT RESIDENTIAL UNIT (ERU)	3,403 sq.ft.
FOUR OR MORE UNITS, or COMMERCIAL	

Formula: (Impervious area in sq.ft. / ERU) rounded to nearest whole number x 10.00

Oakwood, Ohio  
October 17, 2023

The Oakwood citizen Budget Review Committee (BRC) met at 5:30 p.m. on Tuesday, October 17, 2023. The meeting took place in the council chambers at the city building, 30 Park Avenue, and was available via the Zoom.com remote teleconferencing platform.

The following people attended:

## Budget Review Committee

### *In-person:*

Howard Boose  
Jeanne Boozell  
Cait Botschner  
Fred Dudding  
Kate Halpin  
Michael Hayes  
Amanda Malusky Krauss  
Megan O'Leary  
Bill Rieger  
Mark Risley  
Jim Vaughn  
Sarah Waechter  
Raya Whalen  
Jeff Woeste

### *Via Zoom:*

Ella Himes  
William Meyer

## Oakwood City Council

### *In-person:*

Mayor William Duncan  
Vice Mayor Steve Byington  
Council Member Anne Hilton  
Council Member Leigh Turben

## City Staff

### *In-person:*

City Manager Norbert Klopsch  
Leisure Services Director Carol Collins  
Finance Director Cindy Stafford  
Public Safety Captain Kevin Pruszynski  
Public Works Director Doug Spitler  
Human Resources Manager Sangita Anand

### *Via Zoom:*

City Engineer Chris Kuzma

## Other

### *In-person:*

Healy Jackson

(Mrs. Jackson is running unopposed for city council on the November 7, 2023 ballot.)

Mayor Bill Duncan opened the meeting with a welcome. He then introduced Oakwood resident Healy Jackson. Mrs. Jackson will be on the November ballot to be on Oakwood City Council. Mrs. Hilton's term will be expiring at the end of this year.

Mayor Duncan asked the committee members to do self-introductions. He asked if there were any suggested edits to the September 12, 2023 meeting minutes. There being no edits, Mayor Duncan asked for a motion to approve those minutes. Motion to approve by Mr. Boose; second by Mr. Dudding. Upon viva voce vote, motion passed and the minutes were approved.

Mayor Duncan invited Mr. Klopsch to make opening comments and deliver the meeting presentation.

Mr. Klopsch began the meeting by stating that if not for the \$1.1 million that will go uncollected in 2024 due to the property tax issue, 2024 revenues and expenses would likely be balanced. The property tax issue will be discussed later in the meeting. He then discussed the following:

- Family Fall Festival/Scarecrow Row: This continues to be a great community event. There were 25 scarecrows built on Shafor Boulevard this year.
- Electricity Purchasing... Aggregation Program: Oakwood's electricity energy aggregation program is an opt-in program so citizens can choose to join the program, stay with AES, or possibly find better rates by using the State of Ohio's Apples to Apples website to compare different contracts. Oakwood residents can enroll in the electricity energy aggregation program with the MVCC contract prices until November 15, 2023.
- Far Hills Storm Sewer Replacement: The Far Hills Storm Sewer Replacement project is moving along. The construction is expected to be completed by the end of November or the beginning of December.
- Five Points Traffic Intersection: City staff presented a grant application to ODOT officials. A decision on whether ODOT grant money will be awarded for the potential roundabout project is expected by late 2023 or early 2024.
- Rotary HAZMAT Program: This program began in 2008 and continues to be highly successful. Volunteer Oakwood Rotarians pick up large quantities of hazardous material on a quarterly basis for drop-off at the Montgomery County Refuse Transfer Station where they are properly disposed of. The County may begin charging for the disposal of hazardous waste material in 2026.
- 3.75 Mill Property Tax Levy: The levy renewal will not be on the November 7, 2023 ballot. City Council properly passed the appropriate legislation, but the ordinance requesting to place the issue on the ballot was mistakenly sent to the Auditor's office rather than the Board of Elections. The city plans to place the issue on the March 19, 2024 ballot and to request the same amount of tax revenue as the current issue, which will result in a lower millage rate due to the new triennial property valuations. The city would not seek any additional revenue from Oakwood taxpayers.
- Water System Infrastructure: The city continues to analyze Oakwood's public utility infrastructure and develop improvement projects, particularly with the water, sanitary sewer, and stormwater underground piping. Prior to 1953, the city of Oakwood purchased all of its water from the city of Dayton. In 1953, two wells were drilled on the city-owned property at 120 Springhouse Road and the city started producing some of its own water. Three new wells were drilled at Springhouse in 1965 and the water production increased. The city currently has eight water production wells and has produced nearly all of its own water over the last 20-plus years. The water tower at Fairridge Park provides for the pressure in the system and is in good shape. A major rehabilitation project was completed on the tower in 1996 and it has held up very well. Similar to CenterPoint's major gas line replacement project, which should be completed at the end of this year, the old cast-iron water pipes in town will need to be rebuilt at some point. Mr. Klopsch displayed a line graph showing the number of water main breaks over the past 12 years. The graph does not identify any trends or show evidence that the piping needs to be replaced right now. A multi-year long-term plan is being developed to systematically work towards the updates.

