



4/21/2025 | 7:00 PM

**Municipal Services Center, Council Chamber
3600 Tremont Road**

1. Call to Order/Roll Call

2. Pledge of Allegiance Led By Vice President Close

3. Consent Agenda

- a. Approve City Council Meeting Minutes for April 14, 2025
- b. Ordinance No. 12-2025 - An ordinance authorizing the City Manager to enter into contract with Strawser Paving Company for construction-related services for the 2025 Street Reconstruction Project
- c. Ordinance No. 13-2025 - An ordinance authorizing the City Manager to enter into contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sustainable Sewer Solutions Project
- d. Ordinance No. 14-2025 - An ordinance authorizing the City Manager to enter into a contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sanitary Sewer Repairs Project
- e. Resolution No. 4-2025 - A resolution authorizing the City's participation in the Ohio Department of Transportation Cooperative Contract Program for rock salt

4. Reports/Presentations

- a. Recognition of UAHS Girls Swim Team and Men's Hockey Team - 2025 State Champions
- b. Housing Market Analysis Update, Presented by CommunityScale Principal Nels Nelson
- c. Finance Director Monthly Report - March 2025

5. Legislative Items for Second Reading/Public Hearing/Council Action

- a. Resolution No. 5-2025 - A resolution establishing a policy and procedure for requesting street name changes in the City of Upper Arlington (*Munc*)

6. Legislative Items for First Reading/Public Hearing

- a. Ordinance No. 15-2025 - An ordinance authorizing the issuance of a City permit to the Upper Arlington Civic Association for the sale of alcohol on public property during the 2025 Neighbors Night Out event

7. City Manager Update

8. Council Liaison Report

9. Adjournment

April 14, 2025

City Council met in regular session in the Council Chamber of the Municipal Services Center, 3600 Tremont Road, and the meeting was called to order by President Awakessien Jeter at 7:00 p.m.

Members Present: President Ukeme Awakessien Jeter, Vice President Brian Close, Kathy Adams, John Kulewicz, Jim Lynch, Heidi Munc, and Todd Walter

Staff Present: City Attorney Darren Shulman, Assistant City Manager Jackie Thiel, City Clerk Krystal Gonchar, Finance Director Brent Lewis, IT Director Jeff Kasson, Community Development Director Chad Gibson, Public Service Director Gary Wilfong, City Engineer Aaron Scott, Parks and Recreation Director Debbie McLaughlin, HR Director Don Essex, Community Affairs Director Emma Speight, Police Lt. Jason Amweg, Fire Chief Chris Zimmer, Assistant City Engineer Rory Stimpson, and Economic Analyst James Russell

Pledge of Allegiance

The Pledge of Allegiance was led by Scout Troop 96.

Consent Agenda

- a. **Approve City Council Meeting Minutes for March 10, 2025**
- b. **Ordinance No. 9-2025 - An ordinance authorizing the City Manager to enter into contract with Strawser Paving Company for construction-related services for the 2025 Street Maintenance Program**
- c. **Ordinance No. 10-2025 - An ordinance authorizing the City Manager to enter into contract with Strawser Paving Company for construction-related services for the 2025 Redding Road Resurfacing and Multimodal Improvement Project**
- d. **Ordinance No. 11-2025 - An ordinance authorizing the purchase of server virtualization equipment and software from Ideal Integrations**

Mr. Lynch moved, seconded by Vice President Close, to approve the Consent Agenda. The motion carried with the following vote:

Voting Aye: Adams, Close, Kulewicz, Lynch, Munc, Walter, and President Awakessien Jeter

Reports/Presentations

a. Finance Director's Report- February 2025

The Finance Director presented the Finance Director's Report for February 2025 (attached as Exhibit A). He reported that income tax was looking good, with no significant red flags through the first two months of the year. He highlighted two items:

1. The capital equipment fund showed a negative balance, which would be resolved when real estate taxes come in March and transfers are made from the general fund.
2. The solid waste fund also showed a negative balance due to the waiver of first-half fees and an internal accounting allocation issue that should resolve itself.

Mr. Lewis noted that income tax was four percent above budget and six percent above the previous year at this point.

Mr. Kulewicz asked about tracking the financial performance of the community center. Mr. Lewis explained that a financial statement for the community center would be included in the monthly packet starting with the April report.

Mr. Kulewicz also inquired about any material changes in investment income due to recent market fluctuations. Mr. Lewis responded that there were no issues to date, and the city maintains a conservative investment approach.

Mr. Lynch asked about the surprisingly low bids for several projects. Mr. Lewis explained that they had seen generally lower prices across the board, particularly for asphalt. He attributed this to increased competition and contractors' familiarity with city projects.

Legislative Items for First Reading/Public Hearing

a. Ordinance No. 12-2025 - An ordinance authorizing the City Manager to enter into contract with Strawser Paving Company for construction-related services for the 2025 Street Reconstruction Project

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 12-2025.

Mr. Kulewicz asked if any streets were added or removed from the project due to the change in scoring paradigm. The City Engineer responded that no changes were made for this project, but it would affect future years in the Capital Improvement Plan (CIP).

Ms. Adams inquired about the use of recycled asphalt and the lower-than-expected bids. Mr. Scott explained that asphalt prices have been lower than anticipated, possibly due to increased competition and contractors' familiarity with city projects.

President Awakessien Jeter advised that the Second Reading/Public Hearing/Council Action will occur on April 21, 2025.

b. Ordinance No. 13-2025 - An ordinance authorizing the City Manager to enter into contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sustainable Sewer Solutions Project

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 13-2025.

In response to Mr. Kulewicz, Mr. Scott confirmed that the city is on schedule to meet the OEPA deadline of 2028 for completion and explained that this contract involves lining sewers with cast-in-place polymer lining.

President Awakessien Jeter advised that the Second Reading/Public Hearing/Council Action will occur on April 21, 2025.

c. Ordinance No. 14-2025 - An ordinance authorizing the City Manager to enter into a contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sanitary Sewer Repairs Project

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 14-2025.

President Awakessien Jeter advised that the Second Reading/Public Hearing/Council Action will occur on April 21, 2025.

d. Resolution No. 4-2025 - A resolution authorizing the City's participation in the Ohio Department of Transportation Cooperative Contract Program for rock salt

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Resolution No. 4-2025.

Ms. Munc asked about the history of salt usage and whether the city was ordering the same amount of salt each year despite decreased usage. The Public Service Director explained that usage has been within a consistent range over the past several years, and the city was not at risk of running out of storage space.

President Awakessien Jeter inquired about alternatives to rock salt, such as beet juice. Mr. Wilfong explained that beet juice is used as a pretreatment and is separate from the rock salt application.

President Awakessien Jeter advised that the Second Reading/Public Hearing/Council Action will occur on April 21, 2025.

e. Resolution No. 5-2025 - A resolution establishing a policy and procedure for requesting street name changes in the City of Upper Arlington

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Resolution No. 5-2025.

The City Attorney presented the draft policy for street name changes (attached as Exhibit B), explaining that it was a follow-up to the October 7, 2024 meeting. He highlighted three main points of discussion:

1. The percentage of property owners required to sign a petition (currently set at 90%)
2. The application fee (currently set at \$500)
3. Whether a portion of the fee would be returned if the request is not granted

Council Members discussed various aspects of the policy, including:

- The threshold percentage for petition signatures (suggestions ranged from 80% to 90%)
- The need for clear disclosure of potential costs to residents
- The application fee and its relation to actual staff costs
- The role of City Council in the decision-making process
- The possibility of including a provision allowing council to initiate street name changes independently

Mr. Shulman agreed to prepare amendments based on the discussion, including:

- Adding a disclosure requirement for potential costs to residents
- Calculating a more accurate estimate of staff time and costs
- Considering an 80% threshold for petition signatures
- Adding language to clarify council's ability to initiate street name changes

These amendments will be distributed to Council Members and included in the next meeting packet for further discussion and potential vote.

President Awakessien Jeter advised that the Second Reading/Public Hearing/Council Action will occur on April 21, 2025.

City Manager Update

The Assistant City Manager provided the following update:

- The Bob Crane Community Center ribbon cutting was held on Sunday, April 6th and the building has been in full operations officially for a week
- Membership numbers are over 5,500
- Introduction of Rory Stimpson the new Assistant City Engineer and James Russell Economic Analyst

Executive Session

A motion was made by Mr. Walter, seconded by Vice President Close to enter into Executive Session to consider negotiations for economic development assistance, which may include information such as marketing plans, specific business strategies, production techniques, trade secrets, or personal financial statements, or related to negotiations with other political subdivisions as to requests for economic development Rules of Council Page 13 Article II assistance, pursuant to Article II (13)(A)(8) of the City Council Rules and R.C. 121.122 (G)(8)(a)(b)

<u>Roll Call</u>	<u>Vote</u>
Close	Aye
Lynch	Aye
Walter	Aye
Adams	Aye
Kulewicz	Abstain
Munc	Aye
Awakessien Jeter	Aye

Motion carried and City Council went into Executive Session at 7:44 p.m. Due to a conflict, Mr. Kulewicz and Mr. Walter abstained from a portion of the Executive Session. City Council reconvened into open session at 8:29 p.m.

* * *

There being no further business to come before City Council, President Awakessien Jeter called for a motion to adjourn the meeting. Ms. Munc moved, seconded by Mr. Lynch to adjourn. The motion carried unanimously, and the meeting adjourned at 8:29 p.m.

Monthly Financial Report As of February 2025

General Fund (101)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Income Tax	\$ 34,595,400	\$ 34,595,400	\$ 5,675,949	\$ 5,923,758	\$ 247,809	4.37%
Real & Personal Property Tax	10,230,600	10,230,600	-	-	-	0.00%
All Other Operating Revenues	14,137,400	14,137,400	2,090,783	1,895,364	(195,419)	-9.35%
Transfers/Advances In	10,052,500	10,052,500	-	-	-	0.00%
Total Revenues and Other Sources	69,015,900	69,015,900	7,766,732	7,819,122	52,390	0.67%
Obligations:						
Police Division	12,262,800	12,262,800	2,503,655	2,438,239	65,416	2.61%
Fire Division	12,519,900	12,519,900	2,097,877	2,086,865	11,012	0.52%
Board of Health	400,000	400,000	363,604	363,604	-	0.00%
Parks and Recreation	8,383,300	8,426,600	1,453,119	1,370,595	82,524	5.68%
Community Development	1,563,300	1,579,300	546,652	470,588	76,064	13.91%
Public Service Administration	1,397,800	1,502,800	280,444	240,414	40,030	14.27%
Public Works	1,700,400	1,670,400	278,400	235,130	43,270	15.54%
City Manager	2,087,400	2,187,400	447,746	389,190	58,556	13.08%
City Attorney	983,700	1,053,700	182,743	130,513	52,230	28.58%
City Clerk	334,800	330,200	55,033	35,412	19,621	35.65%
City Council	208,900	237,400	39,567	33,684	5,883	14.87%
Finance	1,638,800	1,638,800	360,163	316,847	43,316	12.03%
Facilities Maintenance	4,818,400	4,818,400	675,460	521,808	153,652	22.75%
Information Technology	2,522,200	2,522,200	602,513	517,098	85,415	14.18%
General Administration	3,800,600	3,800,600	1,042,000	1,016,648	25,352	2.43%
Transfers/Advances Out	10,624,300	18,943,400	-	-	-	0.00%
Total Obligations	65,246,600	73,893,900	10,928,976	10,166,635	762,341	6.98%
Excess of Revenue and Other Sources over Obligations:	3,769,300	(4,878,000)	(3,162,244)	(2,347,513)		
Total Beginning Fund Balance	34,761,336	34,761,336	34,761,336	34,761,336		
Anticipated Appropriation Lapses	1,415,000	1,415,000	1,415,000	-		
Total Ending Fund Balance	\$ 39,945,636	\$ 31,298,336	\$ 33,014,092	\$ 32,413,823	\$ (600,269)	-1.82%

Capital Asset Management Fund (102)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Income Tax	\$ 13,453,700	\$ 13,928,200	\$ 2,207,313	\$ 2,304,853	\$ 97,540	4.42%
Total Revenues and Other Sources	13,453,700	13,928,200	2,207,313	2,304,853	97,540	4.42%
Obligations						
Transfers/Advances Out	9,776,200	9,776,200	-	-	303,631	0.00%
Total Obligations	9,776,200	9,776,200	-	-	303,631	0.00%
Excess of Revenue and Other Sources over Obligations:	3,677,500	4,152,000	2,207,313	2,304,853		
Beginning Fund Balance	20,368,117	20,368,117	20,368,117	20,368,117		
Ending Fund Balance	\$ 24,045,617	\$ 24,520,117	\$ 22,575,430	\$ 22,672,970	\$ 97,540	0.43%

Monthly Financial Report As of February 2025

Capital Equipment Fund (106)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Real & Personal Property Tax	\$ 1,312,400	\$ 1,312,400	\$ -	\$ -	\$ -	0.00%
Homestead & Rollbacks	173,500	173,500	-	-	-	0.00%
Transfers In	500,000	500,000	-	-	-	0.00%
Total Revenues and Other Sources	1,985,900	1,985,900	-	-	-	0.00%
Obligations						
Capital Equipment	2,548,300	2,548,300	1,542,500	1,542,500	-	0.00%
Total Obligations	2,548,300	2,548,300	1,542,500	1,542,500	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(562,400)	(562,400)	(1,542,500)	(1,542,500)		
Beginning Fund Balance	1,208,768	1,208,768	1,208,768	1,208,768		
Ending Fund Balance	\$ 646,368	\$ 646,368	\$ (333,732)	\$ (333,732)	\$ -	0.00%

Note: Negative fund balance is due to the timing of orders (expense), while the first half real estate settlement not being received in March (revenue) and the transfers from the General Fund not occurring yet.

Street Maintenance and Repair Fund (207)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Gasoline Taxes	\$ 1,800,000	\$ 1,800,000	\$ 291,165	\$ 302,761	\$ 11,596	3.98%
Motor Vehicle License Taxes	450,000	450,000	74,633	76,876	2,243	3.01%
All Other Operating Revenues	138,000	138,000	11,222	11,222	-	0.00%
Total Revenues and Other Sources	2,388,000	2,388,000	377,020	390,859	13,839	3.67%
Obligations						
Public Service Administration	1,129,200	1,129,200	75,280	69,816	5,464	7.26%
Public Works	1,582,700	1,582,700	269,705	257,127	12,578	4.66%
Total Obligations	2,711,900	2,711,900	344,985	326,943	18,042	5.23%
Excess of Revenue and Other Sources over Obligations:	(323,900)	(323,900)	32,035	63,916		
Beginning Fund Balance	1,927,174	1,927,174	1,927,174	1,927,174		
Ending Fund Balance	\$ 1,603,274	\$ 1,603,274	\$ 1,959,209	\$ 1,991,090	\$ 31,881	1.63%

Bonded Improvement Fund (402)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Sale of Bonds and Notes	\$ 19,973,700	\$ -	\$ -	\$ -	\$ -	0.00%
All Other Operating Revenues	475,000	475,000	162,332	162,332	-	0.00%
Total Revenues and Other Sources	20,448,700	475,000	162,332	162,332	-	0.00%
Obligations						
Capital Improvements	500,000	500,000	46,399	46,399	-	0.00%
Total Obligations	500,000	500,000	46,399	46,399	-	0.00%
Excess of Revenue and Other Sources over Obligations:	19,948,700	(25,000)	115,933	115,933		
Beginning Fund Balance	7,509,727	7,509,727	7,509,727	7,509,727		
Ending Fund Balance	\$ 27,458,427	\$ 7,484,727	\$ 7,625,660	\$ 7,625,660	\$ -	0.00%

Monthly Financial Report As of February 2025

Infrastructure Improvement Fund (404)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
All Other Operating Revenues	\$ 6,700,000	\$ 6,700,000	\$ 5,000,000	\$ 5,062,443	\$ 62,443	1.25%
Transfers/Advances In	5,750,000	14,069,100	-	-	-	0.00%
Total Revenues and Other Sources	12,450,000	20,769,100	5,000,000	5,062,443	62,443	1.25%
<u>Obligations</u>						
Capital Improvements	9,986,900	18,306,000	41,642	41,642	-	0.00%
Transfers/Advances Out	6,100,000	6,100,000	-	-	-	0.00%
Total Obligations	16,086,900	24,406,000	41,642	41,642	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(3,636,900)	(3,636,900)	4,958,358	5,020,801		
Beginning Fund Balance	5,549,699	5,549,699	5,549,699	5,549,699		
Ending Fund Balance	\$ 1,912,799	\$ 1,912,799	\$ 10,508,057	\$ 10,570,500	\$ 62,443	0.59%

Solid Waste Management Fund (710)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Charges for Services	\$ 1,900,000	\$ 1,900,000	\$ -	\$ (176,729)	\$ (176,729)	0.00%
All Other Operating Revenues	45,000	45,000	8,866	9,548	682	7.69%
Transfers/Advances In	2,000,000	2,000,000	-	-	-	-
Total Revenues and other sources	3,945,000	3,945,000	8,866	(167,181)	(176,047)	-1985.64%
<u>Obligations</u>						
Public Works	4,134,100	4,134,100	3,736,504	3,709,061	27,443	0.73%
Total Obligations	4,134,100	4,134,100	3,736,504	3,709,061	27,443	0.73%
Excess of Revenue and Other Sources over Obligations:	(189,100)	(189,100)	(3,727,638)	(3,876,242)		
Beginning Fund Balance	1,534,635	1,534,635	1,534,635	1,534,635		
Ending Fund Balance	\$ 1,345,535	\$ 1,345,535	\$ (2,193,003)	\$ (2,341,607)	\$ (148,604)	6.78%

Note: The negative revenue amount and the negative fund balance amount are a factor of the first half waiver of solid waste fees. First, the transfer from the General Fund to cover the waiver of first half fees has not occurred to date (timing). Second, delinquent collection through special assessment will not be received until March. Lastly, utility receipts are allocated via a standard methodology across the Solid Waste and Stormwater Fund (based on balance due). The waiver of fees has caused an accounting issue within the system as it relates to the first half bill. This issue will correct itself when the second half bill is sent and includes fees.

Water Surcharge Fund (720)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Charges for Services	\$ 855,000	\$ 855,000	\$ 39,678	\$ 218,078	\$ 178,400	449.62%
Total Revenues and other sources	855,000	855,000	39,678	218,078	178,400	449.62%
<u>Obligations</u>						
Public Works	490,700	490,700	112,483	102,158	10,325	9.18%
Capital Equipment	10,000	10,000	-	-	-	0.00%
Capital Improvements	246,000	246,000	-	-	-	0.00%
Transfers Out (including intra-city services)	99,900	99,900	2,056	2,056	-	0.00%
Total Obligations	846,600	846,600	114,539	104,214	10,325	9.01%
Excess of Revenue and Other Sources over Obligations:	8,400	8,400	(74,861)	113,864		
Beginning Fund Balance	1,778,865	1,778,865	1,778,865	1,778,865	-	
Prior Year Lapsed Encumbrances	-	-	-	-		
Ending Fund Balance	\$ 1,787,265	\$ 1,787,265	\$ 1,704,004	\$ 1,892,729	\$ 188,725	11.08%

Monthly Financial Report As of February 2025

Sanitary Sewer Surcharge Fund (730)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 1,333,000	\$ 1,333,000	\$ 58,140	\$ 319,001	\$ 260,861	448.68%
All Other Operating Revenues	1,500	1,500	-	794	794	0.00%
Total Revenue	1,334,500	1,334,500	58,140	319,795	261,655	450.04%
Obligations						
Public Works	1,214,000	1,214,000	164,123	143,882	20,241	12.33%
Capital Equipment	13,000	13,000	-	-	-	0.00%
Capital Improvements	315,000	315,000	-	-	-	0.00%
Transfers Out (including intra-city services)	27,600	27,600	5,784	5,784	-	0.00%
Total Obligations	1,569,600	1,569,600	169,907	149,666	20,241	11.91%
Excess of Revenue and Other Sources over Obligations:	(235,100)	(235,100)	(111,767)	170,129		
Beginning Fund Balance	2,831,202	2,831,202	2,831,202	2,831,202		
Ending Fund Balance	\$ 2,596,102	\$ 2,596,102	\$ 2,719,435	\$ 3,001,331	\$ 281,896	10.37%

Stormwater Management Fund (740)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 753,000	\$ 753,000	\$ 288,903	\$ 267,635	\$ (21,268)	301.00%
Investment Earnings	70,000	70,000	18,107	18,107	-	0.00%
Miscellaneous income	-	-	-	699	699	100.00%
Total Revenues and other sources	823,000	823,000	307,010	286,441	(20,569)	-6.70%
Obligations						
Public Works	690,000	690,000	89,050	72,792	16,258	18.26%
Capital Equipment	470,000	470,000	-	-	-	0.00%
Capital Improvements	449,800	449,800	-	-	-	0.00%
Transfers Out (including intra-city services)	77,600	77,600	2,940	2,940	-	0.00%
Total Obligations	1,687,400	1,687,400	91,990	75,732	16,258	17.67%
Excess of Revenue and Other Sources over Obligations:	(864,400)	(864,400)	215,020	210,709		
Beginning Fund Balance	2,987,559	2,987,559	2,987,559	2,987,559		
Ending Fund Balance	\$ 2,123,159	\$ 2,123,159	\$ 3,202,579	\$ 3,198,268	\$ (4,311)	-0.13%

Swimming Pool Fund (750)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 1,013,800	\$ 1,013,800	\$ 5,495	\$ 7,153	\$ 1,658	30.17%
Transfers/Advances In	300,000	300,000	-	-	-	0.00%
Total Revenues and other sources	1,313,800	1,313,800	5,495	7,153	1,658	30.17%
Obligations						
Parks and Recreation	1,140,600	1,140,600	107,888	88,503	19,385	17.97%
Total Obligations	1,140,600	1,140,600	107,888	88,503	19,385	17.97%
Excess of Revenue and Other Sources over Obligations:	173,200	173,200	(102,393)	(81,350)		
Beginning Fund Balance	397,663	397,663	397,663	397,663		
Ending Fund Balance	\$ 570,863	\$ 570,863	\$ 295,270	\$ 316,313	\$ 21,043	7.13%

Monthly Financial Report As of February 2025

Statement of Receipts and Disbursements (cash basis rounding)

<u>Fund</u>	<u>Beginning Balance</u>	<u>Year to Date & Transfer In</u>	<u>Year to Date & Transfer Out</u>	<u>Ending Balance</u>	<u>Percentage Change</u>
General	\$ 43,870,708	\$ 7,819,122	\$ 8,748,968	\$ 42,940,862	-2.1%
Capital Asset Management	24,410,352	2,304,853	-	26,715,205	9.4%
Police Pension	1,499,760	-	-	1,499,760	0.0%
Fire Pension	1,499,759	-	-	1,499,759	0.0%
Self Insurance	1,084,300	9,268	6,439	1,087,129	0.3%
Capital Equipment	1,720,307	-	124,861	1,595,446	-7.3%
Police & Fire Pension	1,422,653	-	-	1,422,653	0.0%
Technology Fund	425,843	41,147	141,274	325,716	-23.5%
Street Maintenance and Repair Fund	1,965,631	390,859	387,406	1,969,084	0.2%
EMS Billing Fund	1,691,000	246,859	17,430	1,920,429	13.6%
Law Enforcement	2,739,032	20,497	57,535	2,701,994	-1.4%
Tree Planting Fund	92,965	1,900	-	94,865	2.0%
Enforcement Education	20,650	100	-	20,750	0.5%
Mayor's Court Computer	45,728	807	-	46,535	1.8%
Mayor's Court Special Project	171,505	2,700	-	174,205	1.6%
Local Fiscal Recovery Fund	2,192,062	-	657,462	1,534,600	-30.0%
OneOhio Opioid Fund	141,353	-	900	140,453	-0.6%
Economic Development	2,078,781	-	558	2,078,223	0.0%
Arlington Centre TIF Fund	116,976	-	-	116,976	0.0%
Tremont Road TIF Fund	18,760	-	-	18,760	0.0%
Lane Avenue Mixed Use TIF Fund	738,355	-	-	738,355	0.0%
Lane Avenue TIF Fund	304,986	-	-	304,986	0.0%
Arlington Crossing TIF Fund	1,068,524	-	-	1,068,524	0.0%
Horizon TIF Fund	1,053,912	-	-	1,053,912	0.0%
Kingsdale West TIF Fund	395,386	-	-	395,386	0.0%
Kingsdale CORE TIF Fund	668,801	-	-	668,801	0.0%
Civil Service	60,960	-	2,180	58,780	-3.6%
Riverside North TIF Fund	19,946	-	-	19,946	0.0%
Riverside South TIF Fund	224,430	-	-	224,430	0.0%
W. Lane Northwest TIF Fund	22,542	-	-	22,542	0.0%
Lane II TIF Fund	1,265,563	-	3,200	1,262,363	-0.3%
Kingsdale Center TIF Fund	30,032	-	-	30,032	0.0%
Gateway TIF Fund	39,409	-	-	39,409	0.0%
Neighborhood Lighting Utility	318,423	28,747	5,077	342,093	7.4%
Clerk of Courts Fund	21,343	808	-	22,151	3.8%
UA Visitor's Bureau Fund	572,453	17,297	-	589,750	3.0%
General Bond Retirement	315,716	-	52,292	263,424	-16.6%
Bonded Improvements	13,072,564	162,333	2,223,017	11,011,880	-15.8%
Infrastructure Improvement Fund	25,102,125	5,062,443	7,760,192	22,404,376	-10.7%
Estate Tax Fund	85	-	-	85	0.0%
Community Fiber Optic Fund	352,606	-	10,888	341,718	-3.1%
Employee Benefit	2,014,911	867,321	1,018,600	1,863,632	-7.5%
BWC Administration Fund	1,340,044	72,880	41,725	1,371,199	2.3%
Solid Waste Management	1,919,144	(167,181)	626,400	1,125,563	-41.4%
Water Surcharge	1,952,948	218,078	53,070	2,117,956	8.4%
Sanitary Sewer Surcharge	3,532,735	319,795	490,258	3,362,272	-4.8%
Stormwater Management	3,301,276	286,441	399,488	3,188,229	-3.4%
UA Swimming Pools	397,663	7,153	27,962	376,854	-5.2%
Unclaimed Funds	8,491	7	-	8,498	0.1%
Revolving Fund	53,814	20,300	10,891	63,223	17.5%
Construction Withholding	3,108,854	121,161	846,632	2,383,383	-23.3%
Payroll Clearing Fund	330,833	6,785,591	6,552,705	563,719	70.4%
Totals (ROUNDED)	\$ 150,816,999	\$ 24,641,286	\$ 30,267,410	\$ 145,190,875	ROUNDED TOTALS

Monthly Financial Report As of February 2025

Income Tax Comparisons

	Projections	Year to date	Difference	% Difference
Withholdings	\$ 5,065,398	\$ 5,635,599	\$ 570,201	11.26%
Individuals	1,868,258	1,418,860	(449,398)	-24.05%
Net Profits	949,606	1,174,152	224,546	23.65%
Total	\$ 7,883,262	\$ 8,228,611	\$ 345,349	4.38%

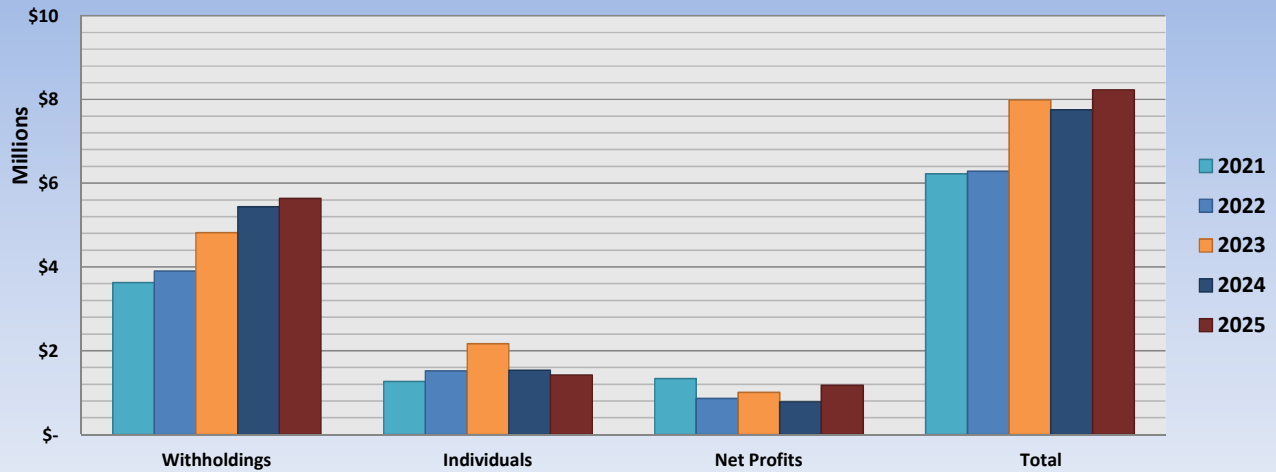
Income Tax Five Year Comparison

	2021	2022	2023	2024	2025
Withholdings	\$ 3,623,583	\$ 3,901,620	\$ 4,815,201	\$ 5,434,722	\$ 5,635,599
Individuals	1,265,502	1,518,770	2,167,018	1,533,691	1,418,860
Net Profits	1,332,654	863,803	1,008,880	780,294	1,174,152
Total	\$ 6,221,739	\$ 6,284,193	\$ 7,991,099	\$ 7,748,707	\$ 8,228,611

