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# **CITY OF MONTGOMERY**

## **STRATEGIC PLAN**

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**December 2001**

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## INTRODUCTION

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

## STRATEGIC PLANNING APPROACH

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

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

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

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

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

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

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

## **BUILDING ON MONTGOMERY'S STRENGTHS**

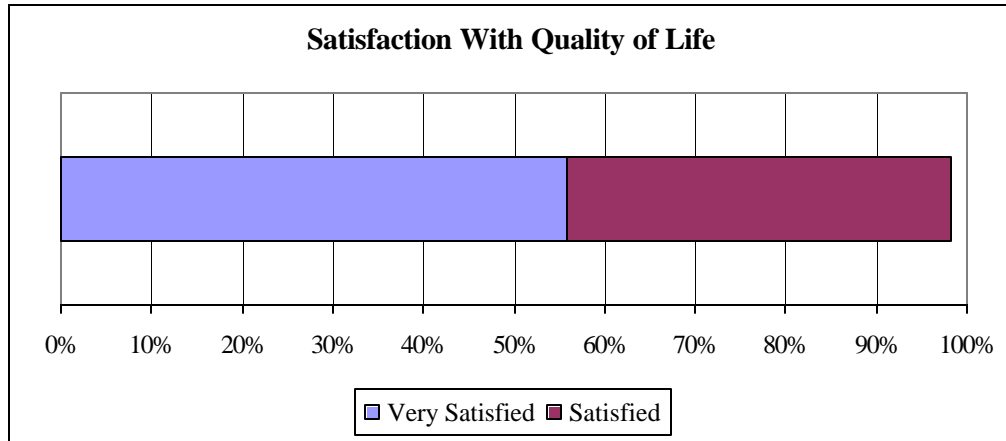
Montgomery is a city with a host of attributes that residents, council members, and staff are quick to mention when asked about the city's strengths. From high quality services to its special amenities like the park system, the historic district, brick sidewalks and flower plantings, Montgomery is special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

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

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

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

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



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

## VALUES

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

### **WE VALUE ...**

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

## VISION

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

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

## MISSION STATEMENT

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

*Taking responsibility together to provide superior services*

## GOALS

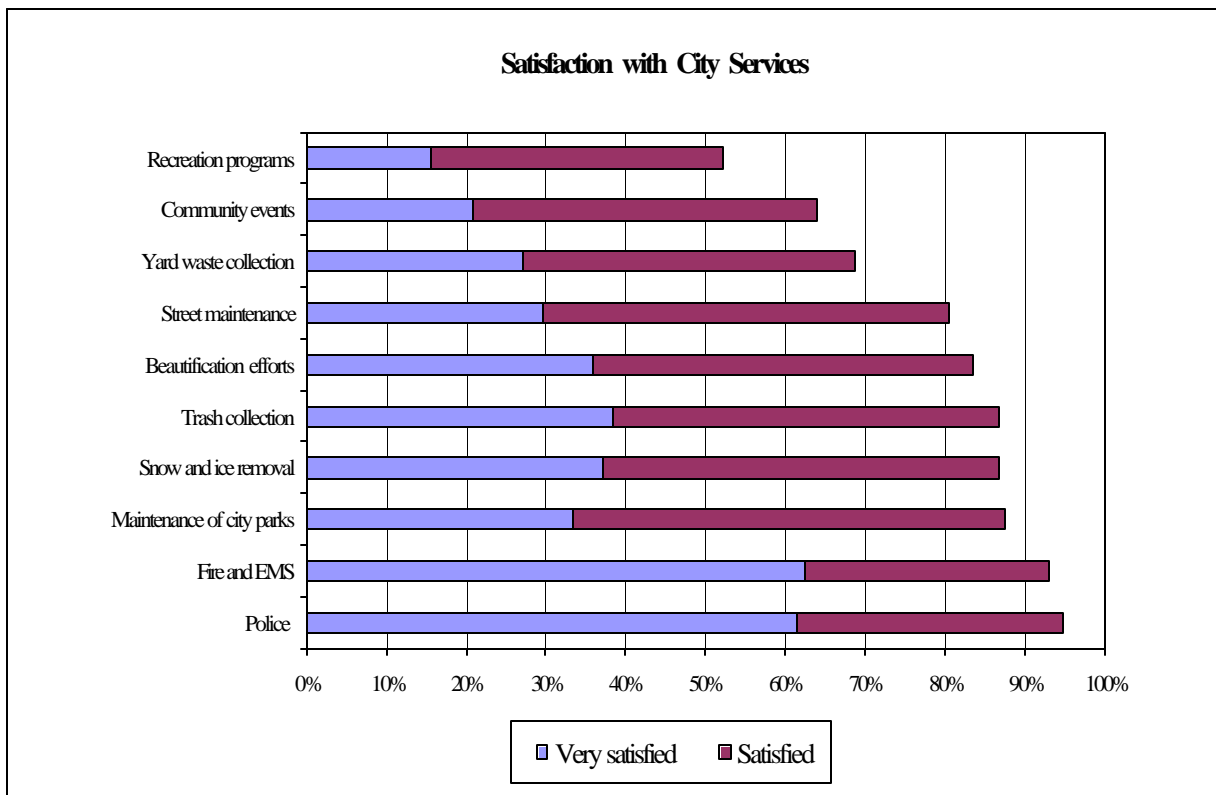
The Strategic Plan promotes the city's vision by establishing goals and strategic directions for each of the issue areas identified during the planning processes. The City of Montgomery has identified the following six goals to reflect the character of the community that is envisioned:

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

## CITY SERVICES

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

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



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

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

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

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

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

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

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

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

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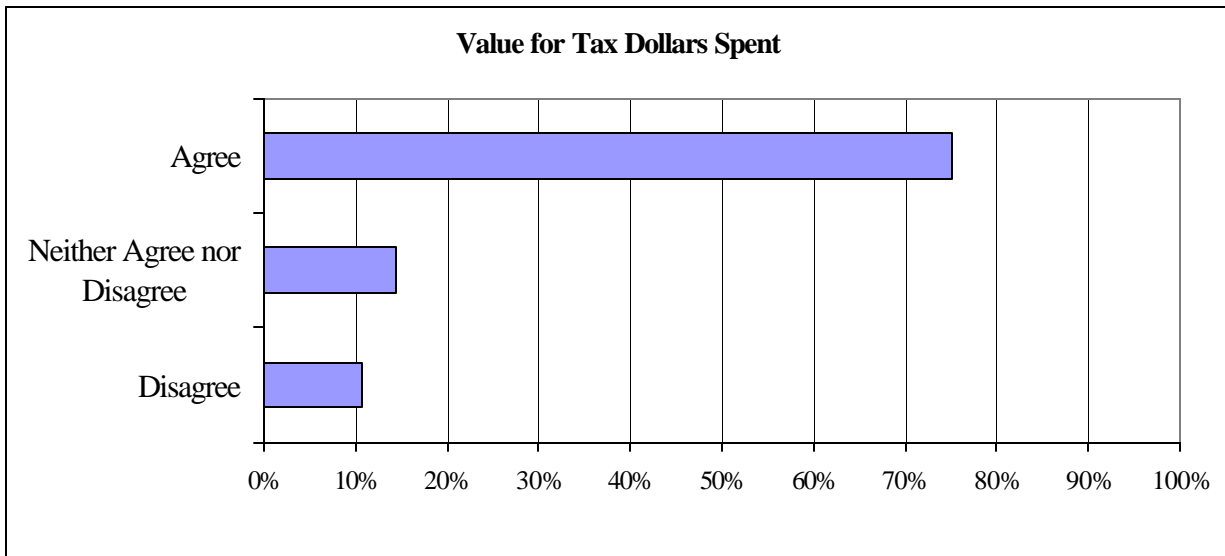
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A comprehensive citywide technology master plan will be developed and implemented. The plan will include technology elements from all city service areas, developed and presented as subsets of the overall plan to facilitate departmental implementation.

