



5/12/2025 | 7:00 PM

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

1. Call to Order/Roll Call

2. Pledge of Allegiance Led By Troop 555 Eagle Scouts

3. Consent Agenda

- a. Approve City Council Meeting Minutes
- b. 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

4. Reports/Presentations

- a. Presentation of Troop 555 Eagle Scout Certificates for Alvaro Gonzalez-Adams, Grayson Campbell, Grant Mitchell, Noah Dombrowski, and Alexander Skoracki
- b. Update from Community Development Department and Board of Zoning and Planning, Presented by Director Chad Gibson and Chair Shannon Tolliver
- c. Finance Director Report - April 2025

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

- a. Ordinance No.16-2025 - An ordinance authorizing Upper Arlington's participation in the Central Ohio Shared Mobility Program and authorizing the City Manager to enter into a service agreement with Veoride, Inc. for the operation of scooters, bikes, and other mobility devices within the City (*Kulewicz*)

6. Liquor Control

- a. Ohio Division of Liquor Control Notice to Legislative Authority: Transfer of Liquor Permit from Bonsai Restaurant to US Restaurant and Catering LLC (*no action needed from Council unless there is an objection*)

7. City Manager Update

8. Council Liaison Report

9. Executive Session

- a. To enter into Executive Session pursuant to O.R.C. Section 121.22 (G)(1) – to consider the appointment, employment, dismissal, discipline, promotion, demotion, or compensation of a public employee

10. Adjournment

April 21, 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 7:05 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 Manager Steven Schoeny, City Attorney Darren Shulman, City Clerk Krystal Gonchar, Finance Director Brent Lewis, IT Director Jeff Kasson, Community Development Director Chad Gibson, Public Service Director Gary Wilfong, HR Director Don Essex, Community Affairs Director Emma Speight, Police Lt. Jason Amweg, Assistant Fire Chief Mike Bell, and Economic Analyst James Russell

Pledge of Allegiance

The Pledge of Allegiance was led by Vice President Close.

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 a 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 a 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**

Vice President Close moved, seconded by Ms. Adams, 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. Recognition of UAHS Girls Swim Team and Men's Hockey Team - 2025 State Champions

Mr. Walter presented the Upper Arlington High School Girls Swim Team with a Resolution of Commendation for their recent State Championship win (attached as Exhibit A). Mr. Lynch presented the Upper Arlington High School Men's Hockey Team with a Resolution of Commendation for their recent State Championship win (attached as Exhibit B).

b. Housing Market Analysis Update, Presented by CommunityScale Principal Nels Nelson

The City Manager introduced Nels Nelson, from CommunityScale to present the findings of the Upper Arlington Housing Market Analysis (presentation attached as Exhibit C). Mr. Nelson highlighted several key findings and insights about the local housing market. Upper Arlington has experienced significant growth in median household income, positioning it near the top compared to similar communities. The city attracts families with children, and this demographic is notably growing, bucking the national trend of population aging. The community currently has a tight housing market characterized by low vacancy rates. The analysis deemed a healthy vacancy rate for ownership and rental properties as essential, suggesting that the City's current rates are slightly below ideal, indicating underproduction in past years, exacerbated by COVID-19. A substantial affordability gap exists between median home prices and what median income households can afford. Median home prices exceed what households earning the median income can comfortably purchase, highlighting concerns over attainment for different income levels in the future. The study projected a need for approximately 57 new housing units per year to meet the ongoing demand. However, projected and historical data reveal that maintaining this growth rate poses challenges due to the city being landlocked and fully developed, complicating infill and redevelopment efforts. A community survey conducted as part of the study showed that while residents express high satisfaction with living in Upper Arlington, opinions on increasing housing options are mixed. Many residents value maintaining the current character of Upper Arlington over introducing new housing developments regardless of type.

Council members engaged in robust discussions about these findings, questioning demographic trends and the sustainability of growth without compromising community character. One of the core concerns was the potential impact of increased housing on local schools and municipal services. School funding mainly derives from property taxes, which may not keep up with the costs if new housing brings in more school-aged children than expected.

Council members discussed various housing types, such as townhomes and multifamily units, evaluating their potential contributions to tax revenue and school enrollment. The possibility of introducing more senior-focused housing and smaller units for young professionals was also discussed as options to diversify housing options and meet varied resident needs throughout the life cycle.

The role of tax abatements in stimulating development was examined, particularly their effect on making multifamily projects financially feasible, given current construction costs and the high land value in Upper Arlington.

Council members discussed how best to balance growth with existing infrastructure capacity, understanding that while service levels allow for some growth, widespread redevelopment may necessitate broader infrastructure investments.

Mr. Schoeny shared that the study's findings could significantly inform future planning efforts, such as the upcoming Master Plan process, but noted that policy recommendations were not included in the scope of this study. Mr. Nelson highlighted the importance of strategically managing growth to preserve Upper Arlington's high quality of life while addressing affordable housing issues.

c. Finance Director Monthly Report - March 2025

The Finance Director presented the Finance Director's Report for March 2025 (attached as Exhibit D). Mr. Lewis noted that the city's finances were in good shape, with income tax revenues remaining solid. He mentioned upcoming bond refinancing opportunities and the potential for using cash for the 2026-2027 CIP instead of issuing bonds.

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

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 15-2025.

Representatives from the Upper Arlington Civic Association (UACA) presented their request to sell alcohol at the 2025 Neighbors Night Out event (presentation attached as Exhibit E). Shelby Croft, UACA President, explained that the event would be held in the Tremont Library parking lot on August 23rd. The presentation included details about the event layout, security measures, and the UACA's history of community involvement.

Council members inquired about alcohol sale procedures, event security, and family-friendly aspects of the event. The UACA representatives assured Council that appropriate measures would be in place to ensure safety and compliance with regulations.

President Awakessien Jeter advised that the Second Reading/Public Hearing/Council Action will occur on May 12, 2025.

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*)

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.

Ms. Munc moved, seconded by Ms. Adams, to pass Resolution No. 5-2025.

Mr. Kulewicz moved to amend #4 of the policy to add the following sentence as the 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." Mr. Lynch seconded the motion.

The motion carried with the following vote:

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

Ms. Adams moved to amend #4 of the policy to replace "90%" with "80%", with a corresponding change from "10%" to "20%" for objections. Ms. Munc seconded the motion.

The motion carried with the following vote:

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

Voting Nay: Lynch

Mr. Kulewicz moved to amend the policy to include the sentence "This policy is not intended to infringe on City Council's ability to initiate its own legislative action to change a street name." Vice President Close seconded the motion.

The motion carried with the following vote:

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

Mr. Kulewicz moved to amend the policy title to "Resident-Petitioned Street Renaming Policy." Mr. Lynch seconded the motion.

The motion carried with the following vote:

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

Mr. Kulewicz moved to amend the second sentence of #3 of the policy, in regard to the contents of a complete application, to read “Only the names of individuals who are deceased are eligible for consideration.” Mr. Lynch seconded the motion.

The motion carried with the following vote:

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

Mr. Lynch moved to amend #4 of the policy to replace “80%” with “85%” with a corresponding change from “20%” to “15%” for objections. The motion died for lack of second.

President Awakessien Jeter called for a vote to pass Resolution No. 5-2025 as amended.

The motion carried with the following vote:

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

City Manager Update

No update provided.

Council Liaison Report

Mr. Kulewicz reported that the Upper Arlington Board of Health met the previous week and reviewed health statistics and demographic data for the city. He mentioned that more detailed information would be forthcoming.

Vice President Close noted that the May 5, 2025, City Council meeting will be canceled. The next Council meeting will be held on May 12, 2025.

* * *

There being no further business to come before City Council, President Awakessien Jeter called for a motion to adjourn the meeting. Mr. Kulewicz moved, seconded by Mr. Lynch to adjourn. The motion carried unanimously, and the meeting adjourned at 9:44 p.m.

COUNCIL OF THE CITY OF UPPER ARLINGTON
RESOLUTION OF COMMENDATION

**In Recognition of the Upper Arlington High School Girls Swim Team State
Championship Win**

WHEREAS, the City of Upper Arlington takes great pride in recognizing outstanding achievements in athletics, which serve as a testament to the dedication, perseverance, and teamwork of our community's youth; and

WHEREAS, the UAHS Girls Swim Team demonstrated remarkable determination and skill in winning their second consecutive Division I state championship on February 22, 2025; and

WHEREAS, the Upper Arlington Golden Bears, through the collective efforts of their talented athletes secured the program's 14th state championship title; and

WHEREAS, the team's success at the state tournament was a result of exceptional performances across multiple events, showcasing the depth of talent, hard work, and commitment of its members; and

WHEREAS, this season's achievements were not only a reflection of the athletes' dedication but also of the untiring commitment of the coaching staff; and

WHEREAS, the resilience, sportsmanship, and teamwork demonstrated by the UAHS Girls Swim Team serve as an inspiration to young athletes across our City and bring honor and recognition to Upper Arlington.

NOW, THEREFORE BE IT RESOLVED that members of the Council of the City of Upper Arlington, Ohio, do hereby recognize the Upper Arlington High School Girls Swim Team and coaching staff for their outstanding season and state championship victory and urge all residents to join in celebrating their exceptional accomplishment and contributions to our community's proud tradition of athletic excellence.

Ukeme Awakessien Jeter, President

Brian C. Close, Vice President

Kathy Adams

John J. Kulewicz

Jim Lynch

Heidi Munc

Todd Walter

Attest: Krystal Gonchar

COUNCIL OF THE CITY OF UPPER ARLINGTON

RESOLUTION OF COMMENDATION

In Recognition of the Upper Arlington High School Men's Hockey Team State Championship Win

WHEREAS, the Upper Arlington Golden Bears hockey team achieved an extraordinary milestone by securing the 2025 OHSA State Championship, marking the first hockey state title in school history; and

WHEREAS, under the leadership of Head Coach Craig Hagkull and his talented staff, the Golden Bears displayed unwavering determination, resilience, and teamwork, culminating in a 5-2 victory over Cleveland St. Ignatius at Nationwide Arena on March 9, 2025; and

WHEREAS, the Golden Bears demonstrated excellence in competition and sportsmanship throughout the season; and

WHEREAS, the Upper Arlington hockey program, established in 1977, has long been one of the most respected in the region, and this championship marks the culmination of decades of dedication, perseverance, and hard work by players, coaches, families, and supporters; and

WHEREAS, the Golden Bears' success was amplified by the enthusiastic support of the Upper Arlington community, whose presence and energy helped propel the team to victory throughout the playoffs, reinforcing the City's strong sense of pride and unity; and

WHEREAS, this historic achievement serves as an inspiration to student-athletes throughout Upper Arlington and beyond, highlighting the values of commitment, teamwork, and the pursuit of excellence.

NOW, THEREFORE BE IT RESOLVED that members of the Council of the City of Upper Arlington, Ohio, do hereby recognize the Upper Arlington High School Men's Hockey Team for their first ever State Championship win on March 9, 2025, and urge all residents to join in celebrating this remarkable accomplishment and the legacy of our state champion Golden Bears hockey team.

Ukeme Awakessien Jeter, President

Brian C. Close, Vice President

Kathy Adams

John J. Kulewicz

Jim Lynch

Heidi Munc

Todd Walter

Attest: Krystal Gonchar

Housing Market Detailed Analysis

City of Upper Arlington

April 21, 2025 **DRAFT**



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

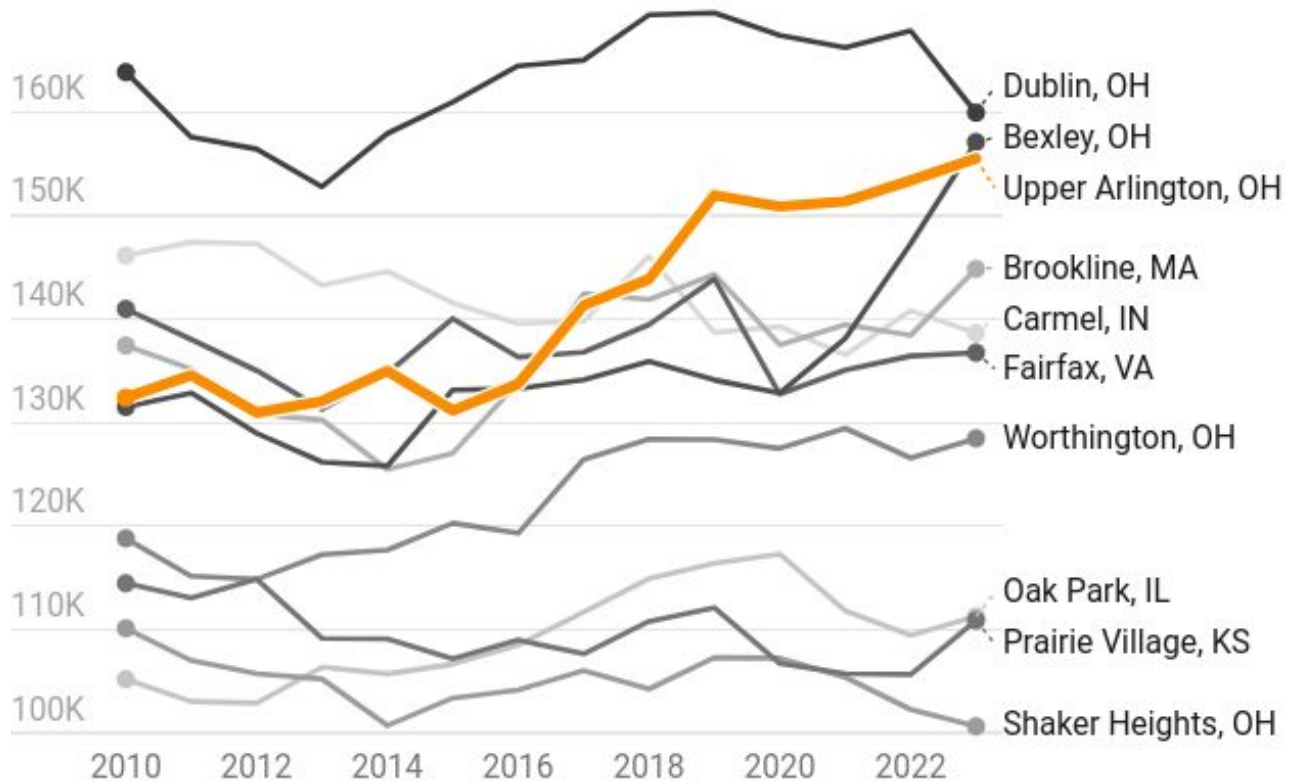
COMPARISONS

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

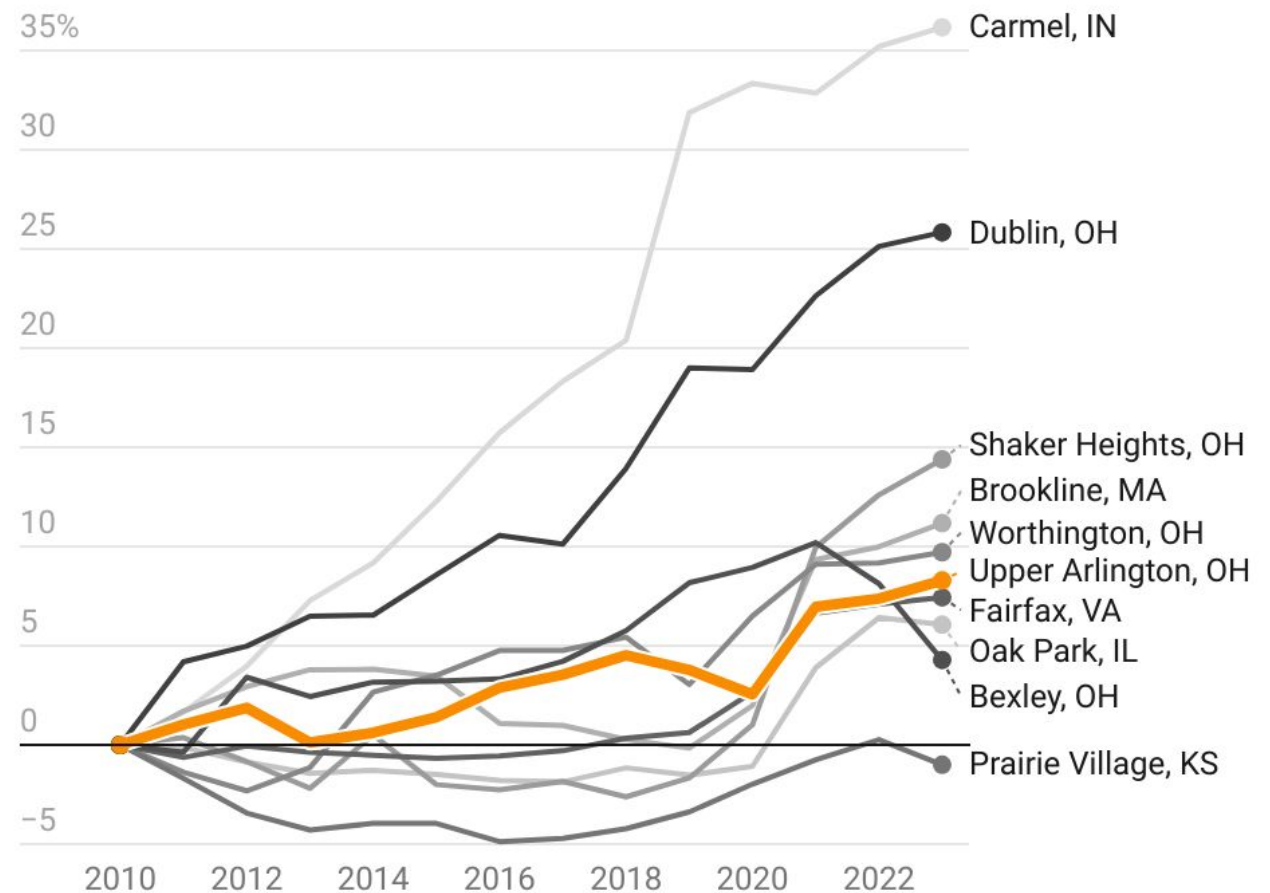
Percent household growth since 2010

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

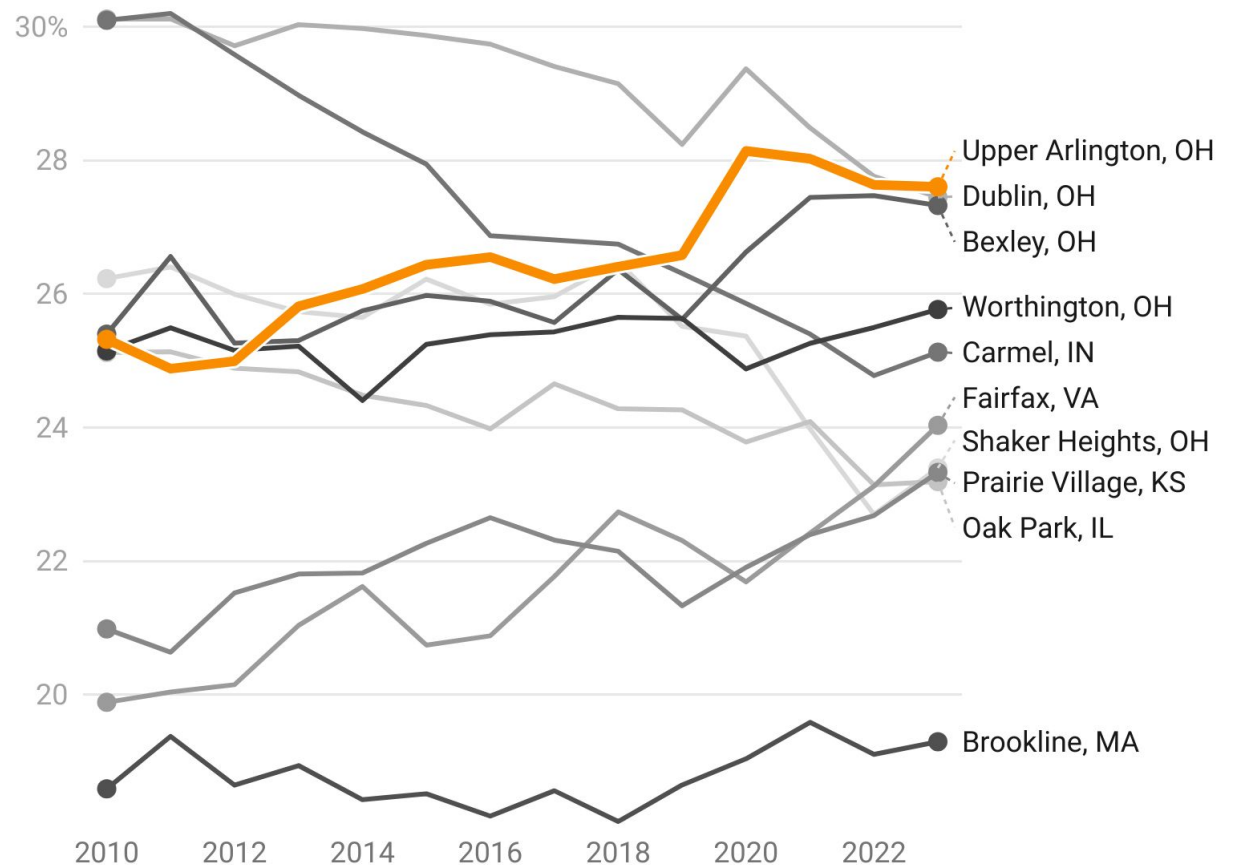
23.39% Shaker Heights, OH

23.33% Prairie Village, KS

23.19% Oak Park, IL

19.29% Brookline, MA

Percent of residents under 18



COMPARISONS

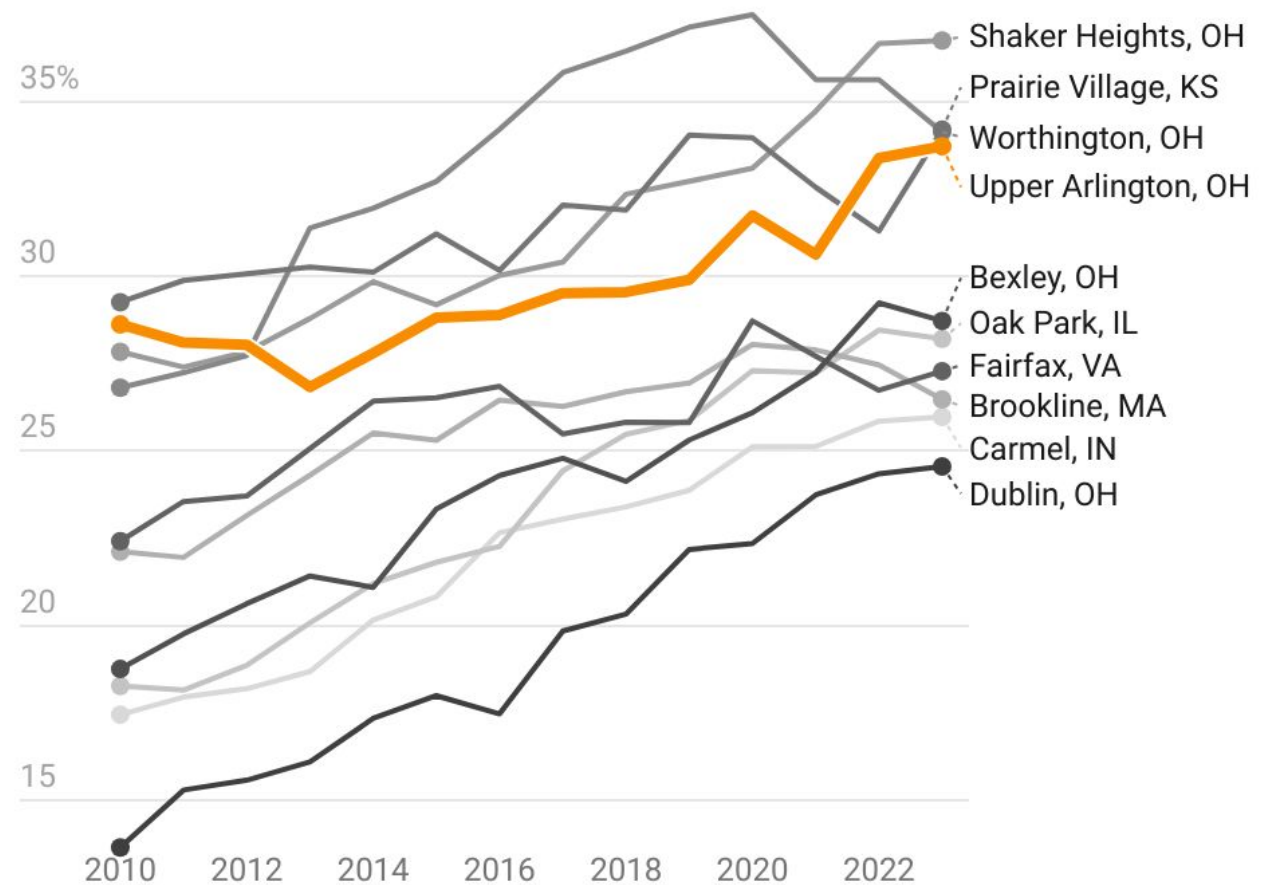
Percent of householders over 65 years old