Percentage Increase (Decrease) From Prior Year

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
Withholdings	14.71%	7.67%	23.42%	12.87%	3.70%
Individuals	9.43%	20.01%	42.68%	-29.23%	-7.49%
Net Profits	18.28%	-35.18%	16.80%	-22.66%	50.48%
Total	14.33%	1.00%	27.16%	-3.03%	6.19%

Income Tax Five Year Trend vs Prior YTD Monthly



Interest & Investment Income

Feb-25

General Investments	Beginning Balance	Purchased	Matured/Sold	Deposited/Withdrawn	Investment Acct.	Ending Balance
Municipal Securities	4,102,786.00					\$ 4,102,786.00
Corporate / General Investments	11,764,306.18					\$ 11,764,306.18
Federal Agency	54,336,202.52					\$ 54,336,202.52
US Government Bonds	22,832,284.44					\$ 22,832,284.44
Total Bonds	\$ 93,035,579.14	\$ -	\$ -	\$ -	\$ -	\$ 93,035,579.14
Short Term Fixed Maturity Commercial Paper	-					\$ -
Other Assets (Savings Cert - Market Traded)	\$ 3,439,988.55					\$ 3,439,988.55
Bond and Investments:						
2022						
Federal Agency	-					\$ -
Corporate / General Investments	-					\$ -
Short Term Fixed Maturity Commercial Paper	-					\$ -
US Government Bonds	225,787.50		(112,635.94)			\$ 113,151.56
Community Center						
Federal Agency	1,655,368.06		(631,577.52)			\$ 1,023,790.54
US Government Bonds	512,080.08					\$ 512,080.08
Total Bonds & Investments	\$ 98,868,803.33	\$ -	\$ (744,213.46)	\$ -	\$ -	\$ 98,124,589.87
Money Markets:						
General	85,849.82			(2,365.00)	315,550.29	\$ 399,035.11
Community Center	12,339.73		630,000.00	(650,000.00)	14,209.72	\$ 6,549.45
Bond 2020 & 2022	3,342.48		120,000.00	(120,000.00)	1,216.44	\$ 4,558.92
Total Money Markets	\$ 101,532.03	\$ -	\$ 750,000.00	\$ (772,365.00)	\$ 330,976.45	\$ 410,143.48
Star Ohio:						
General Investment	31,194,365.19	2,269,021.09		(4,000,000.00)	105,136.45	\$ 29,568,522.73
Bond Proceeds	7,602,095.84	120,000.00		(715,359.30)	25,284.73	\$ 7,032,021.27
Federal ARPA (Gen. Inv.)	2,045,724.05			(665,318.97)	6,149.73	\$ 1,386,554.81
Gateway	977,822.98				3,368.97	\$ 981,191.95
Kingsdale	230,717.59				794.91	\$ 231,512.50
Community Center	786,778.77	650,000.00		(478,316.58)	2,463.78	\$ 960,925.97
Office (Comm. Center)	2,552,401.92			(410,026.24)	8,240.18	\$ 2,150,615.86
Total STAR Ohio	\$ 45,389,906.34	\$ 3,039,021.09	\$ -	\$ (6,269,021.09)	\$ 151,438.75	\$ 42,311,345.09
Total Investments	\$ 144,360,241.70	\$ 3,039,021.09	\$ 5,786.54	\$ (7,041,386.09)	\$ 482,415.20	\$ 140,846,078.44
NW Huntington Bank	\$ 2,047,842.91					\$ 4,344,801.83
Total Cash & Investments	\$ 146,408,084.61					\$ 145,190,880.27

ITEMS PURCHASED BETWEEN \$25,000 & \$150,000 FEBRUARY 2025

[illegible]

QUALITY BASED SELECTION CONSULTANTS – FEBRUARY 2025

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
None			

NOTIFICATION OF CHANGE ORDERS: NON-CONSTRUCTION, CITY MANAGER APPROVAL
FEBRUARY 2025

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>CHANGE ORDER AMOUNT</u>	<u>New Total</u>
2/6/25	Atlantic Emergency Solutions	Changes to Ladder Truck	\$7,085.00	\$1,410,813.00

GRANTS FEBRUARY 2025

<u>DATE</u>	<u>ORGANIZATION</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
2/11/25	Syntero	Older Adult Programs	\$30,000.00
2/26/25	Common Greens	UA Farmer's Market	\$15,000.00
2/26/25	St. Mark's Episcopal Church	UA Culture & Artisans Fair	\$3,000.00



Street Renaming Policy

The Street Name Change Review Process for eligible streets begins with the submission of a complete application.

An eligible street is one that has not had a name change within the past 50 years.

A complete application includes the following:

1. Copy of the tax map showing:
 - a. The street to be renamed and all lots involved in the request
 - b. All streets that intersect the street to be renamed
 - c. Requests must be for a continuous length of the street that begins and ends at a logical termini such as a dead end or intersection
2. Requested new street name
3. Provide biographical or historical information about the person or event for whom the street would be named after. Only individuals who are deceased are eligible for street renaming. If the request is to name the street after a person, the application should detail how the person was outstanding in achievement in the arts, professions, politics, science, education, sports, religion, commerce, philanthropy, public service, or a reputation that brings honor to the community, or personal commitment and service to the community, or has had a lasting effect for the good of the community.*
4. Following the receipt of an application, a petition will be prepared by the City Engineering Division containing all the names and addresses of property owners with land abutting the street in question (see a through c below). It will then be provided to the applicant for circulation. It will be the applicant's responsibility to contact all adjacent property owners in order to obtain evidence of 90% concurrence to the proposed street name change. Objections by 10% or more adjacent property owners, and/or a failure to obtain evidence to the contrary from each adjacent owner, will prevent said street renaming request from proceeding for City Council consideration.
 - a. A petition requires a minimum of ten signatures

- b. If a street has less than ten parcels, any properties that touch the street (such as a side or back yard) must be included in the petition even if it would not result in an address change for that property.
 - c. If this still results in less than ten properties, the closest properties on intersecting streets must be included in the petition even if it would not result in an address change for that property.
5. \$500 application fee. The City will return \$400 of the fee if the request is not granted.

Upon receipt of a complete application, staff will review the application and provide Council with:

1. Historical information about the current street name (if available)
2. A recommendation as to whether the requested name is consistent with City's Policy for Naming Public Properties, adopted 2/27/17.
3. A report detailing any concerns staff has identified with naming a street after the individual including the Franklin County Engineer's Office analysis to identify any conflicts across the County.
4. An estimated cost of replacing the renamed street signs

* These criteria match the criteria for eligibility for induction in the Wall of Honor.



Authors: Gary Wilfong, P.E., Public Service Director
Aaron Scott, City Engineer

Council Meeting Date: April 21, 2025

Subject/Legislative Item: Ordinance No. 12-2025 - An ordinance authorizing the City Manager to enter into contract with Strawser Paving Company for construction-related services for the 2025 Street Reconstruction Project

Purpose: To Maintain and Improve the Roadway System

Executive Summary: Legislation authorizes the City Manager to enter into contract for construction-related services for the 2025 Street Reconstruction Project.

Purpose and Impact

This is an ordinance authorizing the City Manager to enter into contract with Strawser Paving Company in the amount of \$2,755,904.78 for the 2025 Street Reconstruction Project (SRP).

On Wednesday, April 2, 2025, the City received bids from two (2) contractors: Strawser Paving Company and Decker Construction Company. The results are summarized below:

	Base Bid	Alternate A - RAP Substitute	Alternate B - Mill and Overlay Streets	Base Bid + Alternate A & B
Strawser Paving Company	\$2,299,416.88	\$0	\$205,951.10	\$2,505,367.98
Decker Construction	\$2,346,128.50	\$55,910.30	\$207,915.06	\$2,609,953.86
Engineer's Estimate	\$2,529,075.20	\$0	\$237,791.85	\$2,766,867.05

Strawser Paving Company had the lowest and best base bid of \$2,299,416.88.

The base bid includes typical virgin asphalt material while Alternate Bid A substitutes recycled asphalt pavement (RAP) for the virgin material. Alternate Bid B includes streets to be milled and overlaid. Strawser Paving Company had the lowest and best total bid of \$2,505,367.98 for



the combination of the Base Bid and Alternates A & B. The total contract value of \$2,755,904.78 includes the Base Bid, Alternates A & B, as well as a 10% construction contingency. The proposed contract remains within the 2025 budgeted amount of \$2,970,000, therefore staff recommends awarding the Base Bid and both Alternates.

SRP construction includes: full-depth base pavement reclamation with new pavement, curb and gutter, drive aprons and the restoration of any affected lawn areas. Full-depth base pavement reclamation (also known as cement stabilization) means that the road will be replaced approximately 16-inches deep with the bottom 12-inches reusing existing road base material mixed with cement, then 4-inches of asphalt. The SRP streets and limits are summarized in **Table 1**, streets to be milled and overlaid in Alternate B are listed below in **Table 2**.

Table 1:

Street	From	To
Bramford Road	Woodbridge Road	Lytham Road
Carriage Hill Drive	Windham Road	Longeaton Drive
Chardon Road	Mountview Road	Woodbridge Road
Churchview Lane	Reed Road	Patricia Drive
Dorchester Road	Fishinger Road	Cranford Road
Hove Road	Fishinger Road	Fishinger Road
Overdale Drive	Donna Drive	Johnston Road
Walhaven Road	Glenmere Road	Surrey Hill Road
Wesleyan Drive	Mountview Road	Redding Road
Brixton Road*	Mountview Road	Canterbury Road
Crafton Park*	Leeds Road	Cul de sac
Edington Road*	S. Dorchester	Dead End
S. Dorchester Road*	Charing Road	Canterbury Road
S. Dorchester Road*	Canterbury Road	Zollinger Road
Sunset Drive*	Wickliffe Road	Swansea Drive

*Denotes streets to be milled and overlaid included in the base bid



Table 2:

Street	From	To
Bristol Road	Kioka Road	Mountview Road
Camborne Road	McCoy Road	Sheringham Road
Club Road	Oxford Drive	Cambridge Blvd
Deno's Ct	Burbank Drive	Cul de sac

History

The Street Reconstruction Program is an annual Capital Improvement Project that consists of full-depth base pavement reclamation with new pavement, curb and gutter, drive aprons and the restoration of any affected lawn areas. The City determines which streets receive maintenance based on physical inspections of the roadway which are performed every two (2) years. In the past, these inspections have utilized the Pavement Condition Rating (PCR) method, which generates a 1-100 score based on four roadway elements. In 2024, the Engineering Division transitioned from the Pavement Condition Rating method to the Pavement Condition Index (PCI). The PCI rating system is a nationally used rating system developed by the United States Army Corps of Engineers (USACE) which was then adopted by the Department of Defense as well as the American Public Works Association. After comparing our past PCR method to the PCI method, staff determined that the Pavement Condition Index would provide a more comprehensive and objective look at the quality of our pavement.

In making this transition, staff partnered with Applied Pavement Technologies (APTech) to perform the 2024 PCI street ratings. APTech utilizes a vehicle outfitted with the Laser Crack Measurement System (LCMS), which allows automated data collection at normal roadway speeds. The LCMS system maps and records pavement distresses which, when combined with artificial intelligence processing software, produces a PCI rating based on the standards established by the USACE and memorialized by the American Society for Testing and Materials in the ASTM 6433 specification.

Similar to the PCR system, the Pavement Condition Index is a scale ranging from 1 to 100. To establish a PCI score, eight (8) different distress types along with their associated severity are evaluated to determine the "deduct value". The sum of all eight deduct values is subtracted from 100 to determine the PCI score. The distress types are:

- Alligator Cracking
- Block Cracking
- Longitudinal and Transverse Cracking
- Distortions
- Patching and Utility Cuts
- Rutting and Depression
- Raveling



- Weathering

In addition to the Pavement Condition Index, staff continues to evaluate the condition of our curb and gutter. Curbs are rated from 0 to 5, with 5 being the worst condition. Street segments with Curb/Gutter Deterioration or distress indicative of a base failure are reviewed as candidates for full-depth reconstruction projects. All others are reviewed as candidates for the pavement maintenance program.

Recycled asphalt pavement materials reduce the environmental footprint of infrastructure, with typically slight additional costs over traditional asphalt, but in this case there are no additional costs to utilize RAP. To date, the city's pilot test of a side-by-side comparison on Mountview Road in 2019 does not show any differences in terms of quality or performance. Material testing is required to ensure compliance with road specifications, including volumetric, aggregate gradation, binder volume, and binder/asphalt mixture performance grading. Up to 60% Recycled Asphalt Product (RAP) is permitted and will be tested to ensure these specifications are met. Due to the city's commitment to sustainability, it is recommended to award the alternative bid that includes the recycled asphalt pavement.

Updated construction information on this and other 2025 Capital Projects can be found on our online construction Storymap located here: <https://storymaps.arcgis.com/collections/a618ce4fe1d649fc9f7da209eefb2e8d?item=1>

Alternatives

Council can choose not to authorize the City Manager to enter into contract with Strawser Paving Company for this project. This will delay construction on streets with the greatest need for replacement.

Council could choose any different combination of base bid and alternates. However, if Council chooses to authorize the contract for the base bid, it is recommended that Alternate A be authorized as well. This allows the use of recycled material, is within budget, and is in line with the City's sustainability efforts. However, Council could award the Base Bid without RAP, which would not change the contract amount.

Attachments

1.	Ordinance No. 12-2025
----	-----------------------



RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 12-2025

TO AUTHORIZE THE CITY MANAGER TO ENTER INTO CONTRACT WITH STRAWSER PAVING COMPANY FOR CONSTRUCTION-RELATED SERVICES FOR THE 2025 STREET RECONSTRUCTION PROJECT

- WHEREAS,** the City of Upper Arlington annually undertakes a Street Reconstruction Program (SRP) to maintain and improve roadway infrastructure, including pavement, curbs, gutters, drive aprons, and lawn restoration; and
- WHEREAS,** the City evaluates roadway conditions every two years and has transitioned from the Pavement Condition Rating (PCR) method to the nationally recognized Pavement Condition Index (PCI), which provides a more comprehensive and objective assessment; and
- WHEREAS,** Recycled Asphalt Pavement (RAP) has proven to meet performance standards with no added cost and supports the City's sustainability goals; and
- WHEREAS,** competitive bids for the 2025 SRP were received on April 2, 2025, with Strawser Paving Company submitting the lowest and best bid of \$2,505,367.98 for the Base Bid plus Alternates A (RAP) and B (mill and overlay), and the total contract value including a 10% contingency is \$2,755,904.78, within the budgeted amount of \$2,970,000; and
- WHEREAS,** it is therefore recommended that the City Manager be authorized to enter into contract with Strawser Paving Company for the 2025 Street Reconstruction Project.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Upper Arlington, Ohio:

SECTION 1. The City Manager is hereby authorized to enter into contract with Strawser Paving Company in an amount not to exceed \$2,755,904.78, which includes the Base Bid and Alternates A and B, and a 10-percent contingency, for construction-related services for the 2025 Street Reconstruction Project.

SECTION 2. The City Manager, Finance Director, and the City Attorney are hereby authorized to take all actions, including the execution of all documents or amendments necessary to enter into, implement, and administer the contract, that are not substantially inconsistent with this ordinance.

SECTION 3. This ordinance shall take effect immediately upon passage.



Authors: Gary Wilfong, P.E., Public Service Director
Aaron Scott, City Engineer

Council Meeting Date: April 21, 2025

Subject/Legislative Item: Ordinance No. 13-2025 - An ordinance authorizing the City Manager to enter into contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sustainable Sewer Solutions Project

Purpose: To Maintain and Improve the Wastewater System.

Executive Summary: Legislation authorizes the City Manager to enter into contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sustainable Sewer Solution Project.

Purpose and Impact

This is an ordinance authorizing the City Manager to enter into contract with Performance Pipelining, Inc. in the amount of \$1,300,925.14 for the 2025 Sustainable Sewer Solutions (SSS) Project. On Monday, March 31, 2025, the City received bids from three contractors. The results are summarized below:

	2025 SSS Bid Price
Performance Pipelining, Inc.	\$1,182,659.22
BLD Services, LLC	\$1,352,790.00
United Survey	\$1,392,376.00
Engineer's Estimate	\$1,274,724.00

Performance Pipeline, Inc. had the lowest and best bid of \$1,182,659.22.

The amount included in the 2025 budget for the project is \$1,608,565. With a 10% construction contingency, the 2025 SSS project contract is under budget at \$1,300,925.14.

Under the requirements of the Ohio Environmental Protection Agency (OEPA) Director's Final Findings and Orders, the Engineering Division studied the sewer systems and developed a remediation plan to reduce excessive inflow and infiltration (I/I) of rain water into the sanitary sewer system. The OEPA has approved the remediation plan which we call the Sustainable Sewer Solutions Program. This program also updates and improves the overall sanitary sewer



system for Upper Arlington.

The attached exhibit shows the limits of the 2025 SSS project, generally located near the intersection of Riverside Drive and Nottingham Road.

History

This project is part of the Ohio EPA-approved plan to address inflow and infiltration into the sanitary sewer system. The total program cost over the plan is estimated at \$18,150,000. Construction of the program began in 2017 and must be completed by 2028 to meet EPA requirements.

A map of the overall SSS plan can be found on the city's website at:

<https://upperarlingtonoh.gov/wp-content/uploads/2018/07/Sustainable-Sewer-Solutions-Map.pdf>

A video overview of the program can be found at:

<https://www.youtube.com/watch?v=j3okYViZVPQ>

More information on the overall 2025 CIP can be found on the city's GIS system at:

<https://storymaps.arcgis.com/collections/a618ce4fe1d649fc9f7da209eefb2e8d?item=1>

Alternatives

Council could choose not to authorize the City Manager to enter into contract with Performance Pipelining, Inc. for the project. Upper Arlington would still be required to complete this project prior to the 2028 deadline.

Attachments

1.	2025 Sustainable Sewer Solution Program Area
2.	Ordinance No. 13-2025



RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 13-2025

TO AUTHORIZE THE CITY MANAGER TO ENTER INTO CONTRACT WITH PERFORMANCE PIPELINING, INC. FOR CONSTRUCTION-RELATED SERVICES FOR THE 2025 SUSTAINABLE SEWER SOLUTIONS PROJECT

WHEREAS, the City of Upper Arlington is implementing the Sustainable Sewer Solutions (SSS) Program as required by the Ohio Environmental Protection Agency (OEPA) Director's Final Findings and Orders to reduce inflow and infiltration (I/I) of stormwater into the sanitary sewer system; and

WHEREAS, the OEPA has approved the City's 17-year remediation plan, which began in 2017 and must be completed by 2028, which will improve and update the City's sanitary sewer system; and

WHEREAS, on March 31, 2025, the City received three bids for the 2025 SSS Project, with Performance Pipelining, Inc. submitting the lowest and best bid in the amount of \$1,182,659.22; and

WHEREAS, with a 10-percent construction contingency, the total contract amount of \$1,300,925.14 remains within the 2025 budgeted amount of \$1,608,565; and

WHEREAS, it is therefore recommended that the City Manager be authorized to enter into contract with Performance Pipelining, Inc. in an amount not to exceed \$1,300,925.14 for construction-related services for the 2025 SSS Project.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Upper Arlington, Ohio:

SECTION 1. The City Manager is hereby authorized to enter into contract with Performance Pipelining, Inc. in an amount not to exceed \$1,300,925.14, which includes a 10-percent contingency, for construction-related services for the 2025 Sustainable Sewer Solutions Project.

SECTION 2. The City Manager, Finance Director, and the City Attorney are hereby authorized to take all actions, including the execution of all documents or amendments necessary to enter into, implement, and administer the contract, that are not substantially inconsistent with this ordinance.

SECTION 3. This ordinance shall take effect immediately upon passage.



Authors: Gary Wilfong, P.E., Public Service Director
Aaron Scott, City Engineer

Council Meeting Date: April 21, 2025

Subject/Legislative Item: Ordinance No. 14-2025 - An ordinance authorizing the City Manager to enter into a contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sanitary Sewer Repairs Project

Purpose: To Maintain and Improve the Wastewater System

Executive Summary: This legislation authorizes the City Manager to enter into contract with Performance Pipelining, Inc. for construction-related services for the 2025 Sanitary Sewer Repairs Project.

Purpose and Impact

This is an ordinance authorizing the City Manager to enter into contract with Performance Pipelining, Inc. in the amount of \$165,965.80 for the 2025 Sanitary Sewer Repairs Construction Contract. On Monday, March 31, 2025, the City received bids for the project from four (4) contractors. The results are summarized below:

	Bid Price
Visu-Sewer of Ohio, LLC	\$181,961.40
Insight Pipe Contracting, LLC	\$173,300.00
Performance Pipelining, Inc.	\$150,878.00
United Survey	\$183,386.00
Engineer's Estimate	\$180,388.00

Performance Pipelining, Inc. had the lowest and best bid of \$150,878.00. The amount included in the 2025 budget for this project is \$215,000 (Sanitary Sewer Surcharge Fund). The total contract price is under budget at \$165,965.80, which includes a 10% contingency.

History

This project consists of sanitary sewer lining of approximately 1,964 linear feet of 8-inch pipe and point repair work for 1 location. The proposed work has been prioritized based on recommendations from the Public Works Division from conditions found while performing



periodic video inspection of the lines. Point Repairs are prioritized by Public Works and are completed as funds remain.

Alternatives

The alternative to not authorize the City Manager to enter into contract with Performance Pipelining, Inc. for this project would delay top priority repairs and maintenance to the sewer system, which could lead to sewer backup and/or more costly improvements.

Attachments

1.	Ordinance No. 14-2025
----	-----------------------



RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON

STATE OF OHIO

ORDINANCE NO. 14-2025

TO AUTHORIZE THE CITY MANAGER TO ENTER INTO CONTRACT WITH PERFORMANCE PIPELINING, INC. FOR CONSTRUCTION-RELATED SERVICES FOR THE 2025 SANITARY SEWER REPAIRS PROJECT

WHEREAS, the 2025 Sanitary Sewer Repairs Project consists of lining approximately 1,964 linear feet of 8-inch sanitary sewer pipe and performing point repair work at one location, prioritized based on recommendations from the Public Works Division following periodic video inspections; and

WHEREAS, on March 31, 2025, the City received bids from four contractors, with Performance Pipelining, Inc. submitting the lowest and best bid of \$150,878.00; and

WHEREAS, including a 10% contingency, the total contract price of \$165,965.80 remains below the allocated budget of \$215,000; and

WHEREAS, it is therefore recommended that the City Manager be authorized to enter into a contract with Performance Pipelining, Inc. to ensure the successful completion of the 2025 Sanitary Sewer Repairs Project.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Upper Arlington, Ohio:

SECTION 1. The City Manager is hereby authorized to enter into contract with Performance Pipelining, Inc. in the amount of \$165,965.80, which includes a 10-percent contingency, for the 2025 Sanitary Sewer Repairs Project.

SECTION 2. The City Manager, Finance Director, and the City Attorney are hereby authorized to take all actions, including the execution of all documents or amendments necessary to enter into, implement, and administer the contract, that are not substantially inconsistent with this ordinance.

SECTION 3. This ordinance shall take effect immediately upon passage.



Authors:	Gary Wilfong, P.E., Public Service Director
Council Meeting Date:	April 21, 2025
Subject/Legislative Item:	Resolution No. 4-2025 - A resolution authorizing the City's participation in the Ohio Department of Transportation Cooperative Contract Program for rock salt
Purpose:	To provide the necessary materials to maintain roadway safety during winter weather events.
Executive Summary:	Legislation authorizes the City Manager to participate in the ODOT Cooperative Rock Salt Purchasing Contract.

Purpose and Impact

The Public Service Department proposes to purchase 1,500 tons of rock salt through the Ohio Department of Transportation's cooperative contract program for the upcoming 2025-26 winter season.

Ohio Department of Transportation (ODOT) plans to bid this salt contract in the next couple of months and the proposed contract is estimated to begin June 2025 and end May 2026. Local government agencies are required by ODOT to pass a subject specific resolution confirming the agency's intention to join the ODOT salt contract. The resolution must be submitted to ODOT by May 2, 2025.

History

During the 2024-25 winter season, the Public Works Division used 1445 tons of salt and in the 2023-2024 winter season we used 1,284 tons.

In the 2024 budget, we spent \$96,840.00 for 1,500 tons of rock salt at a cost of \$64.56 per ton. In the 2025 budget, we allocated \$250,000 for purchasing salt. We anticipate that we will spend an estimated \$95,340.00 for 1,500 tons of rock salt at an estimated cost of \$63.56 per ton.

This resolution to participate in the ODOT program will ensure that our salt supplies are maintained at maximum capacity, ensuring our ability to maintain safe roadways during winter weather events. Upper Arlington has participated in this cooperative contract for the past nine (9) years.

Rock salt stored in our barn for snow and ice removal purposes will not go bad because it is a naturally occurring mineral that does not decompose or degrade over time. As long as it is



stored in a dry environment away from moisture, sunlight, and contaminants, rock salt remains effective for melting snow and ice indefinitely. Its chemical composition remains stable, ensuring its usability whenever needed during winter weather conditions.

Alternatives

Delaying the passage of this resolution may delay the acquisition of materials necessary to maintain safe roadways during a snow and ice weather event on Upper Arlington’s 365 lane miles of roadway.

Attachments

1.	Resolution No. 4-2025
----	-----------------------



RECORD OF RESOLUTIONS

CITY OF UPPER ARLINGTON
STATE OF OHIO

RESOLUTION NO. 4-2025

A RESOLUTION AUTHORIZING THE CITY'S PARTICIPATION IN THE OHIO DEPARTMENT OF TRANSPORTATION COOPERATIVE CONTRACT PROGRAM FOR ROCK SALT

- WHEREAS,** it is the responsibility of the City to maintain and operate the City's roadways for the safety of the community; and
- WHEREAS,** the Ohio Department of Transportation (ODOT) has invited the City to participate in its 2025-2026 "Salt Participation Program" in order to purchase rock salt; and
- WHEREAS,** the City, pursuant to Ohio Revised Code 5513.01(B), may participate in the contracts entered into by the Ohio Department of Transportation; and
- WHEREAS,** the City of Upper Arlington hereby requests participation in the program for a total of 1,500 tons of sodium chloride (rock salt), of which Upper Arlington agrees to purchase from its awarded salt supplier at the delivered bid price per ton, awarded by the Director of ODOT; and
- WHEREAS,** the program year is estimated to begin in June 2025 and run through May 2026.

NOW, THEREFORE, BE IT RESOLVED by the Council of the City of Upper Arlington, Ohio:

- SECTION 1.** The City of Upper Arlington is hereby authorized to participate in the Ohio Department of Transportation Cooperative Contract Program for the purchase of rock salt for program year 2025-2026.
- SECTION 2.** This City Council hereby directs City staff to submit a copy of this resolution to the Ohio Department of Transportation (ODOT) prior to its May 2, 2025 deadline.
- SECTION 3.** This resolution shall take effect immediately upon passage.

Housing Market Detailed Analysis

City of Upper Arlington

2025 **DRAFT**

Contents

💡	EXECUTIVE SUMMARY	3
➡	COMPARISON COMMUNITIES	8
➡	PEOPLE AND PLACE	15
✓	MARKET STUDY KEY FINDINGS	25
➡	DEVELOPMENT ECONOMICS	31
➡	ENGAGEMENT RESULTS	43
📍	OPPORTUNITIES FOR FURTHER STUDY	55

DRAFT - EXPECTED Published April 2025

© 2025 CommunityScale. All rights reserved.





Executive summary

This is a detailed analysis of Upper Arlington's housing market to provide data-driven insights into housing affordability, availability, and long-term trends. Focuses on understanding the city's current housing stock, demographic changes, and economic factors that impact residents and housing development.

Executive summary

The information in this detailed housing market analysis is intended for the City to evaluate policies and programs that seek to grow the City responsibly and increase housing options for residents, whether they are forming a new household in Upper Arlington, entering as a new resident, or looking to remain in Upper Arlington through various life stages.

This study provides a review of demographic trends, comparable communities, regional influences, and a quantitative deep dive into issues that shape the housing market. The analysis is grounded by interviews with stakeholders such as single-family and multifamily housing developers, regional and local government staff, and housing advocates, as well as an online survey with more than 700 responses.

In summary, the following conditions and trends are expected to shape the housing market in and around Upper Arlington through 2050:

1. **Ongoing Regional Growth:** MORPC's Metropolitan Transportation Plan forecasts Central Ohio to continue strong growth. Additional growth will be driven by job creation from mega-projects at Intel, Honda-LG, and advanced defense manufacturing, along with ongoing in-migration. Upper Arlington's housing market could absorb 57 housing units per year through 2050. If the City doesn't add housing at the regional growth rate, residents will see price escalation exceeding regional and national norms. As a predominantly build-out and land-locked community, realizing this 9.8% growth in housing units over the next 25 years will require intensification of land use, such as redeveloping low density commercial to have housing on upper stories and allowing replacement of single-family housing with duplexes, quadplexes, and townhomes.
2. **Upper Arlington's Strong Market Position:** Higher-income families attracted by the community's quality of life have a high willingness-to-pay for new housing in Upper Arlington. The median household income in the City is high and has been growing, putting it on par with communities like Dublin and Bexley, Ohio. The median income surpasses notable national communities such as Carmel, IN, Fairfax, VA, and Oak Park, IL. Due to high demand and constraints on housing production, Upper Arlington's ownership and rental vacancy rates are less than what is considered healthy for a market, leading to pent-up demand and households not forming.