- 2023 FINANCIALS THROUGH SEPTEMBER: Finance Director Cindy Stafford presented the following financial data:
  - General City Services receipts through September are at 85.41% of budget, while disbursements and encumbrances are at 78.64% of budget. As the two largest sources of revenue, graphs were displayed for Income Tax receipts and Property Tax receipts. Mrs. Stafford projected that the income tax receipts will come in slightly less than the \$11 million that was budgeted. This is likely due to people returning back to working in the office versus working remotely. Next year's budget will include \$10.8 million for income tax receipts. Regarding property taxes, there was a decrease in property tax revenue due to a property tax levy expiring in 2008, and there will be a decrease in 2024 due to the 3.75 mill levy not making it on the November ballot. The minor changes from year to year are a result of increases in the total valuation of Oakwood property. Investment revenues were approximately \$460,000 more than anticipated. Mrs. Stafford anticipates ending the year with expenses around 97% of what was budgeted.
  - Refuse Fund receipts through September are at 75.84% of budget and disbursements and encumbrances are at 77.98% of budget. Mrs. Stafford shared that she expects to end the year very close to budget.
  - Water Utility Fund receipts through September are at 79.95% of budget and disbursements and encumbrances are at 68.97% of budget. Mrs. Stafford shared that she anticipates that the fund will end the year below \$1 million, which is why a water rate increase is being proposed for 2024. She explained that the Water, Sanitary Sewer and Stormwater Funds receive an allocation of interest income based on fund balances.
  - Sanitary Sewer Utility Fund receipts through September are at 75.91% of budget and disbursements and encumbrances are at 61.70% of budget. Mrs. Stafford shared that she expects to end the year with revenue around 2% more than what was budgeted, primarily due to investment revenue. A sewer rate increase is being proposed for 2024.
  - Stormwater Utility Fund receipts through September are at 95.27% of budget and disbursements and encumbrances are at 92.30% of budget. This includes \$985,000 for the Far Hills Storm Sewer Reconstruction Project. Mrs. Stafford shared that she expects to end the year with revenue 4% higher due primarily to investment revenue.

Mr. Klopsch shared that staff tracks home sales in Oakwood on a monthly basis. Roughly 90% of the homes are selling above the county's appraised values. Oakwood continues to be a very desirable place to live.

Mr. Klopsch commented on the September 18 event held at Hawthorn Hill announcing that Joby Aviation will be spending half a billion dollars to build their main manufacturing plant at a property near the Dayton International Airport. The company is predicted to be the single biggest new employer in the state and region bringing 2,000 new jobs to the area.

- 2024 PROPOSED BUDGET: Mr. Klopsch stated that the proposed 2024 Budget will show that expenses exceed revenue by \$1,481,814. This is primarily due to \$1.1 million in property taxes that will not be collected in 2024 because of the 3.75 mill levy issue. The proposed 2024 Budget includes \$1,206,400 for the 2024 Far Hills Resurfacing Project.