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

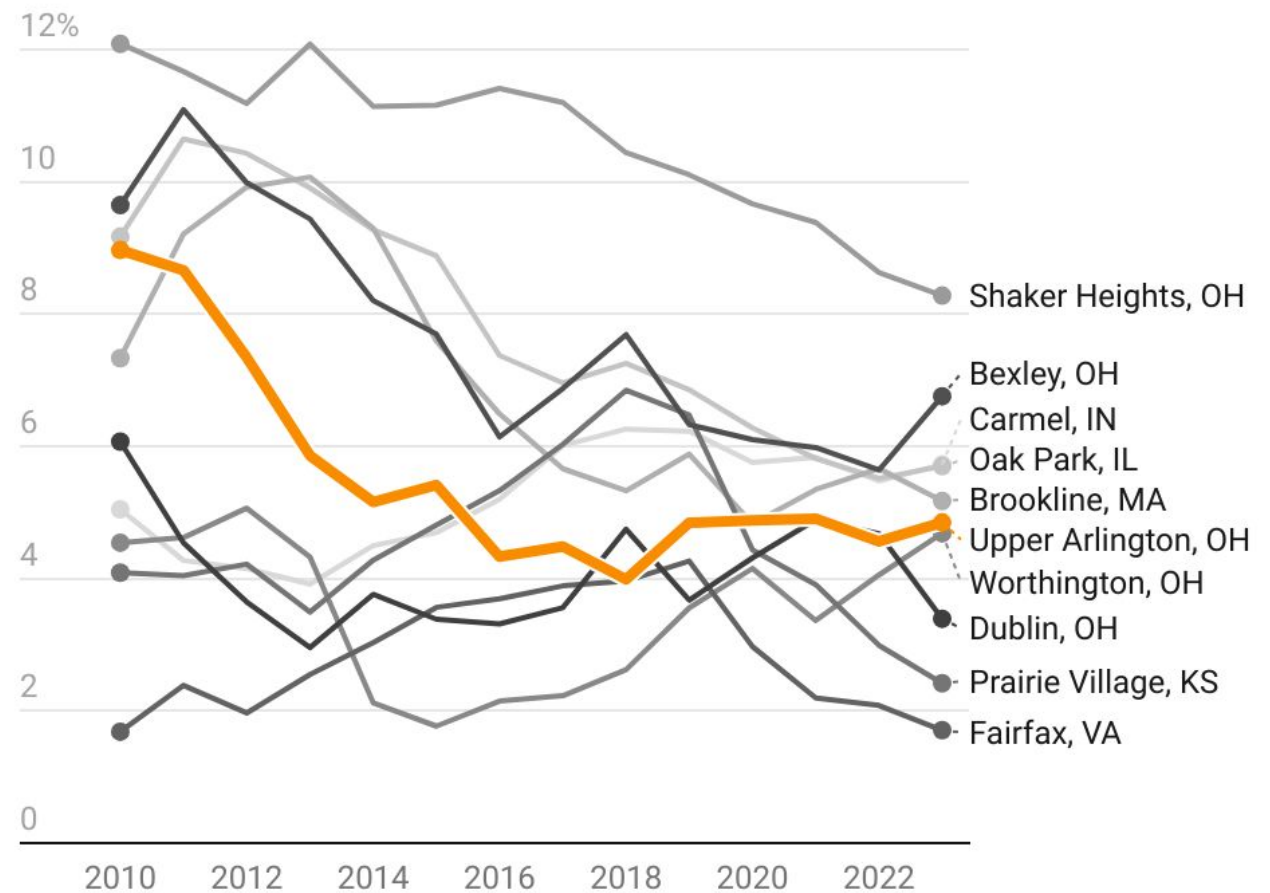
Percent vacant homes

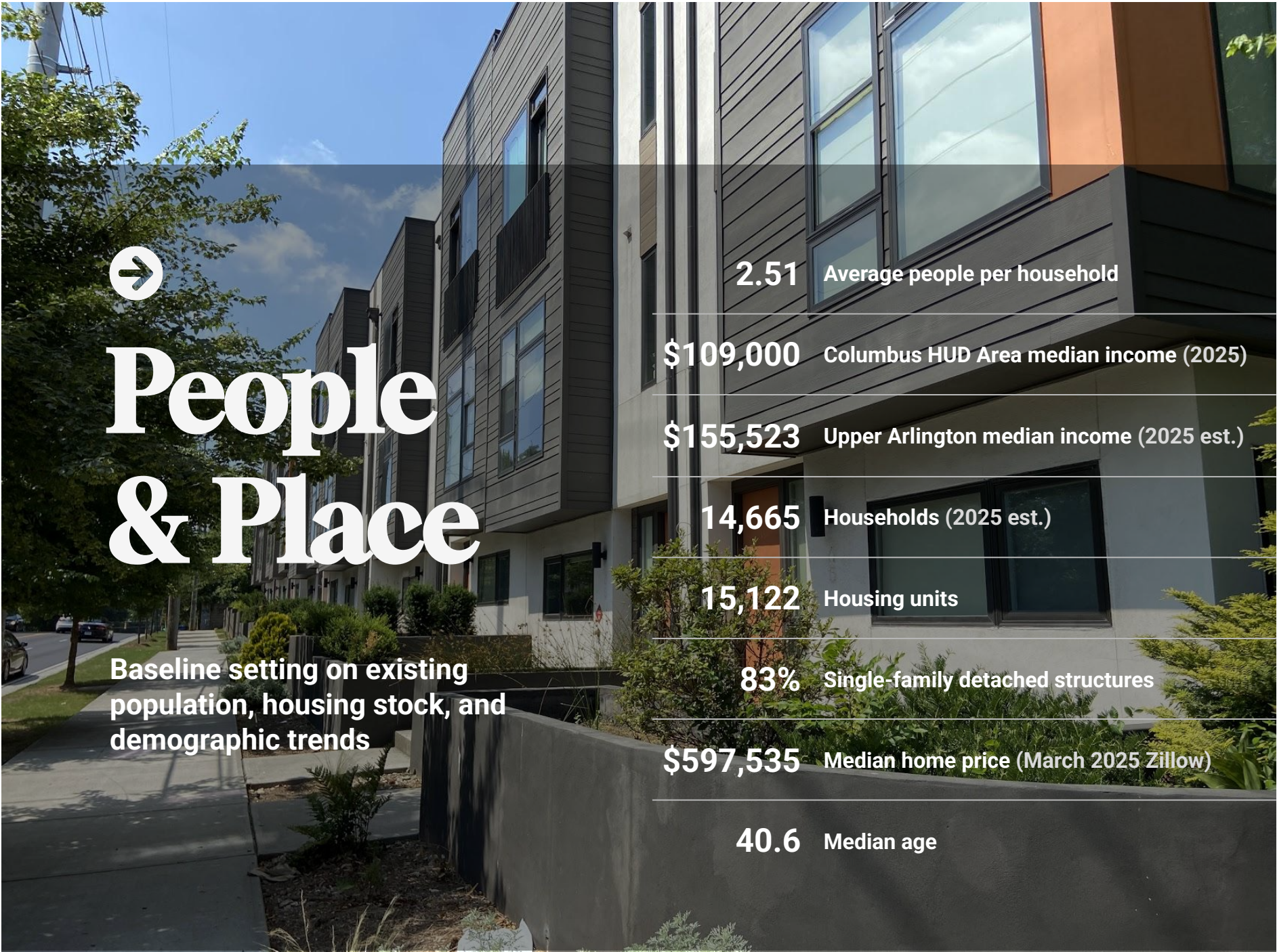
Source: 2010 - 2023 ACS 5-Year, CommunityScale

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

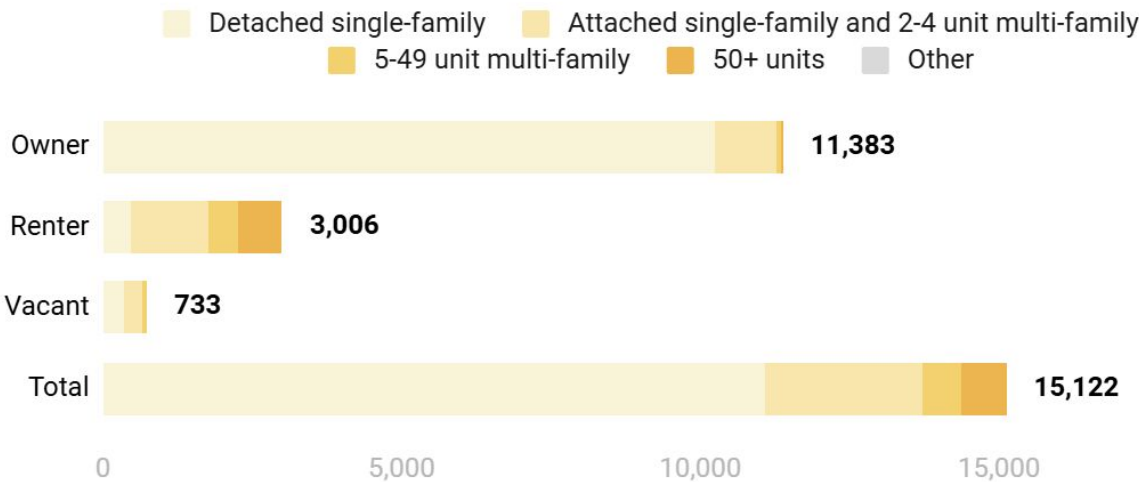
Source: ACS 5-year, 2023



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

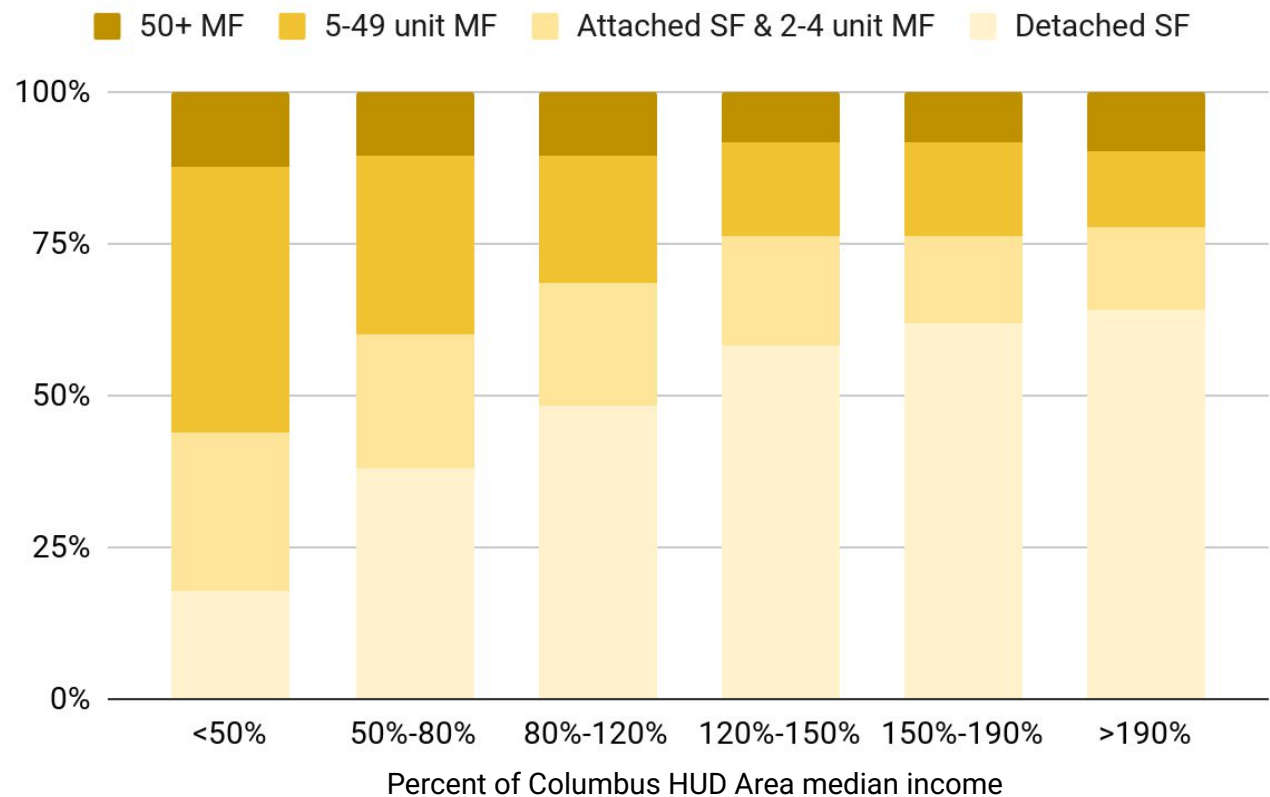


Given the variety of housing structure types available, it is important to consider how demand is distributed across the primary categories.

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

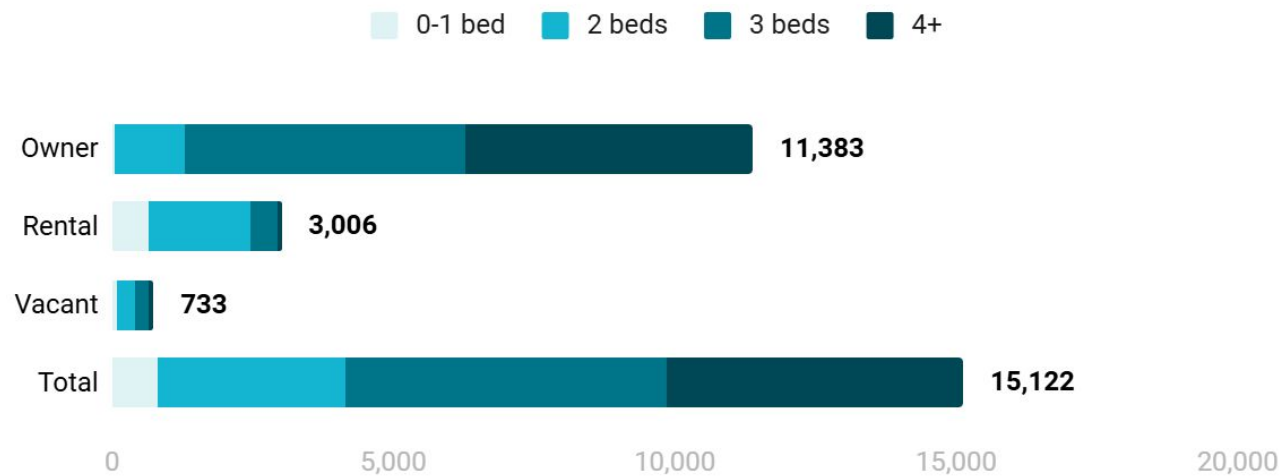
Existing units by bedroom count

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



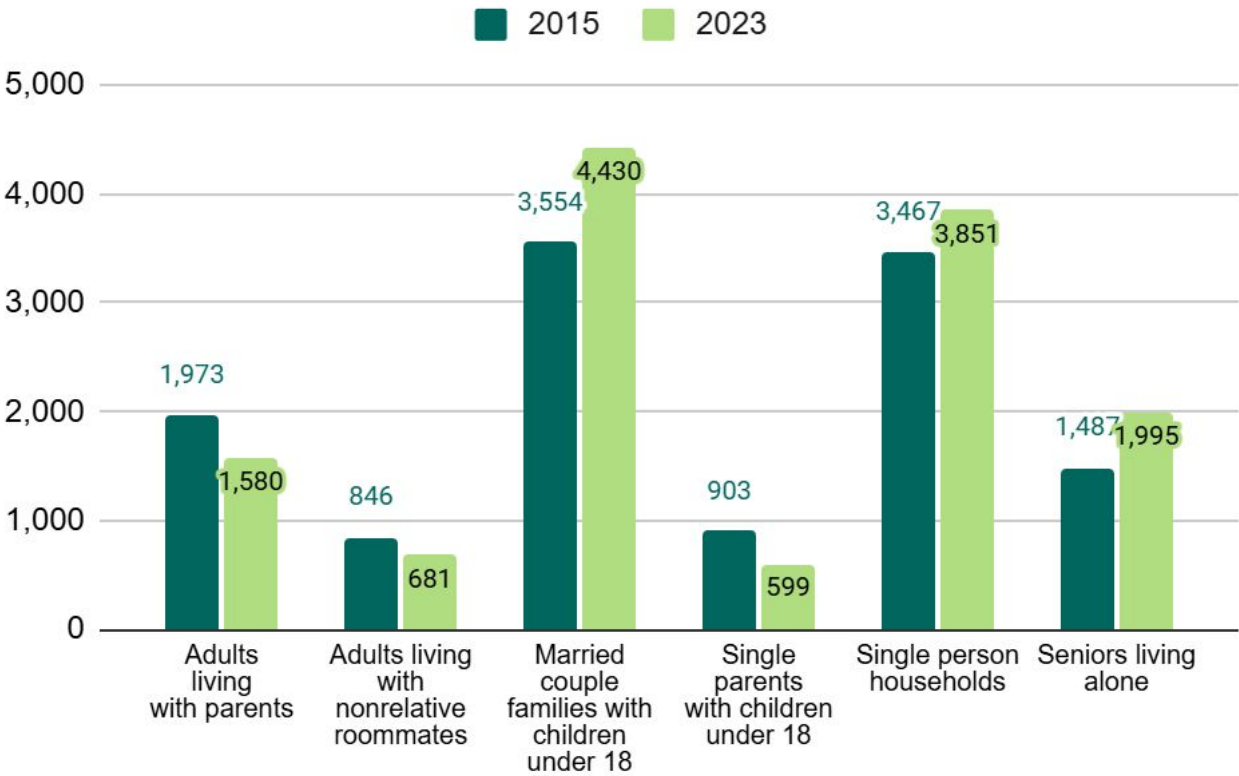
ANALYSIS

Family structure and change over time

Sources: Census ACS 2023 5-Year; CommunityScale

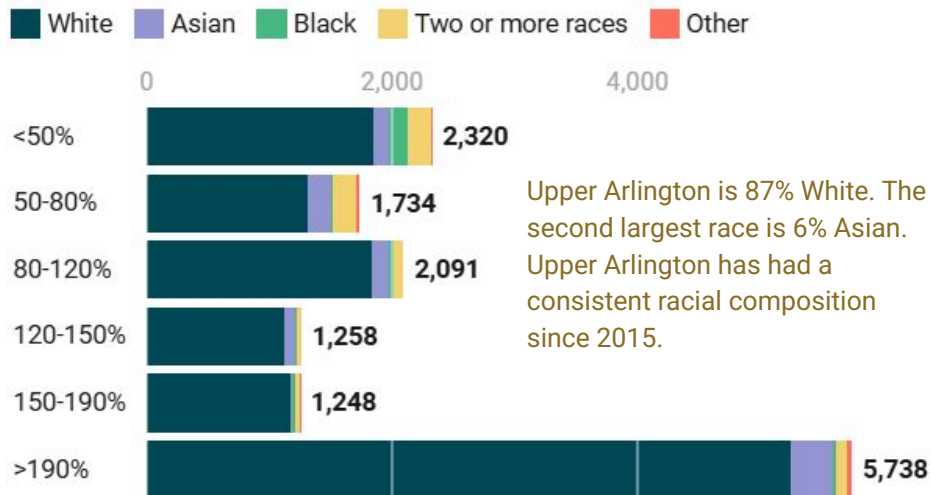
Upper Arlington experienced notable shifts in family structures with a significant increase in married-couple families with children under 18. There was also growth in single-person households and seniors living alone.