3181 Northwest Blvd - The Kingston

EXECUTIVE SUMMARY

3. **Addressing Housing Needs Across Life Stages:** Upper Arlington has successfully attracted families but faces challenges retaining young adults (ages 20-34) and empty nesters (ages 50-64) due to limited suitable housing options. Both empty nesters and younger professionals demonstrate preference walkable, urban-style living environments. This preference was echoed in this study's Housing Market Survey with more than 700 responses. Most responders would prefer houses with small yards within an easy to walk to places you need to go. Increasing housing diversity, including multifamily, mixed-use, and senior independent living facilities with supportive services will help retain these demographics. Given the rate of older adults in the community and their likelihood of downsizing into a new unit, an estimated 145 new senior living units could easily be absorbed by growth in the market without addressing pent up demand from existing residents.
4. **Development Economics for New Ownership Properties:** High construction costs (\$200-\$300 per sq ft), coupled with rising land prices (\$1.3M per acre median for lots that have been redeveloped in the last 5 years), have led to market prices for new homes well above the median income of residents. Single-family home redevelopment typically results in sale prices exceeding \$1M even for smaller homes on smaller lots. The cost of larger single-family homes on larger lots is variable due to differences in land costs, but similarly are typically delivered at a market price of at least \$1.8M.
5. **Development Economics for New Large Rental Properties:** Financial feasibility is driven by market rent, annual return on investment ("cap rate"), and construction costs. Market rents are competitive with the region and are around \$2,250 for a 900 sq ft apartment, which is affordable to a household earning \$98,000 a year. In Upper Arlington, that unit is likely to be suitable for a younger household, downsizing seniors, or empty nester. To achieve viability given land prices of about \$2M per acre along with other costs, the economic model estimates that large scale rental developments would require subsidies averaging \$79K per unit, which includes support for structured parking needed to reach higher density. Looking ahead, the such subsidy rates are consistent with incentives being offered by the City of Columbus and some other jurisdictions to encourage denser, mixed use development and redevelopment.



Thrive Quarry Trails, Columbus

EXECUTIVE SUMMARY

6. **Incentivizing Large Scale Redevelopment:** As discussed, large scale redevelopment currently requires public support to be financially viable. Furthermore, Upper Arlington competes for developers with nearby Columbus on subsidy amounts. For example, if two otherwise equal redevelopment opportunities were on the Upper Arlington and Columbus sides of Henderson Road, developers expressed that they would choose to build in Columbus due to the generous incentives offered in the form of long-term tax abatements.
7. **The Need to Balance of Revenue and Cost of City Services Per Unit:** New homes in Upper Arlington generate municipal revenue exceeding service costs, thus providing a net positive impact on municipal finances. The break-even assessed value per unit is approximately \$619K, current market values for new construction easily surpass. The marginal cost to serve a new home in Upper Arlington is a function of services that need to scale with new demand but are not inherently covered by their own fees. Police, fire, EMS, and Parks and Recreation are funded by the City's general revenue, whereas other services like waste, water, and sewer are covered by fees connected to those services. These expenses are then balanced by revenues from property tax, income tax for work-from-home, and ongoing revenue positive building permit fees for redevelopment and renovation.
8. **Economies of Scale Help with Municipal Finance:** As cities grow, the cost of providing essential services per household decreases because the new homes leverage existing infrastructure and distribute expenses such as police, fire protection, and parks across more households. More precisely, the relationship between growth and overall expenses is nonlinear as cities achieve 15% efficiency gains in infrastructure and service provision. Larger cities can provide essential services like police, fire protection, and parks at a lower per-unit cost due to these economies of scale. For Upper Arlington, a 9.8% increase in housing units from 2025-2050 as forecasted by MORPC's Metropolitan Transportation Plan would only require about 8.2% additional resources. This economy of scale effectively reduces the break even point for revenue from new homes for Upper Arlington.



1600 W Lane Ave - The Lane

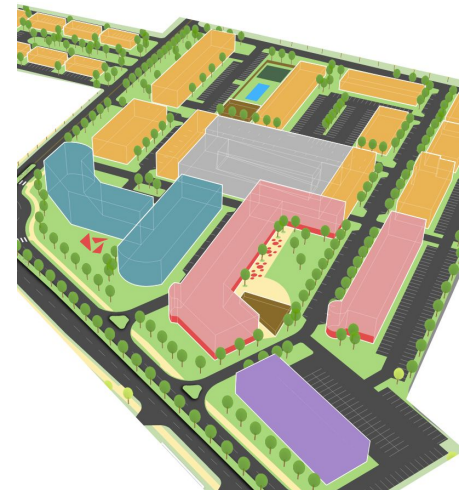
EXECUTIVE SUMMARY

The analysis reveals key trends and economic realities shaping Upper Arlington's housing landscape. With these insights as a foundation, the following **opportunities for further study** offer targeted strategies to achieve the City's goals:

- A. **Explore areas where allowing neighborhood-scale density will create new housing opportunities:** Adjusting allowable density in regulations would improve housing attainability by creating options for organic, locally-led infill market rate development without financial subsidies. For example, applying the same single-family development economics to a quadplex on a half-acre lot could achieve sales prices around \$770K per 1,500 sq ft unit. This option would offer more attainable housing solutions across life stages while also contributing to overall municipal revenue. During stakeholder interviews, local builders expressed their support for regulatory adjustments to encourage more housing options, particularly along primary corridors.
- B. **Support Senior Housing:** Upper Arlington should continue to pursue a multifamily approach to senior housing that encompasses both a basic independent living model and an enhanced service offering. The City is encouraged to support projects designed to meet diverse income levels and service needs and integrate amenities such as senior-centric commercial spaces, community centers, and structured parking. This strategy would enable one or two larger-scale developments to effectively address a decade's worth of potential downsizing needs within the community.
- C. **Large-Scale Multifamily as a Component of Transformational Redevelopment:** The City should cultivate opportunities and time the market to seize the benefits of co-locating rental housing with commercial uses in transformation mixed-use projects, such as the successful collaboration with The Kingston and the Community Center. For example, the Envision Henderson plan (shaped by input from over 900 residents) demonstrates how multifamily can effectively complement new office, streetscape enhancements, and open space amenities. With multifamily as a core element of a holistic redevelopment strategy, the City can create much needed market-rate rental housing, a walkable environment, and expanded tax revenue from integrated commercial development.



London Court Condos developed in 2015



Envision Henderson (draft) showing attached townhomes and multifamily buildings within a transformational mixed-use redevelopment



Comparison Communities

Upper Arlington compared to other Ohio and nationally similar communities



COMPARISONS

Upper Arlington's Comparison Communities

Source: 2010 - 2023 ACS 5-Year, CommunityScale

Comparable communities help market studies by providing benchmarks on key metrics such as growth, demographics, and income across areas with similar socioeconomic or geographic characteristics. In this case, each community was chosen for its relevance in size, regional context, and overall demographic profiles, allowing for a meaningful comparison of trends and conditions.

Households	Household growth 2010-2023	65+ households	Median household income	Vacant units	
38,160	36.17%	25.98%	\$138,640	5.72%	Carmel, IN
27,210	11.17%	26.48%	\$144,850	5.18%	Brookline, MA
23,267	6.06%	28.21%	\$111,267	5.70%	Oak Park, IL
17,797	25.84%	24.56%	\$159,940	3.39%	Dublin, OH
14,389	8.29%	33.73%	\$155,523	4.85%	Upper Arlington, OH
13,029	14.39%	36.76%	\$100,653	8.28%	Shaker Heights, OH
10,054	-1%	34.21%	\$110,894	2.42%	Prairie Village, KS
9,158	7.44%	27.29%	\$136,757	1.71%	Fairfax, VA
6,064	9.72%	34.14%	\$128,476	4.68%	Worthington, OH
4,581	4.28%	28.73%	\$157,102	6.76%	Bexley, OH

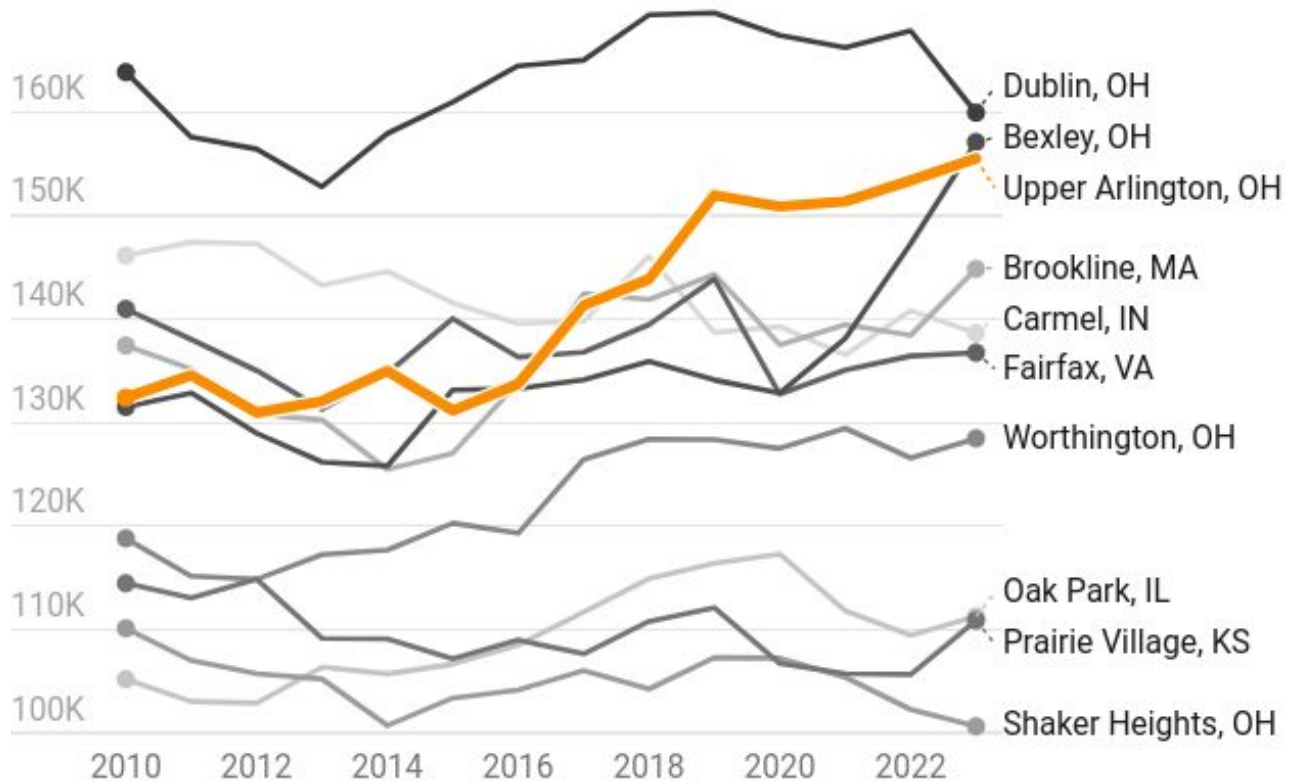
COMPARISONS

Inflation-adjusted median household income

Source: 2010 - 2023 ACS 5-Year, CommunityScale

Median household income in Upper Arlington rose faster over the last 10 years compared to similar communities.

Inflation-adjusted median household income



\$159,940 Dublin, OH
\$157,102 Bexley, OH
\$155,523 Upper Arlington, OH
\$144,850 Brookline, MA
\$138,640 Carmel, IN
\$136,757 Fairfax, VA
\$128,476 Worthington, OH
\$111,267 Oak Park, IL
\$110,894 Prairie Village, KS
\$100,653 Shaker Heights, OH

COMPARISONS

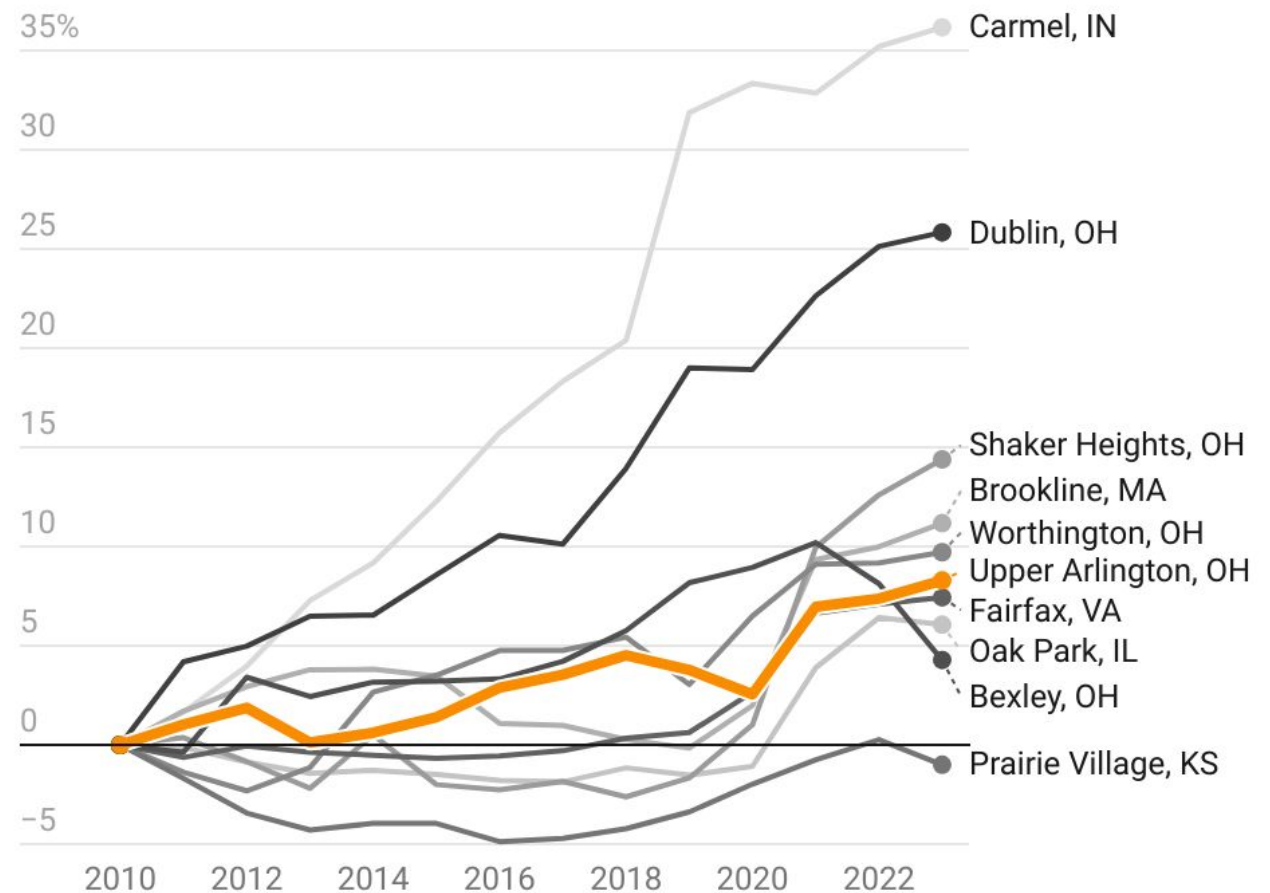
Percent household growth since 2010

Source: 2010 - 2023 ACS 5-Year, CommunityScale

At 8% household growth since 2010, Upper Arlington is in the middle of the pack.

36.17% Carmel, IN
25.84% Dublin, OH
14.39% Shaker Heights, OH
11.17% Brookline, MA
9.72% Worthington, OH
8.29% Upper Arlington, OH
7.44% Fairfax, VA
6.06% Oak Park, IL
4.28% Bexley, OH
-1% Prairie Village, KS

Percent household growth since 2010



COMPARISONS

Percent of residents 18 and under

Source: 2010 - 2023 ACS 5-Year, CommunityScale

The share of households with someone who is 18 years or younger in Upper Arlington has been steadily rising for the last 10 years. Compared to similar communities, Upper Arlington has the most households with children.

27.61% Upper Arlington, OH

27.45% Dublin, OH

27.33% Bexley, OH

25.77% Worthington, OH

25.13% Carmel, IN

24.03% Fairfax, VA

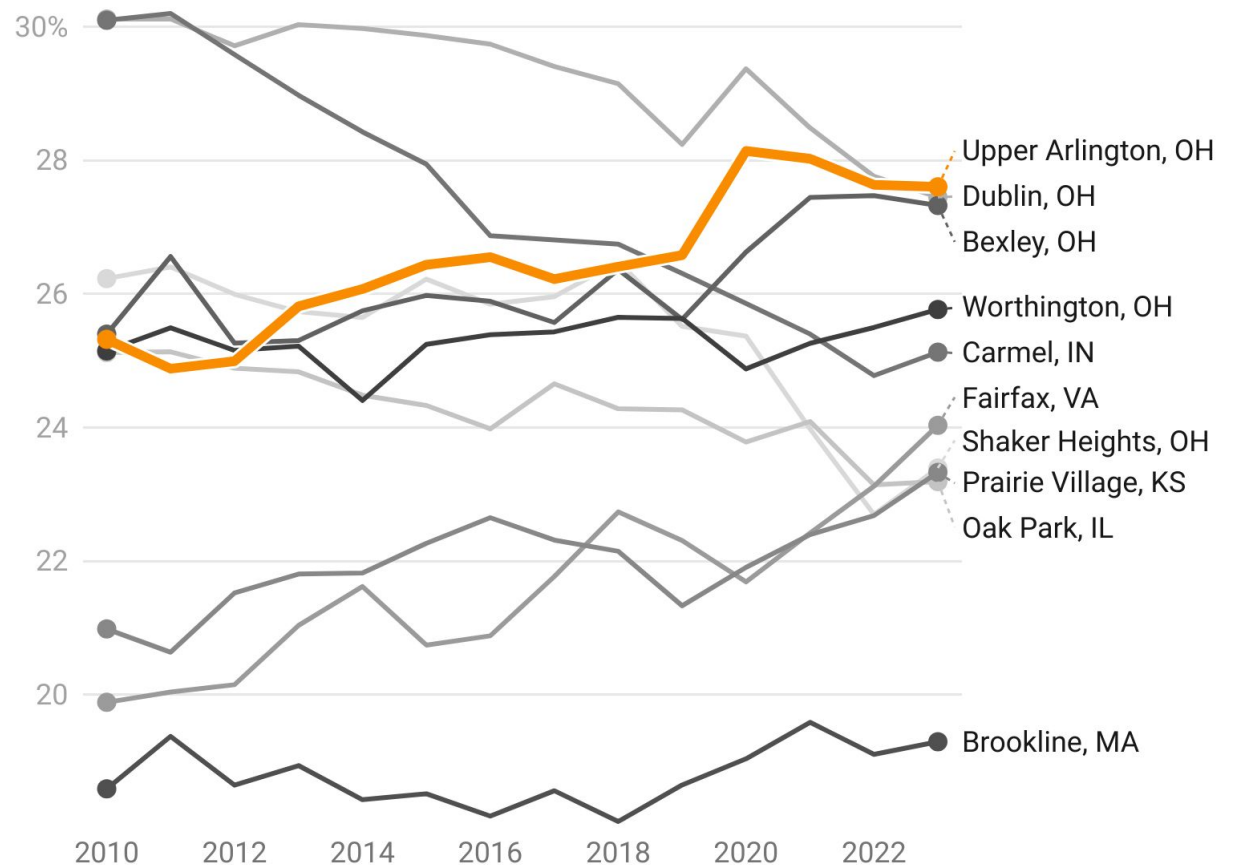
23.39% Shaker Heights, OH

23.33% Prairie Village, KS

23.19% Oak Park, IL

19.29% Brookline, MA

Percent of residents under 18



COMPARISONS

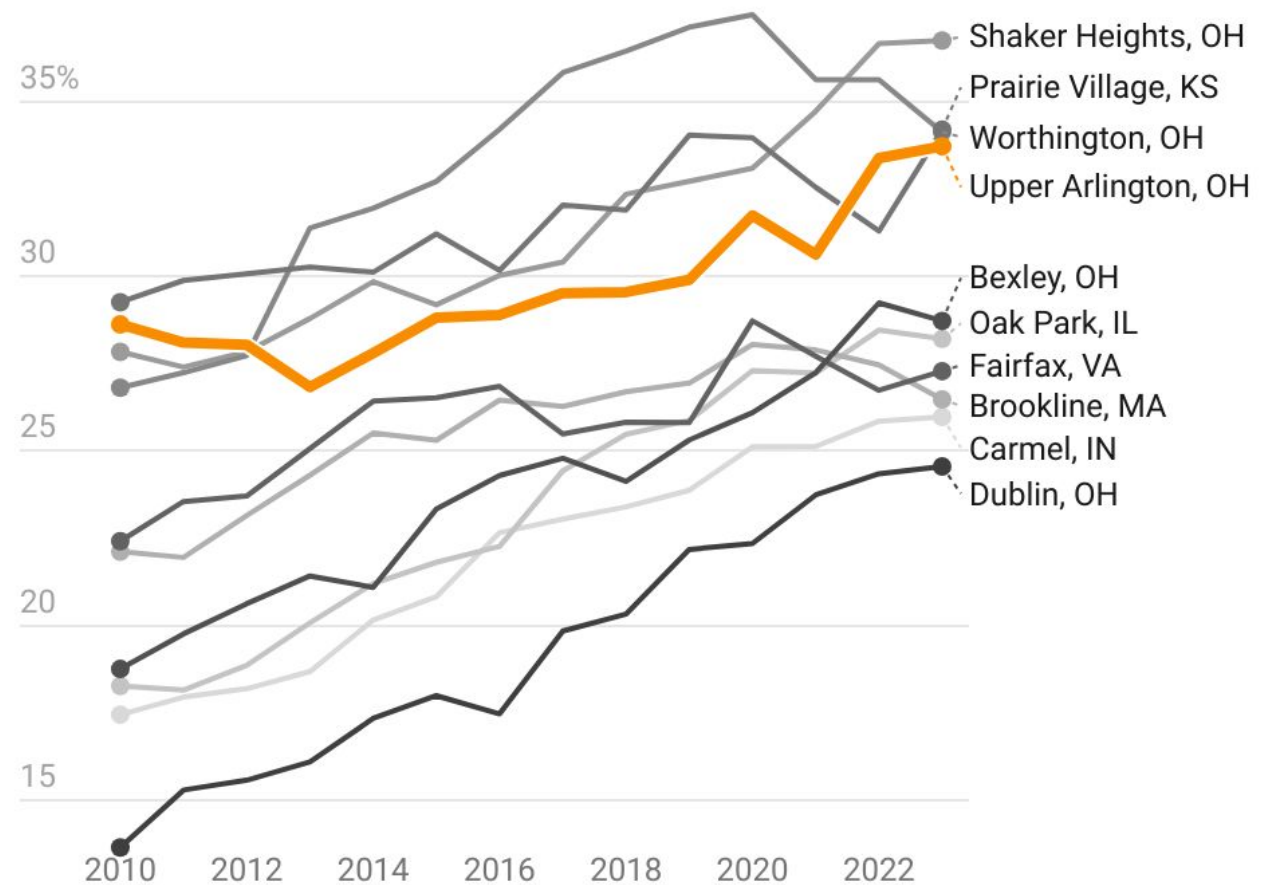
Percent of householders over 65 years old

Source: 2010 - 2023 ACS 5-Year, CommunityScale

The share of households with someone who is 65 years or older in Upper Arlington has been steadily rising for the last 10 years. Compared to similar communities, Upper Arlington generally has an older population with one-third of households falling into this category.

36.76% Shaker Heights, OH
34.21% Prairie Village, KS
34.14% Worthington, OH
33.73% Upper Arlington, OH
28.73% Bexley, OH
28.21% Oak Park, IL
27.29% Fairfax, VA
26.48% Brookline, MA
25.98% Carmel, IN
24.56% Dublin, OH

Percent of householders over 65 years old



COMPARISONS

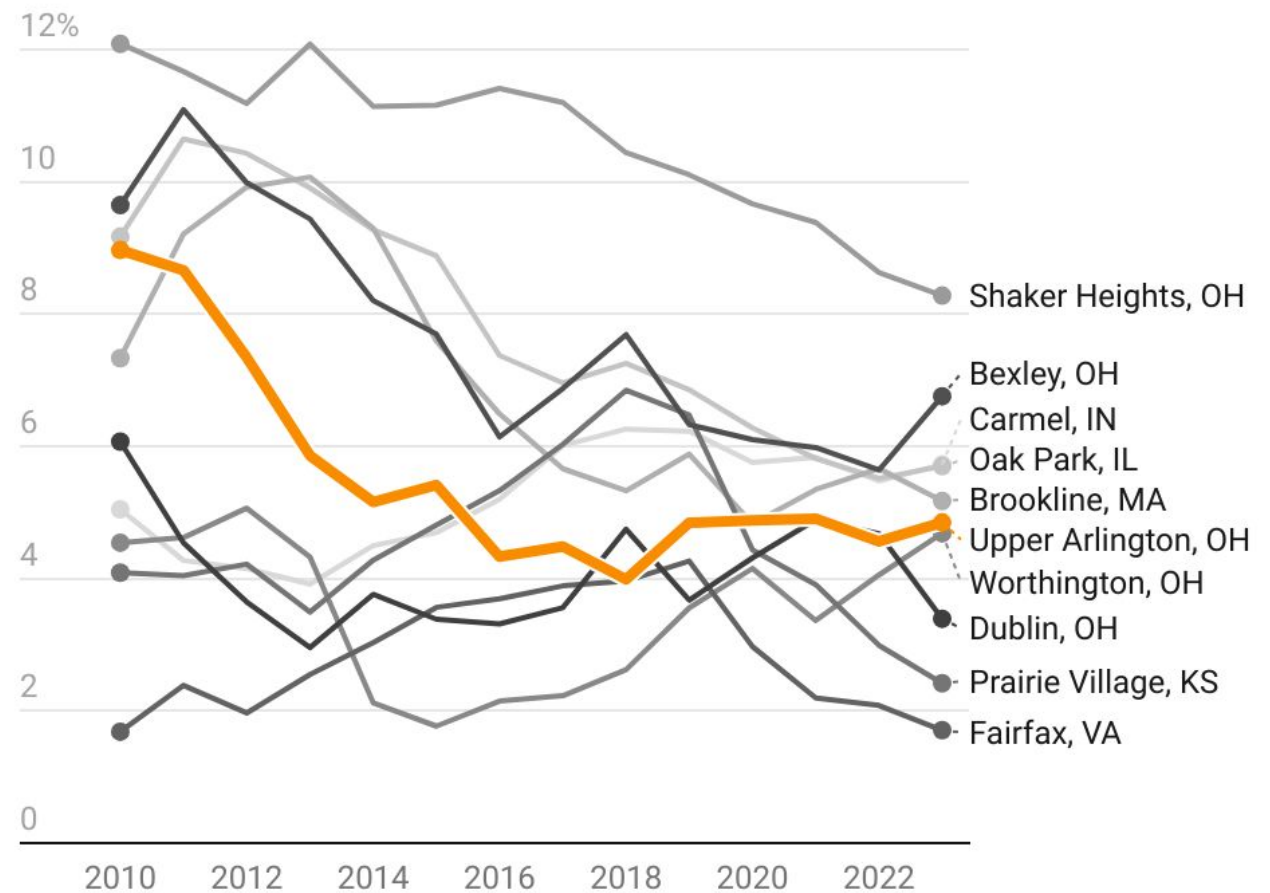
Percent vacant homes

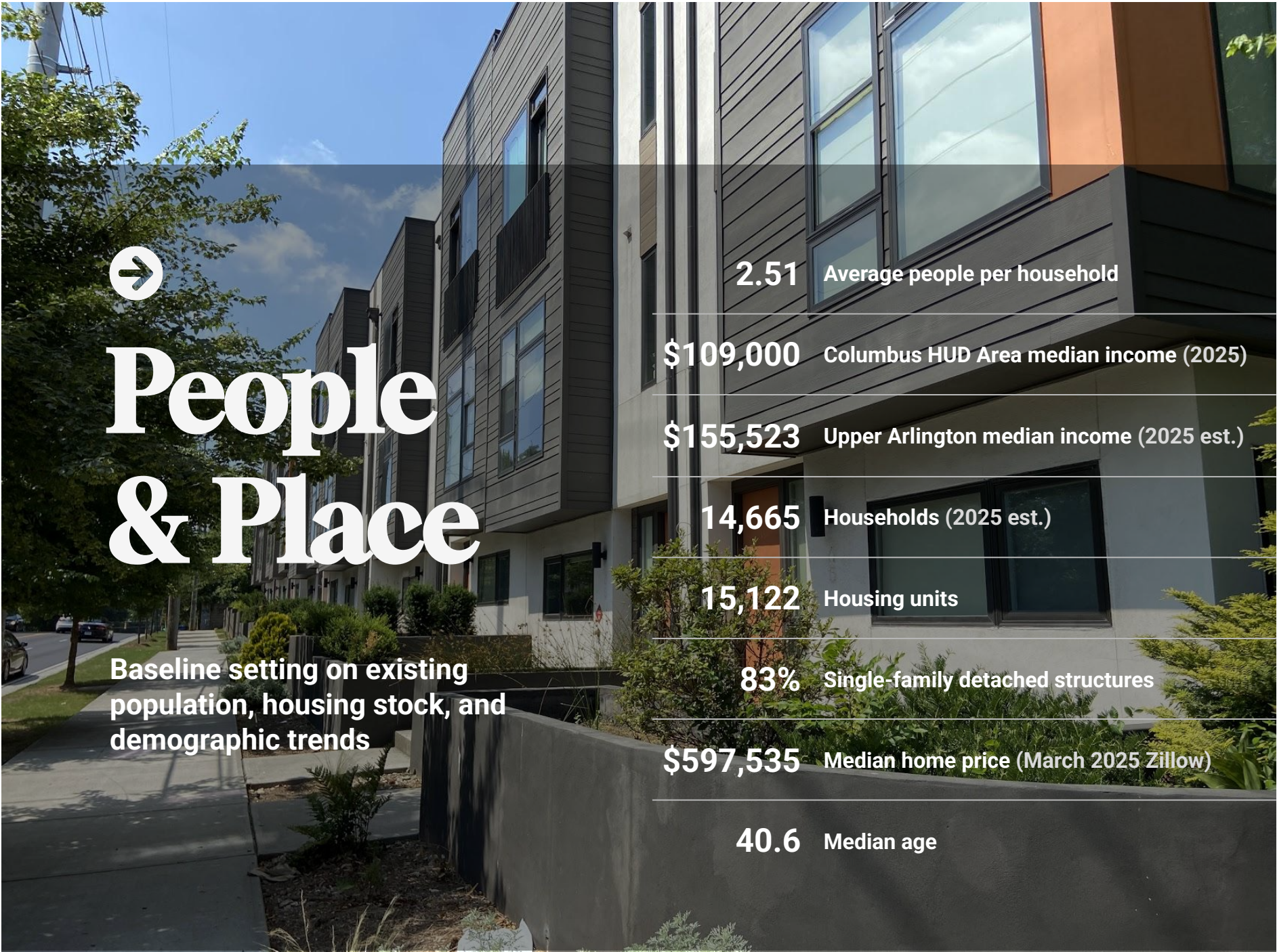
Source: 2010 - 2023 ACS 5-Year, CommunityScale

Unlike other communities, the vacancy rate in Upper Arlington has held steady between 4-5% since 2018. According to the Census, vacant homes include homes without permanent residents, second homes, seasonal homes, unrented homes, homes that have been rented or sold but are awaiting occupancy, and unoccupied homes under renovation.