## CITY FINANCES

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

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



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

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

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

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

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

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

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***Strategic Direction 1: Maintain sound financial position***

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

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

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

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

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

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

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

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

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

***Strategic Direction 6: Generate funds from grants***

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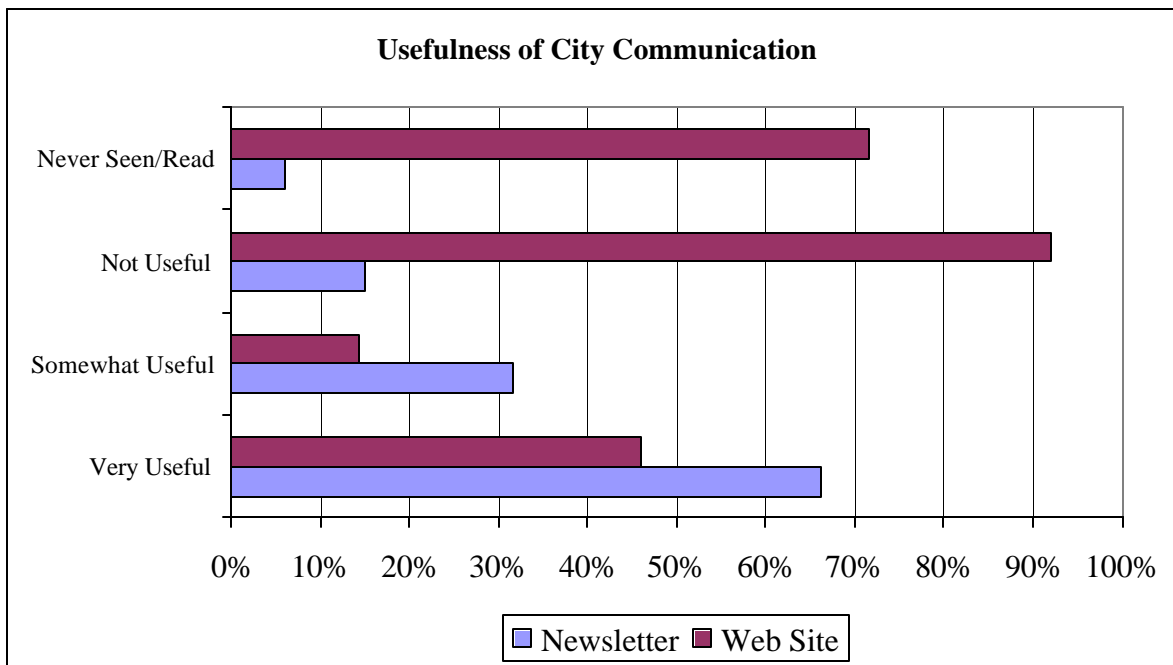
Departmental “grant specialists” will be selected and trained to identify grant sources, develop effective grant writing skills, and pursue funding.

## COMMUNICATION AND COLLABORATION

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

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

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



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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## COMMUNITY AESTHETICS AND AMENITIES

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

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

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

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

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

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

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

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

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

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

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

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

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

***Strategic Direction 4: Protect existing green space in residential neighborhoods***

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

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

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

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

## COMMUNITY AND ECONOMIC DEVELOPMENT

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Strategic Direction 6: Encourage appropriate alternative housing options**