- 2024 CAPITAL PROJECTS/EXPENSES: Below is a comparison of the 2022 budget, 2023 budget, and proposed 2024 capital expenses:
  - 2022: \$2,700,889
  - 2023: \$5,337,994
  - 2024: \$4,494,100

The 2023 budget included \$2.2 million for the Far Hills Storm Sewer project. The 2024 budget includes \$1,206,400 for the Far Hills Resurfacing project.

Mr. Klopsch reviewed the following capital projects proposed for 2024:

- *General City Services*
    - Computer Equipment: \$50,000
    - Hanging Baskets: \$35,000
    - S-29 Air Compressor: \$30,000
    - Seal City Parking Lot & ORSC Lot: \$27,500
    - OCC Carpet Replacement – Lower Level and Great Room: \$24,000
    - Gardner Pool Liners: \$100,000
    - PW Center Salt Storage & Yard Improvements: \$300,000
    - Med-26 2005 Ford Ambulance: \$300,000
    - S-75 2016 GMC Sierra: \$45,000
    - A-8 2008 Ford Escape: \$25,000
    - A-4 Engineering Vehicle: \$57,000
    - Concrete Street Program: \$200,000
    - 2024 Far Hills Resurfacing (\$80% payment by ODOT): \$1,206,400
    - Harman Blvd. 400 Block Median: \$175,000
    - Orchardly Park Fencing: \$38,000
    - Sidewalk, Curb & Driveway Apron Program: \$200,000
  - *Refuse Utility*
    - S-89 2002 Kramer Loader: \$115,000
    - S-04 2009 Cushman: \$25,000
  - *Water Utility*
    - EZ Valves: \$50,000
    - Caton/Far Hills Water Main Improvement: \$215,000
    - Oakwood/Briar Hill/ Far Hills Water Main Improvement: \$150,000
    - Peach Orchard Vault: \$30,000
    - Well #6 Underground Electric Service: \$52,000
    - Water Line Repairs: \$50,000
  - *Sanitary Sewer Utility*
    - Sewer Easement Cleaner Machine: \$125,000
    - Trench Box & Trailer: \$20,000
    - Sanitary Sewer Repairs: \$50,000
    - Sanitary Sewer Lining: \$125,000
    - Sanitary Manhole Rehab: \$100,000
  - *Stormwater Utility*
    - S-20 2002 Johnston Street Sweeper: \$280,000
- 2024 LINE ITEM BUDGET: Mr. Klopsch briefly reviewed the line item budgets for General City Services, Refuse Operations, Water Utility, Sanitary Sewer Utility and Stormwater Utility.



- REFUSE RATES: Refuse rates were last increased in 2019 and no increase is proposed for 2024.
- WATER RATES: The last water rate increase was imposed in 2017. There are upcoming costs related to infrastructure improvements and capital equipment including water mains and service lines, water well maintenance, water tower refurbishments, and water meter replacements. The chart below shows the proposed monthly water bill increase for three water usage scenarios... 300, 600 and 900 cubic feet, comparing 2023 and proposed 2024 rates:

	2023 Rate			Proposed 2024 Rate			
	Service Fee	Usage Charge	Total	Service Fee	Usage Charge	Total	Monthly Increase
300 cf	10.00	5.28	15.28	15.00	7.92	22.92	7.64
600 cf	10.00	10.56	20.56	15.00	15.84	30.84	10.28
900 cf	10.00	15.84	25.84	15.00	23.76	38.76	12.92

- SANITARY SEWER RATES: The sanitary sewer rates were last increased in 2018. Below is a rate comparison of 2023 and proposed 2024 rates:

	2023 Rate			Proposed 2024 Rate			
	Service Fee	Usage Charge	Total	Service Fee	Usage Charge	Total	Monthly Increase
300 cf	21.20	10.58	31.78	26.50	13.23	39.73	7.95
600 cf	21.20	21.16	42.36	26.50	26.45	52.95	10.59
900 cf	21.20	31.74	52.94	26.50	39.68	66.18	13.24

Mr. Klopsch closed his comments by stating that the proposed budget shows \$1.48 million of cash reserves being used in 2024.

Mayor Duncan mentioned that staff and Council will continue to develop and refine the Capital Improvement Program.