8.28% Shaker Heights, OH
6.76% Bexley, OH
5.72% Carmel, IN
5.70% Oak Park, IL
5.18% Brookline, MA
4.85% Upper Arlington, OH
4.68% Worthington, OH
3.39% Dublin, OH
2.42% Prairie Village, KS
1.71% Fairfax, VA

Percent vacant homes





ANALYSIS

Upper Arlington is predominantly detached single-family, with some denser housing for rent

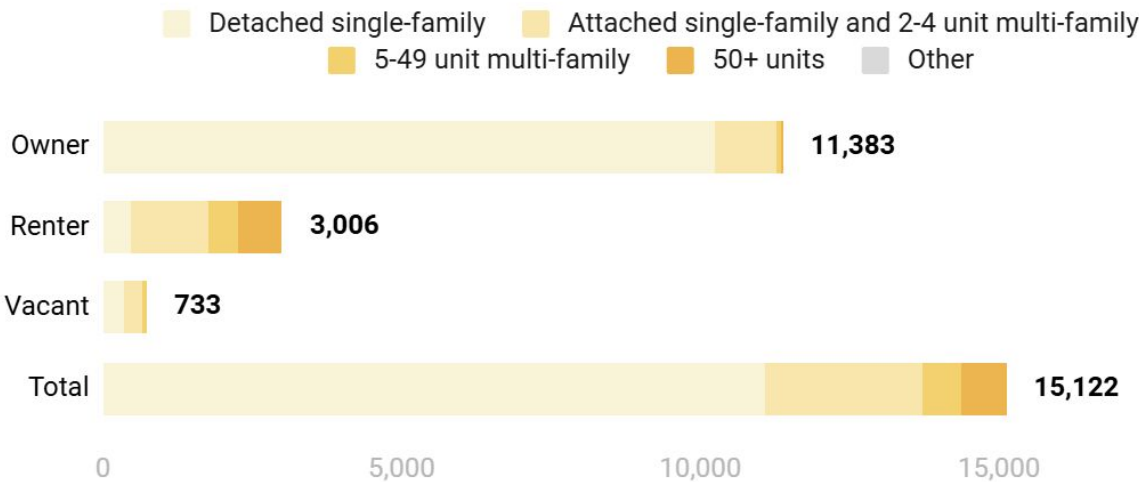
Source: ACS 5-year, 2023



This graph inventories the local housing stock in terms of each unit's structure type, a characteristic defined as the number of units in the building that contains a given unit.

Households may have different structure type preferences depending on characteristics such as household size, income, employment, presence of children, age of individuals, and lifestyle choices. Understanding the housing stock in corresponding terms helps assess how well existing units align with existing households' ideals.

Existing units by structure type



ANALYSIS

Households in the region are moving into all types of housing structures across all income groups

Sources: Census ACS 2023 5-Year; CommunityScale

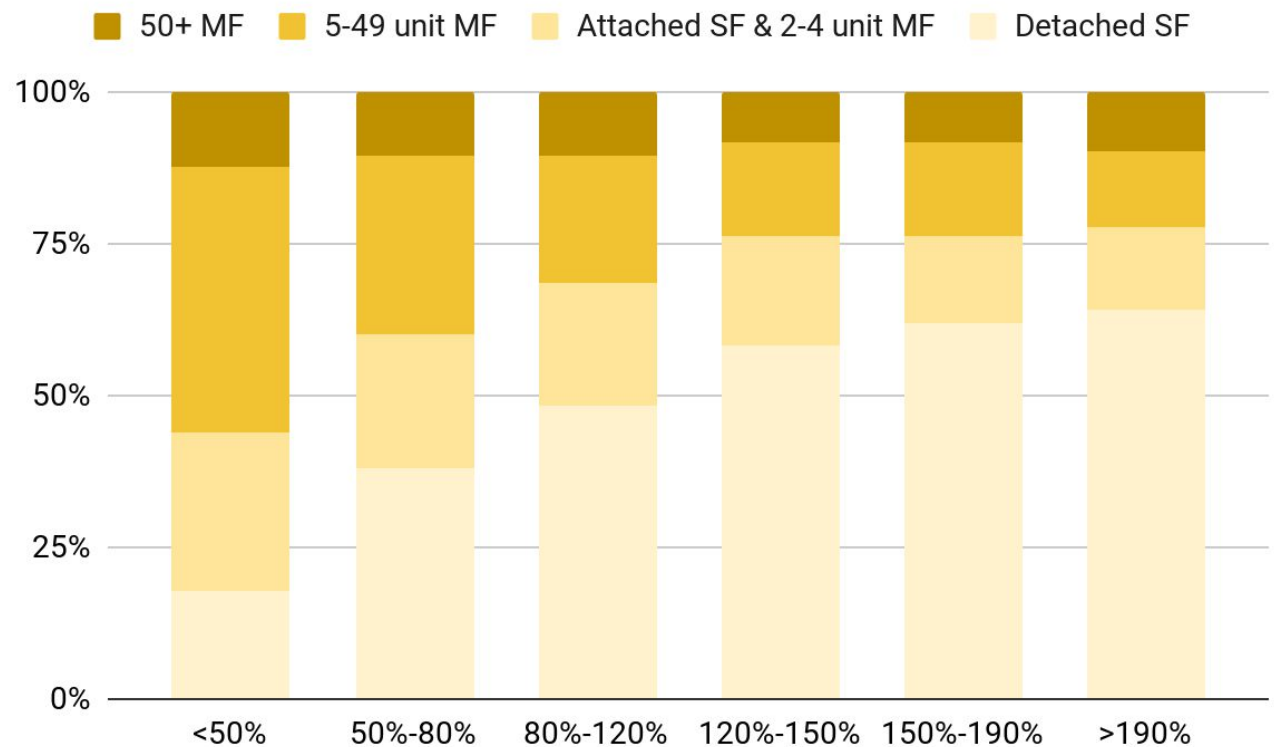


Given the variety of housing structure types available, it is important to consider how demand is distributed across the primary categories.

In general, lower-income households are more likely looking for multifamily and attached single family options whereas higher-income households are more likely looking for detached single family.

Importantly, however, there is significant demand for all structure types at all income levels, suggesting a full range of options are needed across price points.

Housing demand by structure type and income level



ANALYSIS

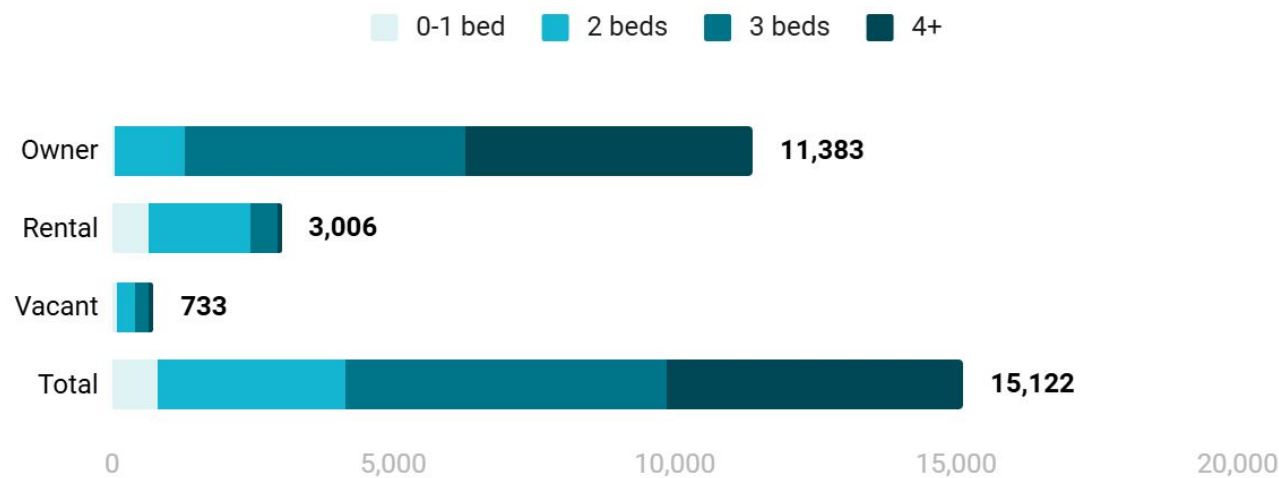
Existing units by bedroom count

Source: ACS 5-year, 2023

This graph inventories the local housing stock in terms of bedroom count by unit by tenure. The majority of Upper Arlington’s housing units are three bedrooms and more, with no ownership studios or one bedrooms recognized in 2023.

Household size and the presence of children are primary drivers for bedroom count with, as expected, larger families desiring more bedrooms than smaller households. However, other factors such as income and the incremental cost of extra bedrooms also influence these preferences.

Existing units by number of bedrooms



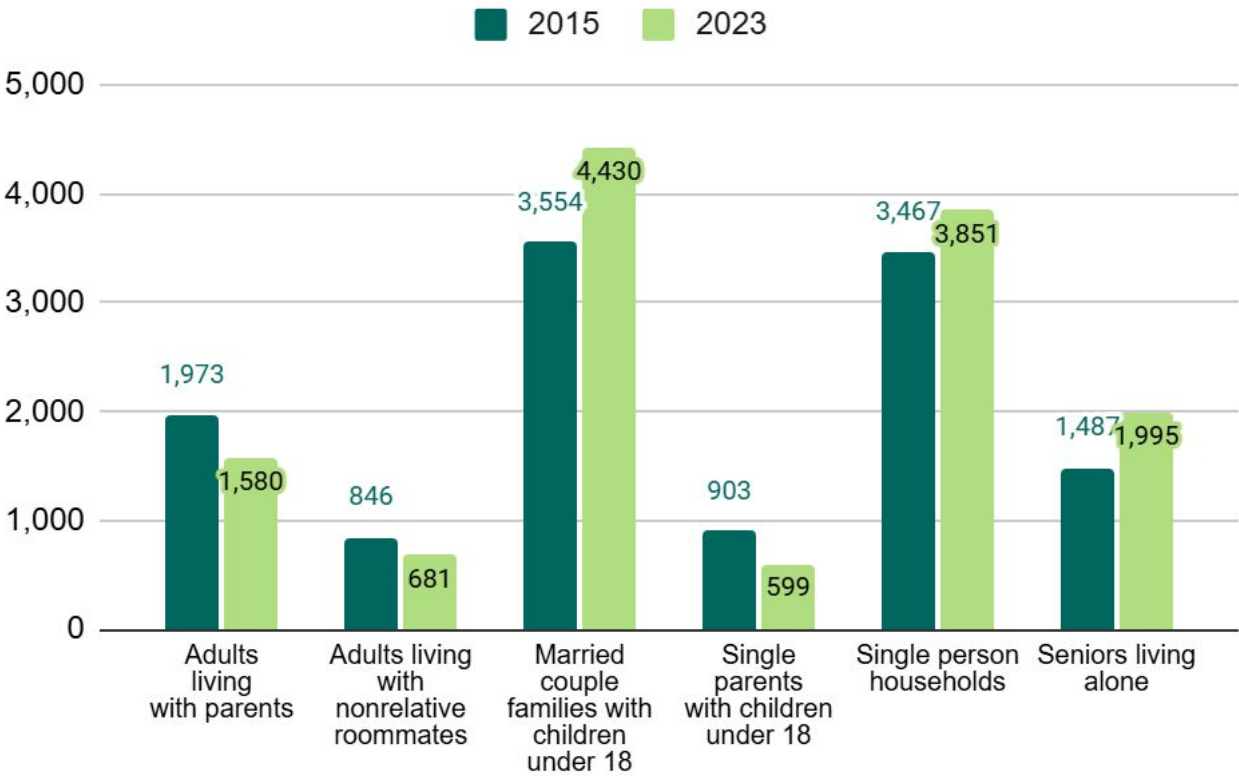
ANALYSIS

Family structure and change over time

Sources: Census ACS 2023 5-Year; CommunityScale

Upper Arlington experienced notable shifts in family structures with a significant increase in married-couple families with children under 18. There was also growth in single-person households and seniors living alone.

Change in family structure since 2015



ANALYSIS

Employment and wages

Source: ACS 2023

Median wages for Franklin County, OH compared to Upper Arlington’s area median income (AMI) for households with a single earner and households assuming double income of the same job type.

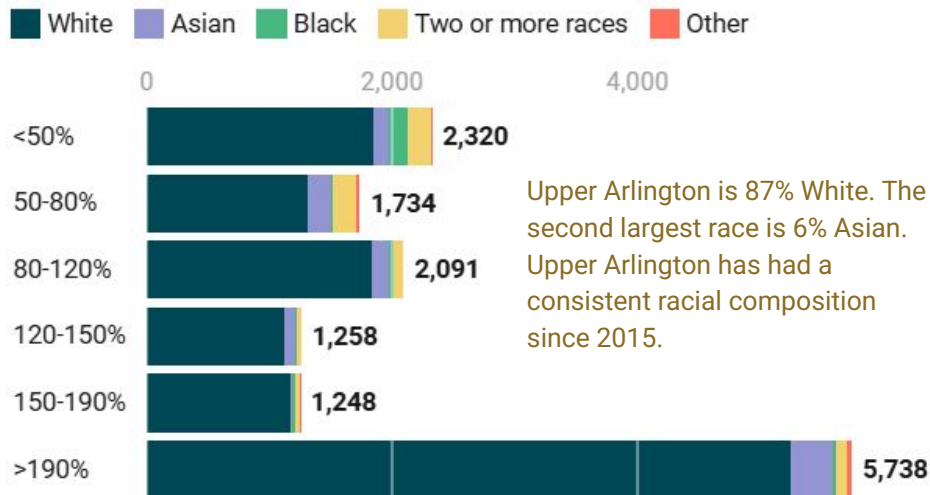
Though technically more of a bedroom community than a job center, Upper Arlington has a somewhat balanced jobs/workers mix. However, a very small portion of people both live and work in town.

People who live here	18,114
People who work here	12,929
People who live and work here	1,337
Of total people who live here	7.4%
Of total people who work here	10.3%

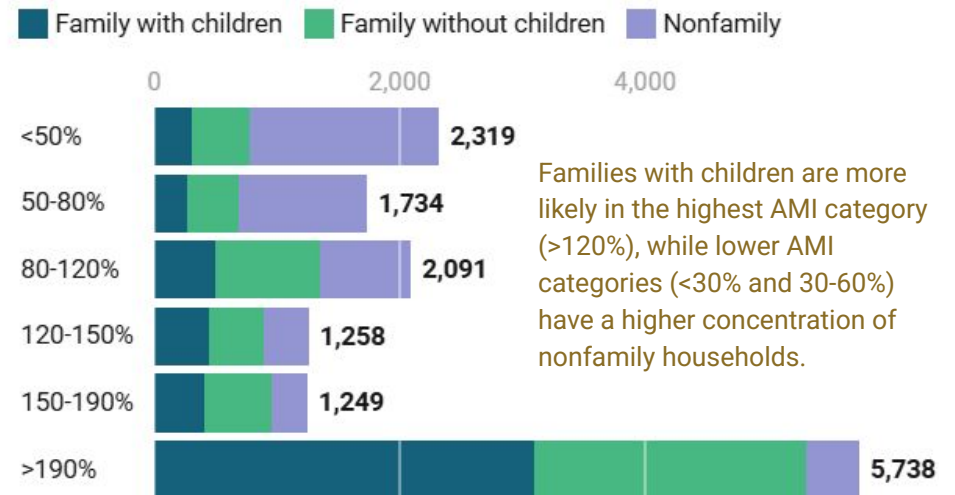
Occupation	Median wage (adjusted to 2025 dollars)	Single earner AMI	Two earner AMI
Food preparation and serving related	\$20,573	20%	40%
Personal care and service	\$23,198	22%	45%
Farming, fishing, and forestry	\$26,000	25%	50%
Building and grounds cleaning and maintenance	\$30,623	30%	59%
Healthcare support	\$31,080	30%	60%
Material moving	\$32,969	32%	64%
Firefighting and prevention	\$38,114	37%	74%
Production	\$42,478	41%	82%
Transportation	\$43,740	42%	85%
Office and administrative support	\$43,803	42%	85%
Sales and related	\$43,969	43%	85%
Construction and extraction	\$45,472	44%	88%
Health technologists and	\$50,286	49%	97%
Arts, design, entertainment, sports, and media	\$50,597	49%	98%
Educational instruction, and library	\$51,165	50%	99%
Installation, maintenance, and repair	\$54,286	53%	105%
Community and social service	\$56,874	55%	110%
Life, physical, and social science	\$60,241	58%	117%
Business and financial operations	\$76,175	74%	147%
Law enforcement	\$77,954	75%	151%
Health diagnosing and treating practitioners	\$78,604	76%	152%
Management	\$83,008	80%	161%
Legal	\$86,074	83%	167%
Architecture and engineering	\$92,061	89%	178%
Computer and mathematical	\$94,753	92%	183%

Household characteristics by income group

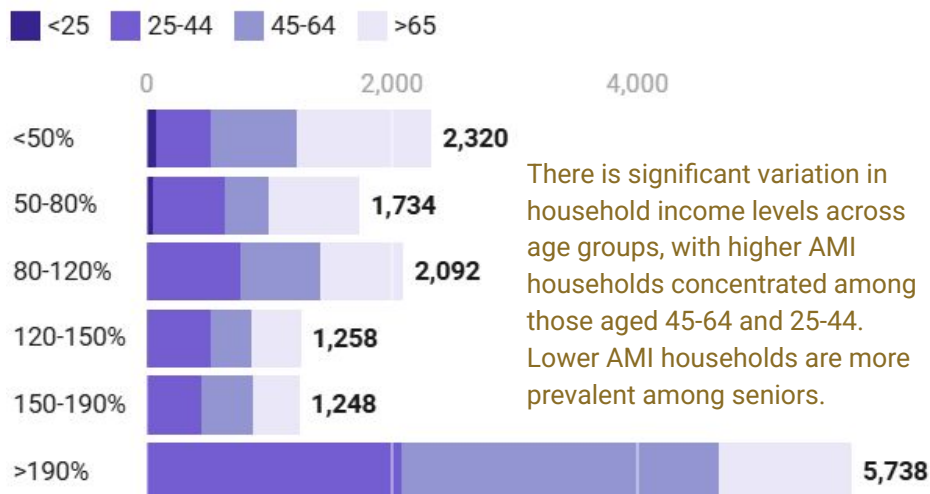
Race



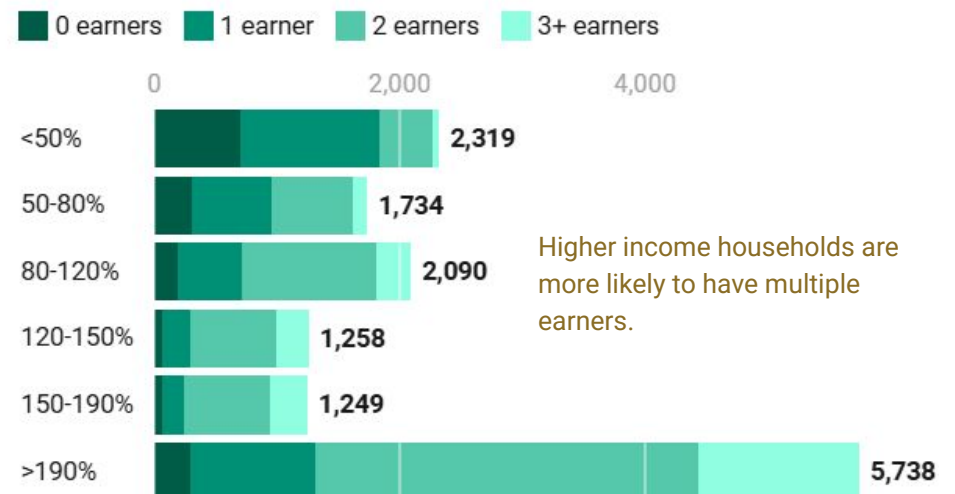
Household type



Age of householder



Number of earners



ANALYSIS

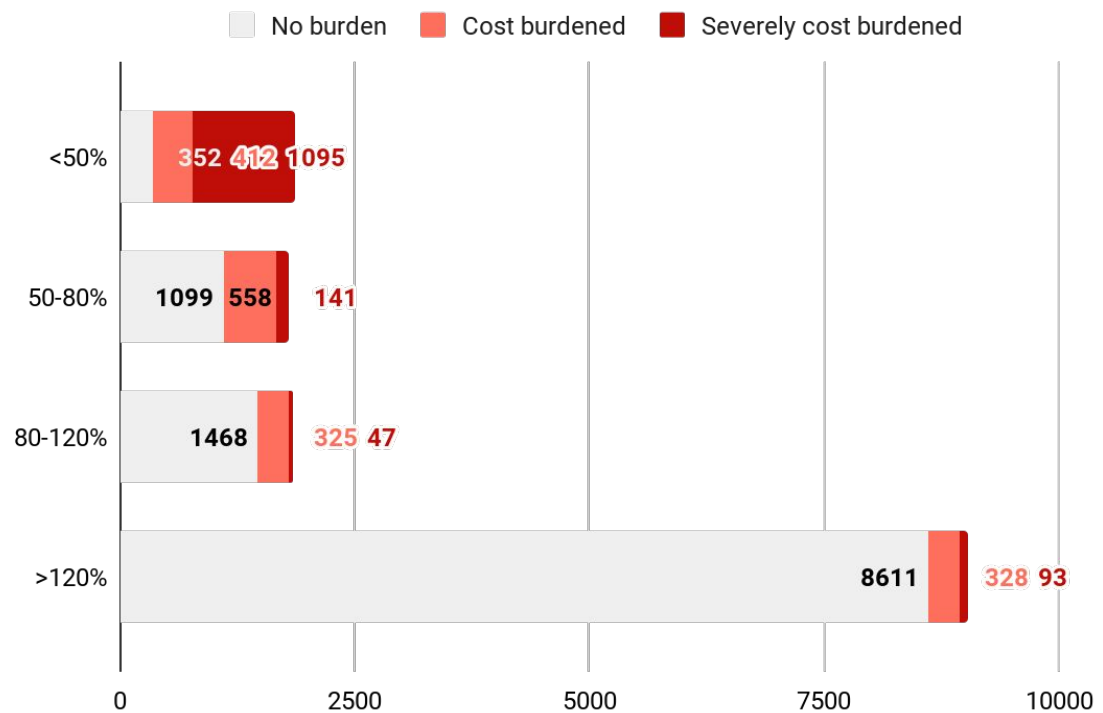
Cost burdened households are concentrated in the lower income groups

Source: 2023 ACS 5-Year, CommunityScale

Households are cost burdened when paying more than 30% of their income on housing costs. They are considered severely cost burdened when these costs exceed 50% of their income. For [renters](#), this includes lease rent and utilities. For [homeowners](#), this includes mortgage costs, property taxes, insurance, utilities, and any condo fees.

According to [Census research](#), approximately 60% of HUD Housing Choice Voucher and state voucher recipients report their contract rent, which results in an overestimate of cost burden among lower income households. There are only about 13 households receiving that type of subsidy in Upper Arlington, so the degree of overestimation is low.

Number of households in each AMI group, by cost burden



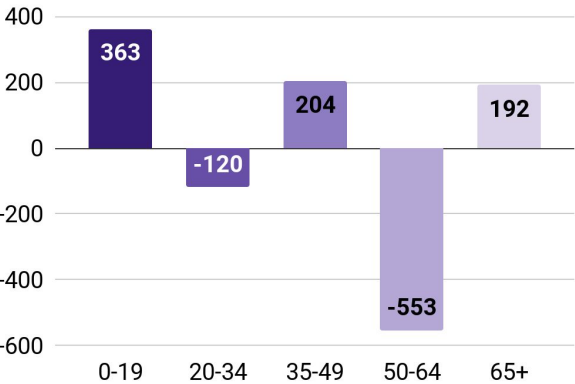
ANALYSIS

Upper Arlington has a growing share of families

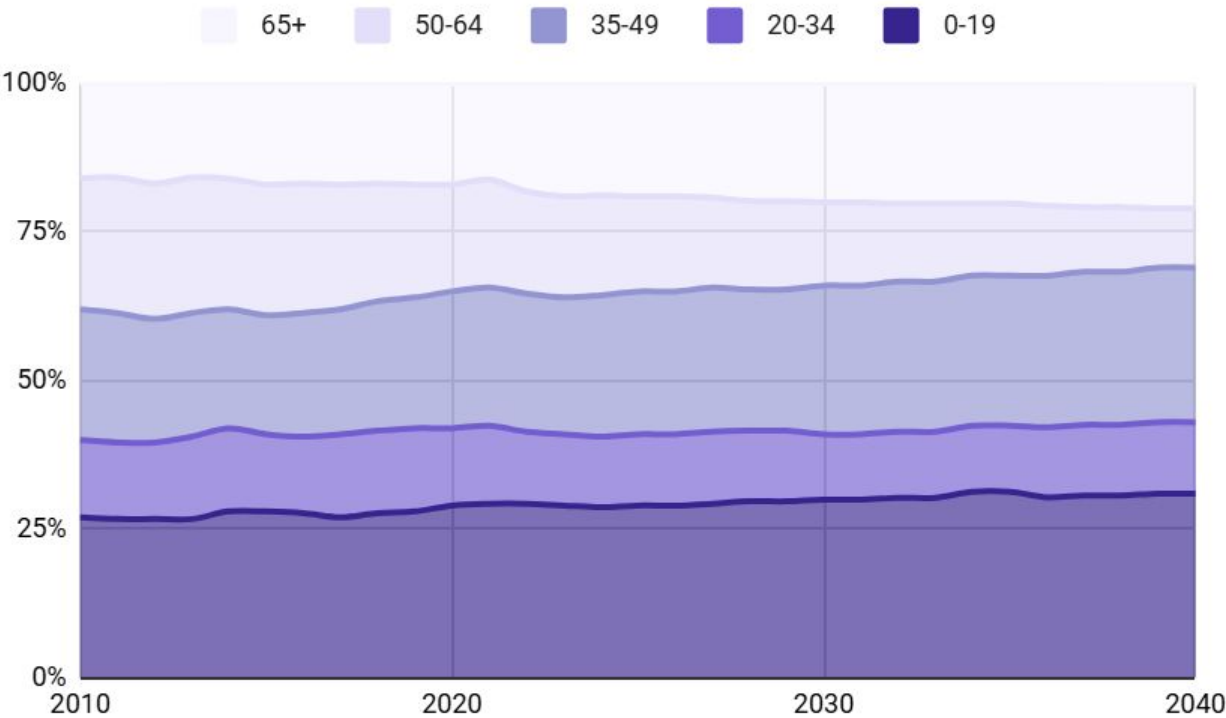
Source: ACS 5-Year, CommunityScale

Bucking national trends, Upper Arlington has had more children as a share of the population between 2010 and 2023. There is also a modest growth in the share of older households.

Net household change (2025-35)



Population by age cohort



This chart illustrates trends in population by age cohort, both historic and projected. The projection is based on recent trends extended. Depending on economic, policy, and other conditions, the future age distribution may vary over time.

ANALYSIS

Downsizing seniors

Sources: Census ACS 2023 5-Year; CommunityScale

Most older adults prefer to "age in place" in their existing homes. Only 5% of seniors relocate each year (versus 16% of the rest of the population), with only a portion of those movers specifically downsizing. Those seniors who do relocate are typically motivated by cheaper, better, or newer housing, family reasons, health reasons, or specific life events. They also strongly prefer staying within their community.