Change in family structure since 2015

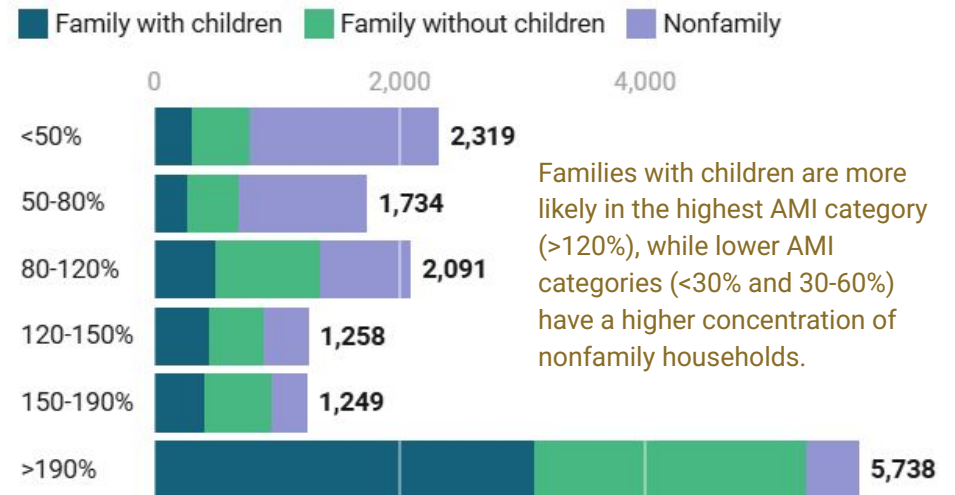


Household characteristics by income group

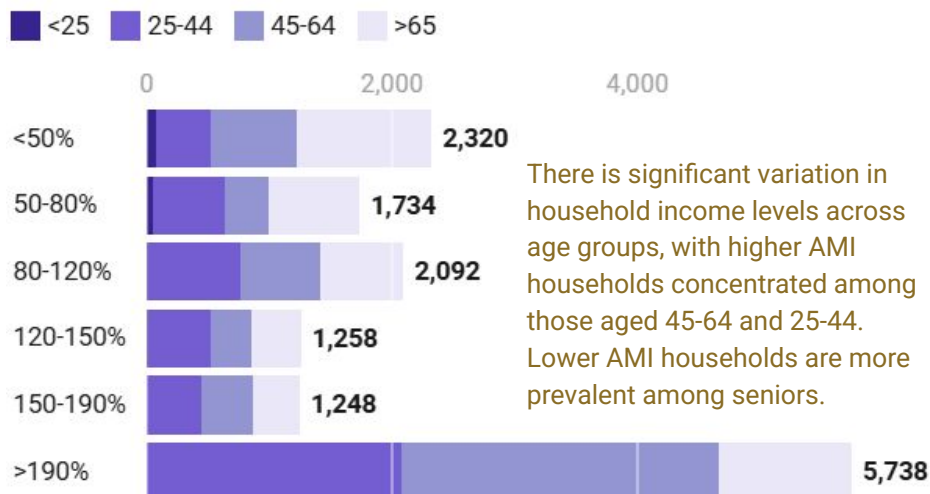
Race



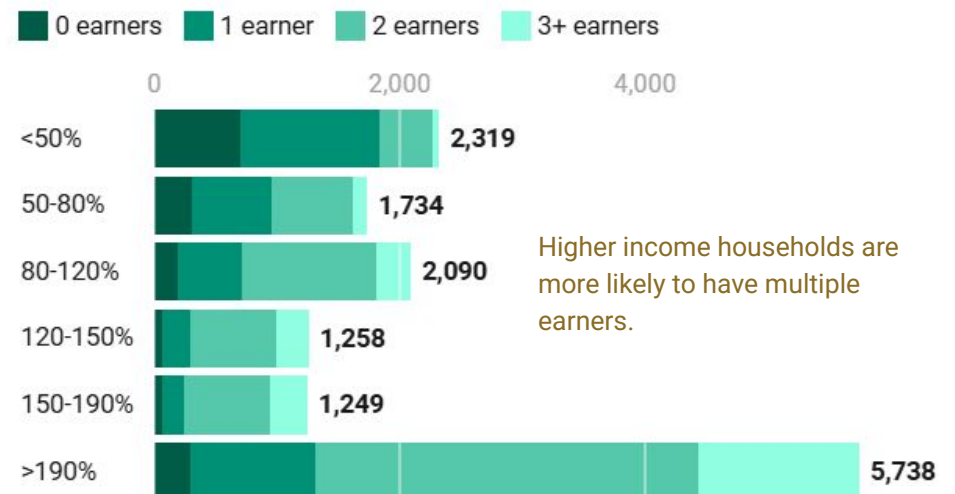
Household type



Age of householder



Number of earners



ANALYSIS

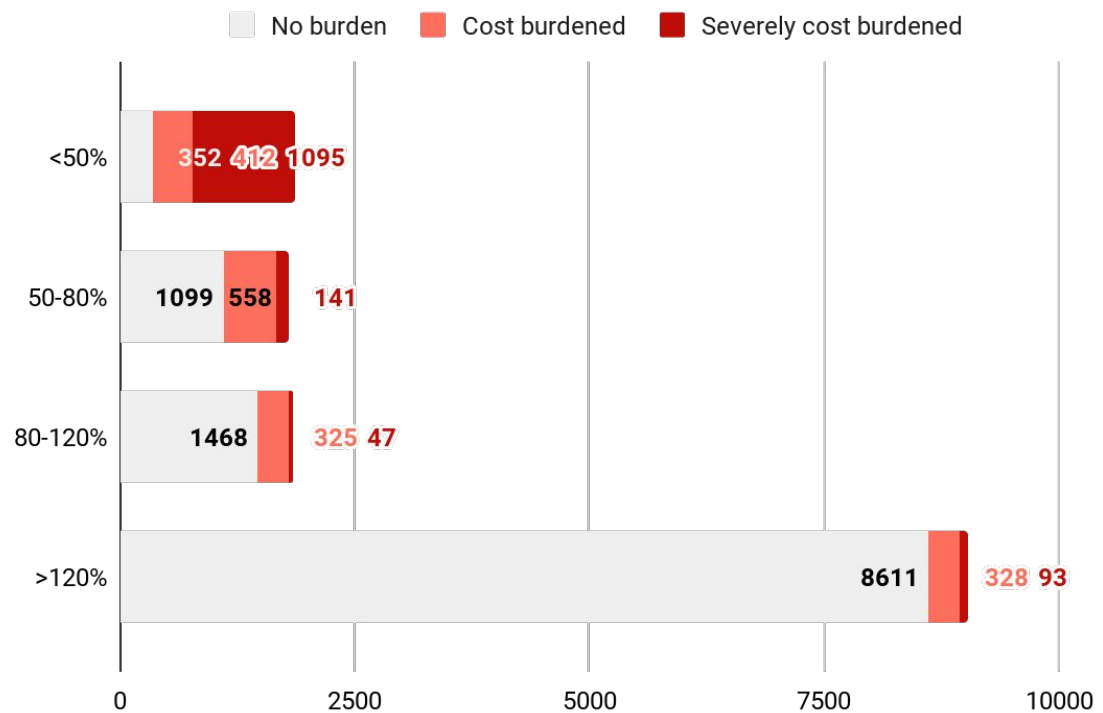
Cost burdened households are concentrated in the lower income groups

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

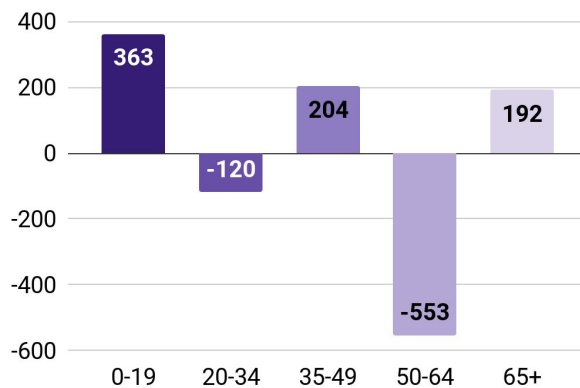


ANALYSIS

Upper Arlington has a growing share of families

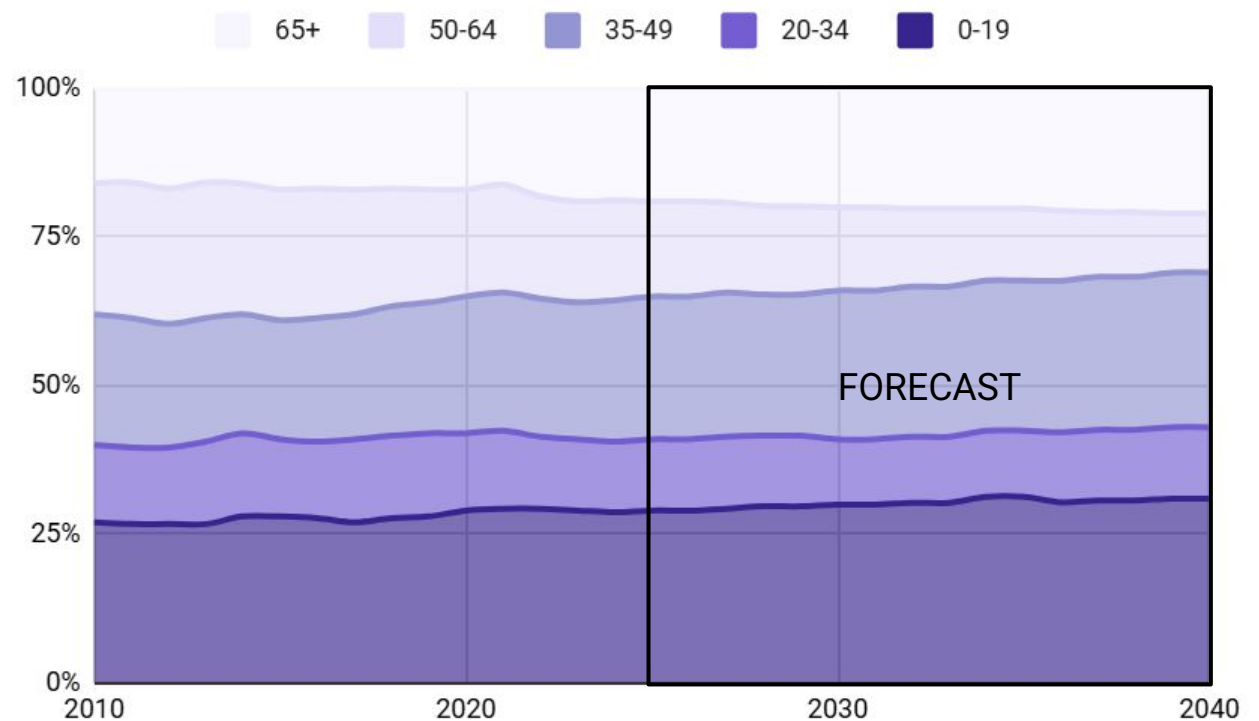
Source: ACS 5-Year, CommunityScale

10-year household change



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.

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

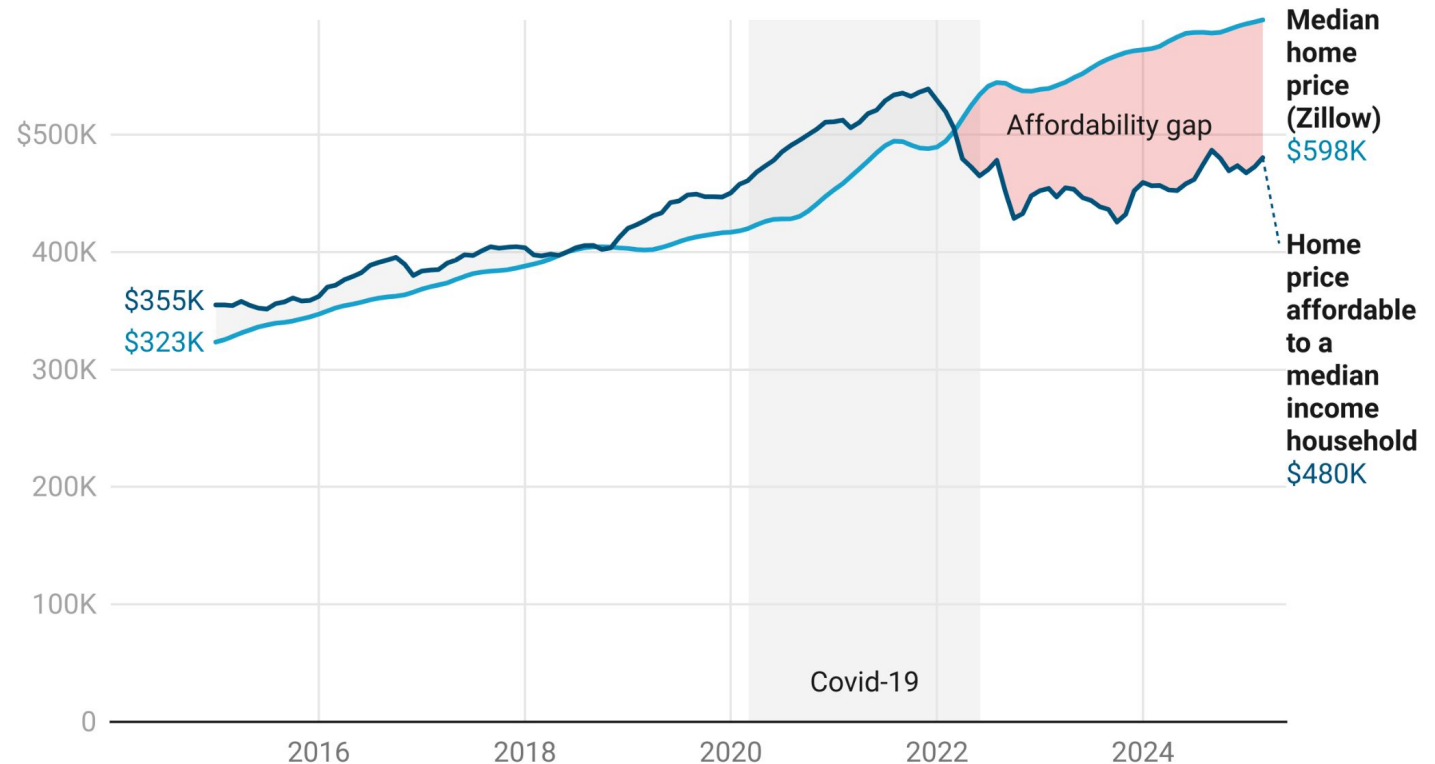
Source: Zillow ZHVI 2024, Census ACS 2023 5-Year, data from March 2025.

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%.

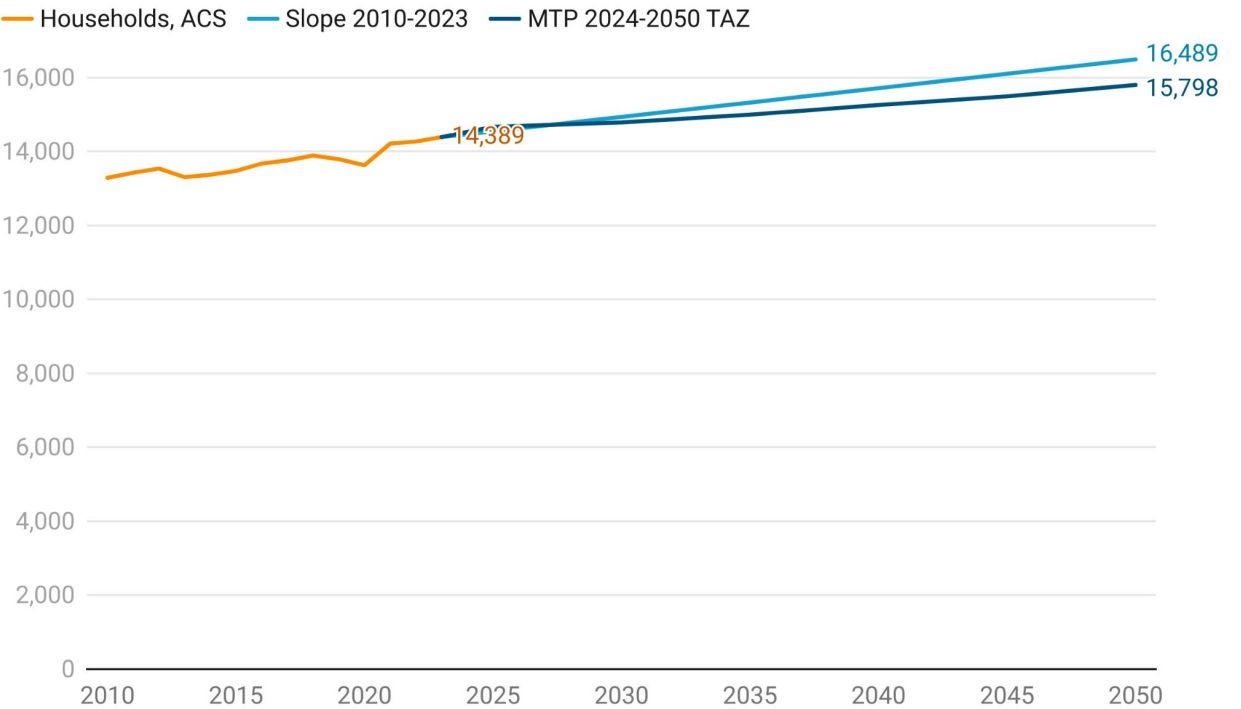
Projected household growth

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

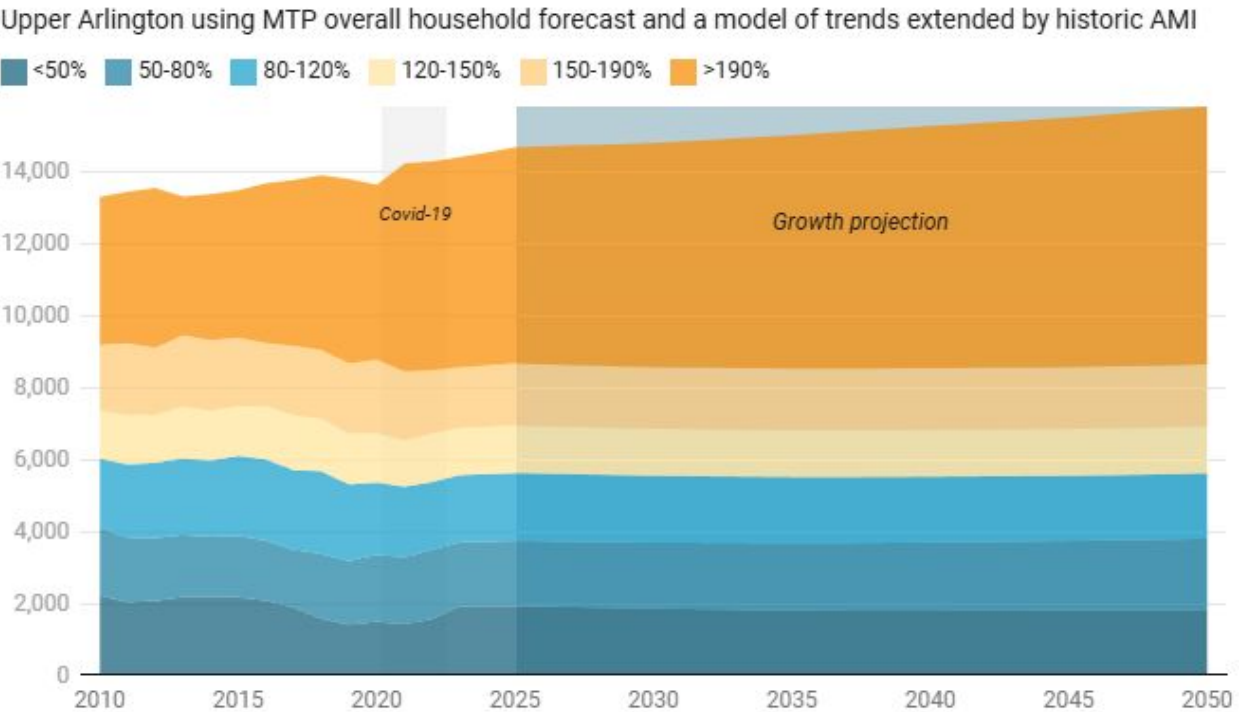
The regional narrative is that Central Ohio is projected to keep growing, driven by job creation (e.g., Intel and Honda-LG sites) and ongoing in-migration.

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

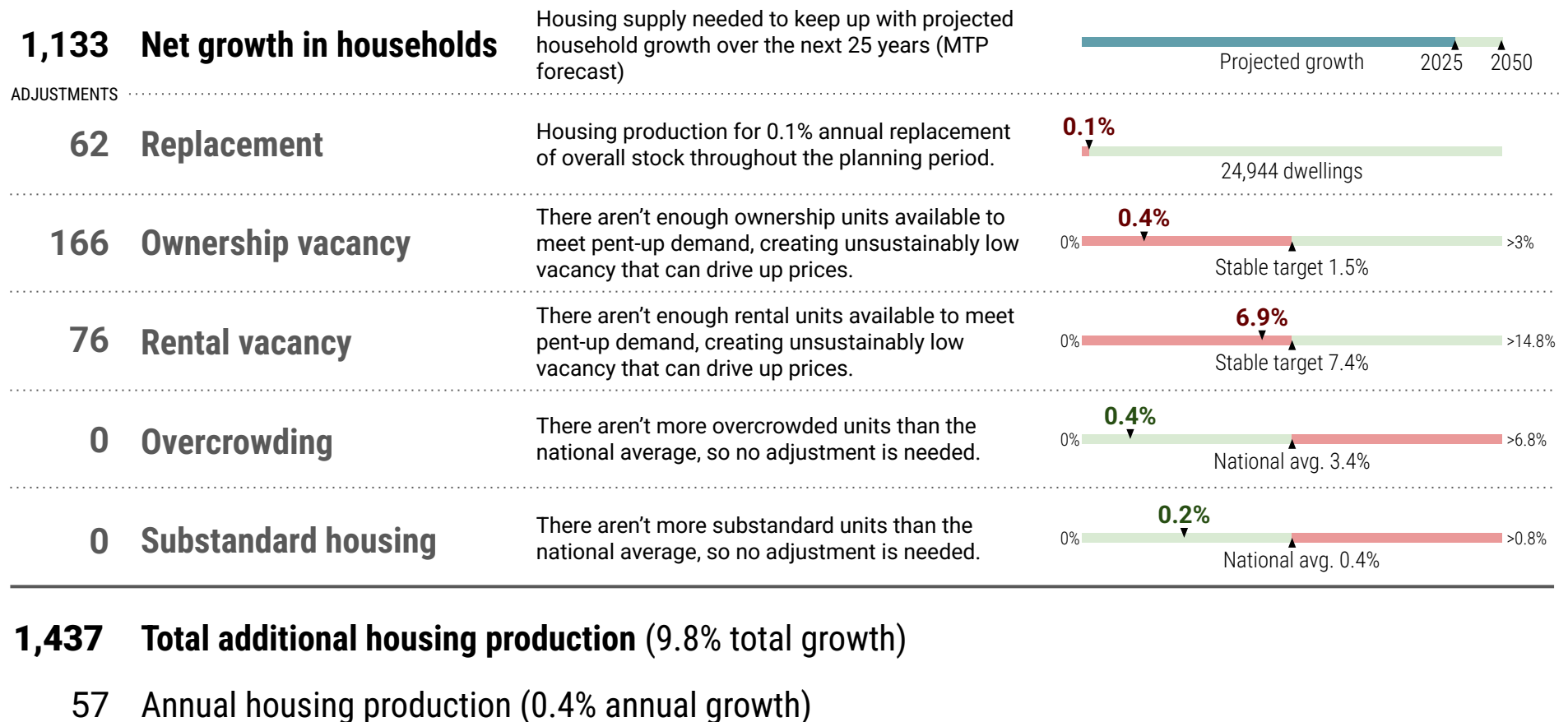
This summary table compares key housing need attributes per household income group.

<\$50,000	\$50,000 - \$80,000	\$80,000 - \$120,000	\$120,000 - \$150,000	\$150,000 - \$200,000	>\$200,000	Household income
<50%	50-80%	80-120%	120-150%	150-190%	>190%	% of regional 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
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](#)

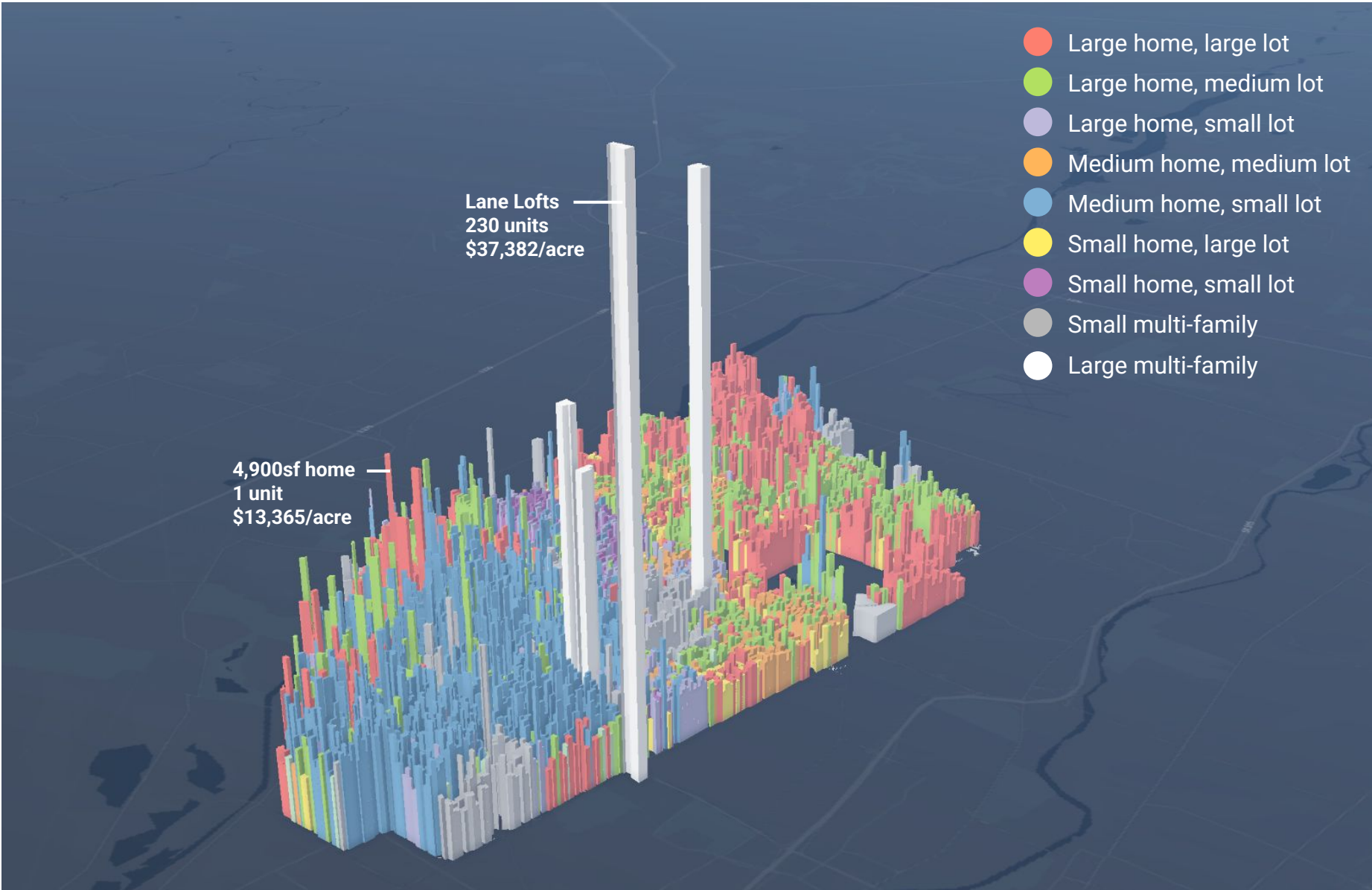
The following calculation translates household growth to a target for housing supply and related housing production. This calculation takes into account several adjustments intended to relieve underlying market pressures such as pent up demand.