There being no other business, at 6:27 p.m. Mayor Duncan and Mr. Klopsch thanked the committee members for their service and the meeting was adjourned.

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Chairman

**From:** Ohio Public Employees Retirement System <[communications+opers.org@ccsend.com](mailto:communications+opers.org@ccsend.com)>

**Sent:** Tuesday, October 24, 2023 11:33 AM

**To:** Klopsch, Norbert S. <[Klopsch@oakwood.oh.us](mailto:Klopsch@oakwood.oh.us)>

**Subject:** OPERS Board Report



**September/October 2023**

## **Trustees approve seeking employer contribution rate increase**

The OPERS Board of Trustees took action at its October meeting to authorize OPERS staff to seek the system's first statutory maximum employer contribution rate increase in nearly 50 years. The legislation would increase the maximum employer contribution limit for state and local members to 18 percent, and set the Law Enforcement statutory contribution at the same rate as that of the Ohio Police & Fire Pension Fund. The increase in the statutory maximum would not necessarily translate into an automatic increase in the employer rate right away.

Contributions is one of the four components of a pension system's retirement funding equation: Contributions + Investment Earnings = Benefits + Expenses. OPERS' statutory contribution rate has not increased in almost 50 years, and investments face a volatile, uncertain future. In order to preserve the current benefit level, which has been significantly reduced over the past decade by legislative action, it's become necessary to pursue additional legislation to increase the employer contribution rate.

OPERS' proposed legislation would:

- Increase the statutory maximum employer contribution limit from 14 percent to 18 percent.

- Set the law enforcement and public safety statutory employer contribution rate to the same rate as that of the Ohio Police & Fire Pension Fund.
- Establish a plan and schedule for contribution rate increases, to be determined annually by the OPERS Board of Trustees.
- Pursue legislation once every 10 years that would increase the statutory employer maximum by up to 1 percent if the Actuarially Determined Employer Contribution is higher than the statutory maximum.
- Determine the impact to the Member-Directed Fund at a later date.

The OPERS Defined Benefit Fund has a significant unfunded liability because of past benefit increases, a decreasing active member-to-retiree ratio, weakening investment return assumptions and actual market losses in 2008 and 2022. If OPERS experiences poor investment results, the fund's amortization period could exceed the state-mandated level of 30 years, and further benefit changes could be required.

Health care also is at risk because only the employer contribution can fund health care, and currently all of that contribution is necessary to fund pensions.

OPERS has a long history and proven track record of responsibly increasing employer contributions. The current maximum rate was established in 1976, but it wasn't until 2008 that OPERS reached that rate. Prior to 1976, there was no statutory maximum. Similarly, any future increase in the statutory maximum employer contribution could be implemented over time.

While the Ohio legislature historically has not considered increases to the employer contribution, in the last General Assembly legislators appeared willing to consider an increase to that rate for the Ohio Police & Fire Pension Fund. OPERS believes if there should be an employer contribution rate increase, it should be done at once with all pension systems in mind.

## **BOARD ACTION**

### **Board approves budgets for 2024**

Trustees voted to approve operating, administrative and capital budgets for 2024 at the October meeting.

The operating budget of \$120.4 million is an increase of 5.3 percent over the 2023 approved budget, and the administrative budget of \$135.2 million is a 4.7 percent increase over last year's approved budget. The proposed capital budget of \$15.2 million is an increase of \$1.8 million from the 2023 budgets.

OPERS has delivered complete 2024 budget information to the Ohio Retirement Study Council.

### **Corporate Governance plan approved; OPERS hires new proxy vendor**

Trustees approved the OPERS Corporate Governance Plan for 2024 after hearing updates from staff on the plan's objectives and the hiring of a new proxy advisory firm.

OPERS will begin working with Institutional Shareholder Services in December for industry research and proxy voting. We will partner with ISS to implement our custom governance policy, and we'll continue to vote proxies in the best interest of our members and beneficiaries. OPERS selected ISS after conducting a public search, as the previous vendor was in the final year of its contract. The new contract is for three years, with options for two additional one-year renewals.