Relocating older adults are more likely to opt for a newer property, at a rate of about 20% moving into homes less than 10 years old as new homes are typically more suitable for aging.

In addition to the senior currently in Upper Arlington looking to downsize, there may be additional demand from older adults looking to move back to Upper Arlington from places like Florida to be closer to grandkids.

Calculation of expected downsizing seniors

65+ households of 1-2 people in 3+ bedroom units	1,453
Potential annual downsizing rate	1.0%
10 year downsizers (and units needed to accommodate them)	145



Market study key findings

How much housing Upper Arlington
could absorb given regional trends

Housing supply constraints and infill limitations

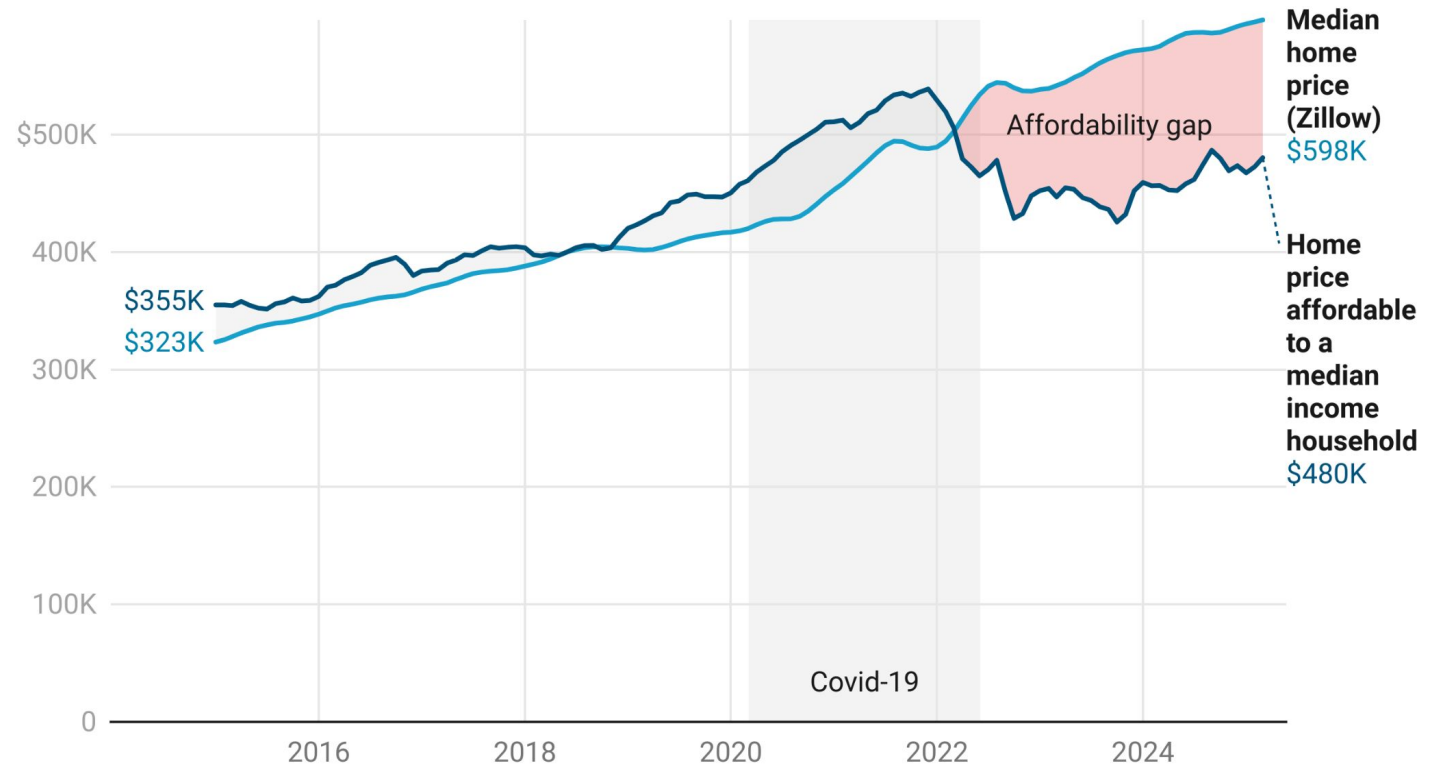
Source: Zillow ZHVI 2024, Census ACS 2023 5-Year, data from March 2025.

As a landlocked and established community, infill and teardowns are required for redevelopment.

A median land cost of \$1.3M per acre for recent teardowns, combined with increasing costs (materials, labor, interest rates), the price of a new single-family home cannot reasonably be less than what is currently on the market.

As a result, the median income household can no longer afford the median house price in Upper Arlington. This graph examines housing costs, prices, and other measures of affordability. Combined with the indicators, this data directly relates to cost burden from misaligned demand and supply.

How affordable is Upper Arlington in March 2025?



\$597,535 Zillow March median home price. \$642,785 for single-family homes. \$293,478 for condos.

Mortgage rate 6.65%.

Property tax rate 2.68%.

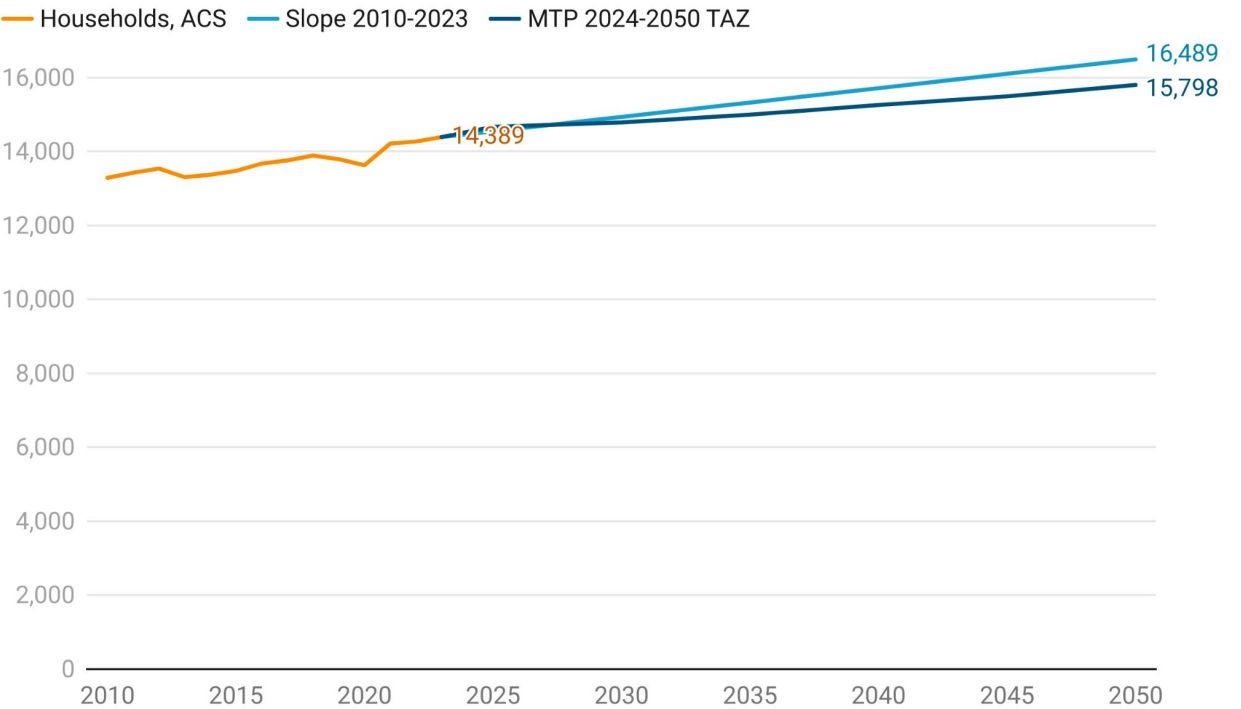
Projected household growth

Sources: Census ACS 2023 5-Year; CommunityScale

[MTP's regional forecast](#) looks out to 2050. To meet Upper Arlington's allocation of overall regional growth, the Upper Arlington's housing market could absorb about 53 households per year, which means constructing 57 housing units a year as shown in subsequent findings.

Household growth forecast alternatives

Comparison of trends extended from 2010-2023 through 2050 and MTP's 2024-2050 forecast. For MTP's forecast, CommunityScale used the rate of change from blockgroups within Upper Arlington's boundary.



Upper Arlington’s housing market within regional growth and demographic shifts

Source: 2023 ACS 5-Year, CommunityScale, RTP

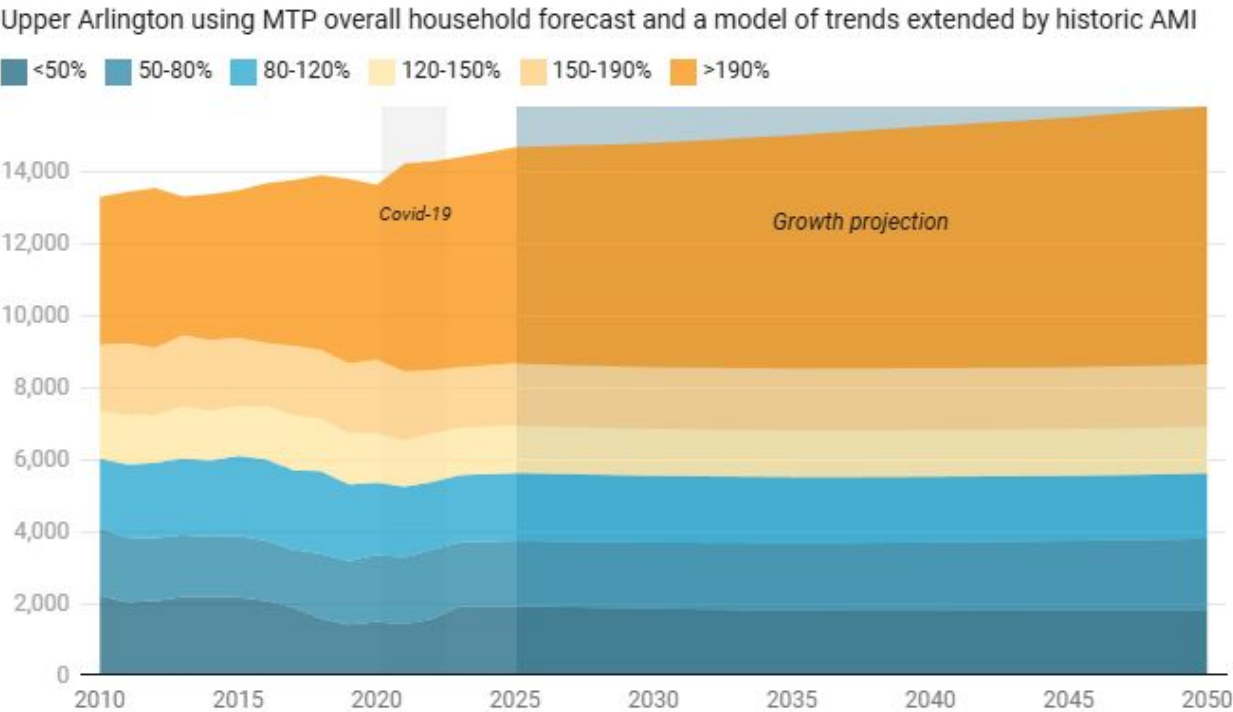
The regional narrative is that Central Ohio is projected to keep growing, driven by job creation (e.g., Intel and Honda-LG sites) and ongoing in-migration.

MTP’s regional forecast looks out 25 years to 2050. The Upper Arlington housing market could easily absorb 57 housing units per year given overall regional growth.

This analysis further breaks down the overall rate of household growth by household income. In this case, household incomes are grouped by their percent of HUD’s Area Median Income, which is \$103,300 (Columbus, OH HUD Metro FMR Area 2025).

If these trends continue, most of Upper Arlington’s growth looking out will be in the >190% AMI group. There will also be modest growth in the 50-80% AMI group. The other AMI groups are relatively stable.

Household growth by household income



	Median income	Household income range	Monthly affordable housing costs	2010 Households	2023 Households
	<50%	<\$50,000	<\$1,250	2,219	1,924
	50-80%	\$50,000-\$80,000	\$1,250-\$2,000	1,891	1,772
	80-120%	\$80,000-\$120,000	\$2,000-\$3,000	1,911	1,867
	120-150%	\$120,000-\$150,000	\$3,000-\$3,750	1,325	1,302
	150-190%	\$150,000-\$200,000	\$3,750-\$5,000	1,829	1,698
	>190%	>\$200,000	>\$5,000	4,112	5,826

Household income segments and housing needs

Sources: Census ACS and PUMS 2023 5-Year

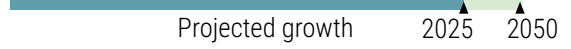
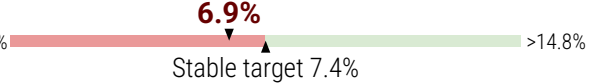
This summary table compares key housing need attributes per household income group.

<\$50,000	\$50,000 - \$80,000	\$80,000 - \$120,000	\$120,000 - \$150,000	\$150,000 - \$200,000	>\$200,000	Household income groups
<50%	50-80%	80-120%	120-150%	150-190%	>190%	Household income % of median
1,924	1,772	1,867	1,302	1,698	5,826	Total households (2025)
<\$1,250	<\$2,000	<\$3,000	<\$3,750	<\$5,000	>\$5,000	Monthly affordable housing costs
\$136,000	<\$217,000	<\$333,000	<\$417,000	<\$560,000	>\$560,000	Affordable purchase price
0%	23%	31%	46%	62%	64%	Rate of homeownership
2.0	2.4	2.7	2.9	3.1	3.2	Average bedrooms for recent movers
60	56	54	53	54	52	Average age householder
0.4	0.9	1.4	1.7	1.8	1.8	Average income earners per household

Additional housing supply needed 2025-2050

Sources: Census ACS 2023 5-Year; CommunityScale, [Harvard University Joint Center for Housing Studies](#)

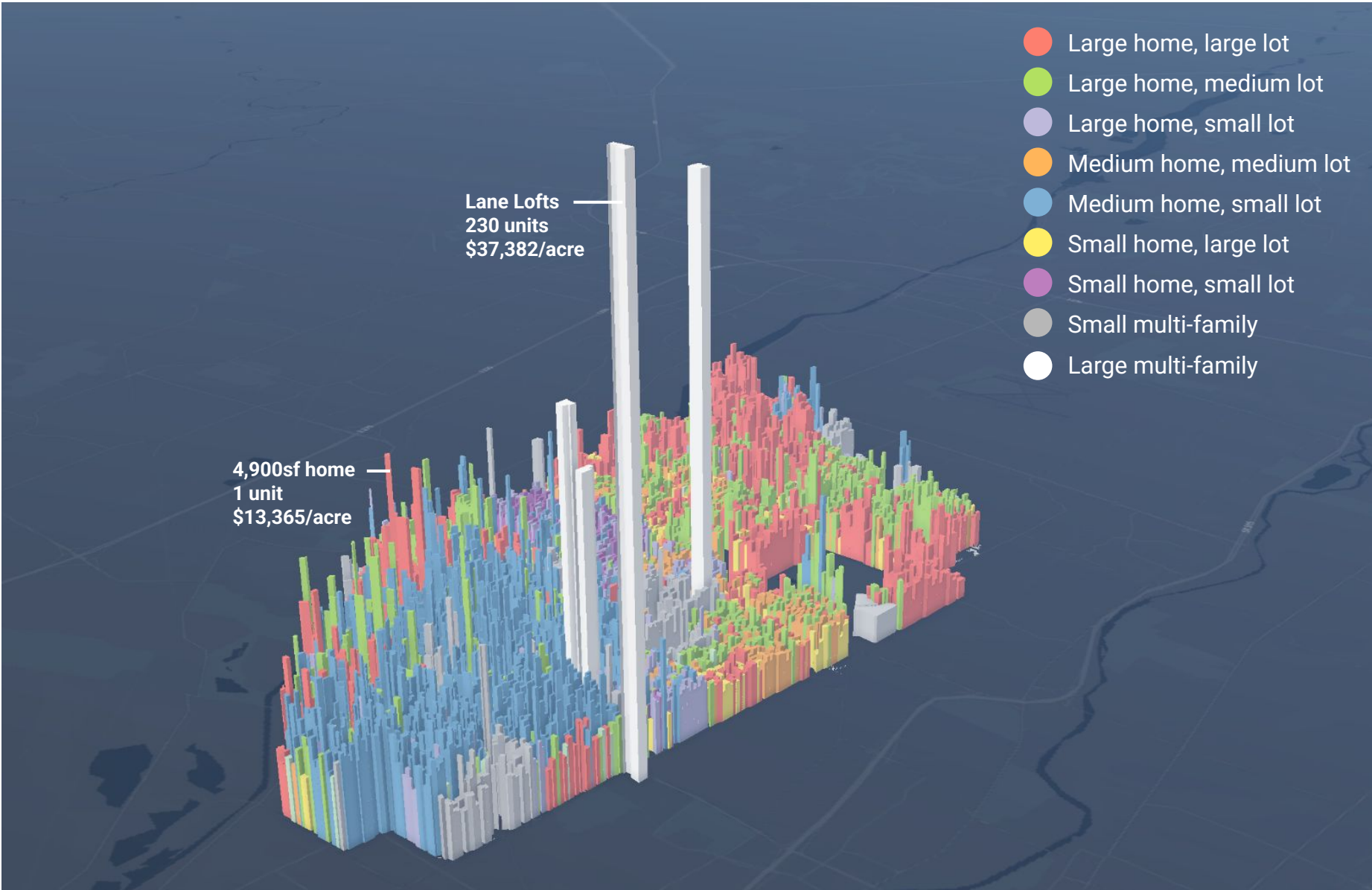
The following calculation translates household growth to a target for housing supply and related housing production. This calculation takes into account several adjustments intended to relieve underlying market pressures such as pent up demand.

1,133	Net growth in households	Housing supply needed to keep up with projected household growth over the next 25 years (MTP forecast)	 Projected growth 2025 2050
ADJUSTMENTS			
62	Replacement	Housing production for 0.1% annual replacement of overall stock throughout the planning period.	 0.1% 24,944 dwellings
166	Ownership vacancy	There aren't enough ownership units available to meet pent-up demand, creating unsustainably low vacancy that can drive up prices.	 0.4% 0% Stable target 1.5% >3%
76	Rental vacancy	There aren't enough rental units available to meet pent-up demand, creating unsustainably low vacancy that can drive up prices.	 6.9% 0% Stable target 7.4% >14.8%
0	Overcrowding	There aren't more overcrowded units than the national average, so no adjustment is needed.	 0.4% 0% National avg. 3.4% >6.8%
0	Substandard housing	There aren't more substandard units than the national average, so no adjustment is needed.	 0.2% 0% National avg. 0.4% >0.8%
1,437	Total additional housing production (9.8% total growth)		
57	Annual housing production (0.4% annual growth)		



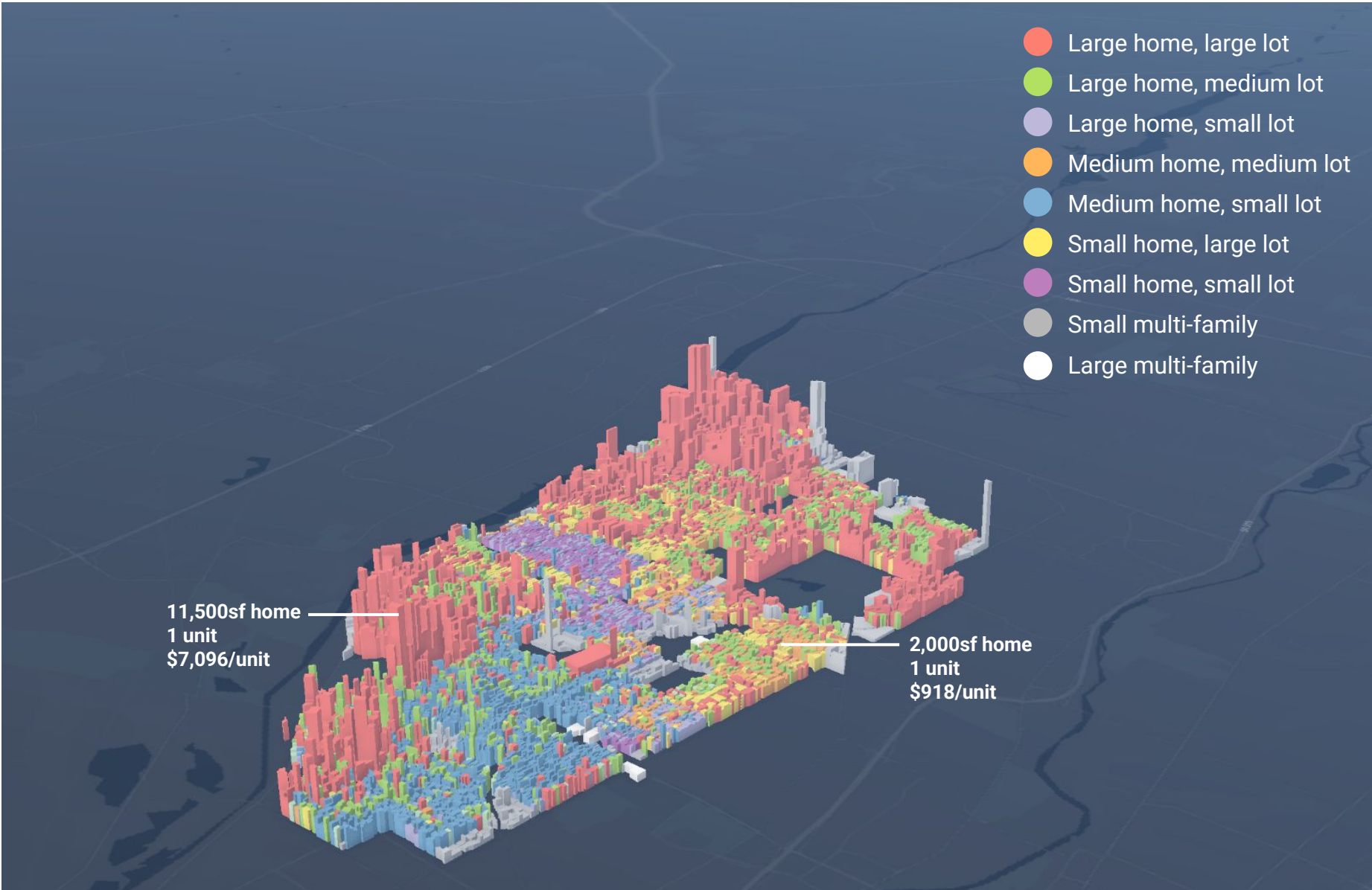
ANALYSIS

Municipal revenue per acre



ANALYSIS

Municipal revenue per unit

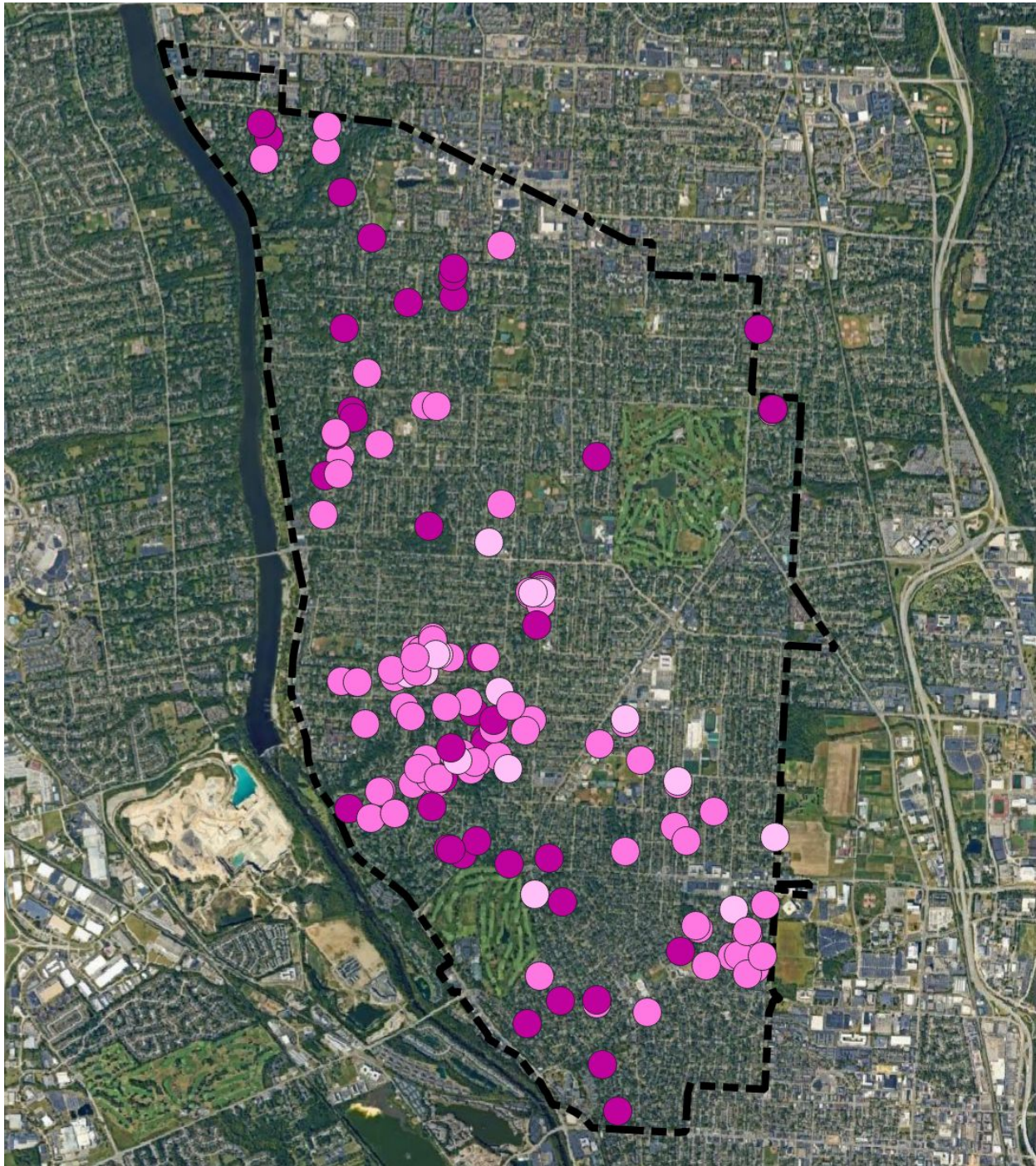


ANALYSIS

Recent permits

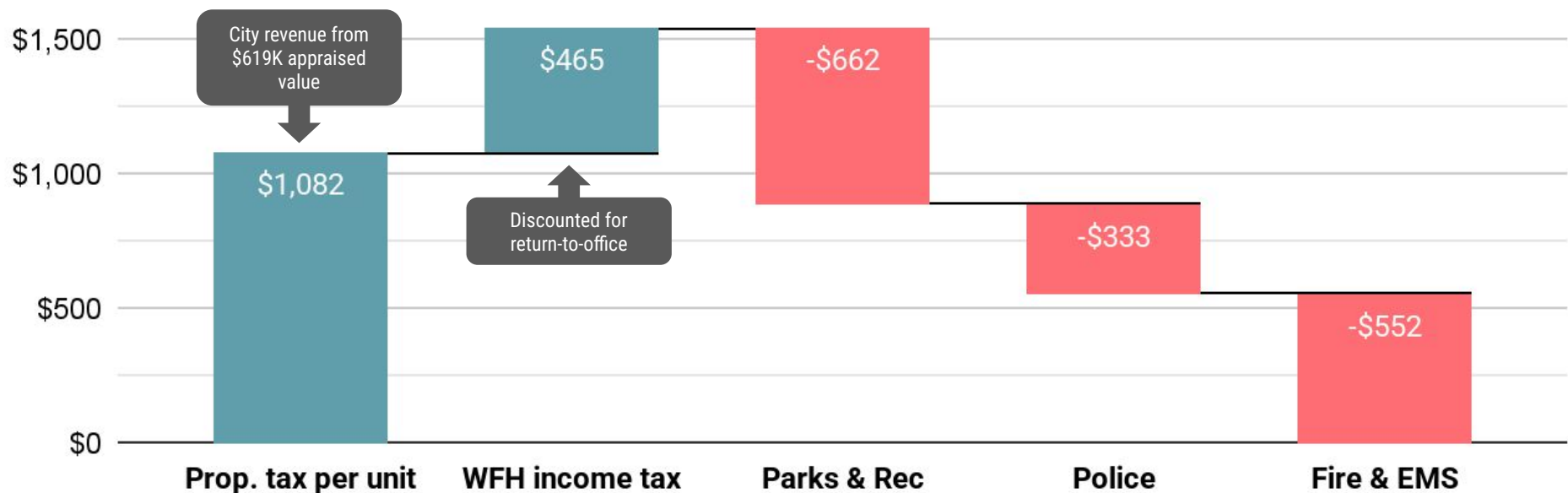
- >5,000 sf
- 3,000-5,000 sf
- <3,000 sf

Map of residential permits. Larger homes are typically more expensive.



An appraised value of \$619K is the tipping point for the balance of City expenses and revenue

Sources: City of Upper Arlington 2025, based on projected FY 2026 budget. Number of dwellings units is ~15,122 based on 2023 ACS.



Notes on revenue and expenses

Housing is revenue positive for the City when the marginal revenues are balanced with the additional cost-to-serve.