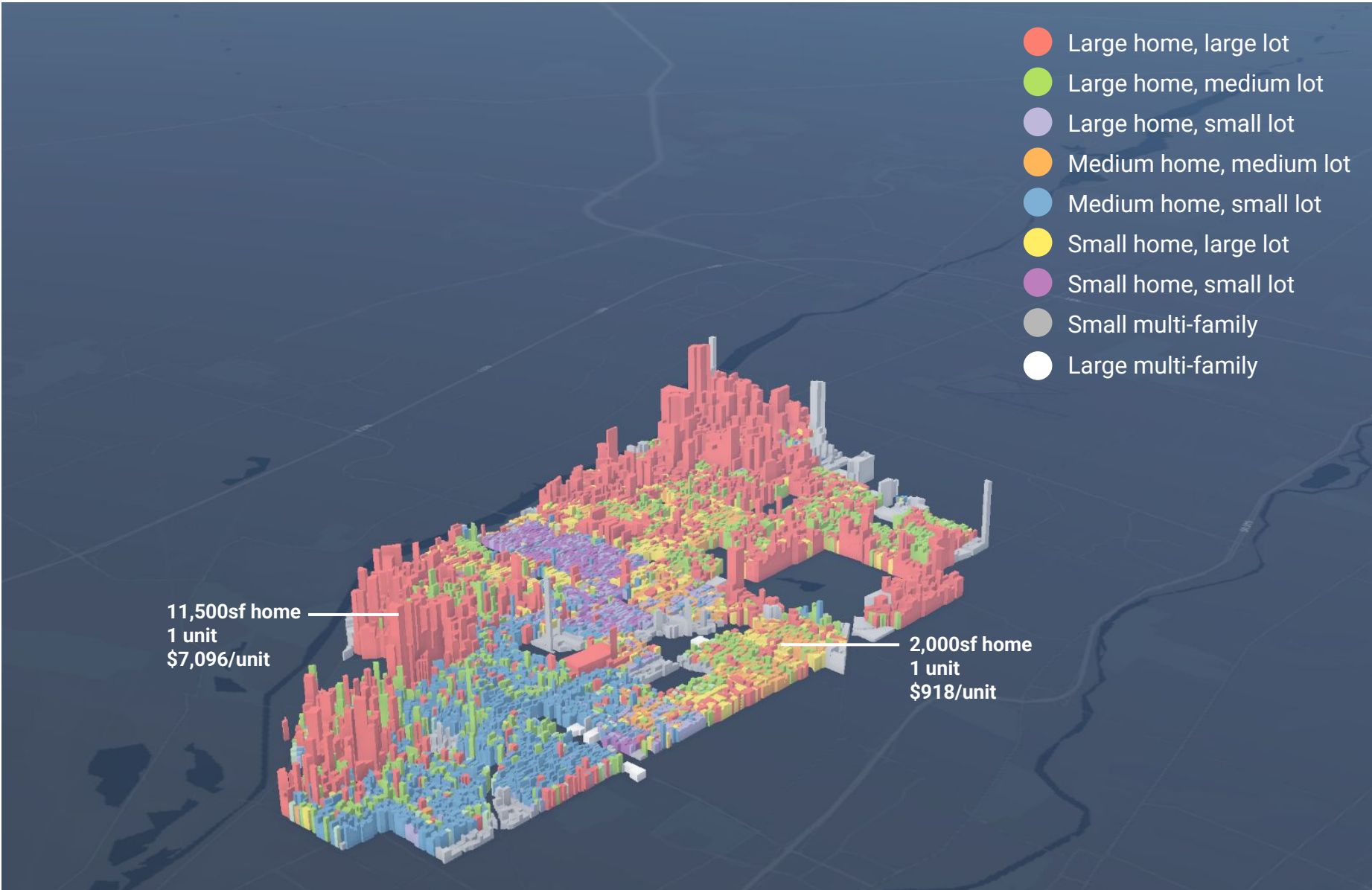
ANALYSIS

Municipal revenue per acre



ANALYSIS

Municipal revenue per unit



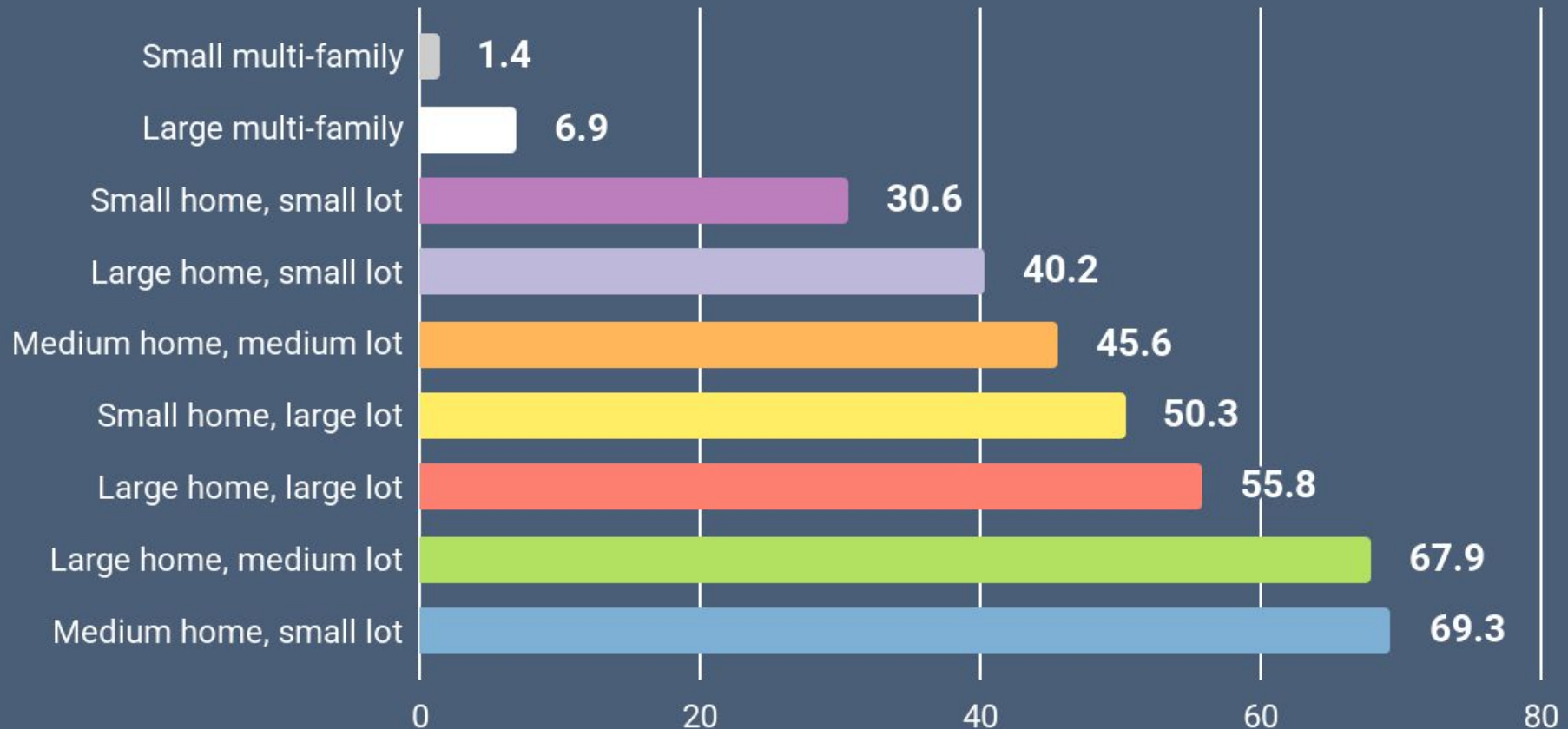
ANALYSIS

PRELIMINARY RESULTS

Property type and enrolled students

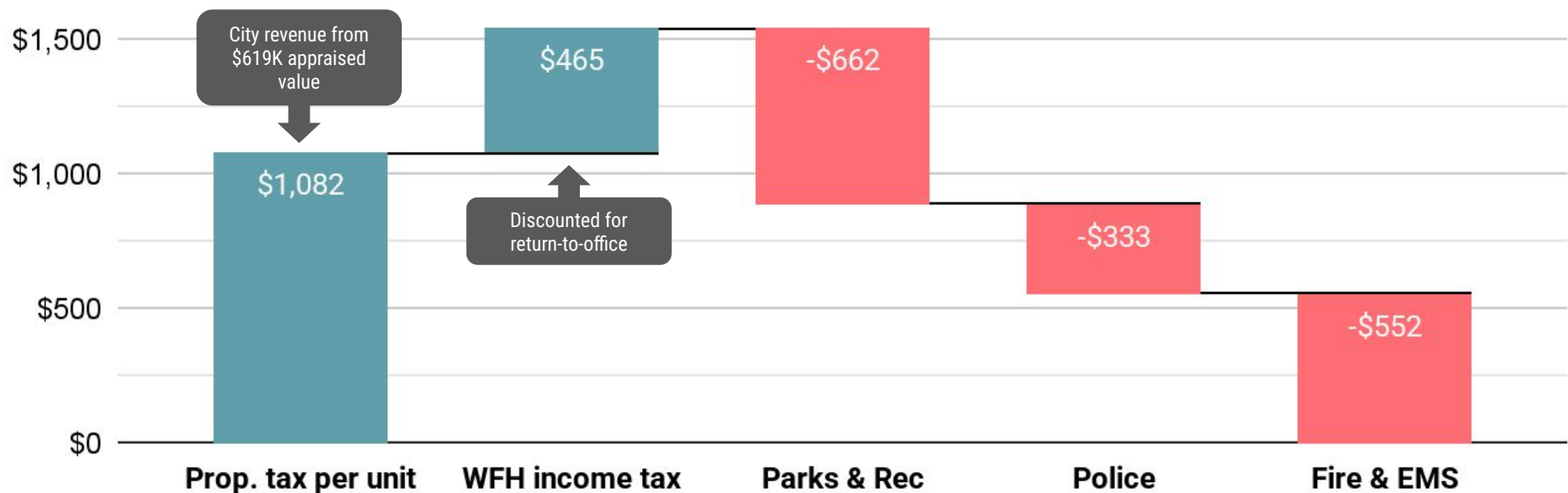
Enrolled students per 100 units

Upper Arlington City Schools student counts per address (2025) and associated property types. The total units for Large multifamily excludes the City's 594 age-restricted senior units.



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

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.

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.

Address	Before price (2025 USD)	Total value after Estimated current market value	Lot area (sqft)
2440 Wickliffe Rd	\$308,500	\$741,100	9,877
2410 Farleigh Rd	\$424,900	\$832,800	10,373
1511 Doone Rd	\$491,800	\$879,300	8,378
2428 Swansea Rd	\$319,600	\$1,258,300	7,697
1553 Grenoble Rd	\$461,300	\$1,268,838	8,317
2438 Farleigh Rd	\$433,000	\$1,803,500	10,585
AVERAGE	\$406,500	\$1,151,178.74	

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	Before price (2025 USD)	Total value after Estimated current market value	Lot area (sqft)
2278 Wickliffe Rd	\$426,900	\$1,106,000	23,500
2109 Oakmount Rd	\$305,000	\$1,258,700	17,624
2592 Eastcleft Dr	\$364,300	\$1,396,300	19,035
2510 Eastcleft Dr	\$369,700	\$1,406,300	19,038
3010 Derby Rd	\$515,300	\$1,480,100	25,112
4225 Kenny Rd	\$477,100	\$1,481,400	43,345
1118 Highland Dr	\$531,400	\$1,638,588	23,814
4010 Fairfax Dr	\$443,000	\$1,686,600	33,626
3068 Avalon Rd	\$528,900	\$1,789,118	21,289
2814 Exmoor Rd	\$1,027,100	\$1,823,645	20,758
4611 Coach Rd	\$620,400	\$2,075,800	40,854
2725 Fairfax Dr	\$376,500	\$2,083,600	28,569
2814 Exmoor Rd	\$1,028,900	\$2,100,000	20,758
AVERAGE	\$539,600	\$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

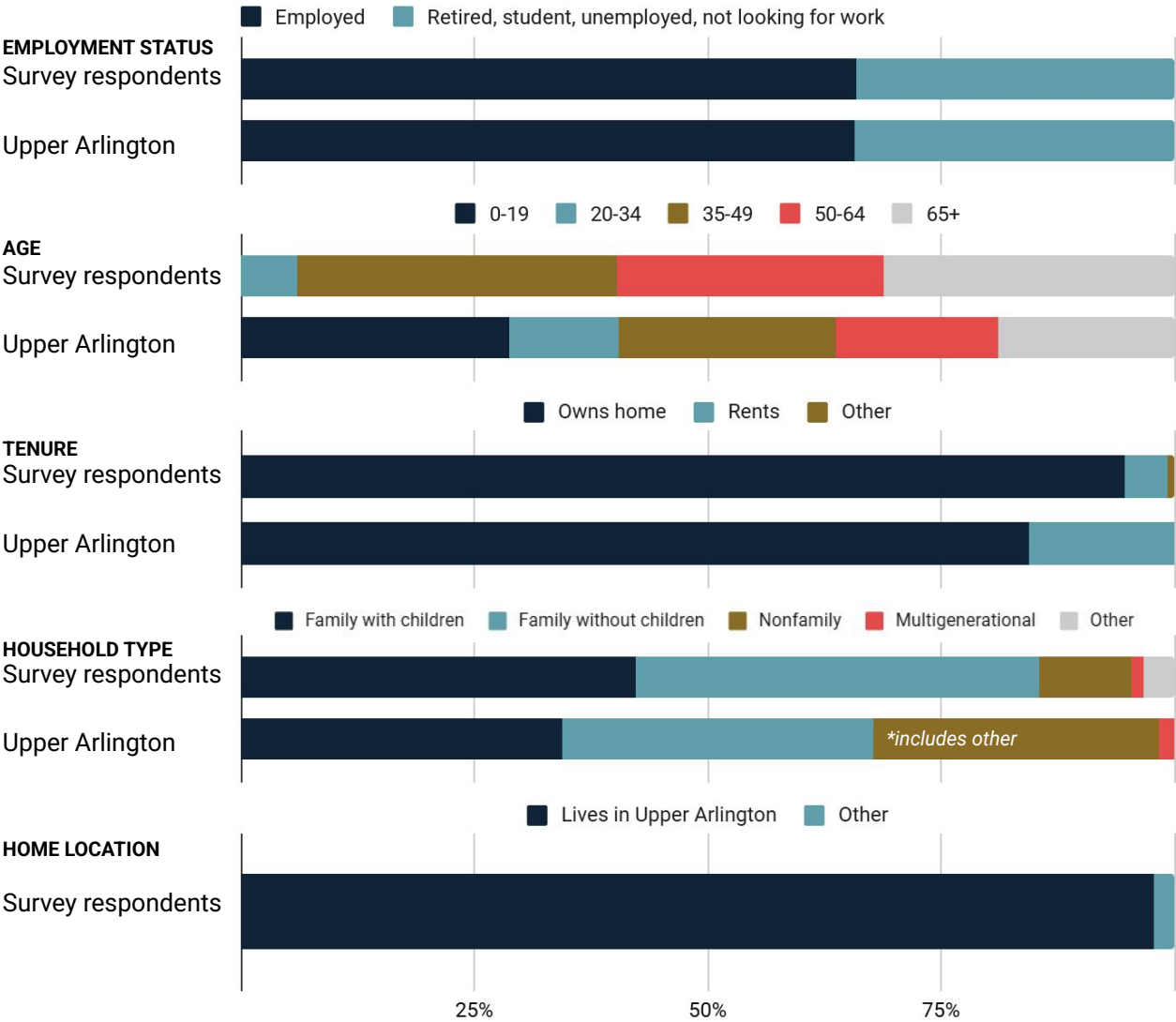


SURVEY RESULTS

Survey respondents

While the survey received 716 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.

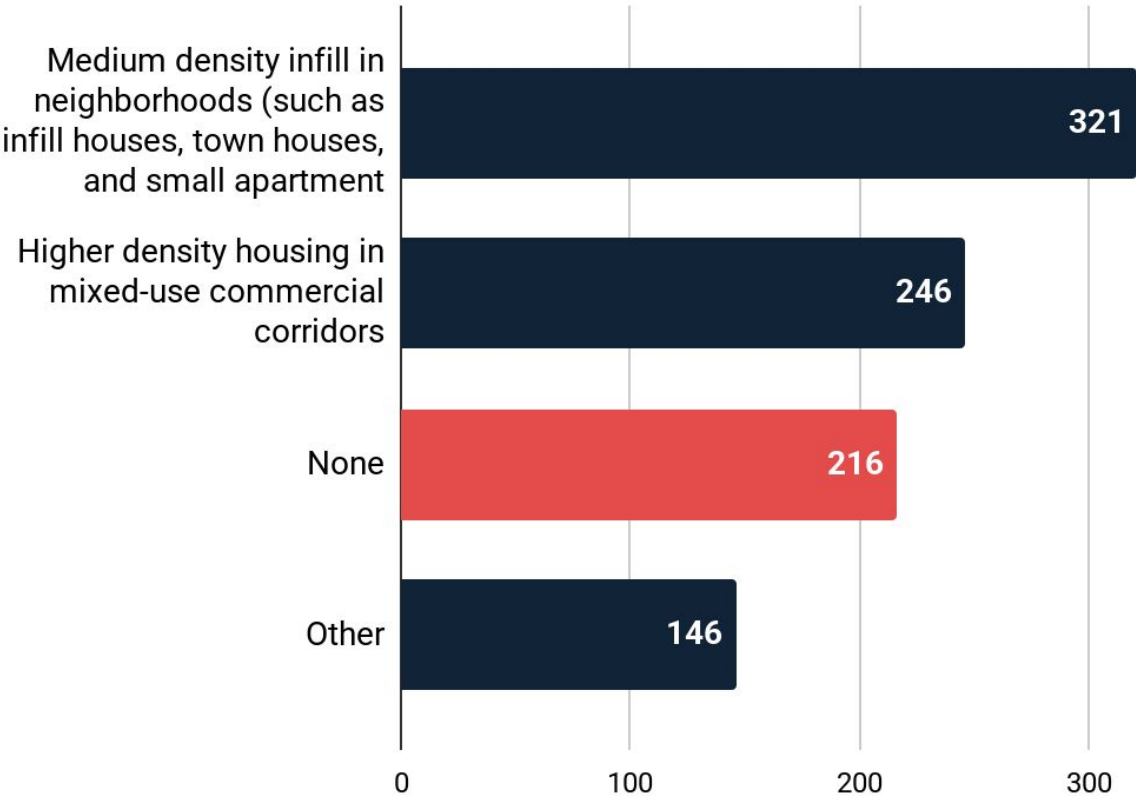
With a sample size of 716 from a population of 35,743, the we are 95% confident that the margin of error is $\pm 3.6\%$. A margin of error under $\pm 5\%$ is generally considered good for many types of surveys. However, as noted, there is response bias as the polling was not random.