OPERS enhances the long-term value of our investments by promoting activities that ensure management and boards of directors of publicly traded companies act in the interest of shareholders and in ways that protect, preserve and enhance OPERS' assets and investments. Corporate governance encourages corporate accountability, financial transparency and responsibility by adopting and promoting appropriate policies and regulations.

### **Trustees extend actuary's contract, put consultancy out for bid**

The OPERS Board of Trustees extended the contract of the system's external actuarial firm, Gabriel, Roeder, Smith & Co., for an additional seven years at the September meeting. The firm's current contract term with OPERS was set to expire this year.

Meanwhile, the Board approved staff issuing a Request For Proposal for a Board investment consultant. The contract with the current consultant, NEPC, is scheduled to expire on April 30, 2024.

OPERS issued the RFP at the end of September. Staff will receive and evaluate responses by the end of 2023. Finalists will make their presentations in February, and the board will select the consultant at its March meeting.

### **Five-year rule review approved**

Every five years, OPERS is required to review its administrative rules to determine whether they require amendment, rescission or no changes. This year's review involved the rules in Chapter 145-4 of the Ohio Administrative Code regarding the OPERS health care program.

OPERS staff recommended, and the Board approved, two amendments to the rules and four plan document amendments. The amendments dealt with operational matters regarding the Member-Directed Retiree Medical Account, the Wellness Retiree Medical Account and the Pre-Medicare and Medicare Health Reimbursement Arrangements.

### **Trustees approve two new investment policies**

OPERS has more than two dozen investment policies that ensure robust governance and oversight of member capital. During the September meeting the Board OK'd two new investment policies: the Private Credit Policy and the Benchmarks Policy.

**Private Credit Policy:** This policy helps establish the foundation for OPERS' foray into private credit. Earlier this year, the Board approved a new, 1 percent Defined Benefit Fund plan allocation to this alternative asset class. Under the policy, OPERS will invest in non-publicly traded debt, thereby diversifying the investment program and potentially tapping into the unique returns this asset class offers.

**Benchmarks Policy:** While OPERS traditionally has used various benchmarks to evaluate and compare its investment performance, this new policy codifies and summarizes these practices. The Benchmarks Policy serves as a guiding document detailing:



- How OPERS sets its intended investment outcome against its actual results
- The mechanisms used to gauge how OPERS stands compared with its industry peers in terms of investment performance

These additions to OPERS' policy framework underline the system's commitment to transparency, governance and strategic foresight.

## BOARD DISCUSSION

### OPERS investments grew during second quarter

OPERS' Defined Benefit and Health Care funds showed significant progress in the second quarter of 2023, while the Defined Contribution Fund also experienced growth, consultant NEPC told the Board of Trustees.

Here's a summary of the specifics of the three investment funds after accounting for fees:

- **Defined Benefit Fund:** The fund grew 2.4 percent for the quarter that ended June 30. The fund was up 6.4 percent for the first half of the year.
- **Health Care Fund:** Given its higher allocation to public stocks, this fund increased a bit more than the Defined Benefit Fund, up 2.8 percent for the quarter and 7.8 percent for the year to date.
- **Defined Contribution Fund:** This diverse fund wrapped up the second quarter with \$2.41 billion in assets, a 5.7 percent increase from the end of the previous quarter.

NEPC said specific asset class performance varied during the second quarter. But a meaningful portion of the positive result was propelled by U.S. stocks, especially those of technology companies. The market's enthusiasm for generative artificial intelligence offerings played a pivotal role in this surge. Meanwhile, non-U.S. equities provided more-modest positive gains.

The Defined Benefit and Health Care funds not only surpassed their benchmarks for the second quarter but have consistently outperformed their respective benchmarks, net of fees, over the last three and five years.

### **Staff provides overview of investment risk team**

The OPERS Investments Risk Management team gave trustees an overview of its role in the Investment Division and how it pertains to the system as a whole.

OPERS employs five full-time associates to oversee investment risks. Staff reviewed the Risk Management team, its primary objectives within the investment program and its roles with the areas of governance, investment assets, operations and counterparties.