- **Property tax:** A home with a total assessed value of \$619K generates \$1,082 in property tax revenue for the City.
- **WFH income tax:** In 2023, 24% of UA employees worked-from-home. For this analysis we assume that number drops by a third due to return-to-office. Still, the overall impact of WFH is an important consideration for expected revenue.
- **Parks and recreation:** The division's overall expenses divided by UA's 15,130 residential dwellings.
- **Police, EMS, Fire:** Cost-to-serve for residential, based on number of calls and expected staffing needs.
- **Revenues and fees not included:** Fees already balanced by service, i.e. swimming pool, waste, water, sewer, are not included.
- **School budget:** The schools receive their funding through a separate line item in the property tax.

Revenue balance scenarios with different development types and balancing points

Sources: City of Upper Arlington 2025, based on projected FY 2026 budget. Number of dwellings units is ~15,122 based on 2023 ACS.

	New single family <i>3072 Asbury Dr</i> <i>SF, 2018</i>	New two family detached <i>3445 London Ct</i> <i>2F, 2015</i>	New multifamily <i>The Kingston</i> <i>Multi, 2023</i>	Break even point single family <i>Hypothetical</i> <i>SF</i>	Break even point four family <i>Hypothetical</i> <i>Quadplex</i>
Total assessed value (2024)	\$1,403,000	\$1,819,200	\$47,196,300	\$619,046	\$2,476,184
Total assessed value per unit	\$1,403,000	\$909,600	\$145,219	\$619,046	\$619,046
Total tax rate	2.03%	2.01%	2.86%	2.02%	2.02%
Total revenue	\$28,429	\$36,556	\$1,348,998	\$12,492	\$49,967
City share of total revenue	8.66%	8.66%	8.66%	8.66%	8.66%
Total revenue to City	\$2,462	\$3,166	\$116,841	\$1,082	\$4,328
Units	1	2	325	1	4
Total City property tax revenue per unit	\$2,462	\$1,583	\$360	\$1,082	\$1,082
WFH income tax	\$465	\$465	\$465	\$465	\$465
Parks & Rec	-\$662	-\$662	-\$662	-\$662	-\$662
Police	-\$333	-\$333	-\$430	-\$333	-\$333
Fire & EMS	-\$552	-\$552	-\$780	-\$552	-\$552
Balance	\$1,380	\$501	-\$1,047	\$0	\$0

How economies of scale tip in the City's favor

As discussed earlier, new housing in Upper Arlington is typically above the break even point for revenue versus the cost-to-serve the new home. In addition to new housing already benefiting the City, each new housing unit will improve the efficiency of the City's infrastructure while also increasing overall productivity and economic growth.

Research by Bettencourt et al. (2007) demonstrates that the infrastructure requirements are in the City's favor as it grows, i.e. new need for infrastructure scales sublinearly with population. In practical terms, this means:

- **Economies of Scale:** Infrastructure such as roads, water systems, and energy networks do not need to double when the population doubles. Instead, they increase by a smaller factor (around the 0.8 power of population growth). For example, doubling the population only requires about a 1.7-fold increase in infrastructure.
- **Per Capita Cost Reduction:** As more households are added, the per capita demand on infrastructure decreases. This translates into more efficient service delivery and potentially lower relative costs for expanding services.

- **Fiscal Implications:** Adding new households is less likely to strain municipal finances because the incremental infrastructure cost is lower than a one-to-one increase. The built-in efficiency means that growth can, in fact, improve fiscal health by spreading costs over a larger population.
- **Increased productivity:** While infrastructure scales sublinearly, there is a superlinear scaling of employment, wages, and even inventions. Knowledge spillovers and economic activity increase wealth faster as the network expands.

In summary, as cities add housing, the cost of providing essential services per household decreases because the new homes leverage existing infrastructure and distribute expenses such as police, fire protection, and parks across more households. For Upper Arlington, a 9.8% increase in housing units from 2025-2050 as forecasted by MORPC's Metropolitan Transportation Plan would only require about 8.2% additional resources.

A development proforma shows what it takes to make a project pencil in Upper Arlington

Proformas

A proforma is a financial model that predicts the expected value of a real estate project. The team then compared that value to the household income required to afford the new home based on the attainability assumptions in this table. Understanding the cost drivers of housing can help set policies to make housing attainable to targeted income levels.

In this section, the analysis looks at what the the cost drivers for residential development in Upper Arlington using these typical development scenarios:

- Single family, small lot, single story:
1,400 sf on a 0.2 acre lot
- Single family, large lot, large house:
over 4,500 sf on a 0.5 acre lot
- New owner occupied small-scale 2-49 unit multifamily
(i.e. condos and owner-occupied townhome)
- New multi-family greater than 50 units

For this analysis, the team interviewed local housing developers, analyzed market conditions with data sources including CoStar and Zillow as well as recent sales.

Housing attainability assumptions

Affordability	Value	Source
2025 AMI	\$103,300	HUD
Mortgage rate	6.72%	FRED (Dec 2024)
Mortgage term	30	
Cost burden threshold	30%	
PMI (rate + baseline)	0.30%	CommunityScale
Insurance (rate + baseline)	0.02%	CommunityScale
Utilities (rate + baseline)	0.30%	CommunityScale
Property tax overall	2.60%	Upper Arlington (Jan 2025)

Small lots (<¼ acre) being redeveloped are worth \$1.9M per acre on average

Sources: Zillow, Redfin, BLS CPI, Upper Arlington building permit records, accessed 2025-01-28



2428 Swansea Rd (0.17 acres) before redevelopment sold for \$300K (\$1.8M/acre after inflation). After redevelopment it is worth \$1.3M total.

Address	\$/acre before (inflation adjusted)	Total value after Estimated current market value	Lot area (sqft)
2440 Wickliffe Rd	\$1,360,555.88	\$741,100	9,877
2410 Farleigh Rd	\$1,784,213.24	\$832,800	10,373
1511 Doone Rd	\$2,556,919.09	\$879,300	8,378
2428 Swansea Rd	\$1,808,446.91	\$1,258,300	7,697
1553 Grenoble Rd	\$2,416,088.16	\$1,268,838	8,317
2438 Farleigh Rd	\$1,781,813.80	\$1,803,500	10,585
AVERAGE	\$1,879,286.01	\$1,151,178.74	

What drives the cost of small lots with smaller houses?

For a prototypical lot of 8,700 square feet (0.2 acres) with a 1,400 square foot single-family residence, the sale price for Upper Arlington is typically three times the price of the lot before it is redeveloped. The most expensive inputs are construction costs (“hard costs”), design, permitting, and carrying costs (“soft costs”), and finally the land cost. With all these costs plus 15% profit for the developer, the sale price should be at least **\$1,144,000**. This home would be affordable to a household earning **\$374,500 a year**, which is 363% of the median household income.

Large lots (>1/3 acre) being redeveloped are worth \$1.3M per acre on average

Sources: Zillow, Redfin, BLS CPI, Upper Arlington building permit records, accessed 2025-01-28



4010 Fairfax Dr (0.77 acres) before redevelopment sold for \$355K (\$573K/acre after inflation). After redevelopment its worth \$1.7M total. Land cost has historically been variable in this category (\$480K to \$2.1M per acre).

What drives the cost of large lots with larger houses?

For a prototypical lot of 0.5 acres with a 4,500 square foot single-family residence, the sale price for Upper Arlington is typically more than three times the price of the lot before it is redeveloped. The most expensive inputs are construction costs (“hard costs”), design, permitting, and carrying costs (“soft costs”), and finally the land cost. Developers are opting for larger homes to cover their costs, with sales price is likely **\$2,144,000** depending on the land cost. This home would be affordable to a household earning **\$607,000 a year**, which is 588% of the median household income.

Address	\$/acre before (inflation adjusted)	Total value after Estimated current market value	Lot area (sqft)
2278 Wickliffe Rd	\$791,236	\$1,106,000	23,500
2109 Oakmount Rd	\$753,889	\$1,258,700	17,624
2592 Eastcleft Dr	\$833,565	\$1,396,300	19,035
2510 Eastcleft Dr	\$845,882	\$1,406,300	19,038
3010 Derby Rd	\$893,799	\$1,480,100	25,112
4225 Kenny Rd	\$479,459	\$1,481,400	43,345
1118 Highland Dr	\$972,112	\$1,638,588	23,814
4010 Fairfax Dr	\$573,930	\$1,686,600	33,626
3068 Avalon Rd	\$1,082,264	\$1,789,118	21,289
2814 Exmoor Rd	\$2,155,335	\$1,823,645	20,758
4611 Coach Rd	\$661,538	\$2,075,800	40,854
2725 Fairfax Dr	\$574,039	\$2,083,600	28,569
2814 Exmoor Rd	\$2,159,135	\$2,100,000	20,758
AVERAGE	\$1,274,413	\$1,446,965	

New owner occupied small-scale 2-49 unit multifamily

How is the proforma for new ownership townhomes and condos different?

This proforma re-imagines a 0.5 acre parcel as four owner-occupied homes rather than a single-family home. Each unit is 1,500 square feet per unit. As before, the sale price is driven by inputs are construction costs (“hard costs”), design, permitting, and carrying costs (“soft costs”), and finally the land cost. With all these costs plus 15% profit for the developer, the sale price is likely **\$783,000 per unit** depending on the land cost. This home would be affordable to a household earning **\$259,000 a year**, which is 251% of the median household income. These homes are significantly more attainable than single-family homes and represent a higher level of property tax revenue per acre due to the increased improvement of the land.

Note that smaller units, i.e. 650 square feet, might be able to achieve prices as low as \$467,000 for new construction, attainable at 150% AMI.

Thrive Quarry Trails
Nearby example of smaller new homes



New multi-family greater than 50 units

What drives the cost of new rental multi-family with more than 50 units?

A proforma for a large scale rental project is calculated differently than smaller owner-occupied projects. The rental price drives the project. Today, the market rent is in the range of **\$2,250 per unit** for a 900 square foot unit. This home would be affordable to a household earning **\$98,000 a year**, which is 95% of the median household income.

For the purpose of this analysis, we assume a 200 unit building with a construction cost of \$175,000 per unit. Given today's cap rate of 6%, which determines the effective sales price of the building, the most residual value this 200 unit project could create to pay for the land is \$75,000. At 15 units per acre with surface parking, the 200 units would need 13.3 acres, which would cost more than \$26M at today's land price of \$2M/acre for parcels with higher allowed use density. With \$75K being less than \$26M, the project does not pencil without significant public investment.

Alternatively, the project could be considered at 100 units per acre (similar to The Kingston) with structured parking at a cost of \$75K per parking space. In this scenario, the total development cost is less, but there is still a \$12.7M overall financing gap, or **\$63K per unit**, which includes the cost of parking. This rate is consistent with incentives being offered by the City of Columbus and other jurisdictions to encourage denser, mixed-use development.



The Kingston

3.08 acres, 325 units

\$2.19 Asking Rent per square foot



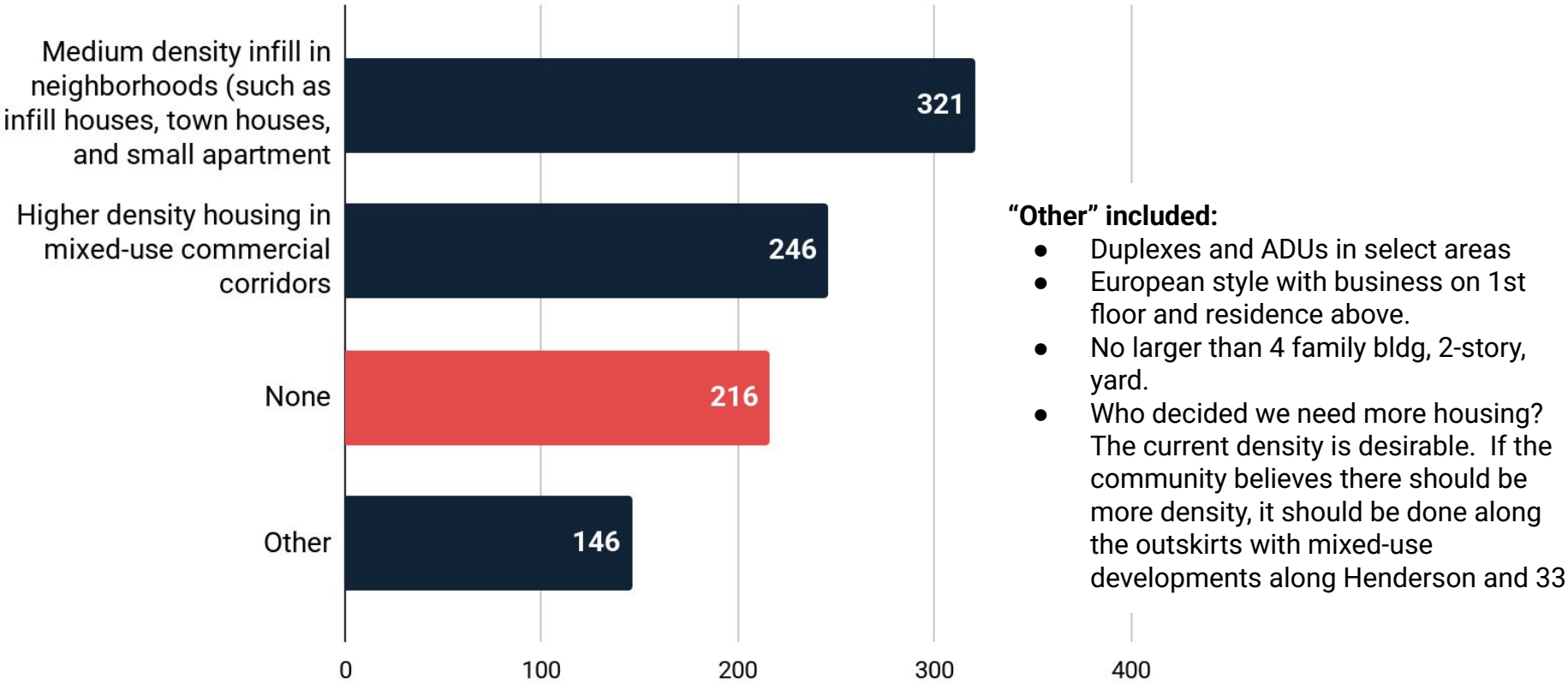
Engagement: Survey Results



SURVEY RESULTS

There is demand for more housing in Upper Arlington. In your opinion, where could that be accommodated? Select all that apply.

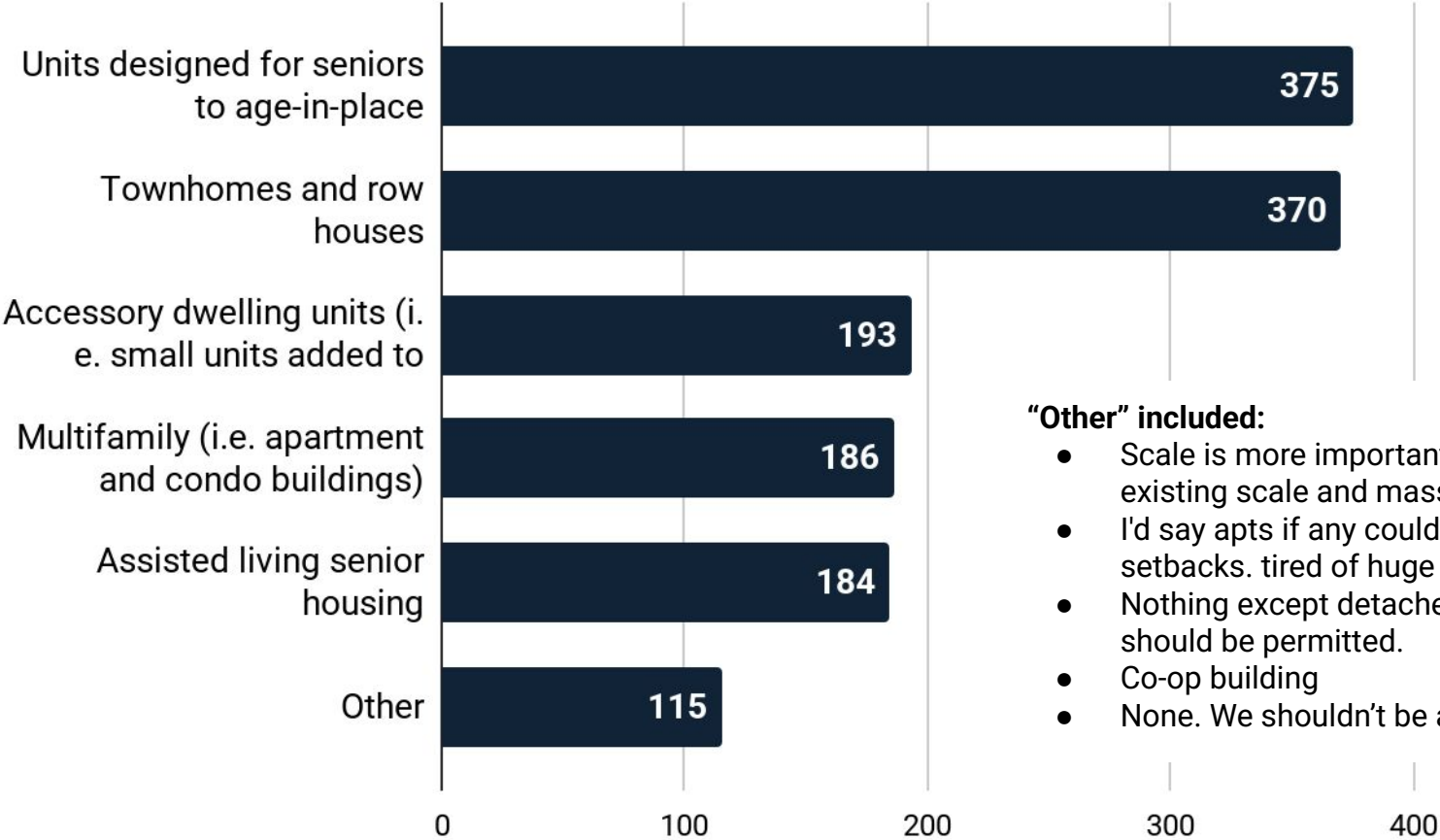
n = 695



SURVEY RESULTS

What housing types should be prioritized to complement the City’s supply of detached single family houses? Select all that apply.

n = 673

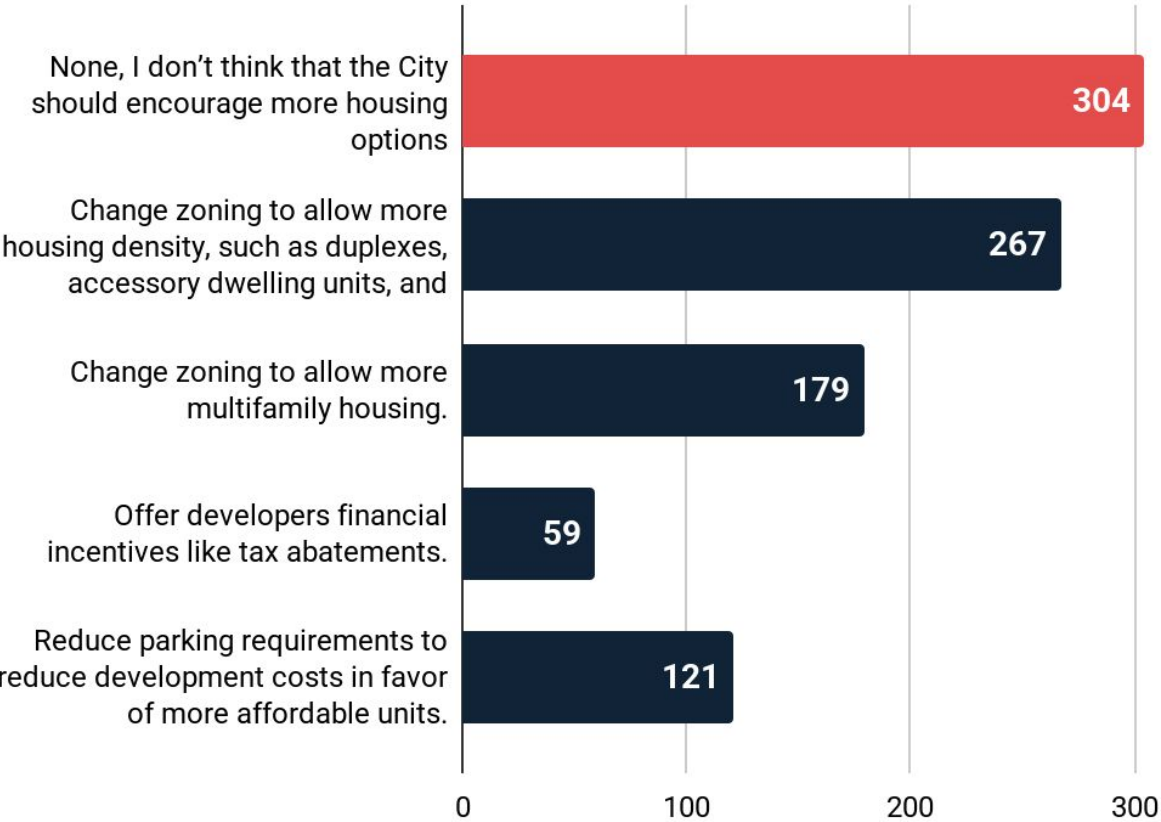


- “Other” included:**
- Scale is more important than density. Match existing scale and massing especially for infill.
 - I'd say apts if any could be designed with decent setbacks. tired of huge cubes
 - Nothing except detached single family houses should be permitted.
 - Co-op building
 - None. We shouldn't be adding transient housing.

SURVEY RESULTS

Which policy ideas would you support in your community to help increase housing options where you live? Select all that apply.

n = 674



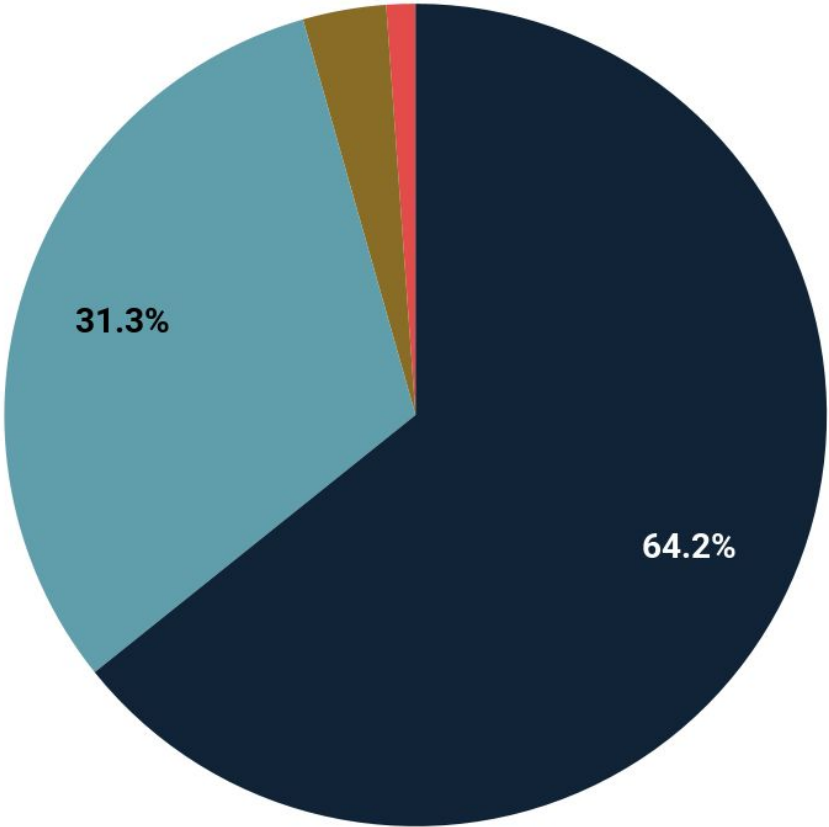
“Other” included:

- I'm not educated enough on this issue to opine.
- More family units in areas close to stores. Don't stick multiple units in the middle of an established neighborhood.
- The city needs to do more to protect existing housing stock and limit opportunity for developers to demo and infill with structures out of step with current neighborhood design characteristics and scale.
- Create incentives and/or mandates for accessibility (i.e. wheelchair accessible apartments or ramped entries for ground level housing).
- Consider neighborhood resources, such as availability of sidewalks if reducing parking requirements
- Allow for easier additions to current houses
- If zoning changes are made, they should only be made in areas that are already clearly commercial or mixed-use, such as Lane Avenue or the Henderson Road corridor.

SURVEY RESULTS

How satisfied would you say you are with the quality of life in your community?

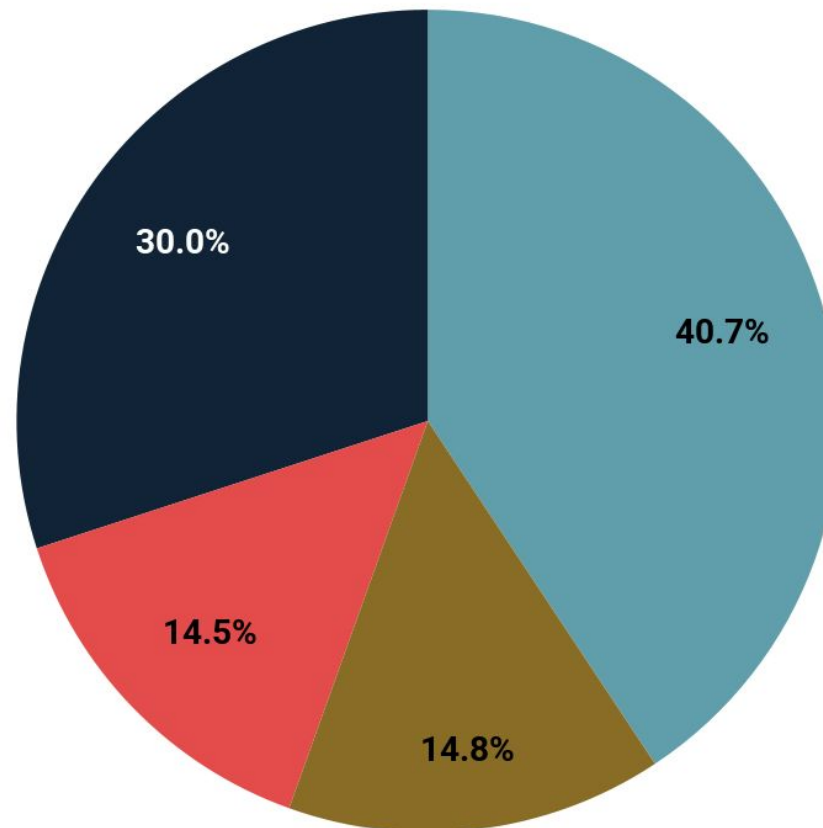
- Very Satisfied
- Somewhat Satisfied
- Somewhat Dissatisfied
- Very Dissatisfied



SURVEY RESULTS

Now thinking about your neighborhood and home, please indicate whether you agree or disagree with the following statement: There are a lot of places to walk nearby, such as shops, cafes, and restaurants.