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

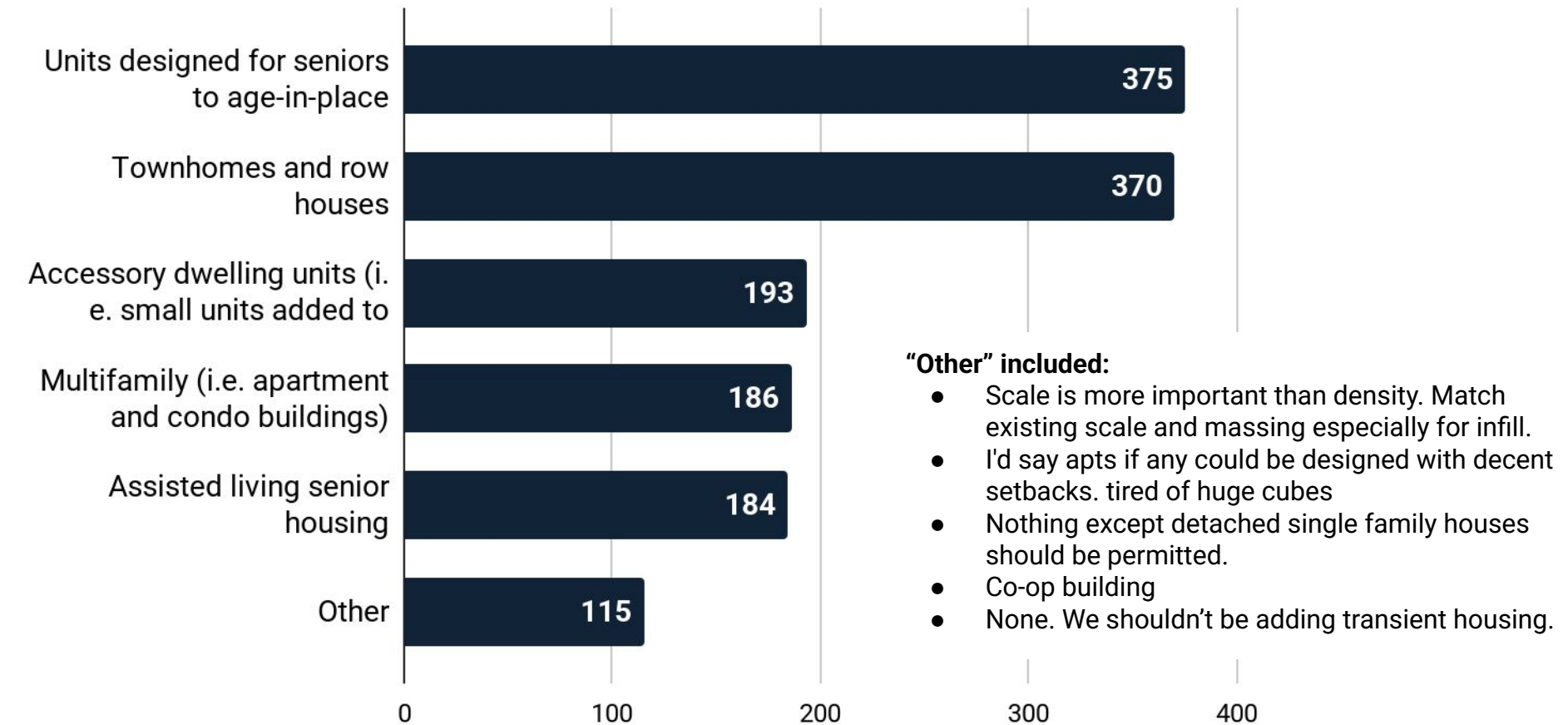


- “Other” included:**
- Duplexes and ADUs in select areas
 - European style with business on 1st floor and residence above.
 - No larger than 4 family bldg, 2-story, yard.
 - Who decided we need more housing? The current density is desirable. If the community believes there should be more density, it should be done along the outskirts with mixed-use developments along Henderson and 33

SURVEY RESULTS

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

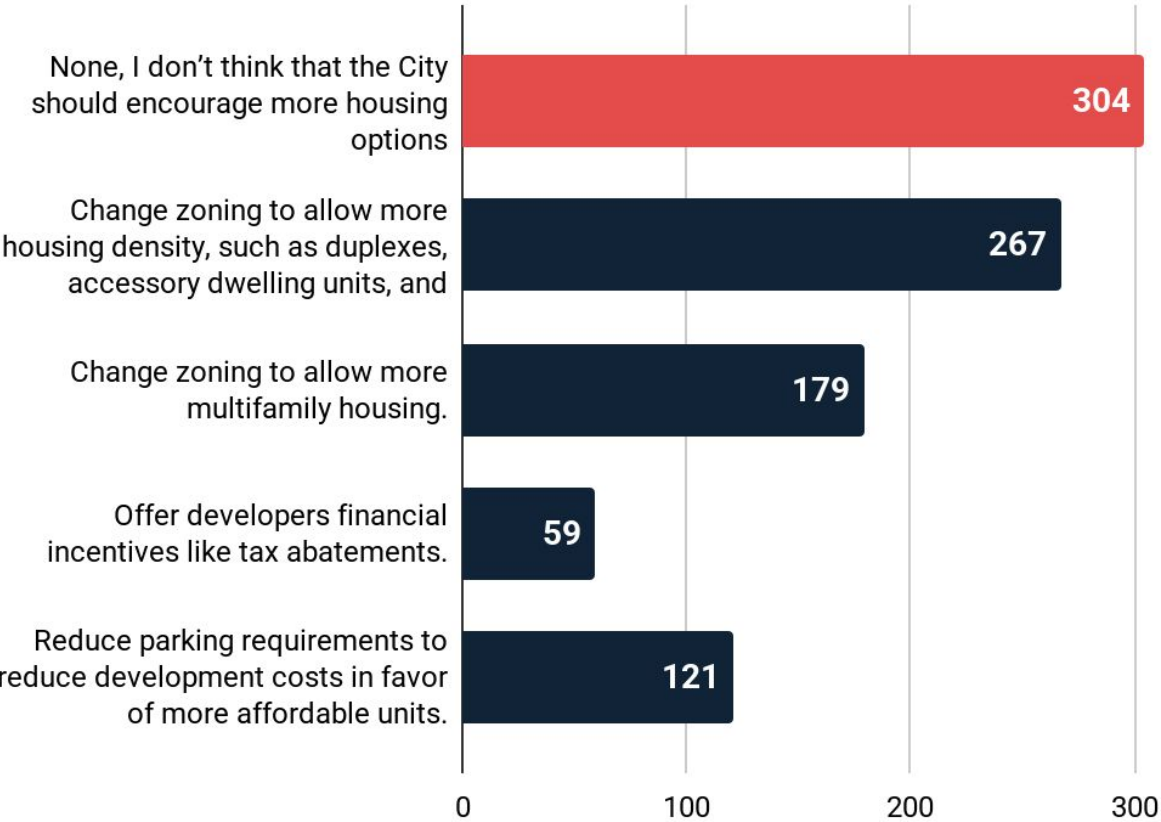
n = 673



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



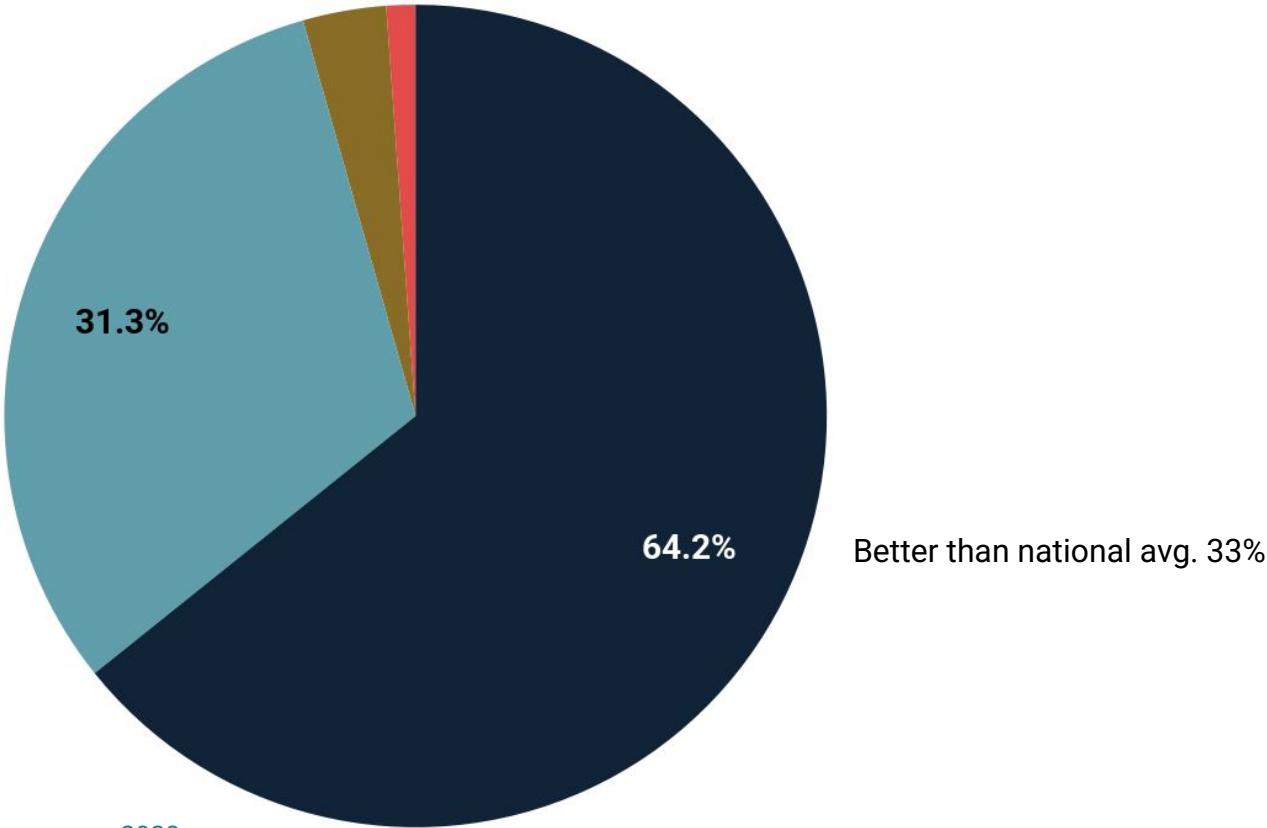
“Other” included:

- 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

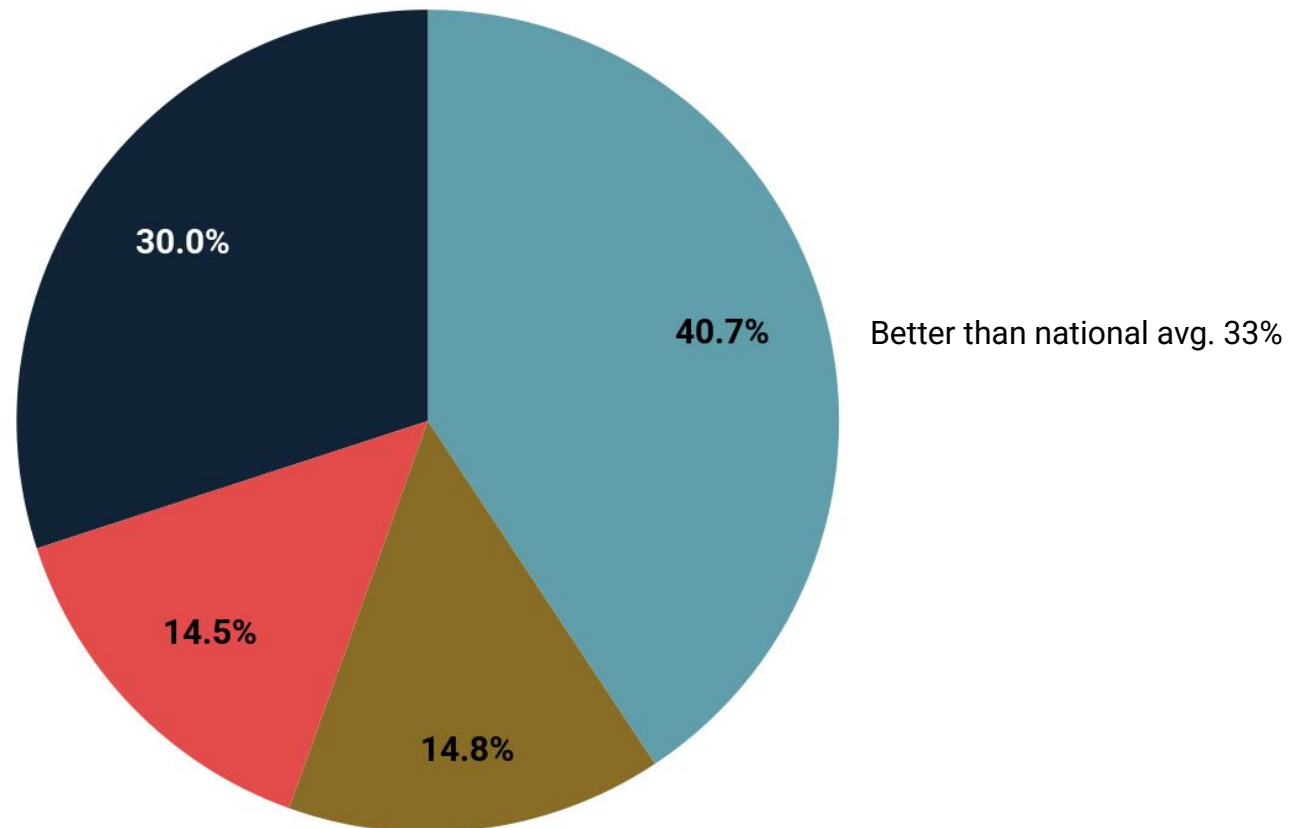


Benchmark to [NAR national community preferences survey 2023](#)

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.

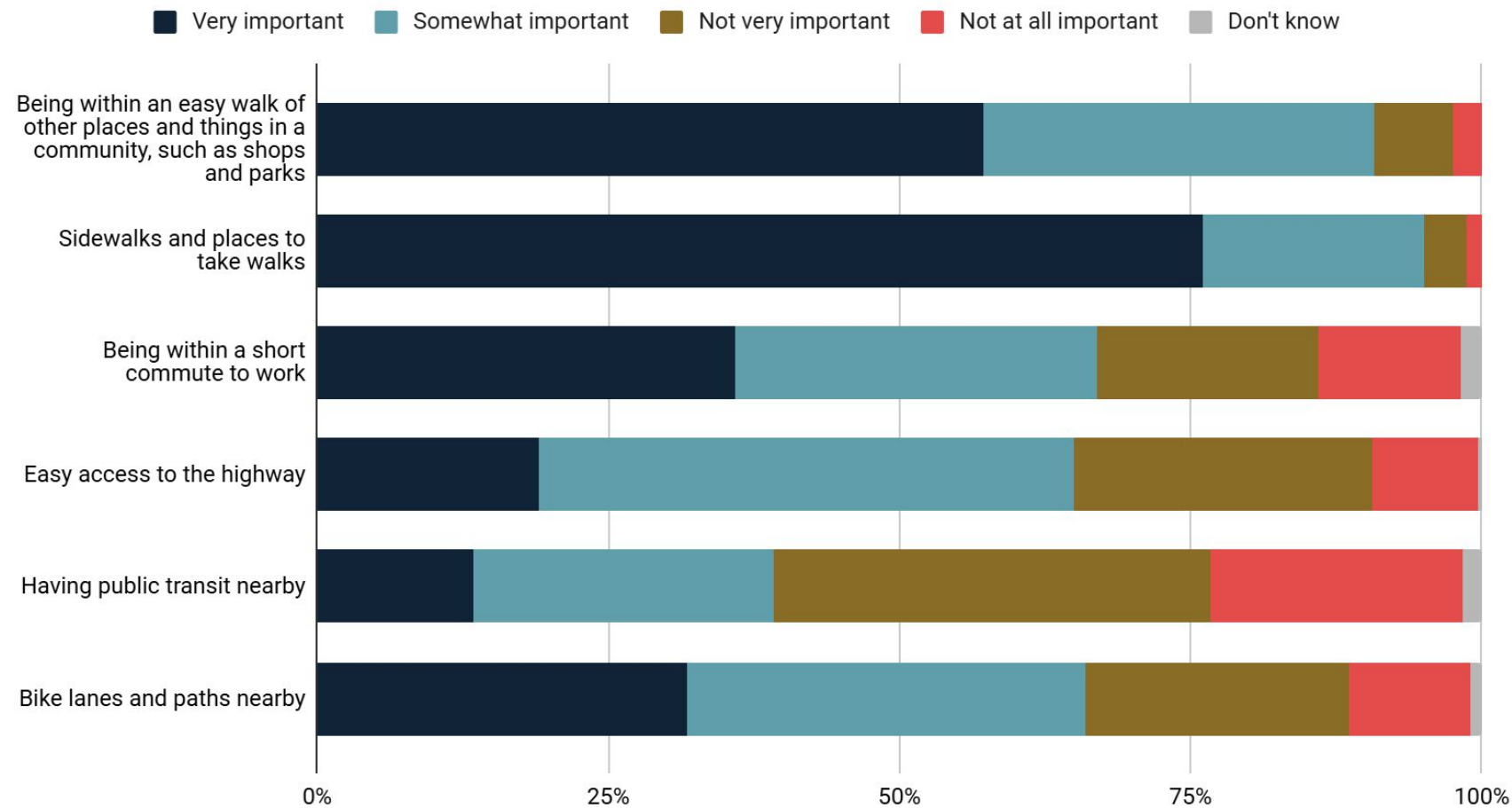
- Somewhat Agree
- Somewhat Disagree
- Strongly Disagree
- Strongly Agree



Benchmark to [NAR national community preferences survey 2023](#)

SURVEY RESULTS

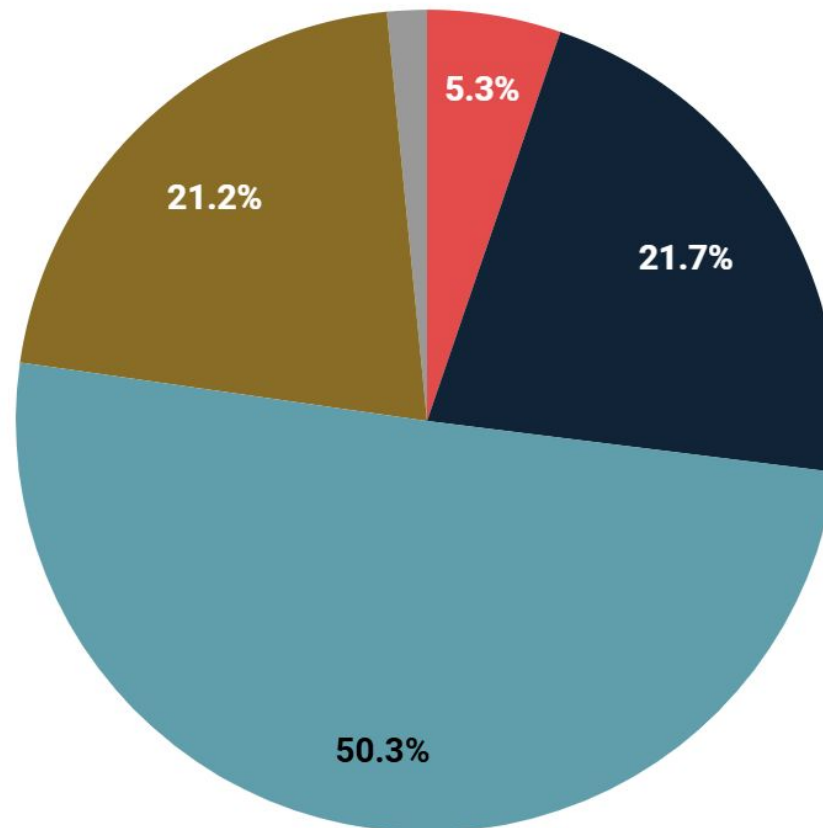
If you were deciding today where to live, please indicate how important each of the following would be to you:



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?

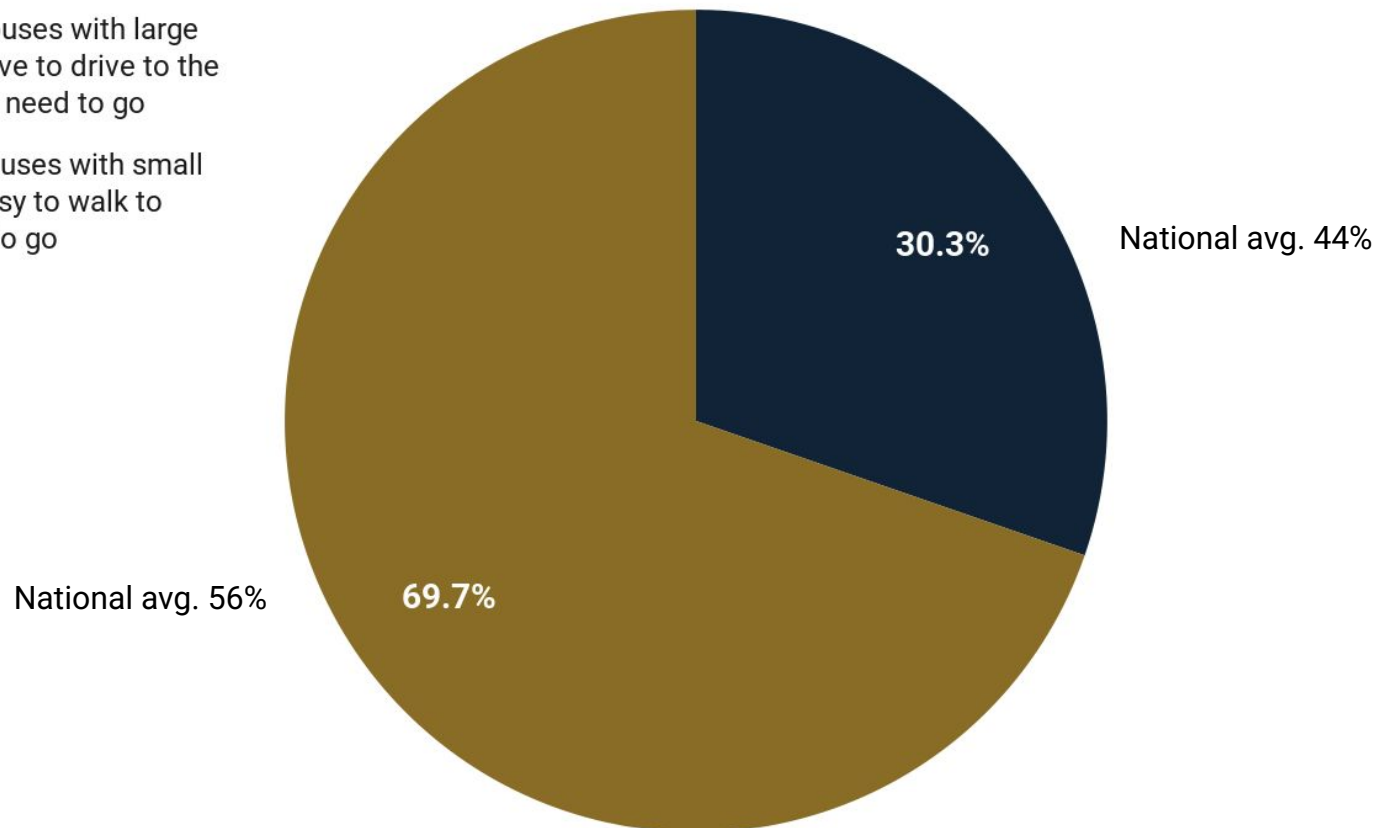
- Being within an easy walk of places isn't important to me
- Yes, a lot more
- Yes, a little more
- No, no more
- Don't know



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





Opportunities for Further Study

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.