For example, the team assesses, monitors and reports on risks to OPERS' investment assets, participating in portfolio management. It also assists with assessing new investment strategies and formulating and managing current assets within policy and portfolio guideline mandates. The team works with OPERS staff to control internal operational risk and also performs operational assessments of external asset managers.

### **Enterprise Risk Management update**

OPERS staff presented an update on the OPERS Enterprise Risk Management program, which is provided on a biannual basis. During the discussion, staff updated the program focus and reviewed the critical risks that the program is monitoring.

The program emphasizes regular discussions to pinpoint key and emerging risks within the system. It's resulted in the identification of 29 key risks and four emerging risks on a wide range of topics, including internal processes, information technology and vendor management.

### **Actuary presents health care valuation, 50-year projection**

The difficult investment environment during calendar year 2022 has impacted the OPERS Health Care Fund, which saw its solvency period reduced.

OPERS' external actuary, Gabriel, Roeder, Smith & Co., told trustees that the retiree health fund's solvency period extends to calendar year 2044. That's a

shorter time period than the previous year, when the solvency extended to 2051. The difference reflects the financial markets that affected all investors in 2022.

The valuation measures the financial position of the Health Care plan as of Dec. 31, 2022, and provides financial reporting required by the Governmental Accounting Standards Board. The 50-year projection examines the long-term sustainability of the fund and, in addition to calculating the expected solvency years, determines the lowest employer contribution rate needed to pay expected benefits indefinitely.

GRS said that because of the need to fund the pension plan, almost all available employer contributions are allocated to the pension fund for the foreseeable future. The firm also notes that retiree health benefit changes in the most-recent iteration of the health care plan have had the intended effect of extending plan solvency and lowering future funding requirements relative to the previous retiree health benefits.

### **Staff gives update on OPERS strategic plan**

Each year the trustees and staff meet to discuss future system strategies that will address current pension industry trends, available opportunities and potential threats that could impact the fund and our benefit offerings.

The resulting document is the OPERS Strategic Plan, which covers a rolling, three-year timeframe. Staff presented an update at the September meeting for initiatives that will comprise the 2024-26 strategic plan. The plan has five areas of focus: products, service delivery, finance, organization, and environment.

### **Trustees updated on status of Private Credit program**

The OPERS Board approved a 1 percent allocation to Private Credit for the Defined Benefit Fund in early 2023. Investment staff presented a status update of that new program.

Private Credit is a unique lending model that bypasses traditional banking channels and operates without a dedicated public exchange. This alternative asset class will be focused on floating rate senior direct lending loans that are expected to further diversify the Defined Benefit Plan and earn higher yields than OPERS' existing credit investments.

## Private Equity and Real Estate fees discussion

OPERS Investments and Finance staff provided an in-depth fee analysis of two essential alternative asset classes in the Defined Benefit Plan: private equity and real estate. Through detailed case studies, staff explained to the Board the intricate methods staff uses to manage these fees.

Such alternative asset class fees are often complex and layered, and they demand vigilant oversight. Recognizing this fact, OPERS has instituted rigorous checks and measures that include the use of specialized software. The goals are to minimize costs while ensuring these asset classes continue to yield appreciable returns.

OPERS uses industry consultant CEM Benchmarking to compare costs to its U.S. public fund peers. Overall, the fees OPERS paid for its private equity and real estate exposure stand out as being significantly more cost-effective.

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# Oakwood woman promotes equity through volunteer work

By Diane Erwin  
Contributing Writer

Leigh Ann Fulford has many causes that are dear to her, including suicide prevention, breast cancer awareness, inclusion and the environment. Although at first glance they may seem disparate, the Oakwood woman says there is a common thread: Equity.

"I just feel the world needs to be more equitable for all," she said.

Her volunteerism reaches youth. She founded the GEM Project Dayton Art Contest for Suicide Prevention, for example, to spread hope and help to students. Submissions to the contest, which is in its third year and is open to middle school and high school students, begin Nov. 1.

And she reaches adults too, such as with the CARE Walk that she organized for 20 years, raising thousands of dollars to fight breast cancer and support breast health throughout the Dayton area. The walk has ended, but she continues to support the cause as part of the board of the Breast Wishes Foundation.