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

## HERITAGE DISTRICT

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

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

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

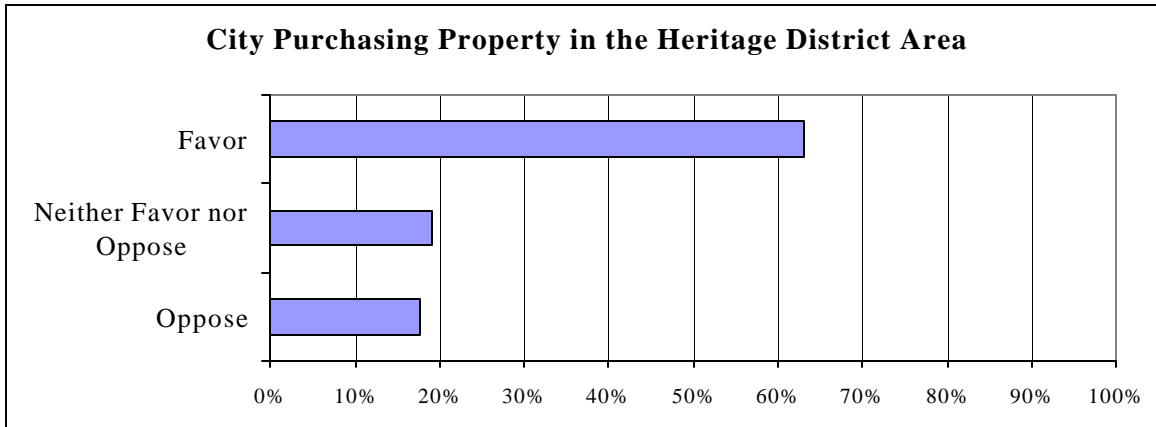
- The Montgomery Elementary School focus area
- Public parking focus area east
- Public parking focus area west
- The Triangle focus area
- Mixed use focus area
- Cooper Road residential focus area
- Redevelopment focus area
- Significant public spaces
- Staff estimates that 80-85% of the retail/commercial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

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

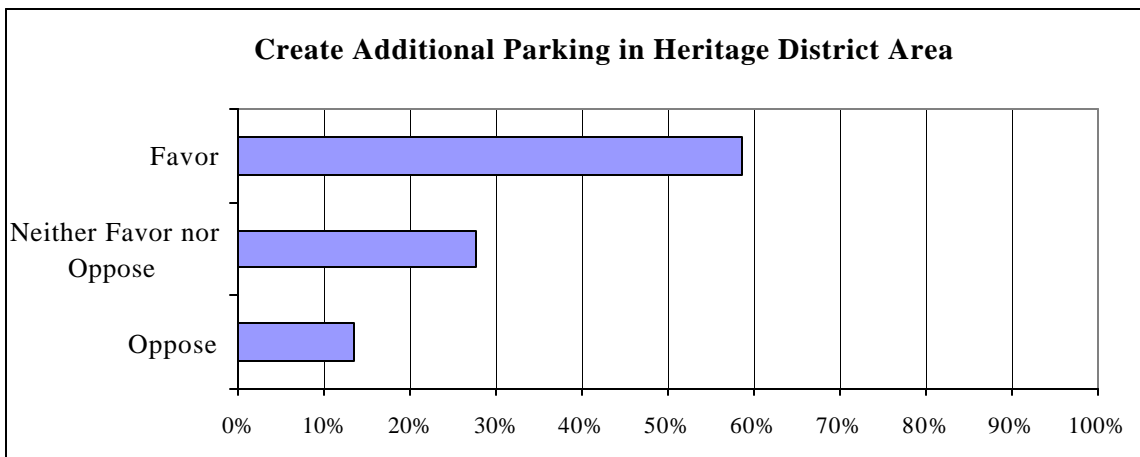
- Reuse of the "Point"
- More residential and mixed uses
- Enhance key gateways to the city and the Heritage District
- Continued development and preservation of the District
- Improved District parking situation