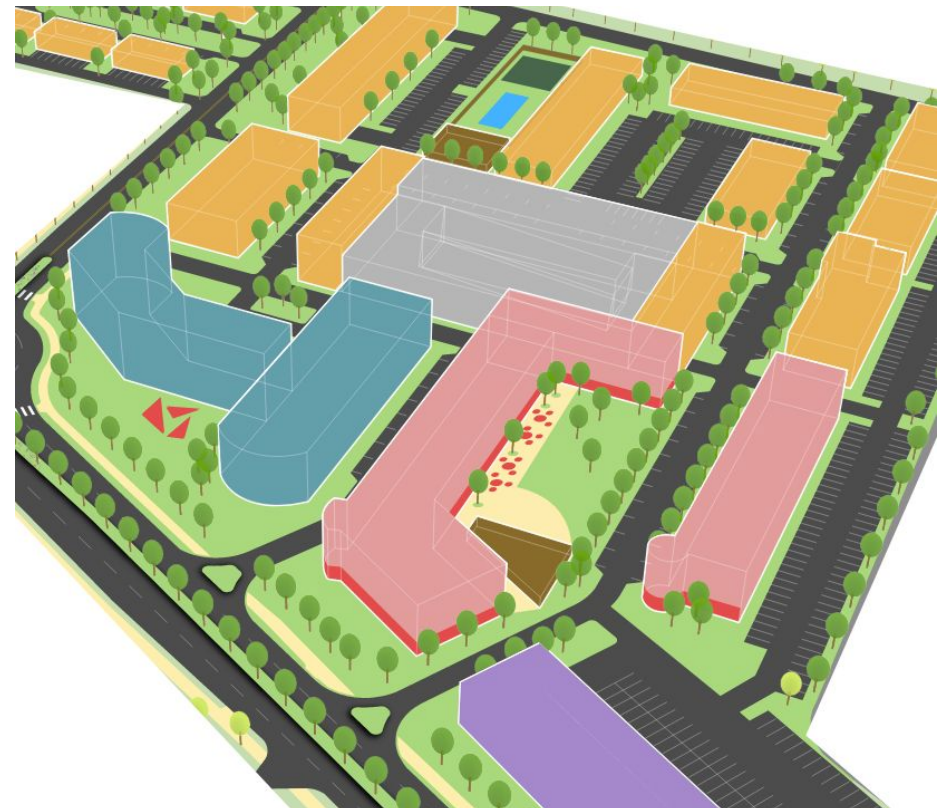


Image credit: Envision Henderson (draft)

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
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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)

	<u>Original Budget</u>	<u>Amended Budget</u>	<u>Projected To Date</u>	<u>Actual</u>	<u>Dollar Variance</u>	<u>Percentage Variance</u>
<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)

	<u>Original Budget</u>	<u>Amended Budget</u>	<u>Projected To Date</u>	<u>Actual</u>	<u>Dollar Variance</u>	<u>Percentage Variance</u>
<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)

	<u>Original Budget</u>	<u>Amended Budget</u>	<u>Projected To Date</u>	<u>Actual</u>	<u>Dollar Variance</u>	<u>Percentage Variance</u>
<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
<u>Revenues and Other Sources</u>						
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%
<u>Obligations</u>						
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
<u>Revenues and Other Sources</u>						
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%
<u>Obligations</u>						
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
<u>Revenues and Other Sources</u>						
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%
<u>Obligations</u>						
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%

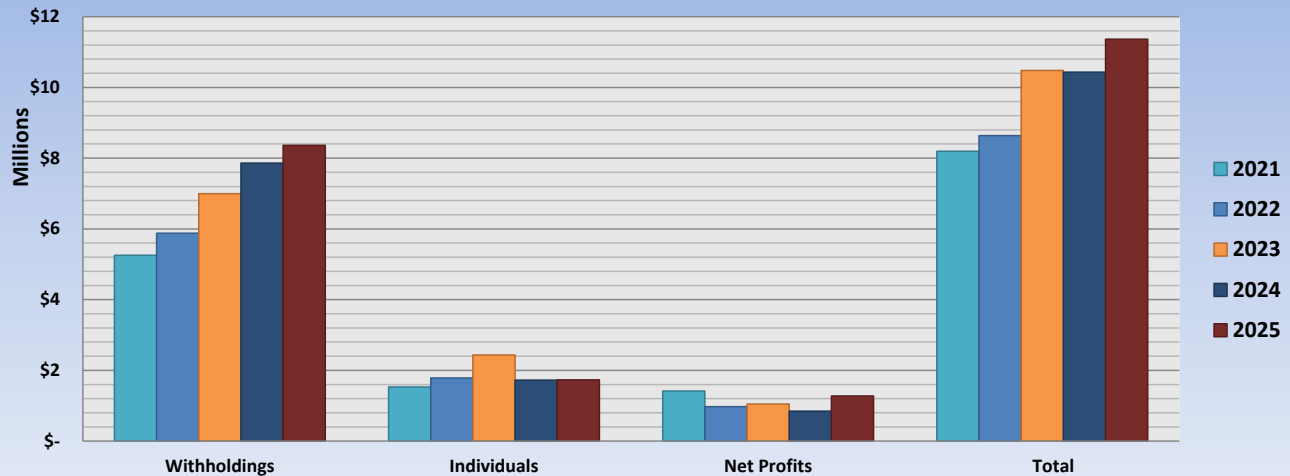
Income Tax Five Year Comparison

	<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>



Upper Arlington Civic Association

Request for Alcohol at
Neighbors Night Out





UACA Events & Activities

- UA Stage
- Easter Egg Hunt
- Golden Apple Awards
- Memorial Day 5k Run
- 4th of July Parade and Party in the Park
- Labor Neighbor Day
- Neighbors Night Out
- Golden Bear Scare
- Christmas in the Park



About UACA



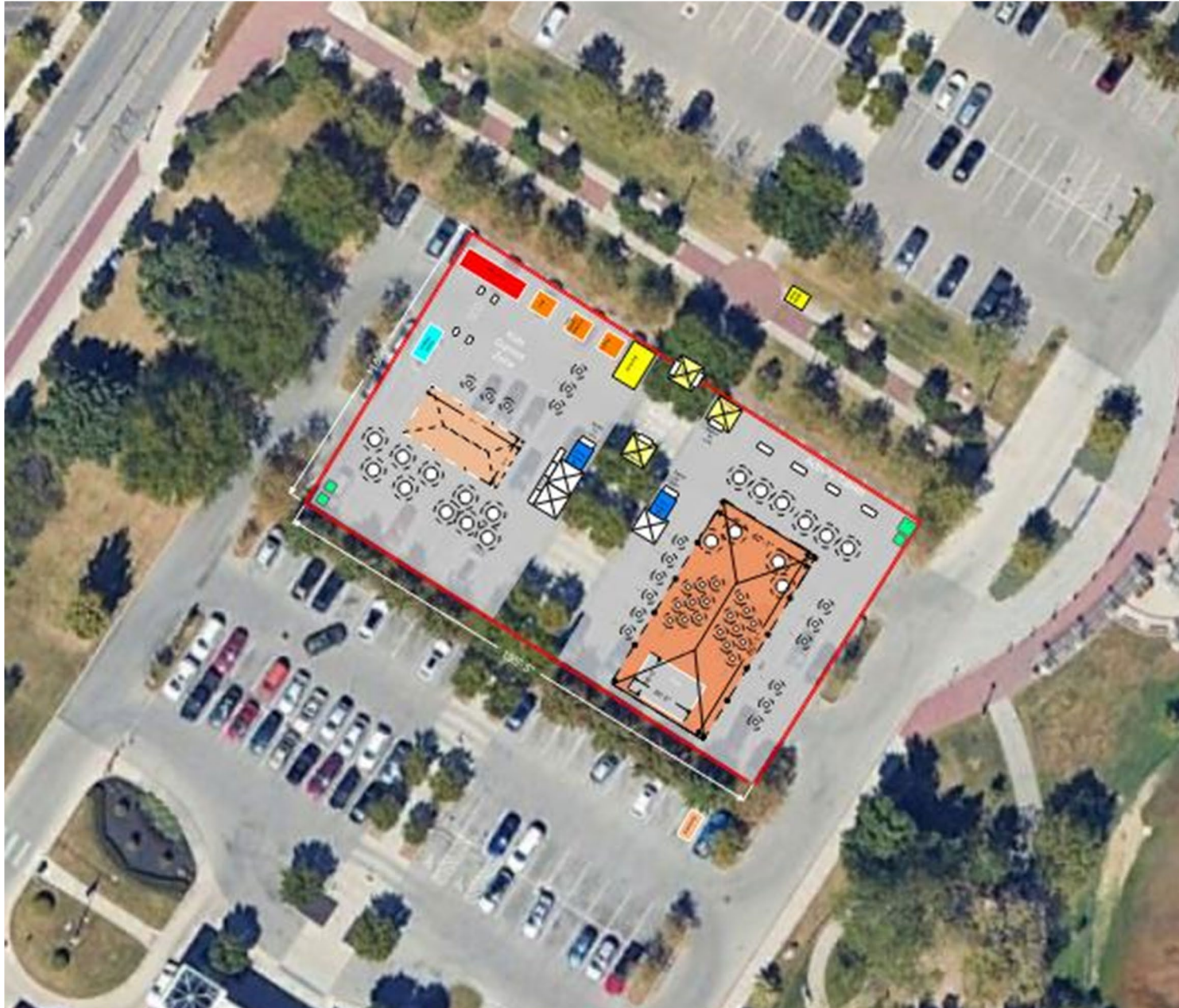
- 501c3 Organization
- 38 Director/Officer Volunteers
- Funded by membership dues and corporate sponsorships
- Create events for the entire community to come together and enjoy



Neighbors Night Out

- Replaced “The Walk”
- 600-800 Residents
- Family Friendly - Food, Entertainment, Activities
- Propose move to Tremont Library parking lot
- 1 station for beer sales, 1 station for wine/seltzer sales





Event Map



**City Council Annual Retreat
February 3, 2025**

City Council met in special session for their annual retreat in the Lower Level Conference Room of the Municipal Services Center, 3600 Tremont Road. The meeting was called to order by President Awakessien Jeter at 5:05 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, City Manager Steven Schoeny, Assistant City Manager Jackie Thiel, City Clerk Krystal Gonchar, Finance Director Brent Lewis, Fire Chief Chris Zimmer, Public Service Director Gary Wilfong, Community Affairs Director Emma Speight, and Community Development Director Chad Gibson

Facilitator: Dawn Tyler Lee, Forrest Street Consulting

Ms. Tyler Lee and Mr. Schoeny welcomed everyone and reviewed the objectives for the day:

- To continue to build relationships with one another
- To understand current projects
- To explore and prioritize 2025 projects

Mr. Schoeny and Ms. Thiel provided an overview of existing projects going into 2025, as well as the anticipated timeline. Projects include:

- Bob Crane Community Center Grand Opening and Year One Operations
- Website Redesign
- Master Plan
- Community Survey
- Housing Study
- Electric Aggregation Renewal
- 5 Points Roundabout Design
- Fire Public Education Re-think
- Fire Station 71 Assessment
- Northam Park East Fields Final Design
- Fancyburg Park Design

- E-Scooters/CoGo Transition
- Patrol Posture and Objectives Assessment
- Building Permit Progress Requirements
- Renewal of Community Relations Committee

Ms. Tyler Lee led the group in an exercise to determine 2025 projects by listing out new ideas that came out of 2024 and early 2025. Staff reviewed the list and categorized into four different areas:

- Those that can be easily incorporated into other projects already in the pipeline
- Those that need Council ok to move forward
- Those that are Council time dependent
- Big projects that will require a lot of time

The list included the following projects and associated timeline:

Can be easily incorporated into other projects

- Tree Canopy Assessment
- Parks Lighting and Hours

Need Council ok to move forward

- Street Tree Program Update
- Retail/Food and Beverage Strategy
- Sidewalk Repair Funding
- Small Business Program Re-evaluation
- Long term subsidy of Food Waste/Compost Program

Council Time Dependent

- Community Group Grant Process
- Board and Commission Term Limit Analysis
- Board and Commission By-Law Updates
- Budget Surplus Accounting Presentation
- Budget Cost Containment Process
- Distracted Driving

Big Projects

- Comprehensive Code Clean Up and Modernization
- Community Group Event Support
- Code Enforcement Fines
- Rental Registry
- Helmet Laws
- Deer Abatement
- Senior Circulator

The group recessed from 6:30-6:40 p.m.

After a brief recess, Council continued discussion on the categories that are Council Time Dependent and Big Projects. Code Enforcement Fees were moved to the “Council Time Dependent” category. Distracted Driving review was split, with Code Changes left in the Need Council Ok category, while extensive review was moved to the Big Projects category. After summarizing each project, Ms. Tyler Lee led Council through an exercise to prioritize the projects. Each member was provided sticker dots to place on their priority project. The results were as follows:

- Board and Commission Term Limit Analysis (4)
- Budget Surplus Accounting Presentation (4)
- Budget Cost Containment (4)
- Comprehensive Code Cleanup (5)
- Senior Circulator (4)

President Awakessien Jeter directed staff to take the above list and create a Gantt chart/2025 Work Plan for review and tracking for Council leadership review.

Staff reviewed potential new staff positions to give Council a sense of which areas they are looking into. The exception to the list is the addition of a fulltime Deputy City Clerk, consolidating two part time positions into one full time position, which will come forward in the upcoming final budget book. Other positions included:

- Certified Information Systems Security Manager
- Parks & Recreation Deputy Director
- Assistant Purchasing Administrator
- Waste Diversion/ Sustainability Manager
- Community Risk Reduction Fire Fighter
- 2nd SRO for UAHS
- Community Events/Marketing Manager

Finally, staff presented an update of unfunded projects, with an approximate cost and projected start year:

Unfunded Project	Approximate Cost	Projected Start Year	Currently Budgeted?
Facilities Maintenance	\$ 5,000,000	2026	No
Station 71	\$ 10,000,000	2028	Yes
Reed Rd. Waterpark	\$ 10,000,000	2030	No
PSC Fuel Tank Replacement	\$ 1,000,000	2029	Yes
Third medic unit	\$ 5,000,000		No

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There being no further business to come before City Council, President Awakessien Jeter adjourned the meeting at 8:53 p.m.



Authors:	Emma Speight, Community Affairs Director
Council Meeting Date:	May 12, 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
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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.

Monthly Financial Report As of April 2025

General Fund (101)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Income Tax	\$ 34,595,400	\$ 34,595,400	\$ 10,370,165	\$ 11,107,396	\$ 737,231	7.11%
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	4,485,520	4,784,558	299,038	6.67%
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	20,780,995	22,075,619	1,294,624	6.23%
<u>Obligations:</u>						
Police Division	12,262,800	12,262,800	5,620,450	5,229,208	391,242	6.96%
Fire Division	12,519,900	12,519,900	4,200,530	3,754,797	445,733	10.61%
Board of Health	400,000	400,000	363,604	363,604	-	0.00%
Parks and Recreation	8,383,300	8,426,600	2,594,804	2,392,181	202,623	7.81%
Community Development	1,563,300	1,579,300	667,691	620,172	47,519	7.12%
Public Service Administration	1,397,800	1,502,800	474,605	438,441	36,164	7.62%
Public Works	1,700,400	1,670,400	452,400	450,330	2,070	0.46%
City Manager	2,087,400	2,187,400	700,147	673,412	26,735	3.82%
City Attorney	983,700	1,053,700	289,122	257,405	31,717	10.97%
City Clerk	334,800	330,200	85,302	69,315	15,987	18.74%
City Council	208,900	237,400	79,133	68,758	10,375	13.11%
Finance	1,638,800	1,638,800	633,982	532,493	101,489	16.01%
Facilities Maintenance	4,818,400	4,818,400	3,166,258	2,602,402	563,856	17.81%
Information Technology	2,522,200	2,522,200	1,005,465	989,396	16,069	1.60%
General Administration	3,800,600	3,800,600	1,608,279	1,522,083	86,196	5.36%
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	24,441,772	22,463,997	1,977,775	8.09%
Excess of Revenue and Other Sources over Obligations:	3,769,300	(4,878,000)	(3,660,777)	(388,378)		
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	\$ 32,515,559	\$ 34,372,958	\$ 1,857,399	5.71%

Capital Asset Management Fund (102)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
Income Tax	\$ 13,453,700	\$ 13,928,200	\$ 4,032,842	\$ 4,320,615	\$ 287,773	7.14%
Total Revenues and Other Sources	13,453,700	13,928,200	4,032,842	4,320,615	287,773	7.14%
<u>Obligations</u>						
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	4,032,842	4,320,615		
Beginning Fund Balance	20,368,117	20,368,117	20,368,117	20,368,117		
Ending Fund Balance	\$ 24,045,617	\$ 24,520,117	\$ 24,400,959	\$ 24,688,732	\$ 287,773	1.18%

Monthly Financial Report As of April 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	4.44%
Homestead & Rollbacks	173,500	173,500	86,750	84,951	(1,799)	-2.07%
Transfers In	500,000	500,000	500,000	500,000	-	0.00%
Total Revenues and Other Sources	1,985,900	1,985,900	1,242,950	1,270,312	27,362	0.00%
<u>Obligations</u>						
Capital Equipment	2,548,300	2,548,300	2,020,563	2,020,563	-	0.00%
Total Obligations	2,548,300	2,548,300	2,020,563	2,020,563	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(562,400)	(562,400)	(777,613)	(750,251)		
Beginning Fund Balance	1,208,768	1,208,768	1,208,768	1,208,768		
Ending Fund Balance	\$ 646,368	\$ 646,368	\$ 431,155	\$ 458,517	\$ 27,362	6.35%

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	\$ 563,021	\$ 589,814	\$ 26,793	4.76%
Motor Vehicle License Taxes	450,000	450,000	149,288	134,089	(15,199)	-10.18%
All Other Operating Revenues	138,000	138,000	12,500	20,852	8,352	66.82%
Total Revenues and Other Sources	2,388,000	2,388,000	724,809	744,755	19,946	2.75%
<u>Obligations</u>						
Public Service Administration	1,129,200	1,129,200	340,547	304,411	36,136	10.61%
Public Works	1,582,700	1,582,700	677,024	606,102	70,922	10.48%
Total Obligations	2,711,900	2,711,900	1,017,571	910,513	107,058	10.52%
Excess of Revenue and Other Sources over Obligations:	(323,900)	(323,900)	(292,762)	(165,758)		
Beginning Fund Balance	1,927,174	1,927,174	1,927,174	1,927,174		
Ending Fund Balance	\$ 1,603,274	\$ 1,603,274	\$ 1,634,412	\$ 1,761,416	\$ 127,004	7.77%

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	158,333	275,069	116,736	73.73%
Total Revenues and Other Sources	20,448,700	475,000	158,333	275,069	116,736	73.73%
<u>Obligations</u>						
Capital Improvements	500,000	500,000	100,028	100,028	-	0.00%
Total Obligations	500,000	500,000	100,028	100,028	-	0.00%
Excess of Revenue and Other Sources over Obligations:	19,948,700	(25,000)	58,305	175,041		
Beginning Fund Balance	7,509,727	7,509,727	7,509,727	7,509,727		
Ending Fund Balance	\$ 27,458,427	\$ 7,484,727	\$ 7,568,032	\$ 7,684,768	\$ 116,736	1.54%

Monthly Financial Report As of April 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	\$ 15,019,000	\$ 7,000,000	\$ 8,276,001	\$ 1,276,001	18.23%
Transfers/Advances In	5,750,000	14,069,100	-	-	-	0.00%
Total Revenues and Other Sources	12,450,000	29,088,100	7,000,000	8,276,001	1,276,001	18.23%
<u>Obligations</u>						
Capital Improvements	9,986,900	18,306,000	6,193,840	6,193,840	-	0.00%
Transfers/Advances Out	6,100,000	6,100,000	-	-	-	0.00%
Total Obligations	16,086,900	24,406,000	6,193,840	6,193,840	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(3,636,900)	4,682,100	806,160	2,082,161		
Beginning Fund Balance	5,549,699	5,549,699	5,549,699	5,549,699		
Ending Fund Balance	\$ 1,912,799	\$ 10,231,799	\$ 6,355,859	\$ 7,631,860	\$ 1,276,001	20.08%

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	\$ 252,246	\$ 252,246	\$ -	0.00%
All Other Operating Revenues	45,000	45,000	15,000	20,303	5,303	35.35%
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	2,267,246	2,272,549	5,303	0.23%
<u>Obligations</u>						
Public Works	4,134,100	4,134,100	3,981,785	3,739,772	242,013	6.08%
Total Obligations	4,134,100	4,134,100	3,981,785	3,739,772	242,013	6.08%
Excess of Revenue and Other Sources over Obligations:	(189,100)	(189,100)	(1,714,539)	(1,467,223)		
Beginning Fund Balance	1,534,635	1,534,635	1,534,635	1,534,635		
Ending Fund Balance	\$ 1,345,535	\$ 1,345,535	\$ (179,904)	\$ 67,412	\$ 247,316	-137.47%

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	\$ 248,183	\$ 285,101	\$ 36,918	14.88%
Total Revenues and other sources	855,000	855,000	248,183	285,101	36,918	14.88%
<u>Obligations</u>						
Public Works	490,700	490,700	222,225	203,042	19,183	8.63%
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	3,578	3,578	-	0.00%
Total Obligations	846,600	846,600	225,803	206,620	19,183	8.50%
Excess of Revenue and Other Sources over Obligations:	8,400	8,400	22,380	78,481		
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	\$ 1,801,245	\$ 1,857,346	\$ 56,101	3.11%

Monthly Financial Report As of April 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	\$ 395,652	\$ 435,546	\$ 39,894	10.08%
All Other Operating Revenues	1,500	1,500	-	1,066	1,066	0.00%
Total Revenue	1,334,500	1,334,500	395,652	436,612	40,960	10.35%
Obligations						
Public Works	1,214,000	1,214,000	502,516	427,576	74,940	14.91%
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	8,385	8,385	-	0.00%
Total Obligations	1,569,600	1,569,600	510,901	435,961	74,940	14.67%
Excess of Revenue and Other Sources over Obligations:	(235,100)	(235,100)	(115,249)	651		
Beginning Fund Balance	2,831,202	2,831,202	2,831,202	2,831,202		
Ending Fund Balance	\$ 2,596,102	\$ 2,596,102	\$ 2,715,953	\$ 2,831,853	\$ 115,900	4.27%

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	\$ 381,437	\$ 416,082	\$ 34,645	9.08%
Investment Earnings	70,000	70,000	23,333	33,617	10,284	44.07%
Miscellaneous income	-	-	-	1,360	1,360	100.00%
Total Revenues and other sources	823,000	823,000	404,770	451,059	46,289	11.44%
Obligations						
Public Works	690,000	690,000	172,500	153,034	19,466	11.28%
Capital Equipment	470,000	470,000	95,787	95,787	-	0.00%
Capital Improvements	449,800	449,800	-	-	-	0.00%
Transfers Out (including intra-city services)	77,600	77,600	4,715	4,715	-	0.00%
Total Obligations	1,687,400	1,687,400	273,002	253,536	19,466	7.13%
Excess of Revenue and Other Sources over Obligations:	(864,400)	(864,400)	131,768	197,523		
Beginning Fund Balance	2,987,559	2,987,559	2,987,559	2,987,559		
Ending Fund Balance	\$ 2,123,159	\$ 2,123,159	\$ 3,119,327	\$ 3,185,082	\$ 65,755	2.11%

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	\$ 131,698	\$ 101,622	\$ (30,076)	-22.84%
Transfers/Advances In	300,000	300,000	-	-	-	0.00%
Total Revenues and other sources	1,313,800	1,313,800	131,698	101,622	(30,076)	-22.84%
Obligations						
Parks and Recreation	1,140,600	1,140,600	179,724	128,123	51,601	28.71%
Total Obligations	1,140,600	1,140,600	179,724	128,123	51,601	28.71%
Excess of Revenue and Other Sources over Obligations:	173,200	173,200	(48,026)	(26,501)		
Beginning Fund Balance	397,663	397,663	397,663	397,663		
Ending Fund Balance	\$ 570,863	\$ 570,863	\$ 349,637	\$ 371,162	\$ 21,525	6.16%