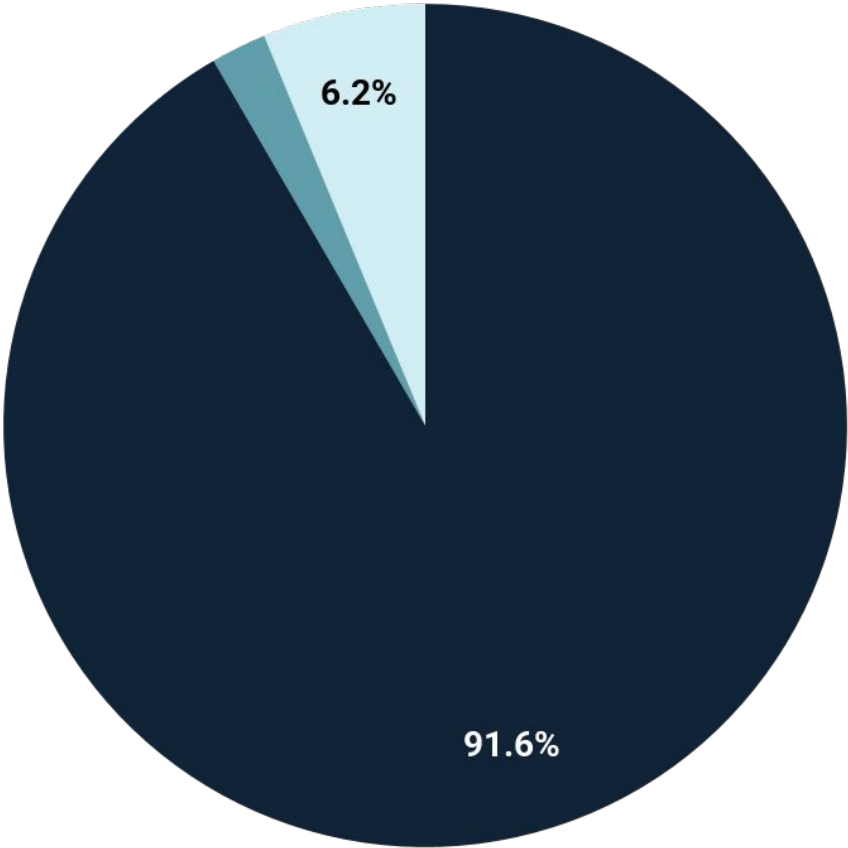
- Somewhat Agree
- Somewhat Disagree
- Strongly Disagree
- Strongly Agree



SURVEY RESULTS

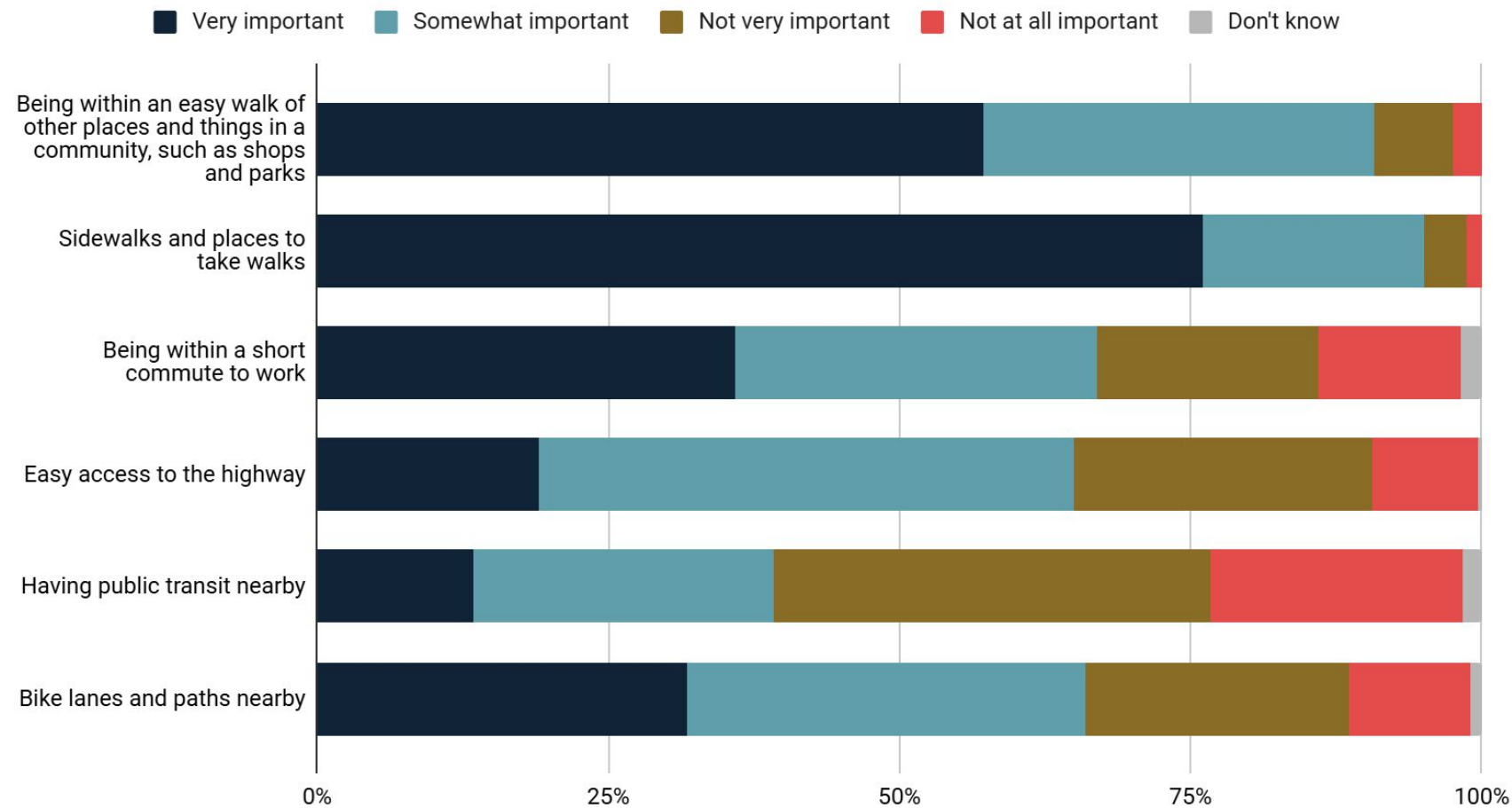
Do you live in:

- A single-family, detached house
- A single-family, attached house such as a townhouse or rowhouse
- A building with two or more apartments or condos



SURVEY RESULTS

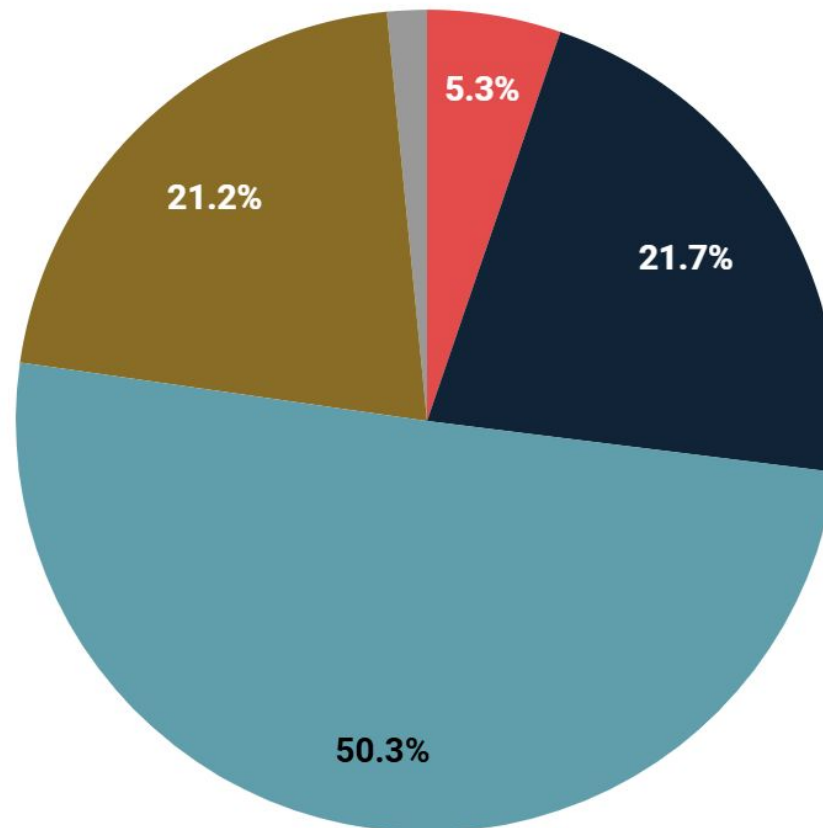
If you were deciding today where to live, please indicate how important each of the following would be to you:



SURVEY RESULTS

If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?

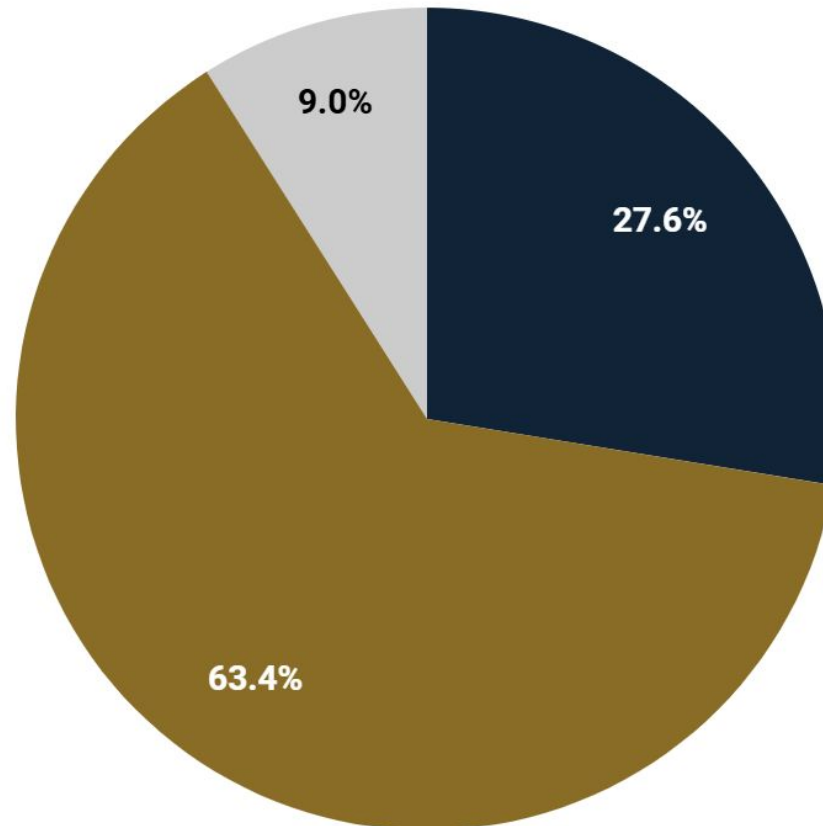
- Being within an easy walk of places isn't important to me
- Yes, a lot more
- Yes, a little more
- No, no more
- Don't know



SURVEY RESULTS

Continue to imagine that you are moving to another home. Please select the community that you prefer.

- Community A: Houses with large yards, and you have to drive to the places where you need to go
- Community B: Houses with small yards, and it is easy to walk to places you need to go
- Don't know



SURVEY RESULTS

Selection of comments:

Support/Need for housing diversity, affordable, smaller units, in walkable areas:

I am a single dad with one child and stuck in a 5 bedroom house. I want to stay in UA for the schools and community, but **there is no where a small family can move** if they prefer a detached house.

Higher density **townhomes and duplexes sounds great**. I'm on board with multifamily rental, but would like it to be held to a **high architectural standard**. Definitely like walkable neighborhoods...some of the oldest parts of UA are the most walkable...would be great if new development would return to some of those planning principles.

I am not entirely opposed to apartments, but think **reasonably-priced condos, townhomes and ADUs would satisfy more people** looking to move into the neighborhood.

I'm a teacher in the school district and so is my wife. We can barely afford to live here. We choose to live here because we love it and we grew up here and want to raise our children here. While we understand that this is an affluent community, **it'd be really nice to see some of the new homes being built, be homes that are affordable to teachers** in the community.

UA is great, but it's so expensive. Once our children graduate, I don't know that we'll stay here. Would **prefer to find a newer, smaller house that doesn't need the maintenance** in a community that is either more affordable with the walkability and/or more diverse.

I am **continually frustrated by the destruction of older homes, often ranch style, to be replaced** by huge two story homes, ruining the feel of the neighborhood and replacing (somewhat) affordable homes with much pricier homes which certainly cost more to build, heat, cool and maintain.

Concern about infrastructure strains

I have noticed traffic, parking, and congestion have become increasingly difficult over the past decade, and **as we build more high density housing those will only get worse**.

I am actually planning on moving in a year or two. Looking for a patio home somewhere else. **UA is overbuilt, has traffic issues and excessive taxes**.

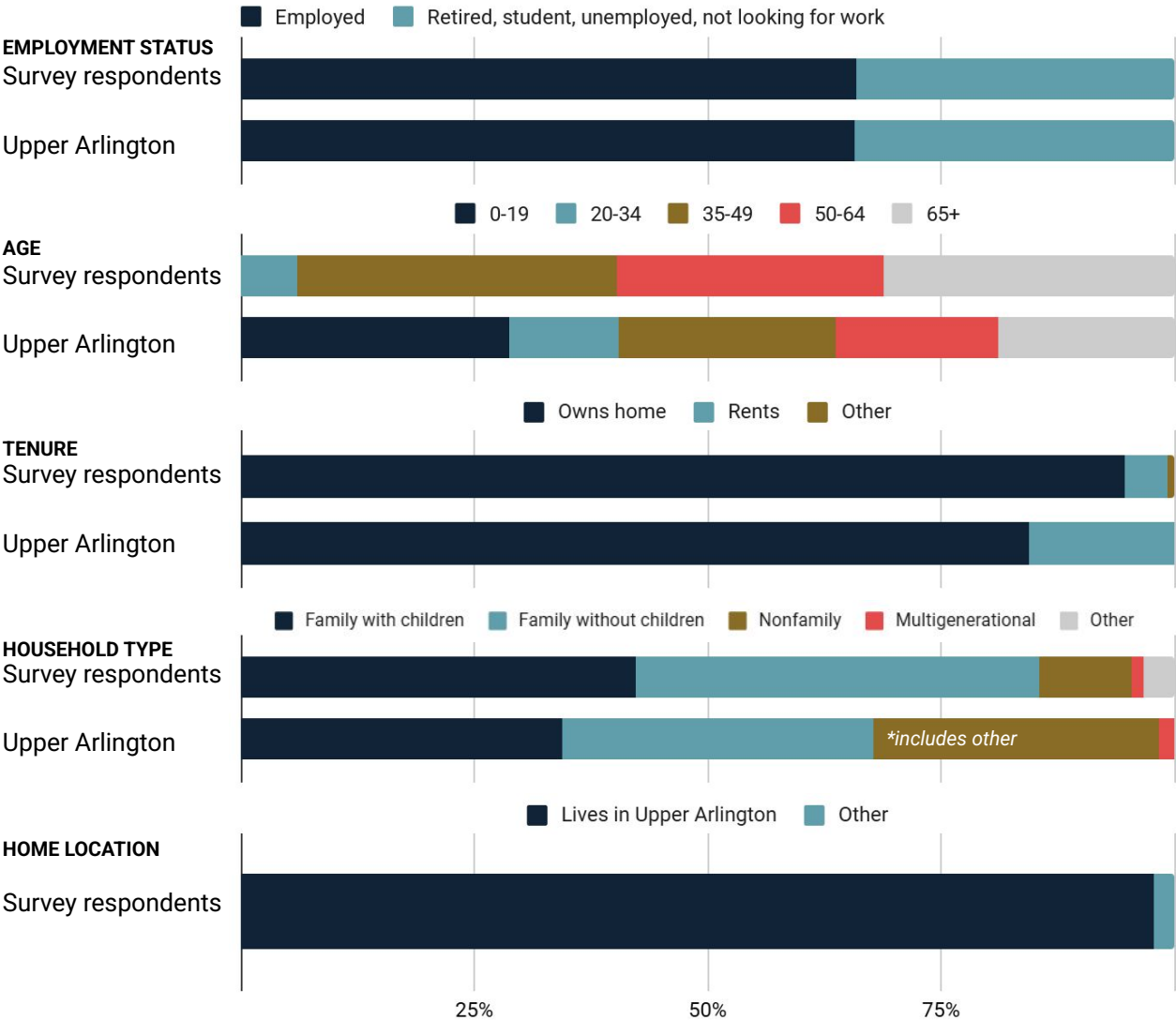
Don't see housing affordability as an issue

There is nothing wrong. **It is okay to have high housing costs in a desirable community**.

SURVEY RESULTS

Survey respondents

While the survey received over 700 responses, the respondents are in some ways not a representative sample of who lives in Upper Arlington. For example, homeowners and older individuals were overrepresented in the survey, while renters and young people were underrepresented - or, in the case of residents younger than age 20, not represented at all.





Explore areas where allowing neighborhood-scale density will create new housing opportunities

As a landlocked community, meeting growth targets will require intensification of land use. For example, one-for-one replacement of single-family housing will not create new housing options for all stages of life. Upper Arlington should revise zoning to allow higher density infill, such as duplexes, quadplexes, and townhomes. New neighborhood-scale density will help increase housing supply while preserving walkability and local character or requiring subsidy.

Economic rationale: Adjusting allowable density in zoning regulations can significantly improve housing attainability by enabling organic, locally-led infill development that operates on market-rate economics. Higher density infill development enhances the tax base and improves the efficiency of existing infrastructure and services.

Community support: Survey participants were vocal about wanting housing options that extend beyond detached single-family homes. These responses align with a zoning revision that would facilitate mixed-use and infill development. While there is support for increased density, many residents also stressed that any new development should respect the existing scale and design of their neighborhoods.

Community survey comments call for “higher density townhomes and duplexes sounds great” and “reasonably-priced condos, townhomes, and ADUs” underscoring need for options.



New Small Single Family
One home on a 0.2 acre lot
\$1.4M sale price
\$470K income to afford



New Townhomes
Four homes on a 0.5 acre lot
\$780K sale price / unit
\$260K income to afford

Support Senior Housing

Upper Arlington should continue to pursue a multifamily approach to senior housing that encompasses both a basic independent living model and an enhanced service offering. The City is encouraged to support projects designed to meet diverse income levels and service needs and integrate amenities such as senior-centric commercial spaces, community centers, and structured parking.



Larger-scale senior living developments with different offerings for different needs and income levels can effectively address a decade's worth of potential downsizing needs within the community.

For Upper Arlington, a “multifamily” model of senior living with a strong sense of community in a park-like setting is appropriate with the following considerations:

- 80-120 units on a 1-3 acre lot
- 600-1000 sq ft typical unit size, some larger units
- Achieve rents of \$1,300-\$1,500 per month with tax credits, \$2,200 per month for independent living, and \$3,000 per month with more services.

Large-Scale Multifamily as a Component of Transformational Redevelopment

The City should cultivate opportunities and time the market to seize the benefits of co-locating rental housing with commercial uses in transformation mixed-use projects, such as the successful collaboration with The Kingston and the Community Center. With multifamily as a core element of a holistic redevelopment strategy, the City can create much needed market-rate rental housing, a walkable environment, and expanded tax revenue from integrated commercial development.

For example, the Envision Henderson plan (shaped by input from over 900 residents) demonstrates how multifamily can effectively complement new office, streetscape enhancements, and open space amenities. The Northern Gateway, as imagined here, is planned to be a lively mixed-use district, brimming with activity, and serving as a welcoming gateway to Upper Arlington. The draft program of uses balances housing with commercial to create a live-work neighborhood.

The plan specifically calls out merge community goals for housing along with fiscal sustainability. While large-scale multifamily needs public subsidy today, the recommendation is to cultivate opportunities such as Envision Henderson where the City's investment in multifamily can contribute to a wider mixed-use project and achieve the City's housing goals.

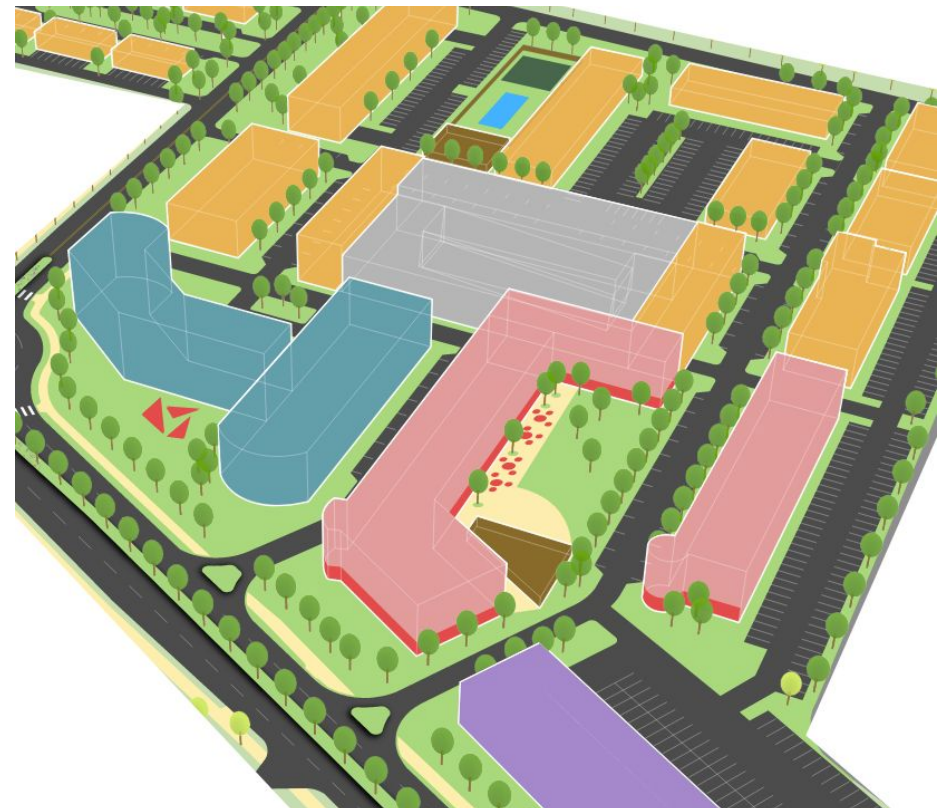


Image credit: Envision Henderson (draft)

Housing Market Detailed Analysis

City of Upper Arlington





Authors:	Brent Lewis, Finance Department Director
Council Meeting Date:	April 21, 2025
Subject/Legislative Item:	Finance Director Monthly Report - March 2025
Purpose:	To keep City Council informed about the City's financial status and assist them with the monitoring of the current year's budget.
Executive Summary:	As required by City Councils' adopted financial accounting and reporting policies, the Finance Director is presenting the 2025 First Quarter Finance Director Report for Council Review. No legislative action is required.

Purpose and Impact

*** Reminder: The accompanying financial report is prepared using the "budgetary method". This means revenues equal amounts actually collected and expenditures equal amounts actually spent plus amounts that have been committed (encumbered) to date. ***

General Fund Overview

- **Ending Balance (Q1 2025):** \$33.1 million
 - \$1M over projection, but \$1.7M lower than Jan 1st balance
- **Reserve Requirement:** \$16.5M – \$27.5M (30%-50% of the annual operating budget)
 - **Unreserved Balance:** \$5.6M – \$15.8M (depending on the reserve level applied)
- **Revenues:**
 - **Income taxes:** 7.43% above projections (details below)
 - **Real estate taxes:** Slightly above projection
 - **Other Revenue - Investment earnings:** Outperforming
 - **Other Revenue - Some revenue sources lagging** (licenses, permits, charges for services, etc.)
- **Expenditures:** All departments are within budget with **no notable variances**

Income Tax Overview

- **Total Q1 Income Tax Receipts:** \$11.4 million



- 7.43% above projection
- 8.91% higher than Q1 2023
- **Withholding Tax:** +12.63% over projections (strongest performer)
- **Net Profits:** Recovering well after a slow 2024
- **Individual Filers:** Still trailing behind projections (potential trend vs. timing variance)
- **Allocation:**
 - **General Fund:** \$8.2M
 - **Capital Asset Management Fund:** \$3.2M
- **Outlook:** Positive overall, no changes to budget or projections needed yet

Other Funds & Notes

- **Citywide Cash Position:** Increased from **\$150.8M to \$155.1M**
 - Driven by strong income tax collections and property tax receipts
- **Utility Billing:**
 - Second half of 2025 bills to be mailed late June/early July
 - Includes second half **solid waste collection fee** (first half waived)
 - Unpaid balances subject to penalty and special assessment via Franklin County
- **Debt Refinancing:**
 - City exploring **bond refinancing for cash savings**
 - **Bond ordinance** expected to come before Council in June
- **EMS Billing Receipts:**
 - Collected **\$410K YTD vs. \$667K in all of 2023**
 - Includes a mix of delayed and new payments
 - Recovery ongoing with regular staff check-ins

History

N/A

Alternatives

N/A

Attachments

1.	March 2025 Finance Director Report
----	------------------------------------



Monthly Financial Report As of March 2025

General Fund (101)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Income Tax	\$ 34,595,400	\$ 34,595,400	\$ 7,616,000	\$ 8,181,082	\$ 565,082	7.42%
Real & Personal Property Tax	10,230,600	10,230,600	5,115,300	5,373,655	258,355	5.05%
All Other Operating Revenues	14,137,400	14,137,400	2,923,480	3,137,979	214,499	7.34%
Transfers/Advances In	10,052,500	10,052,500	810,010	810,010	-	0.00%
Total Revenues and Other Sources	69,015,900	69,015,900	16,464,790	17,502,726	1,037,936	6.30%
Obligations:						
Police Division	12,262,800	12,262,800	4,619,532	4,505,096	114,436	2.48%
Fire Division	12,519,900	12,519,900	3,141,202	2,912,721	228,481	7.27%
Board of Health	400,000	400,000	363,604	363,604	-	0.00%
Parks and Recreation	8,383,300	8,426,600	2,206,136	1,919,220	286,916	13.01%
Community Development	1,563,300	1,579,300	673,356	541,365	131,991	19.60%
Public Service Administration	1,397,800	1,502,800	379,629	340,891	38,738	10.20%
Public Works	1,700,400	1,670,400	417,600	324,153	93,447	22.38%
City Manager	2,087,400	2,187,400	634,485	543,480	91,005	14.34%
City Attorney	983,700	1,053,700	289,466	202,600	86,866	30.01%
City Clerk	334,800	330,200	82,550	48,987	33,563	40.66%
City Council	208,900	237,400	59,350	55,167	4,183	7.05%
Finance	1,638,800	1,638,800	490,165	409,362	80,803	16.48%
Facilities Maintenance	4,818,400	4,818,400	2,788,451	2,470,273	318,178	11.41%
Information Technology	2,522,200	2,522,200	666,399	655,109	11,290	1.69%
General Administration	3,800,600	3,800,600	1,396,253	1,385,463	10,790	0.77%
Transfers/Advances Out	10,624,300	18,943,400	2,500,000	2,500,000	-	0.00%
Total Obligations	65,246,600	73,893,900	20,708,178	19,177,491	1,530,687	7.39%
Excess of Revenue and Other Sources over Obligations:	3,769,300	(4,878,000)	(4,243,388)	(1,674,765)		
Total Beginning Fund Balance	34,761,336	34,761,336	34,761,336	34,761,336		
Anticipated Appropriation Lapses	1,415,000	1,415,000	1,415,000	-		
Total Ending Fund Balance	\$ 39,945,636	\$ 31,298,336	\$ 31,932,948	\$ 33,086,571	\$ 1,153,623	3.61%

Capital Asset Management Fund (102)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Income Tax	\$ 13,453,700	\$ 13,928,200	\$ 2,961,778	\$ 3,182,701	\$ 220,923	7.46%
Total Revenues and Other Sources	13,453,700	13,928,200	2,961,778	3,182,701	220,923	7.46%
Obligations						
Transfers/Advances Out	9,776,200	9,776,200	-	-	303,631	0.00%
Total Obligations	9,776,200	9,776,200	-	-	303,631	0.00%
Excess of Revenue and Other Sources over Obligations:	3,677,500	4,152,000	2,961,778	3,182,701		
Beginning Fund Balance	20,368,117	20,368,117	20,368,117	20,368,117		
Ending Fund Balance	\$ 24,045,617	\$ 24,520,117	\$ 23,329,895	\$ 23,550,818	\$ 220,923	0.95%

Monthly Financial Report As of March 2025

Capital Equipment Fund (106)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Real & Personal Property Tax	\$ 1,312,400	\$ 1,312,400	\$ 656,200	\$ 685,361	\$ 29,161	0.00%
Homestead & Rollbacks	173,500	173,500	-	-	-	0.00%
Transfers In	500,000	500,000	500,000	500,000	-	0.00%
Total Revenues and Other Sources	1,985,900	1,985,900	1,156,200	1,185,361	29,161	0.00%
<u>Obligations</u>						
Capital Equipment	2,548,300	2,548,300	1,815,595	1,815,595	-	0.00%
Total Obligations	2,548,300	2,548,300	1,815,595	1,815,595	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(562,400)	(562,400)	(659,395)	(630,234)		
Beginning Fund Balance	1,208,768	1,208,768	1,208,768	1,208,768		
Ending Fund Balance	\$ 646,368	\$ 646,368	\$ 549,373	\$ 578,534	\$ 29,161	5.31%

Street Maintenance and Repair Fund (207)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Gasoline Taxes	\$ 1,800,000	\$ 1,800,000	\$ 433,643	\$ 455,746	\$ 22,103	5.10%
Motor Vehicle License Taxes	450,000	450,000	109,584	94,534	(15,050)	-13.73%
All Other Operating Revenues	138,000	138,000	12,500	15,967	3,467	27.74%
Total Revenues and Other Sources	2,388,000	2,388,000	555,727	566,247	10,520	1.89%
<u>Obligations</u>						
Public Service Administration	1,129,200	1,129,200	235,250	195,042	40,208	17.09%
Public Works	1,582,700	1,582,700	565,907	512,948	52,959	9.36%
Total Obligations	2,711,900	2,711,900	801,157	707,990	93,167	11.63%
Excess of Revenue and Other Sources over Obligations:	(323,900)	(323,900)	(245,430)	(141,743)		
Beginning Fund Balance	1,927,174	1,927,174	1,927,174	1,927,174		
Ending Fund Balance	\$ 1,603,274	\$ 1,603,274	\$ 1,681,744	\$ 1,785,431	\$ 103,687	6.17%

Bonded Improvement Fund (402)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Sale of Bonds and Notes	\$ 19,973,700	\$ -	\$ -	\$ -	\$ -	0.00%
All Other Operating Revenues	475,000	475,000	118,750	218,495	99,745	84.00%
Total Revenues and Other Sources	20,448,700	475,000	118,750	218,495	99,745	84.00%
<u>Obligations</u>						
Capital Improvements	500,000	500,000	105,043	105,043	-	0.00%
Total Obligations	500,000	500,000	105,043	105,043	-	0.00%
Excess of Revenue and Other Sources over Obligations:	19,948,700	(25,000)	13,707	113,452		
Beginning Fund Balance	7,509,727	7,509,727	7,509,727	7,509,727		
Ending Fund Balance	\$ 27,458,427	\$ 7,484,727	\$ 7,523,434	\$ 7,623,179	\$ 99,745	1.33%