Her efforts also have brought people together and helped them feel connected, through her work on the board of the Oakwood Inclusion Coalition and as a member of the founding committee of David's Place, a safe space for LGBTQ+ youth located at Daybreak.

"I don't like to be reactive. I prefer to be proactive," Fulford said. "I feel like that makes a better outcome."

Fulford, 63, grew up in Nashville, worked as a technical writer, editor and substitute teacher and retired primarily to focus on suicide prevention. Her sister died by suicide, and now Fulford helps others spark conversations and watch for risk factors.

"Anytime someone's behavior changes drastically, that's cause for alarm," she said.

Sometimes youth are too scared to talk about suicide because of the stigma attached to the issue, she said. The art contest started as a way for students to reach other students, but it also has resulted in conversations between parents and their children, she said.



Community Gem Leigh Ann Fulford helps fund many of the causes she is involved in with the stained glass mosaics she creates in her South Park Studio.

Fulford and her husband, Joe, also are involved in environmental issues, promoting electric vehicles and solar panels. In fact, it was at a solar event several years ago that Masha Kisel first met Fulford.

"If there's something good going on helping others, Leigh Ann is there," said Kisel, who nominated Fulford as a Dayton Daily News Community Gem.

Since then, their paths have regularly crossed. Kisel has seen how Fulford val-

ues others, spreads hope and remains optimistic. She brings a "certain light" and helps to create a happier, safer place for those who struggle, Kisel said.

"I feel inspired and encouraged to do more by her example," said Kisel, also of Oakwood.

Fulford helps to fund many of the causes she is involved in with stained glass mosaic windows she creates in her South Park studio. She sells, donates and fulfills commissions for her art-

work to support a variety of issues. Puzzling together broken pieces in order to make something of beauty is fulfilling and cathartic, she said.

The problems of the world can seem overwhelming, but Fulford knows that she can't just ignore them.

"If I can get myself busy and work on the problems I know I can work on and make a difference, it makes me feel like I'm doing something that will help future generations," she said.

10/22/23 DDN



## Mike Kelly Bench dedication



The "Shafor Shufflers"

Family, friends, and colleagues gathered to remember former Oakwood City Manager and "Shafor Shuffler" Mike Kelly on Friday, Oct. 13. A memorial bench dedicated in Kelly's honor was donated by the "Shafor Shufflers" and placed at Wright Memorial Public Library.



Oakwood Mayor Bill Duncan and Wright Library Director Kristi Hale.



Jinny Kelly and Wright Library Director, Kristi Hale, with Mike Kelly memorial bench.



# 2 Reps. propose boosting police pensions by 4.5%

City officials, other  
lawmakers worry  
about cost.

**By Avery Kreemer**  
Staff Writer

Ohio lawmakers are proposing legislation that would increase local governments' contribution to Ohio police officers' pensions from 19.5% to 24% by 2027, bringing it even with the state's firefighters.

This would be costly to local governments. But bill co-sponsors Reps. Sidney Abrams, R-Harrison, and Thomas Hall, R-Madison Twp., told the Ohio House Pension Committee Tuesday that the state has to either increase contributions to the Ohio Police and Fire Pension Fund or cut retirement benefits to Ohio's police and firefighters.

This is due to the pensions board's recent decision to reduce the fund's assumed rate of return from 8% to 7.5% amid volatile economic factors.

Under current law, local governments are required to contribute a the equivalent of 19.5% of each police officer's salary and 24% of each firefighter's salary to the Ohio Police and Fire Pension Fund, which serves over 27,000 active first responders and another 30,000 retirees. House Bill 296 proposes to raise the police officer contribution rate to 24%.

Several committee members raised concerns about how much this mandate would cost local taxpayers, including Rep. Tom Young, R-Washington Twp., who called the proposal "tremendous increase" and asked, "Who's going to pay for this down the road?"