Monthly Financial Report As of April 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	\$ 22,075,619	\$ 19,809,079	\$ 46,137,248	5.2%
Capital Asset Management	24,410,352	4,820,804	500,189	28,730,967	17.7%
Police Pension	1,499,760	462,187	152,039	1,809,908	20.7%
Fire Pension	1,499,759	462,187	152,038	1,809,908	20.7%
Self Insurance	1,084,300	14,503	6,805	1,091,998	0.7%
Capital Equipment	1,720,307	1,270,312	222,621	2,767,998	60.9%
Police & Fire Pension	1,422,653	789,384	505,933	1,706,104	19.9%
Technology Fund	425,843	176,884	234,746	367,981	-13.6%
Street Maintenance and Repair Fund	1,965,631	744,755	695,575	2,014,811	2.5%
EMS Billing Fund	1,691,000	492,015	56,609	2,126,406	25.7%
Law Enforcement	2,739,032	43,102	92,770	2,689,364	-1.8%
Tree Planting Fund	92,965	10,150	-	103,115	10.9%
Enforcement Education	20,650	168	-	20,818	0.8%
Mayor's Court Computer	45,728	1,680	-	47,408	3.7%
Mayor's Court Special Project	171,505	5,630	-	177,135	3.3%
Local Fiscal Recovery Fund	2,192,062	-	657,462	1,534,600	-30.0%
OneOhio Opioid Fund	141,353	-	3,600	137,753	-2.5%
Economic Development	2,078,781	-	2,015	2,076,766	-0.1%
Arlington Centre TIF Fund	116,976	12,734	-	129,710	10.9%
Tremont Road TIF Fund	18,760	20,039	-	38,799	106.8%
Lane Avenue Mixed Use TIF Fund	738,355	511,890	999,744	250,501	-66.1%
Lane Avenue TIF Fund	304,986	30,251	-	335,237	9.9%
Arlington Crossing TIF Fund	1,068,524	69,461	-	1,137,985	6.5%
Horizon TIF Fund	1,053,912	238,445	-	1,292,357	22.6%
Kingsdale West TIF Fund	395,386	28,635	-	424,021	7.2%
Kingsdale CORE TIF Fund	668,801	1,444,741	-	2,113,542	216.0%
Civil Service	60,960	-	2,180	58,780	-3.6%
Riverside North TIF Fund	19,946	1,430	-	21,376	7.2%
Riverside South TIF Fund	224,430	22,177	-	246,607	9.9%
W. Lane Northwest TIF Fund	22,542	8,955	-	31,497	39.7%
Lane II TIF Fund	1,265,563	646,714	113,443	1,798,834	42.1%
Kingsdale Center TIF Fund	30,032	154,319	78	184,273	513.6%
Gateway TIF Fund	39,409	874,429	-	913,838	2218.9%
Neighborhood Lighting Utility	318,423	39,588	7,345	350,666	10.1%
Clerk of Courts Fund	21,343	1,681	-	23,024	7.9%
UA Visitor's Bureau Fund	572,453	37,526	-	609,979	6.6%
General Bond Retirement	315,716	-	112,941	202,775	-35.8%
Bonded Improvements	13,072,564	697,529	3,536,576	10,233,517	-21.7%
Infrastructure Improvement Fund	25,102,125	12,776,829	19,467,236	18,411,718	-26.7%
Estate Tax Fund	85	-	-	85	0.0%
Community Fiber Optic Fund	352,606	-	10,888	341,718	-3.1%
Employee Benefit	2,014,911	1,574,573	1,815,498	1,773,986	-12.0%
BWC Administration Fund	1,340,044	124,463	144,420	1,320,087	-1.5%
Solid Waste Management	1,919,144	2,272,549	1,290,477	2,901,216	51.2%
Water Surcharge	1,952,948	285,101	168,953	2,069,096	5.9%
Sanitary Sewer Surcharge	3,532,735	436,612	599,224	3,370,123	-4.6%
Stormwater Management	3,301,276	451,059	462,139	3,290,196	-0.3%
UA Swimming Pools	397,663	101,622	65,793	433,492	9.0%
Unclaimed Funds	8,491	553	-	9,044	6.5%
Revolving Fund	53,814	828,778	781,332	101,260	88.2%
Construction Withholding	3,108,854	1,218,995	2,217,768	2,110,081	-32.1%
Payroll Clearing Fund	330,833	11,442,733	11,199,036	574,530	73.7%
Totals (ROUNDED)	\$ 150,816,999	\$ 67,723,791	\$ 66,086,552	\$ 152,454,238	ROUNDED TOTALS

1,637,239

Monthly Financial Report As of April 2025

Income Tax Comparisons

	Projections	Year to date	Difference	% Difference
Withholdings	\$ 10,368,734	\$ 11,672,983	\$ 1,304,249	12.58%
Individuals	2,490,218	2,083,182	(407,036)	-16.35%
Net Profits	1,544,055	1,671,846	127,791	8.28%
Total	\$ 14,403,007	\$ 15,428,011	\$ 1,025,004	7.12%

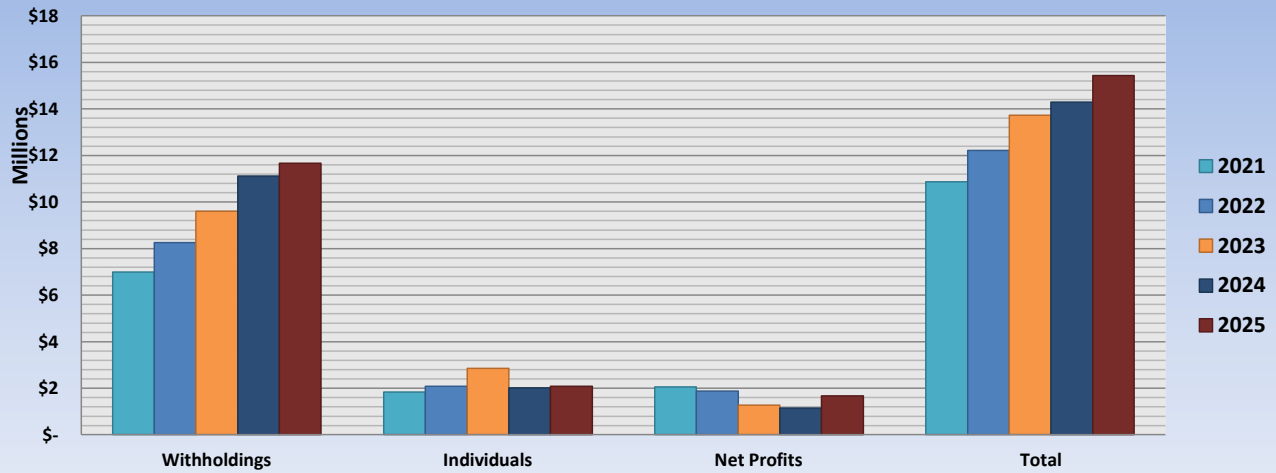
Income Tax Five Year Comparison

	2021	2022	2023	2024	2025
Withholdings	\$ 6,990,788	\$ 8,252,136	\$ 9,600,612	\$ 11,114,797	\$ 11,672,983
Individuals	1,833,640	2,084,788	2,856,896	2,015,406	2,083,182
Net Profits	2,051,720	1,885,543	1,272,639	1,155,832	1,671,846
Total	\$ 10,876,148	\$ 12,222,467	\$ 13,730,147	\$ 14,286,035	\$ 15,428,011

Percentage Increase (Decrease) From Prior Year

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
Withholdings	8.64%	18.04%	16.34%	15.77%	5.02%
Individuals	16.40%	13.70%	37.04%	-29.45%	3.36%
Net Profits	37.63%	-8.10%	-32.51%	-9.18%	44.64%
Total	14.47%	12.38%	12.34%	4.05%	7.99%

Income Tax Five Year Trend vs Prior YTD Monthly



Interest & Investment Income

Apr-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	1,979,148.00	(1,017,793.75)			\$ 55,297,556.77
US Government Bonds	23,330,780.53		(863,984.18)			\$ 22,466,796.35
Total Bonds	\$ 93,534,075.23	\$ 1,979,148.00	\$ (1,881,777.93)	\$ -	\$ -	\$ 93,631,445.30
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	-					\$ -
Community Center						
Federal Agency	443,706.39					\$ 443,706.39
US Government Bonds	512,080.08		(512,080.08)			\$ -
Total Bonds & Investments	\$ 97,929,850.25	\$ 1,979,148.00	\$ (2,393,858.01)	\$ -	\$ -	\$ 97,515,140.24
Money Markets:						
General	86,853.64	(1,979,148.00)	1,900,748.94	(5,476.11)	190,659.23	\$ 193,637.70
Community Center	21,432.16		525,000.00	(550,000.00)	7,136.36	\$ 3,568.52
Bond 2020 & 2022	1,703.88			(1,715.36)	11.48	\$ 0.00
Total Money Markets	\$ 109,989.68	\$ (1,979,148.00)	\$ 2,425,748.94	\$ (557,191.47)	\$ 197,807.07	\$ 197,206.22
Star Ohio:						
General Investment	29,479,061.94	8,635,257.87			118,798.04	\$ 38,233,117.85
Bond Proceeds	6,765,221.20	1,715.36		(353,839.46)	24,014.94	\$ 6,437,112.04
Federal ARPA (Gen. Inv.)	1,385,649.42			(5,244.34)	5,083.44	\$ 1,385,488.52
Gateway	984,910.79				3,622.41	\$ 988,533.20
Kingsdale	232,389.96			(77.47)	854.52	\$ 233,167.01
Community Center	1,540,622.83	550,000.00			6,609.40	\$ 2,097,232.23
Office (Comm. Center)	1,783,276.65			(276,096.60)	5,881.94	\$ 1,513,061.99
Total STAR Ohio	\$ 42,171,132.79	\$ 9,186,973.23	\$ -	\$ (635,257.87)	\$ 164,864.69	\$ 50,887,712.84
Total Investments	\$ 140,210,972.72	\$ 9,186,973.23	\$ 31,890.93	\$ (1,192,449.34)	\$ 362,671.76	\$ 148,600,059.30
NW Huntington Bank	\$ 14,866,379.37					\$ 3,854,187.68
Total Cash & Investments	\$ 155,077,352.09					\$ 152,454,246.98

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

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
4/1/25	Insight Public Sector	Vectra Network Detection	\$38,319.61
4/10/25	Parr Public Safety Equip.	Upfitting for Police Vehicles	\$31,709.14
4/14/25	Bayside Supply	14- foot and 12- foot light poles	\$64,320.00
4/16/25	Insight Public Sector	CrowdStrike Software	\$29,627.33
4/23/25	NeoGov	NeoGov Software Renewal	\$40,836.82
4/23/25	CPP of Dayton	Fire Hydrant Painting	\$47,030.00

QUALITY BASED SELECTION CONSULTANTS – APRIL 2025

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

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

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>CHANGE ORDER AMOUNT</u>	<u>New Total</u>
4/21/25	EDGE Group	Fancyburg Park Master Plan, Phase 2	\$100,636.00	\$174,636.00

GRANTS APRIL 2025

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



Authors:	Chad Gibson, AICP, Community Development Director
Council Meeting Date:	May 12, 2025
Subject/Legislative Item:	Ordinance No.16-2025 - An ordinance authorizing Upper Arlington's participation in the Central Ohio Shared Mobility Program and authorizing the City Manager to enter into a service agreement with Veoride, Inc. for the operation of scooters, bikes, and other mobility devices within the City (Kulewicz)
Purpose:	The purpose of this ordinance is to authorize participation in the Central Ohio Shared Mobility Program and enter into a service agreement with Veoride, Inc. for the operation of scooters, bikes, and other mobility devices within the City.
Executive Summary:	In 2024, the Columbus Shared Mobility Evaluation Committee went through a Request for Proposal process and recommended a single operator, Veo, to enter into contract negotiations with and to establish a Service Level Agreement for operations within the Columbus market. The Committee selected Veo due to their state-of-the-art fleet, revenue-sharing model, and their enhanced device locating technology which assures appropriate vehicle parking and facilitates safer use. Veo is an established, female-owned business that currently operates in +/- 17 states, with nearby systems in Toledo and Cleveland. To facilitate a proper transition and ensure the service remains available, the former CoGo docking stations have been replaced with mobility hubs (see attached photo). Authorizing continued participation in the Central Ohio Shared Mobility Program allows the City to continue as a regional partner in expanding alternative transportation. The proposed Service Level Agreement with Veo includes the same CoGo regional partners: Columbus, Bexley, Dublin, Grandview Heights, and The Ohio State University. In Upper Arlington, the Veo devices would operate similar to the CoGo set-up, as the devices would be stored and returned to these mobility hubs and approved parking areas.



Purpose and Impact

Upper Arlington does not currently allow any scooter or micromobility device operators to use its right-of-way, but was a participating city in the CoGo bikeshare program. Following Columbus' formal decision to select Veo, CoGo's parent company, Lyft, exited the Columbus market after their contract expiration in Q1 of 2025. Lyft has since removed the CoGo e-bikes, pedal bikes, and stations, including those within Upper Arlington. Other scooter vendors such as Bird and Lime have also left the market. Per a legal agreement with Columbus, scooter vendor Spin will be allowed to operate through the end of 2025, which has adjusted the initially-proposed financial (revenue share) model.

Entering into a service agreement with Veo will authorize the operation of the system in Upper Arlington; it will ensure that a portion of the revenue generated from trips in the community is appropriately shared. The current vehicle parking map will be refined as needed to ensure appropriate vehicle use and parking. Designated 'slow zones' can be geo-fenced in parks and other areas as needed. Working with Veo will also allow the City to apply geo-fencing, exclusionary zones, to prevent these devices from being operated in specified areas.

Joe Bott, Veo's Senior Policy and Partnerships Manager, will be present at the Council meeting to provide details and answer questions as needed.

History

The CoGo bikeshare system has been in operation since 2013. In 2017, the system expanded into Upper Arlington and other communities with the help of a MORPC attributable funding grant which covered nearly 80 percent of the installation cost. Upper Arlington maintained a separate contract for exclusive use of the station kiosk signage for community messaging. Ridership at Upper Arlington's five (5) stations has generally been moderate, with the West Lane Avenue station typically seeing the most annual trips. Over that time, e-bikes and scooters have increased in popularity, making the pedal-only bike rentals less popular.

Upper Arlington staff have been working with Veo to develop exclusionary zones for these devices and develop a parking map of the station locations and other acceptable parking areas.

Notable updates are listed below:

- Summer 2024 - Columbus issues RFP for micromobility service vendor(s).
- Autumn 2024 - Multi-jurisdictional review committee reviews RFP responses and selects Veo as the sole service provider.
- February 28, 2025 - CoGo bike share program formally ends.
- March 15, 2025 - Veo devices introduced.
- April 1, 2025 - Introductory meeting with select Staff and Veo.
- April 1, 2025 - GIS staff provides a draft preferred scooter and bike parking location map.
- April 9, 2025 - Staff presentation on micromobility proposal at PRAB.
- April 9, 2025 - Notification letters sent to adjacent property owners and businesses located near existing CoGo stations advising them of the change.
- April 21, 2025 - Staff met with Veo representatives to coordinate efforts and to demo the vehicles.



- April 28, 2025 - UA-specific service contract provided to Upper Arlington for review.
- May 12, 2025 - Council to consider Veo service agreement

The term 'micromobility' generally refers to a range of small, lightweight devices, such as electronic scooters. These devices are typically operated at lower speeds and help fill gaps in the transportation system, especially for shorter-distance, 'first mile-last mile' trips. State law requires that an individual must be at least 16 years old to rent a micromobility device. Veo's fleet of devices includes pedal bikes, e-bikes, and a variety of electric scooters.

Alternatives

Should Council decline to enter into a service agreement with Veoride, Inc., their mobility devices and stations would not be permitted in the City. The City could opt to find a different vendor on its own, outside the regional partnership, or decide not to participate with a third-party alternative transportation vendor.

Attachments

1.	Shared Mobility Ride Hub
2.	Veo x Columbus - October 2024
3.	Veo Demo - Josh 4.21.25
4.	Veo Demo - Shannon 4.21.25
5.	Ordinance No. 16-2025





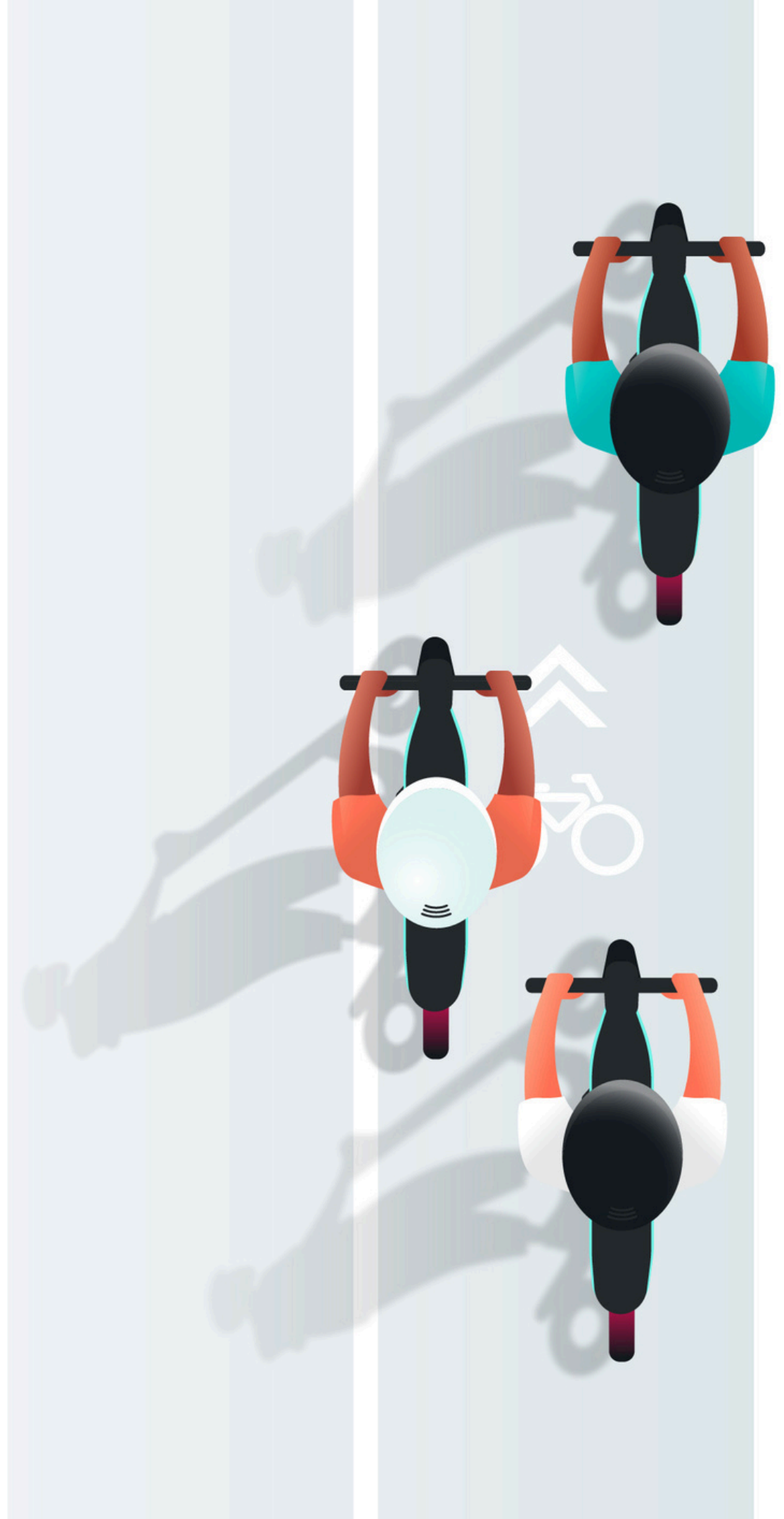
Veo x Columbus

October 15, 2024



Agenda

- 1 About Veo
- 2 Financial & Program Overview
- 3 Meet the Fleet
- 4 Parking and Device Management
- 5 Customer Service and Engagement



1. About Veo

VEO X COLUMBUS

About Veo

Founded at Purdue University in 2017

Diversified fleet options

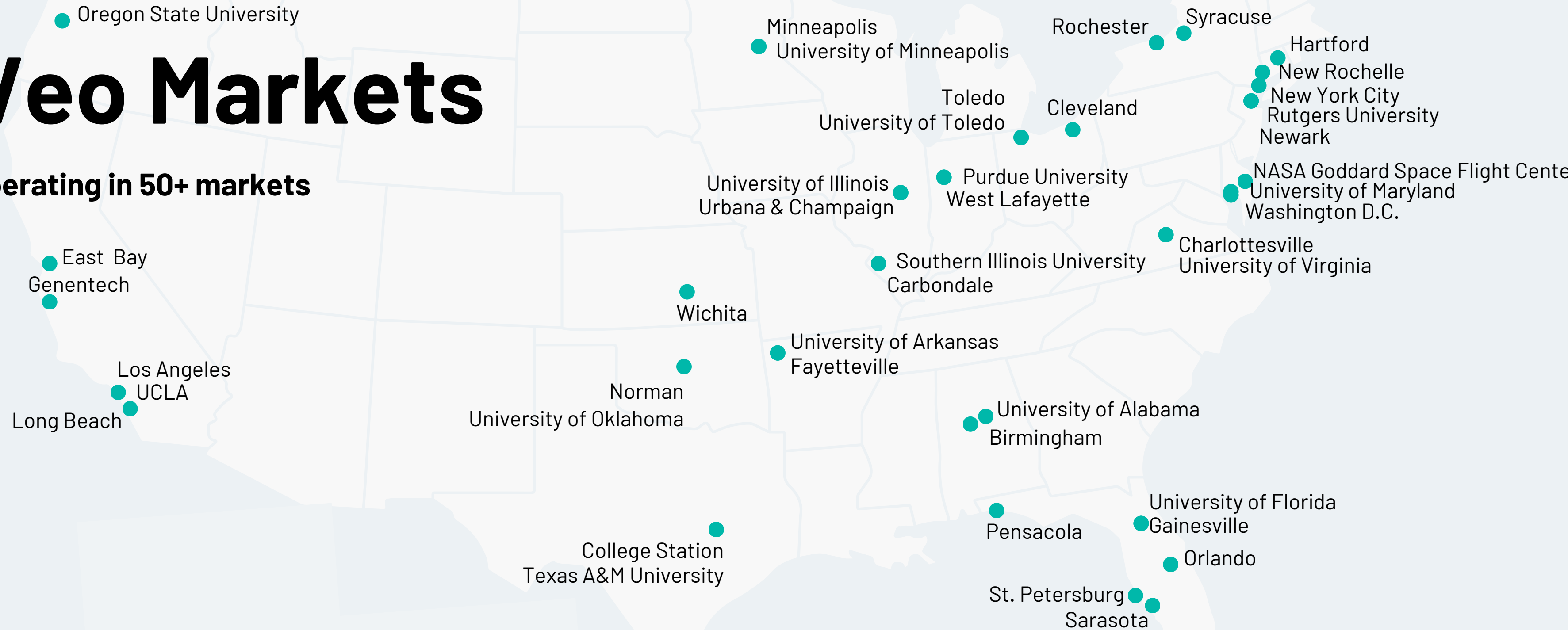
Specialize in long-term partnerships

WMBE and **Certified Green Business**



Veo Markets

Operating in 50+ markets



Market Highlight: East Bay Area

Overview

Launched in 2021 – large-scale regional micromobility system

Jurisdictions: Berkeley, Oakland, Emeryville, Albany

Fleet Type: Astro, Cosmo, Wheelchair attachment

What to Watch For: New B2B “enterprise” partnership with Genentech and other Bay Area biotech firms



Relevant Experience

Operate over 1,000 devices across 4 cities

Allow for uninterrupted travel across municipal borders

Established designated parking zones at key BART and AC Transit BRT stations for integration with public transit



Market Highlight: CRCOG, CT

Overview

Launched in August 2024

Jurisdictions: Hartford, New Haven, New Britain

Fleet Type: Astro, Cosmo-e, Apollo, Halo, Halo-e



Relevant Experience

Operate in up to 38 municipalities across the greater Metro Hartford area

Implemented improved and financially stable program after market micromobility failure



2. Financial & Program Overview

Financial Health

Profitable since 2021

Solvent and stable: Debt-to-Asset ratio 0.25 (Assets = 3.5X Liabilities)

Fleet In Hand: Market launch already budgeted and vehicles manufactured

Built for the long term: Majority of Veo's contracts have been operating for 5+ years



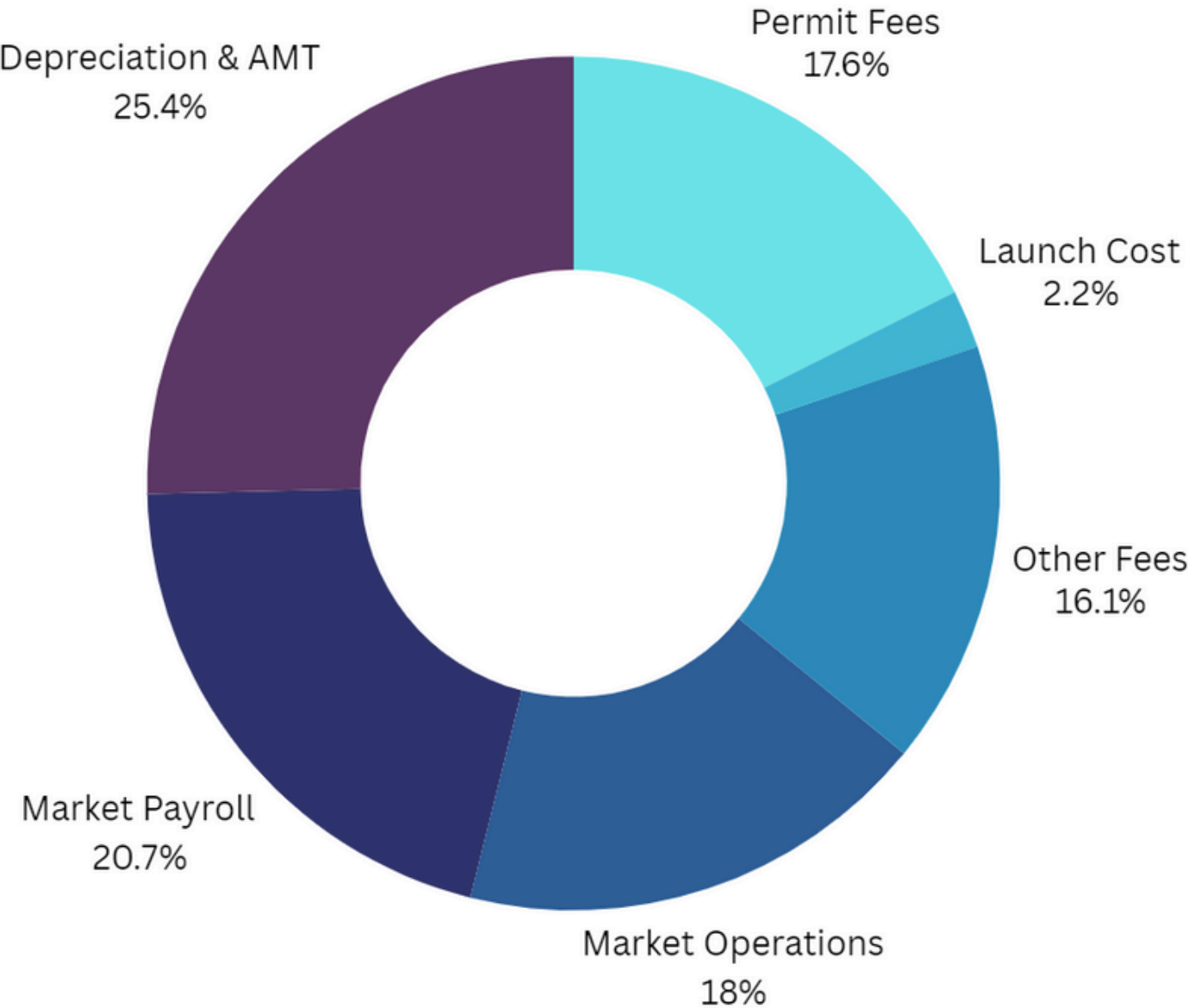
Financial Assumptions

Under an exclusive contract, Columbus will be one of Veo's top three revenue markets (along with DC and NYC) and receive constant investment and attention.