Monthly Financial Report As of March 2025

Infrastructure Improvement Fund (404)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
All Other Operating Revenues	\$ 6,700,000	\$ 6,700,000	\$ 6,000,000	\$ 6,515,029	\$ 515,029	8.58%
Transfers/Advances In	5,750,000	14,069,100	-	-	-	0.00%
Total Revenues and Other Sources	12,450,000	20,769,100	6,000,000	6,515,029	515,029	8.58%
Obligations						
Capital Improvements	9,986,900	18,306,000	161,731	161,731	-	0.00%
Transfers/Advances Out	6,100,000	6,100,000	-	-	-	0.00%
Total Obligations	16,086,900	24,406,000	161,731	161,731	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(3,636,900)	(3,636,900)	5,838,269	6,353,298		
Beginning Fund Balance	5,549,699	5,549,699	5,549,699	5,549,699		
Ending Fund Balance	\$ 1,912,799	\$ 1,912,799	\$ 11,387,968	\$ 11,902,997	\$ 515,029	4.52%

Solid Waste Management Fund (710)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 1,900,000	\$ 1,900,000	\$ 241,985	\$ 241,985	\$ -	0.00%
All Other Operating Revenues	45,000	45,000	11,250	12,519	1,269	11.28%
Transfers/Advances In	2,000,000	2,000,000	2,000,000	2,000,000	-	-
Total Revenues and other sources	3,945,000	3,945,000	2,253,235	2,254,504	1,269	0.06%
Obligations						
Public Works	4,134,100	4,134,100	3,772,998	3,718,809	54,189	1.44%
Total Obligations	4,134,100	4,134,100	3,772,998	3,718,809	54,189	1.44%
Excess of Revenue and Other Sources over Obligations:	(189,100)	(189,100)	(1,519,763)	(1,464,305)		
Beginning Fund Balance	1,534,635	1,534,635	1,534,635	1,534,635		
Ending Fund Balance	\$ 1,345,535	\$ 1,345,535	\$ 14,872	\$ 70,330	\$ 55,458	372.90%

Water Surcharge Fund (720)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 855,000	\$ 855,000	\$ 205,213	\$ 255,954	\$ 50,741	24.73%
Total Revenues and other sources	855,000	855,000	205,213	255,954	50,741	24.73%
Obligations						
Public Works	490,700	490,700	153,374	135,649	17,725	11.56%
Capital Equipment	10,000	10,000	-	-	-	0.00%
Capital Improvements	246,000	246,000	-	-	-	0.00%
Transfers Out (including intra-city services)	99,900	99,900	2,375	2,375	-	0.00%
Total Obligations	846,600	846,600	155,749	138,024	17,725	11.38%
Excess of Revenue and Other Sources over Obligations:	8,400	8,400	49,464	117,930		
Beginning Fund Balance	1,778,865	1,778,865	1,778,865	1,778,865	-	
Prior Year Lapsed Encumbrances	-	-	-	-		
Ending Fund Balance	\$ 1,787,265	\$ 1,787,265	\$ 1,828,329	\$ 1,896,795	\$ 68,466	3.74%

Monthly Financial Report As of March 2025

Sanitary Sewer Surcharge Fund (730)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 1,333,000	\$ 1,333,000	\$ 312,243	\$ 382,215	\$ 69,972	22.41%
All Other Operating Revenues	1,500	1,500	-	794	794	0.00%
Total Revenue	1,334,500	1,334,500	312,243	383,009	70,766	22.66%
Obligations						
Public Works	1,214,000	1,214,000	239,998	195,197	44,801	18.67%
Capital Equipment	13,000	13,000	-	-	-	0.00%
Capital Improvements	315,000	315,000	-	-	-	0.00%
Transfers Out (including intra-city services)	27,600	27,600	6,533	6,533	-	0.00%
Total Obligations	1,569,600	1,569,600	246,531	201,730	44,801	18.17%
Excess of Revenue and Other Sources over Obligations:	(235,100)	(235,100)	65,712	181,279		
Beginning Fund Balance	2,831,202	2,831,202	2,831,202	2,831,202		
Ending Fund Balance	\$ 2,596,102	\$ 2,596,102	\$ 2,896,914	\$ 3,012,481	\$ 115,567	3.99%

Stormwater Management Fund (740)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 753,000	\$ 753,000	\$ 359,779	\$ 408,050	\$ 48,271	13.42%
Investment Earnings	70,000	70,000	17,500	25,717	8,217	46.95%
Miscellaneous income	-	-	-	1,293	1,293	100.00%
Total Revenues and other sources	823,000	823,000	377,279	435,060	57,781	15.32%
Obligations						
Public Works	690,000	690,000	146,550	27,956	118,594	80.92%
Capital Equipment	470,000	470,000	82,000	82,000	-	0.00%
Capital Improvements	449,800	449,800	-	-	-	0.00%
Transfers Out (including intra-city services)	77,600	77,600	3,377	3,377	-	0.00%
Total Obligations	1,687,400	1,687,400	231,927	113,333	118,594	51.13%
Excess of Revenue and Other Sources over Obligations:	(864,400)	(864,400)	145,352	321,727		
Beginning Fund Balance	2,987,559	2,987,559	2,987,559	2,987,559		
Ending Fund Balance	\$ 2,123,159	\$ 2,123,159	\$ 3,132,911	\$ 3,309,286	\$ 176,375	5.63%

Swimming Pool Fund (750)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 1,013,800	\$ 1,013,800	\$ 89,277	\$ 71,026	\$ (18,251)	-20.44%
Transfers/Advances In	300,000	300,000	-	-	-	0.00%
Total Revenues and other sources	1,313,800	1,313,800	89,277	71,026	(18,251)	-20.44%
Obligations						
Parks and Recreation	1,140,600	1,140,600	178,403	100,390	78,013	43.73%
Total Obligations	1,140,600	1,140,600	178,403	100,390	78,013	43.73%
Excess of Revenue and Other Sources over Obligations:	173,200	173,200	(89,126)	(29,364)		
Beginning Fund Balance	397,663	397,663	397,663	397,663		
Ending Fund Balance	\$ 570,863	\$ 570,863	\$ 308,537	\$ 368,299	\$ 59,762	19.37%

Monthly Financial Report As of March 2025

Statement of Receipts and Disbursements (cash basis rounding)

<u>Fund</u>	<u>Beginning Balance</u>	<u>Year to Date & Transfer In</u>	<u>Year to Date & Transfer Out</u>	<u>Ending Balance</u>	<u>Percentage Change</u>
General	\$ 43,870,708	\$ 17,502,726	\$ 16,299,270	\$ 45,074,164	2.7%
Capital Asset Management	24,410,352	3,182,702	-	27,593,054	13.0%
Police Pension	1,499,760	411,217	152,040	1,758,937	17.3%
Fire Pension	1,499,759	411,217	152,039	1,758,937	17.3%
Self Insurance	1,084,300	11,912	6,440	1,089,772	0.5%
Capital Equipment	1,720,307	1,185,361	125,075	2,780,593	61.6%
Police & Fire Pension	1,422,653	704,574	505,933	1,621,294	14.0%
Technology Fund	425,843	44,133	141,274	328,702	-22.8%
Street Maintenance and Repair Fund	1,965,631	566,247	553,878	1,978,000	0.6%
EMS Billing Fund	1,691,000	410,118	43,110	2,058,008	21.7%
Law Enforcement	2,739,032	33,646	75,098	2,697,580	-1.5%
Tree Planting Fund	92,965	9,400	-	102,365	10.1%
Enforcement Education	20,650	100	-	20,750	0.5%
Mayor's Court Computer	45,728	1,293	-	47,021	2.8%
Mayor's Court Special Project	171,505	4,320	-	175,825	2.5%
Local Fiscal Recovery Fund	2,192,062	-	657,462	1,534,600	-30.0%
OneOhio Opioid Fund	141,353	-	2,800	138,553	-2.0%
Economic Development	2,078,781	-	1,331	2,077,450	-0.1%
Arlington Centre TIF Fund	116,976	12,879	145	129,710	10.9%
Tremont Road TIF Fund	18,760	20,267	228	38,799	106.8%
Lane Avenue Mixed Use TIF Fund	738,355	517,967	6,077	1,250,245	69.3%
Lane Avenue TIF Fund	304,986	30,798	547	335,237	9.9%
Arlington Crossing TIF Fund	1,068,524	62,468	1,131	1,129,861	5.7%
Horizon TIF Fund	1,053,912	242,197	3,752	1,292,357	22.6%
Kingsdale West TIF Fund	395,386	28,478	327	423,537	7.1%
Kingsdale CORE TIF Fund	668,801	1,510,486	65,745	2,113,542	216.0%
Civil Service	60,960	-	2,180	58,780	-3.6%
Riverside North TIF Fund	19,946	1,446	16	21,376	7.2%
Riverside South TIF Fund	224,430	22,430	253	246,607	9.9%
W. Lane Northwest TIF Fund	22,542	9,058	103	31,497	39.7%
Lane II TIF Fund	1,265,563	653,783	10,269	1,909,077	50.8%
Kingsdale Center TIF Fund	30,032	171,466	17,225	184,273	513.6%
Gateway TIF Fund	39,409	884,397	9,968	913,838	2218.9%
Neighborhood Lighting Utility	318,423	38,511	6,978	349,956	9.9%
Clerk of Courts Fund	21,343	1,294	-	22,637	6.1%
UA Visitor's Bureau Fund	572,453	27,203	-	599,656	4.8%
General Bond Retirement	315,716	-	52,792	262,924	-16.7%
Bonded Improvements	13,072,564	218,496	2,852,953	10,438,107	-20.2%
Infrastructure Improvement Fund	25,102,125	6,515,029	10,477,143	21,140,011	-15.8%
Estate Tax Fund	85	-	-	85	0.0%
Community Fiber Optic Fund	352,606	-	10,888	341,718	-3.1%
Employee Benefit	2,014,911	1,275,115	1,522,530	1,767,496	-12.3%
BWC Administration Fund	1,340,044	98,602	141,549	1,297,097	-3.2%
Solid Waste Management	1,919,144	2,254,504	961,478	3,212,170	67.4%
Water Surcharge	1,952,948	255,954	129,204	2,079,698	6.5%
Sanitary Sewer Surcharge	3,532,735	383,009	552,092	3,363,652	-4.8%
Stormwater Management	3,301,276	435,060	422,101	3,314,235	0.4%
UA Swimming Pools	397,663	71,026	40,800	427,889	7.6%
Unclaimed Funds	8,491	7	-	8,498	0.1%
Revolving Fund	53,814	792,049	18,510	827,353	1437.4%
Construction Withholding	3,108,854	121,161	1,082,214	2,147,801	-30.9%
Payroll Clearing Fund	330,833	9,108,284	8,877,094	562,023	69.9%
Totals (ROUNDED)	\$ 150,816,999	\$ 50,242,390	\$ 45,982,042	\$ 155,077,347	ROUNDED TOTALS

4,260,348

Monthly Financial Report As of March 2025

Income Tax Comparisons

	<u>Projections</u>	<u>Year to date</u>	<u>Difference</u>	<u>% Difference</u>
Withholdings	\$ 7,422,341	\$ 8,359,941	\$ 937,600	12.63%
Individuals	2,127,310	1,729,761	(397,549)	-18.69%
Net Profits	1,028,127	1,274,082	245,955	23.92%
Total	\$ 10,577,778	\$ 11,363,784	\$ 786,006	7.43%

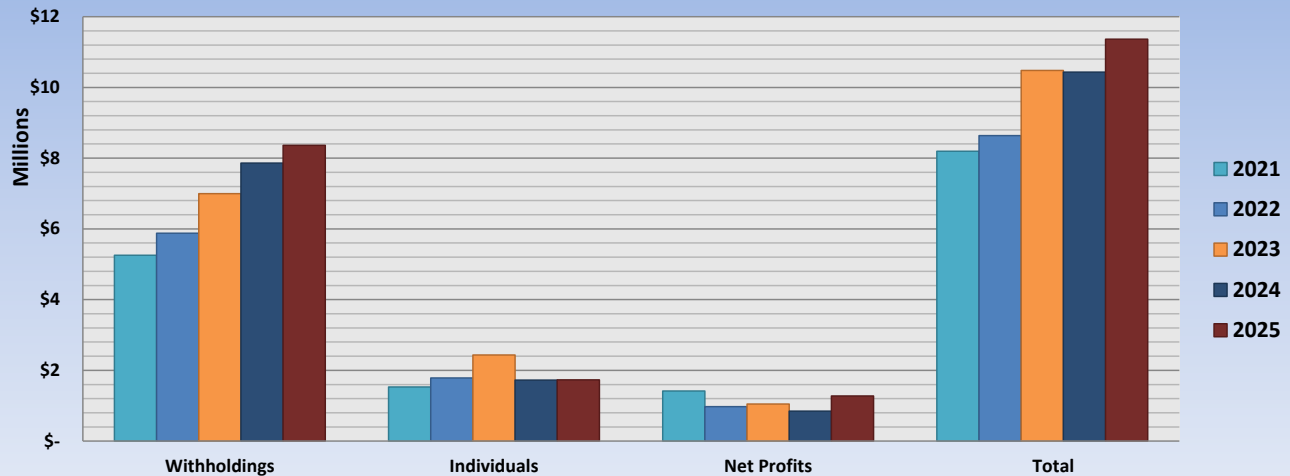
Income Tax Five Year Comparison

	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>
Withholdings	\$ 5,253,229	\$ 5,879,136	\$ 6,998,363	\$ 7,858,793	\$ 8,359,941
Individuals	1,529,457	1,784,072	2,432,916	1,726,220	1,729,761
Net Profits	1,415,524	976,124	1,047,255	848,968	1,274,082
Total	\$ 8,198,210	\$ 8,639,332	\$ 10,478,534	\$ 10,433,981	\$ 11,363,784

Percentage Increase (Decrease) From Prior Year

	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>
Withholdings	8.89%	11.91%	19.04%	12.29%	6.38%
Individuals	14.38%	16.65%	36.37%	-29.05%	0.21%
Net Profits	20.38%	-31.04%	7.29%	-18.93%	50.07%
Total	11.73%	5.38%	21.29%	-0.43%	8.91%

Income Tax Five Year Trend vs Prior YTD Monthly



Interest & Investment Income

Mar-25

General Investments	Beginning Balance	Purchased	Matured/Sold	Deposited/Withdrawn	Investment Acct.	Ending Balance
Municipal Securities	4,102,786.00					\$ 4,102,786.00
Corporate / General Investments	11,764,306.18					\$ 11,764,306.18
Federal Agency	54,336,202.52					\$ 54,336,202.52
US Government Bonds	22,832,284.44	498,496.09				\$ 23,330,780.53
Total Bonds	\$ 93,035,579.14	\$ 498,496.09	\$ -	\$ -	\$ -	\$ 93,534,075.23
Short Term Fixed Maturity Commercial Paper	-					\$ -
Other Assets (Savings Cert - Market Traded)	\$ 3,439,988.55					\$ 3,439,988.55
Bond and Investments:						
2022						
Federal Agency	-					\$ -
Corporate / General Investments	-					\$ -
Short Term Fixed Maturity Commercial Paper	-					\$ -
US Government Bonds	113,151.56		(113,151.56)			\$ -
Community Center						
Federal Agency	1,023,790.54		(580,084.15)			\$ 443,706.39
US Government Bonds	512,080.08					\$ 512,080.08
Total Bonds & Investments	\$ 98,124,589.87	\$ 498,496.09	\$ (693,235.71)	\$ -	\$ -	\$ 97,929,850.25
Money Markets:						
General	399,035.11	(498,496.09)		(3,071.52)	189,386.14	\$ 86,853.64
Community Center	6,549.45		575,000.00	(575,000.00)	14,882.71	\$ 21,432.16
Bond 2020 & 2022	4,558.92		120,000.00	(124,000.00)	1,144.96	\$ 1,703.88
Total Money Markets	\$ 410,143.48	\$ (498,496.09)	\$ 695,000.00	\$ (702,071.52)	\$ 205,413.81	\$ 109,989.68
Star Ohio:						
General Investment	29,568,522.73	797,963.62		(1,000,000.00)	112,575.59	\$ 29,479,061.94
Bond Proceeds	7,032,021.27	124,000.00		(416,965.52)	26,165.45	\$ 6,765,221.20
Federal ARPA (Gen. Inv.)	1,386,554.81			(6,149.73)	5,244.34	\$ 1,385,649.42
Gateway	981,191.95				3,718.84	\$ 984,910.79
Kingsdale	231,512.50				877.46	\$ 232,389.96
Community Center	960,925.97	575,000.00		(0.10)	4,696.96	\$ 1,540,622.83
Office (Comm. Center)	2,150,615.86			(374,848.27)	7,509.06	\$ 1,783,276.65
Total STAR Ohio	\$ 42,311,345.09	\$ 1,496,963.62	\$ -	\$ (1,797,963.62)	\$ 160,787.70	\$ 42,171,132.79
Total Investments	\$ 137,331,915.18	\$ 1,496,963.62	\$ 1,764.29	\$ (2,500,035.14)	\$ 366,201.51	\$ 140,210,972.72
NW Huntington Bank	\$ 4,344,801.83					\$ 14,866,379.37
Total Cash & Investments	\$ 145,190,880.27					\$ 155,077,352.09

ITEMS PURCHASED BETWEEN \$25,000 & \$150,000 MARCH 2025

[illegible]

QUALITY BASED SELECTION CONSULTANTS – MARCH 2025

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
None			

NOTIFICATION OF CHANGE ORDERS: NON-CONSTRUCTION, CITY MANAGER APPROVAL
MARCH 2025

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>CHANGE ORDER AMOUNT</u>	<u>New Total</u>

GRANTS MARCH 2025

<u>DATE</u>	<u>ORGANIZATION</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>





Authors:	Darren Shulman, City Attorney
Council Meeting Date:	April 21, 2025
Subject/Legislative Item:	Resolution No. 5-2025 - A resolution establishing a policy and procedure for requesting street name changes in the City of Upper Arlington (<i>Munc</i>)
Purpose:	To outline a process for renaming streets in the City.
Executive Summary:	This policy creates a formal process for requesting street name changes in the City. At the direction of Council, the City Attorney provided recommendations based on legal and financial analysis by outside counsel. The draft was reviewed by Council on October 7, 2024, with no action taken. The proposed \$500 fee may not cover staff costs, and adjustments could be considered.

Purpose and Impact

This policy establishes a formal process for requests to change street names in Upper Arlington and provides a standard review process for those requests. The attached policy is identical to the draft shared by the City Attorney during the October 7, 2024, City Council meeting. The draft was based on recommendations from outside counsel, which did an evaluation of the costs involved in changing a street name, the legal requirements to do so, and best practices from other cities. At the October meeting, potential amendments were discussed by Council but no votes were taken.

While this policy would establish a process for requesting a street name change, the ultimate cost of adopting such a change would depend on the street. As part of the policy, staff would provide Council with a cost estimate for replacing the street signs. It is likely the proposed \$500 application fee would be insufficient to cover the staff time needed to review the application and create a report for Council as described under the policy, so if being cost-neutral is a goal, the application fee could be increased and/or made non-refundable. Council has previously received a report on the financial impact renaming a street would have on residents, which informed the current draft petition requirement that is near the top of the range referenced in the report.

History

After being presented with a request to change a street name, staff recommended adoption of a formal procedure to ensure all requests were evaluated systematically and consistently. The City engaged outside counsel to research the legal process for changing a street name, the



costs of doing so for both the City and residents, and a review of how other cities handle these requests. Following that report, staff provided a draft policy for Council discussion at its October 7, 2024, meeting, at which time Council indicated it should be prepared for a Council vote, with the understanding that it could be amended.

Alternatives

The policy can be amended by Council at the second reading prior to adoption. In particular, the following provisions have been identified as potentially being amended, which would be policy determinations by Council:

1. Percentage of property owners required on signature (section 4)
2. \$500 application fee (section 5)
3. Whether a portion of the fee will be returned if the request is not granted (section 5)

Procedurally, staff recommends submitting proposed amendments to the City Attorney between readings, so the amendments can be organized and prepared for consideration at the second reading.

Alternatively, Council could decline to adopt a policy. However, staff would recommend not entertaining street name changes without having a policy in place.

Attachments

1.	Resolution No. 5-2025
2.	4.17.25 REVISED DRAFT - Exhibit A - Street Renaming Policy



RECORD OF RESOLUTIONS

CITY OF UPPER ARLINGTON
STATE OF OHIO

RESOLUTION NO. 5-2025

TO ESTABLISH A POLICY AND PROCEDURE FOR REQUESTING STREET NAME CHANGES IN THE CITY OF UPPER ARLINGTON

- WHEREAS,** the City of Upper Arlington has received requests to change the names of streets within the City; and
- WHEREAS,** in response to these requests, City staff and outside legal counsel have evaluated the costs associated with street name changes, applicable legal requirements, and best practices from other municipalities; and
- WHEREAS,** it is in the public interest to establish a formal, consistent process for reviewing and considering such requests; and
- WHEREAS,** City Council discussed a draft policy regarding street name change requests during a presentation by the City Attorney on October 7, 2024, and now wishes to formally adopt said policy.

NOW, THEREFORE, BE IT RESOLVED by the Council of the City of Upper Arlington, Ohio:

- SECTION 1.** The City of Upper Arlington hereby adopts the "Street Renaming Policy," which is attached hereto and incorporated by reference as Exhibit A. The policy establishes a formal application and review process for individuals or entities requesting a change to the name of a public street.
- SECTION 2.** The process set forth in the adopted policy shall be followed by staff when evaluating any street name change request. This includes the preparation of a cost estimate for replacement of street signage and a staff report to be presented to City Council. Staff shall also assess legal and practical implications of the proposed change.
- SECTION 3.** This resolution shall take effect immediately upon passage.

Street Renaming Policy

The Street Name Change Review Process for eligible streets begins with the submission of a complete application.

An eligible street is one that has not had a name change within the past 50 years.

A complete application includes the following:

1. Copy of the tax map showing:
 - a. The street to be renamed and all lots involved in the request
 - b. All streets that intersect the street to be renamed
 - c. Requests must be for a continuous length of the street that begins and ends at a logical termini such as a dead end or intersection
2. Requested new street name
3. Provide biographical or historical information about the person or event for whom the street would be named after. Only individuals who are deceased are eligible for street renaming. If the request is to name the street after a person, the application should detail how the person was outstanding in achievement in the arts, professions, politics, science, education, sports, religion, commerce, philanthropy, public service, or a reputation that brings honor to the community, or personal commitment and service to the community, or has had a lasting effect for the good of the community.*
4. Following the receipt of an application, a petition will be prepared by the Public Service Department containing all the names and addresses of property owners with land abutting the street in question (see a through c below). It will then be provided to the applicant for circulation. It will be the applicant's responsibility to contact all adjacent property owners in order to obtain evidence of 90% concurrence to the proposed street name change. Objections by 10% or more adjacent property owners, and/or a failure to obtain evidence to the contrary from each adjacent owner, will prevent said street renaming request from proceeding for City Council consideration.
 - a. A petition requires a minimum of ten signatures
 - b. If a street has less than ten parcels, any properties that touch the street (such as a side or back yard) must be included in the petition even if it would not result in an address change for that property.

- c. If this still results in less than ten properties, the closest properties on intersecting streets must be included in the petition even if it would not result in an address change for that property.
- 5. \$500 application fee. The City will return \$400 of the fee if the request is not granted.
- 6. Upon receipt of a complete application, staff will review the application and provide Council with:
 - 1. Historical information about the current street name (if available)
 - 2. A recommendation as to whether the requested name is consistent with City's Policy for Naming Public Properties, adopted 2/27/17.
 - 3. A report detailing any concerns staff has identified with naming a street after the individual including the Franklin County Engineer's Office analysis to identify any conflicts across the County.
 - 4. An estimated cost of replacing the renamed street signs

* These criteria match the criteria for eligibility for induction into the Wall of Honor.

Proposed Amendment 1: Add following sentence as second sentence in section 4. The petition shall provide notice of the impacts (including costs borne by the resident) of changing a street name, including but not limited to needing to change their address with the post office, getting a new driver's license, and updating official recorded documents such as deeds, mortgages, and wills.

Proposed Amendment 2: Amend section 4 to replace 90% with 80% (with a corresponding change from 10% to 20% for objections)

Proposed Amendment 3: This policy is not intended to infringe on City Council's ability to initiate its own legislative action to change a street name.



Authors:	Emma Speight, Community Affairs Director
Council Meeting Date:	April 21, 2025
Subject/Legislative Item:	Ordinance No. 15-2025 - An ordinance authorizing the issuance of a City permit to the Upper Arlington Civic Association for the sale of alcohol on public property during the 2025 Neighbors Night Out event
Purpose:	The City Permit to be generated following passage of this ordinance grants permission and provides guidelines to the Upper Arlington Civic Association for the sale of alcohol at the 2025 Neighbors Night Out community event.
Executive Summary:	An ordinance granting permission for the issuance of a City Permit for the Upper Arlington Civic Association for the sale of alcohol on public property for its 2025 Neighbors Night Out community event on Saturday, August 23, in the Northam Park parking lot.

Purpose and Impact

The Upper Arlington Civic Association plans to host its Third Annual Neighbors Night Out community event from 5-10 pm on Saturday, August 23, 2025. New for 2025, this event will move from private property to a portion of Northam Park's south parking lot adjacent to the Tremont Library. Since Neighbors Night Out features the sale of alcoholic beverages as part of UACA's fundraising goals for this event, the City Manager and UACA are seeking City Council authorization to issue a City Permit allowing for the sale and consumption of alcohol on the evening in question, providing that UACA meets the necessary requirements for such authorization, including compliance with all state and local liquor laws, proof of adequate insurance, limiting all sales and consumption within the approved, fenced event layout and ending at 9:45 pm.

The Upper Arlington Civic Association (UACA) is a beloved and long-standing volunteer run non-profit that enriches community life in Upper Arlington by hosting a series of community events each year. UACA is best known for its annual Fourth of July Parade and the Party in the Park evening festival with fireworks, as well as Christmas in the Park, Golden Bear Scare, the Memorial Day Run, and the Golden Apple Awards. Most of these events are free, with the bulk of the funding for UACA secured through membership dues and corporate sponsorships.

UACA has been exploring ways to secure the funding needed each year to continue hosting



its events and programs that are open and accessible to the community. The Neighbors Night Out event has been identified as an integral part of UACA’s funding strategy.

History

In 2023, UACA launched Neighbors Night Out, a family-friendly event designed to bring newer and longstanding neighbors together, while also serving as a fundraiser in place of The Walk, a fundraising approach that was no longer proving effective, requiring numerous volunteers to walk every street in Upper Arlington to encourage households to support UACA by becoming members.

This ticketed event features activities for children for the first part of the evening, along with live music, food and beverages, including the sale of beer and wine. For the first two years, Neighbors Night Out was held at Tremont Center, attracting 600-800 attendees. For 2025, UACA decided to seek an alternate central location, determining that the Northam Park parking lot was their preferred option.

Council approval is required to issue a permit in this location because Northam Park is not one of the areas the City Manager has authority to grant a city permit for under C.O. 131.05.

Alternatives

If City Council denies the Permit, UACA would have to revisit its plans for Neighbors Night Out to a) identify a suitable location on private property that would allow for the sale and consumption of alcohol, or b) decide to cancel this popular community event.

Attachments

1.	Ordinance No. 15-2025
----	-----------------------



RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 15-2025

TO AUTHORIZE THE ISSUANCE OF A CITY PERMIT TO THE UPPER ARLINGTON CIVIC ASSOCIATION FOR THE SALE OF ALCOHOL ON PUBLIC PROPERTY DURING THE 2025 NEIGHBORS NIGHT OUT EVENT

- WHEREAS,** the Upper Arlington Civic Association (UACA) is a long-standing, volunteer-run non-profit organization dedicated to enriching community life through a variety of beloved community events, including the Fourth of July Parade, Party in the Park, Christmas in the Park, Golden Bear Scare, Memorial Day Run, and Golden Apple Awards; and
- WHEREAS,** in 2023, UACA introduced Neighbors Night Out, which features children's activities, live music, food, and beverages, including the sale of beer and wine, and has attracted 600–800 attendees in each of its first two years at Tremont Center; and
- WHEREAS,** for 2025, UACA has identified the south parking lot of Northam Park, adjacent to the Tremont Library, as the preferred new location for the Third Annual Neighbors Night Out, to be held from 5:00 p.m. to 10:00 p.m. on Saturday, August 23, 2025; and
- WHEREAS,** pursuant to C.O. 131.05, the City Manager lacks authority to issue a City Permit for non-city-events involving alcohol at Northam Park and other public property, and therefore City Council approval is required; and
- WHEREAS,** UACA and the City Manager seek City Council's authorization to issue a City Permit for this event to allow for the sale and consumption of alcohol on public property, contingent upon compliance with all applicable local and state liquor laws, proof of adequate insurance, proper fencing and event layout, and ending alcohol sales and consumption no later than 9:45 p.m.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Upper Arlington, Ohio:

- SECTION 1.** The City Manager is hereby authorized to issue a City Permit to the Upper Arlington Civic Association allowing for the sale and consumption of alcoholic beverages at the 2025 Neighbors Night Out event, to be held on Saturday, August 23, 2025, in a designated and fenced portion of the south parking lot of Northam Park, adjacent to the Tremont Library, between the hours of 5:00 p.m. and 10:00 p.m.,

with all alcohol sales ending by 9:45 p.m.

SECTION 2.

The authorization is contingent upon UACA complying with all applicable requirements, including but not limited to:

- (a) Obtaining any required permits or licenses from the Ohio Department of Commerce Division of Liquor Control;
- (b) Providing proof of adequate liability insurance coverage;
- (c) Ensuring that all sales and consumption of alcohol occur within a secured and approved event layout;
- (d) Adhering to all safety and public health regulations and guidelines.

SECTION 3.

This ordinance shall take effect immediately upon passage.