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

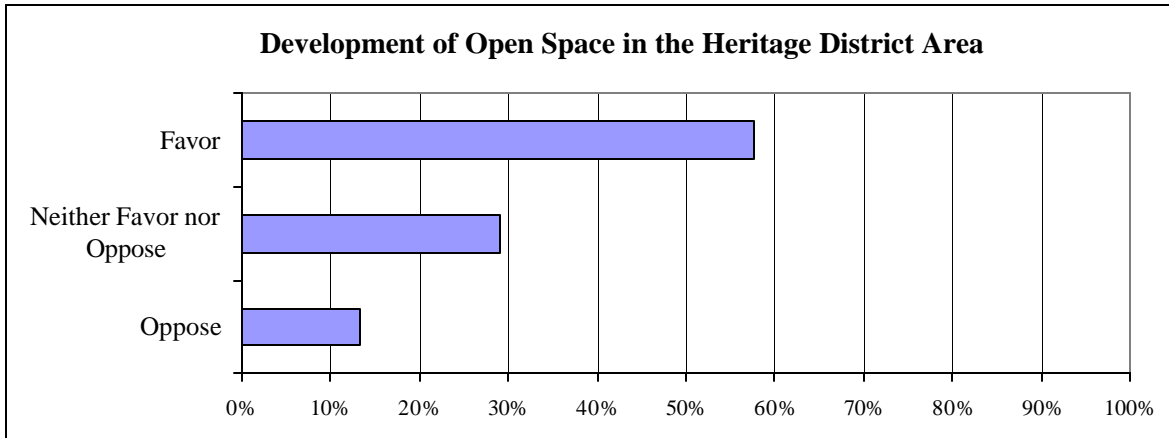
- 63.2% of survey respondents favor the city purchase of property in the Heritage District to ensure that future development is consistent with the character of the District. 19.1% neither favor nor oppose, while 17.7% oppose.



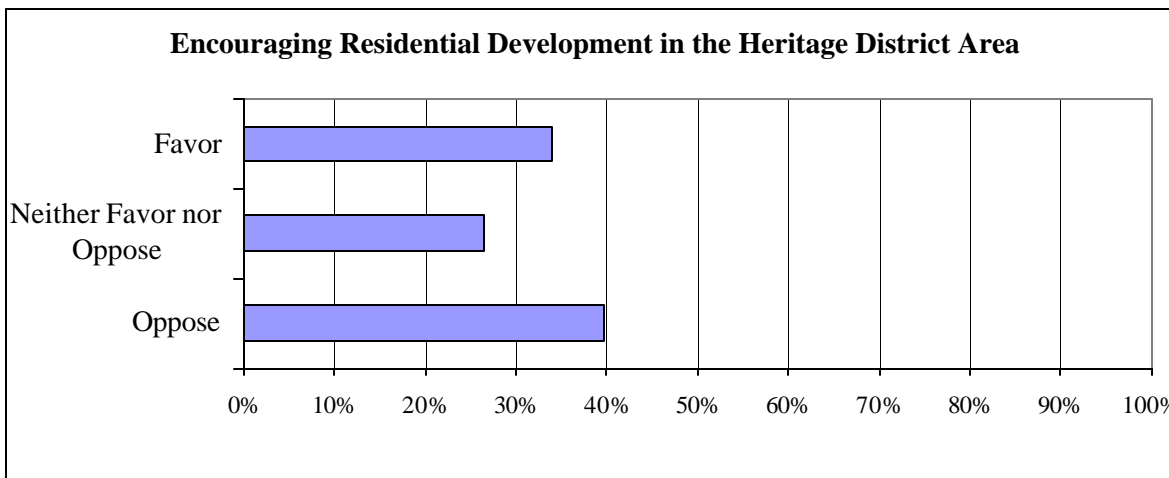
- 58.7% of survey respondents favor the creation of additional parking in the Heritage District area, while only 13.6% oppose creating additional parking.



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



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



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

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

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

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

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

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

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

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

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

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

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

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

## IMPLEMENTATION

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

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

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