Abrams, a former Cincinnati police officer, said the change is necessary to ensure sustainability for the fund and to avoid future disaster. While the Cincinnati area Republican





Dayton police investigate a shooting in East Dayton, on Aug. 10. A bill proposed by Reps. Sidney Abrams, R-Harrison, and Thomas Hall, R-Madison Twp., would increase Ohio police officer pension amounts to match that of firefighters. JIM NOELKER / STAFF

## Pensions

continued from A1

offered no estimates of how much the change might cost local governments cumulatively, she assured the committee that experts from the Ohio Police and Fire Pension Fund would soon provide more clarity.

This is Abrams' second attempt to increase local governments' contributions to the Ohio Police and Fire Pension Fund.

Her first attempt, which sought to raise local contributions to 26% for both police and firefighters, was tabled in committee last year, despite support from the Fraternal Order of Police

and the Ohio Association of Professional Fire Fighters. Its most notable opponent was the city of Cleveland.

The Ohio Municipal League opposed the previous measure and said it will again be opposing HB 296 due to the financial burden it places on local governments, which could quickly reach hundreds of thousands of dollars annually.

"It would be an unfunded mandate on the cities and villages that have to cover the employer increase and because of that, they would have to divert money away from the services and projects they normally do," said Bevan Schneck, spokesperson for the Ohio Municipal League.

The Ohio Municipal League has concerns that tying a greater financial burden to the employment of police officers would disincentivize local governments from making new hires.

But, for the bill's proponents, increasing local contributions to pensions could attract new recruits and make Ohio a more enticing state to work.

"We believe this could tie directly into the workforce shortage, this could tie directly into getting more people recruited to be a police officer because this is their pension, it's their retirement, it's vital to any job," Hall said in an interview.

DDN

10/25/23

## Don't diss the roundabout until you get to know the roundabout!

I am writing in response to the overwhelming outcry against what might be the most innovative solution to a major problem in our city: The Five Points intersection. Not only is the intersection highly dangerous (backed by hard data and statistics) but it causes massive traffic delays, shuffling traffic to Shroyer Road.

I believe citizens who oppose the roundabout might actually want traffic to be shuffled to Shroyer Road due

to racism. Nothing says, "stay out of my town" like a highly congested intersection where passerby moms give motorists a glaring side-eye. A roundabout would allow a constant flow of traffic into our beautiful city, and allow for a more welcoming and inclusive environment.

Our elected city council members should overwhelmingly rubber stamp this project. They each possess the foresight to make the right choices for

our city - choices that, as evidenced by the influx of Oakwood Register articles, clearly indicate our citizens can't handle.

So don't diss the roundabout until you get to know the roundabout - it's the safe, inclusive, and innovative solution to perhaps our most challenging problem!

*Landon Kaczmarek*

OR 10/25/23

**From:** [notify@proudcity.com](mailto:notify@proudcity.com)  
**To:** [Traffic Signal Study](#)  
**Subject:** Website Feedback - Five Points  
**Date:** Saturday, October 21, 2023 7:26:23 PM

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**Name**

Jonathan Rudwall

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**Business/Organization Address**

United States  
[Map It](#)

**How did you hear about the open house meeting? (Select all that apply.)**

- Word-of-mouth
- Other

**Other ways of hearing**

I heard about this project from my grandmother Jo Granzow who has been a resident for nearly 70 years, and my father who also was born and raised here and actually lives in this intersection. Both my parents were raised here, as was I with my siblings.

**What is your interest in the Five Points intersection? (Select all that apply.)**

- Other

**Other interest**

This is a terrible and dangerous idea.

**How often do you or your family members travel through the Five Points intersection?**

- Daily

**How do you or your family members usually travel through the Five Points intersection?**

- Automobile
- Bicycle
- Walk
- Other

**Other ways of travel**

When I visit monthly, I push my child in a stroller through this intersection.



### Questions/Comments

As a former resident who was raised here, a past school commuting pedestrian, and current resident of a the Columbus suburbs where we have countless roundabouts; I can with confidence say this is an abysmal idea. With the number of children, the complicated nature of an intricate and dramatic change to traffic pattern, and blind approaching downhill traffic on far hills, the project is more than dangerous. It could be harmful and potentially fatal on a continual basis. The project may be an innovative idea and beneficial somewhere else, but not at this intersection. It's delusional at best.