Columbus will have the most diverse fleet of micromobility vehicles operating anywhere in the US and 100% of CoGo stations will be maintained and utilized, with strategic reallocation of stations to Opportunity Neighborhoods fully funded by Veo

Financial Assumptions

Model Type	Ridership (Annual)	Fleet Size	Revenue (Annual)	Profit Margin
Exclusive	> 1,000,000	3k-4k	> 4 Million	Approx. 15%
Two Vendors	450,000	1.5k-2k	1.5 Million	Approx. 8%



Financial Assumptions

Model Type (5-year contract)	Revenue Sharing	Infrastructure investment	Local Workforce Investment	Other Program Investment
Exclusive	>\$3,000,000	\$150,000	>\$4,500,000	>\$12,000,000
Two Vendors	\$650,000	\$60,000	\$1,500,000	\$5,000,000

Program Model Options

Model Type	Proposed Fleet	Revenue Share	Parking	CoGo Stations
Exclusive	Total: 4,000 devices 3,000 Astro/Cosmo 500 Apollo 500 Halo-e	- All applicable permit fees - \$90/device fee* - \$150,000 in-kind contribution - Additional 15 Cents per trip	Hybrid mandatory / free-floating	Install painted parking corrals and signage , repurpose, relocate, and rebrand CoGo stations
Two Vendors	Total: 2,000 devices 1,600 Astro/Cosmo 250 Apollo 150 Halo-e	- All applicable permit fees - \$90/device fee* - \$60,000 in-kind contribution - 5 cents per trip	Hybrid mandatory / free-floating	Same as Exclusive model with exclusive use of CoGo stations
Three Vendors	Total: 1,000 devices 950 Astro/Cosmo 50 Apollo	- All applicable permit fees - \$90/device fee	Hybrid mandatory / free-floating	No adaptation of CoGo stations



*RECOMMENDED: NO FEE FOR CLASS 1 E-BIKES + QUARTERLY DEVICE FEE PAYMENT BASED ON REAL DEPLOYMENT

Customer Pricing: All Models

Standard	Astro and Cosmo: \$1.00 unlock, \$0.39/minute Apollo: \$1.00 unlock, \$0.42/minute Halo-e: \$1.00 unlock, \$0.25/minute Wheelchair device: Free 7-day rentals
VeoAccess (Low Income + AARP + Military)	\$5.00/month No unlock fees, free 30-minutes of riding/day \$0.20/minute afterwards
VeoPlus Premium	\$7.99/month No unlock fees, standard/minute fee Transition existing CoGo members: Offer current members six months of VeoPlus Premium membership for free
VeoPlus Commuter	\$10.00/week 2 free 20-minute rides/day (current pass holders are spending at average \$1 per trip)



Comprehensive TDM through corporate partnerships

Nasa Goddard Space Flight Center

100 Cosmo Scooters

Free riding for all campus employees and visitors

Daily W2 staff battery swapping, rebalancing, maintenance

Over 30,000 rides since June, 2024

Oyster Point, South San Francisco

150 Cosmo Scooters

Free riding for all employees of registered businesses (based on email)

Daily W2 staff battery swapping, rebalancing, maintenance

"We're seeing excellent usage at NASA Goddard Space Flight Center. Particularly for employees who rideshare, carpool, use public transport, walk, or bike to campus. So far it is a great addition to our mobility options"

Makenzie Lystrup, Director



Scalability Plan

Flexible Program Management

Ability to scale the program up or down based on demand

Key Metrics

Average Rides per Vehicle per Day

- Primary metric for determining demand and adjusting fleet size
- Distinguish use by vehicle type
- Reflect differing needs and preferences by neighborhood

Average Trip Distance

- **Device Utilization:**
Longer trips mean devices are in use for extended periods
- **Maintenance Needs:**
Increased need for battery swaps and scheduled maintenance



Columbus Program Overview

Central Ohio Limits

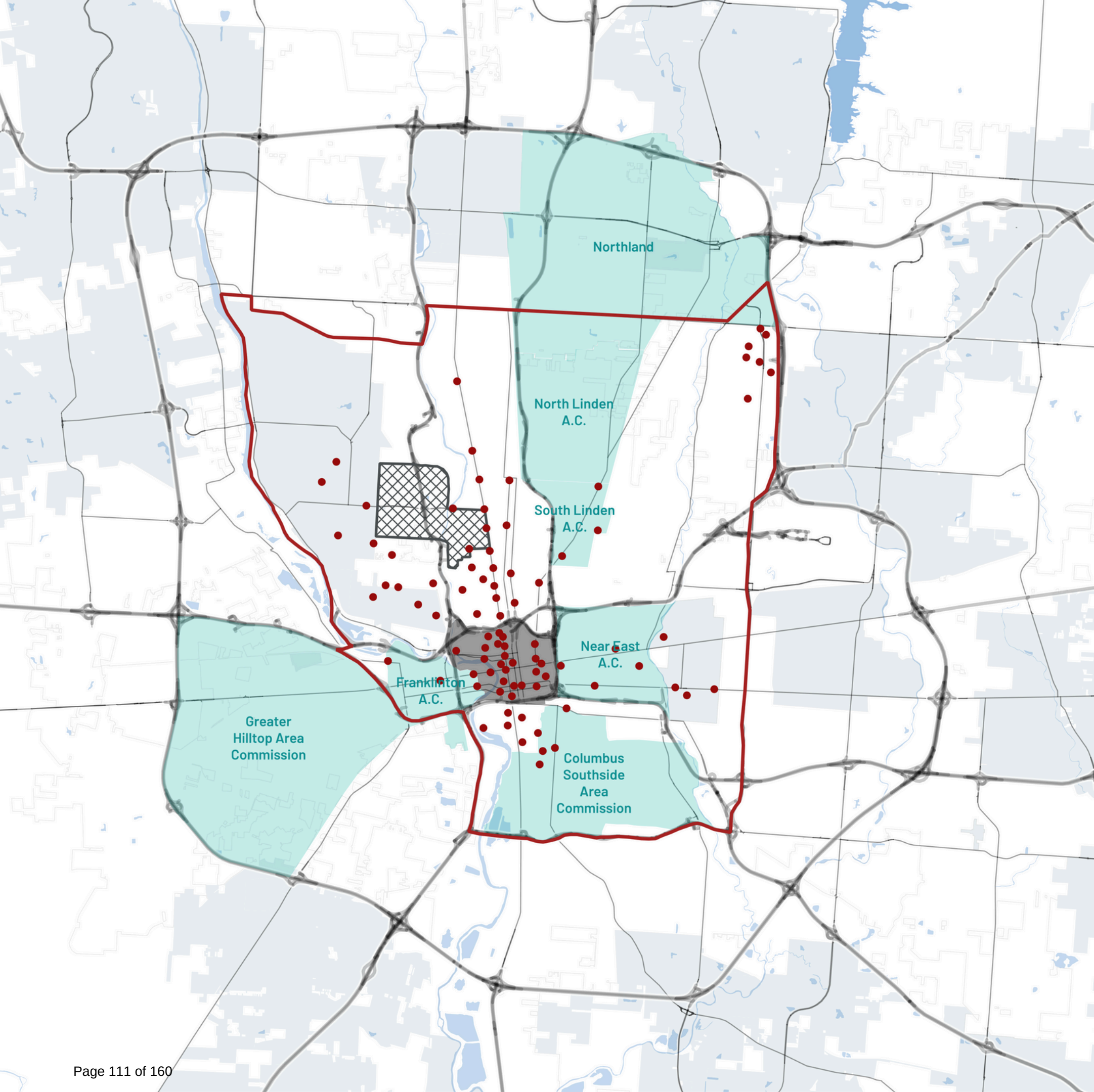
- Columbus
- Cities/Villages

Opportunity Neighborhoods

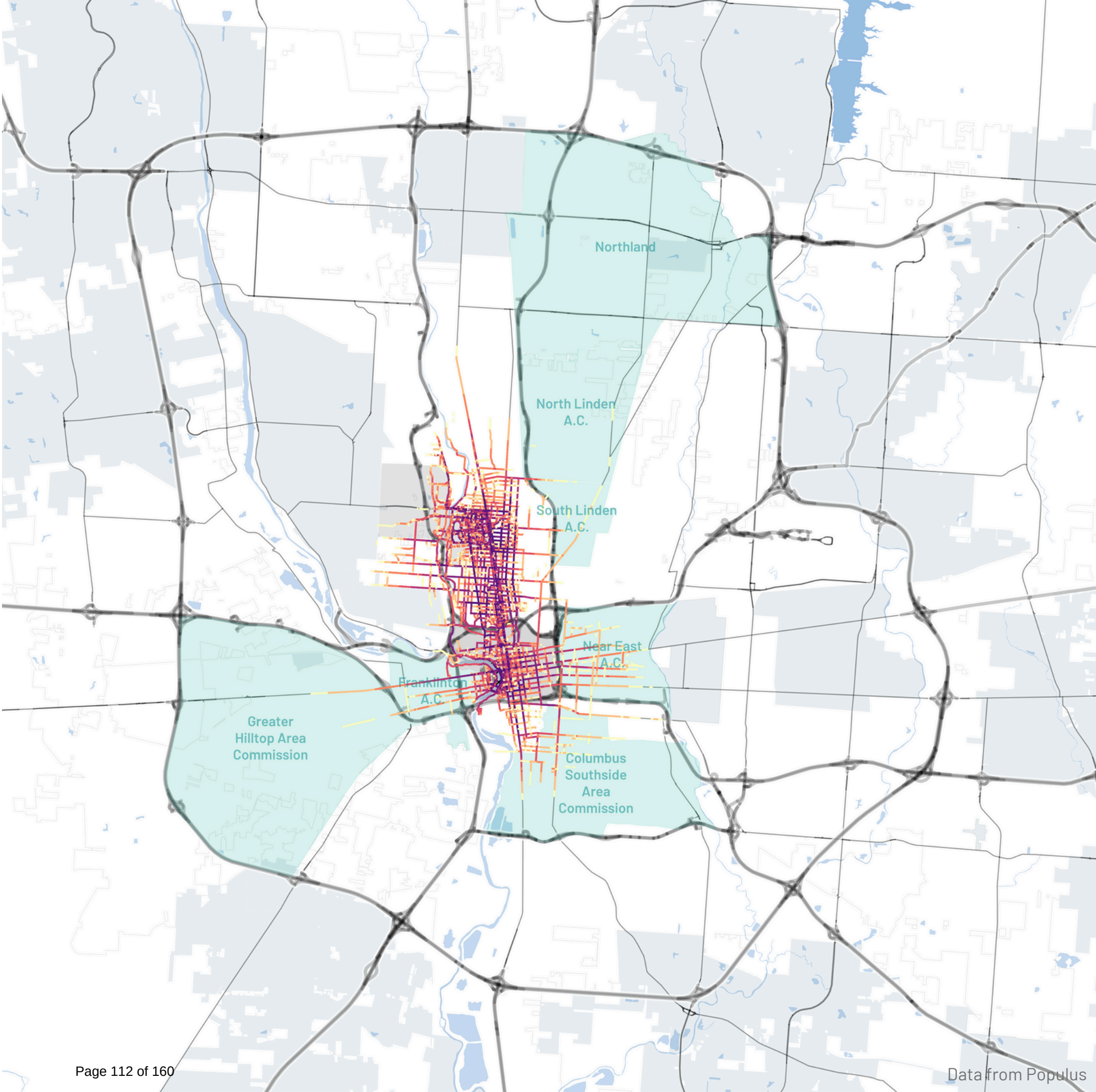
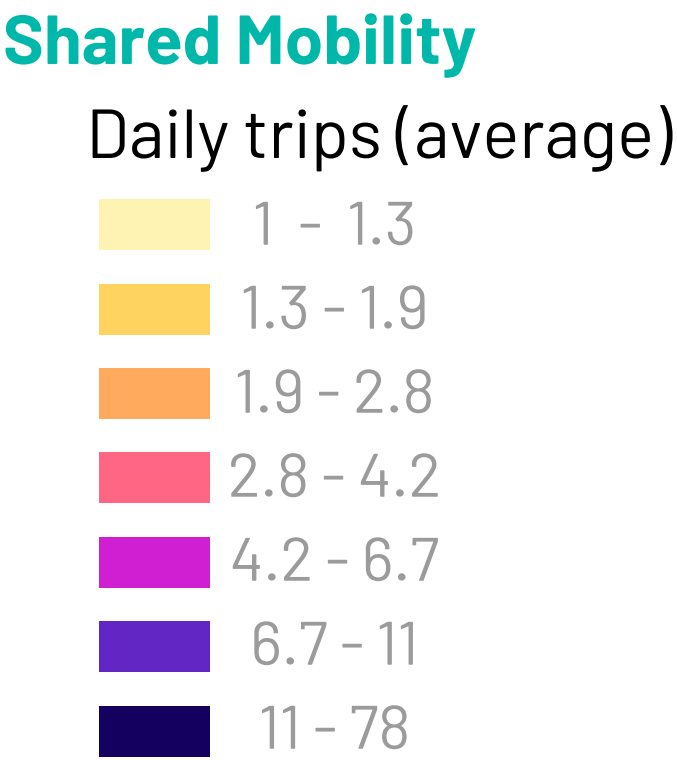
- Opportunity Neighborhoods (with labels)
- Downtown
- Ohio State University

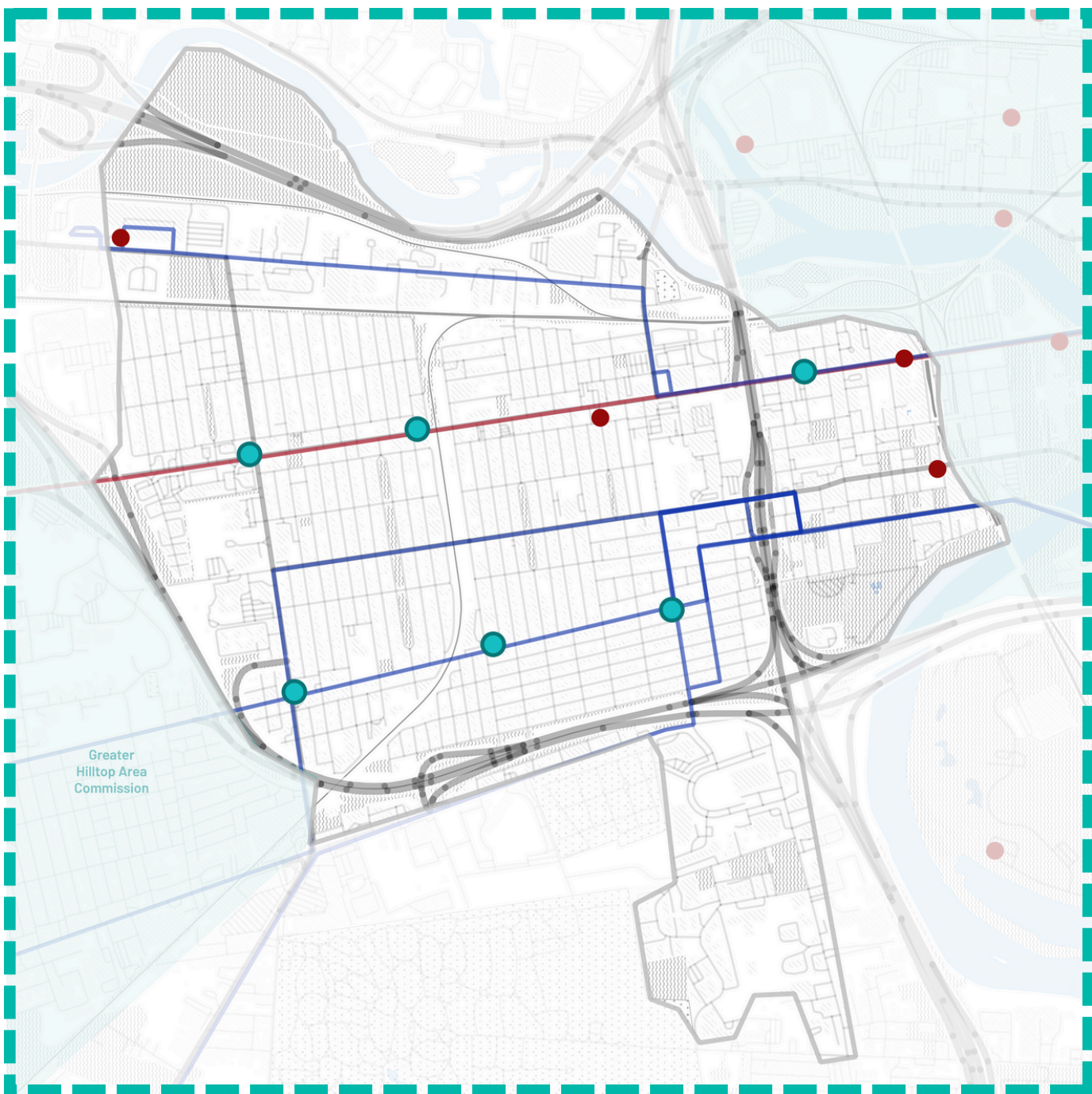
CoGo

- Service Area
- Stations



Columbus Program Overview





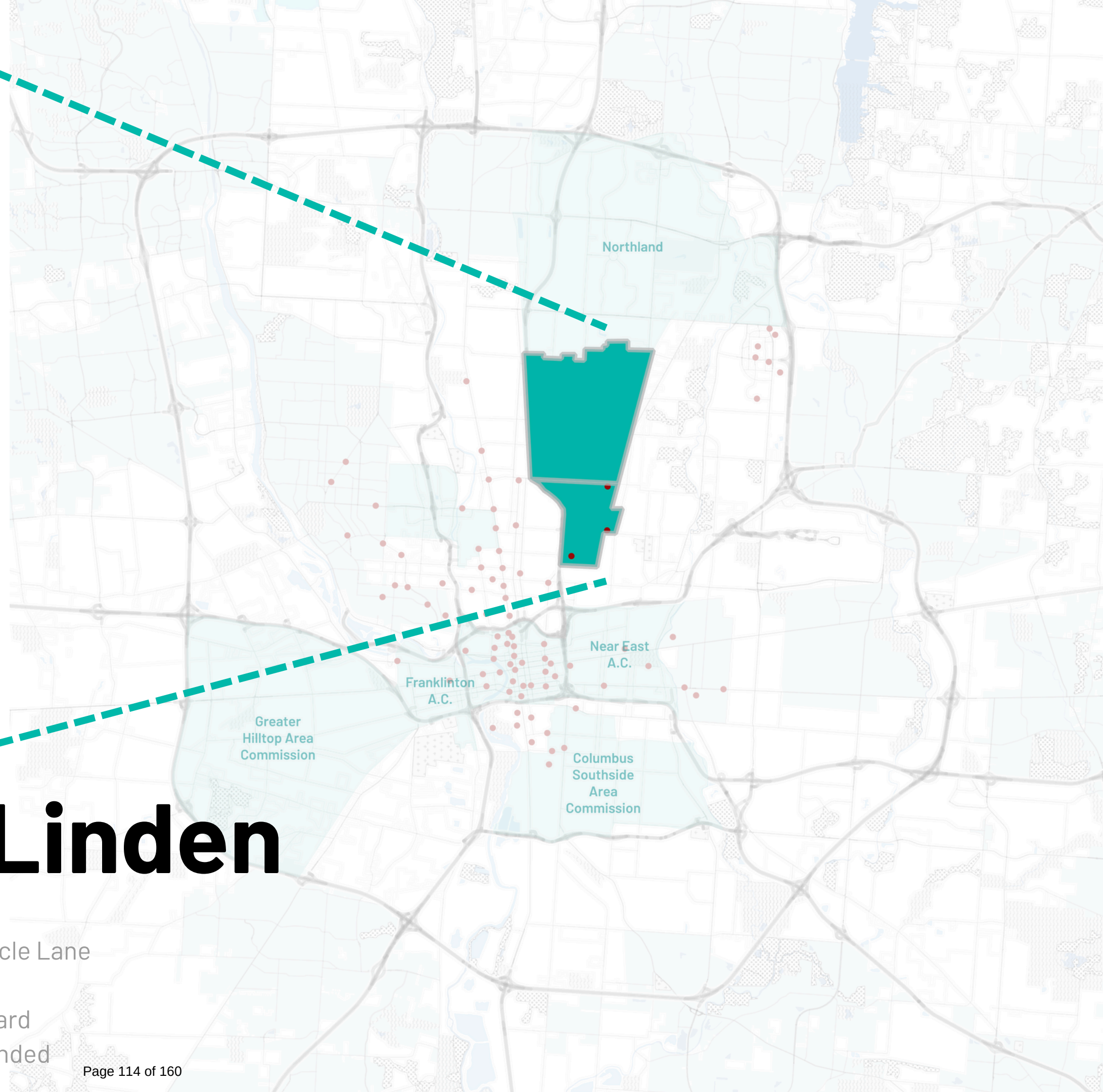
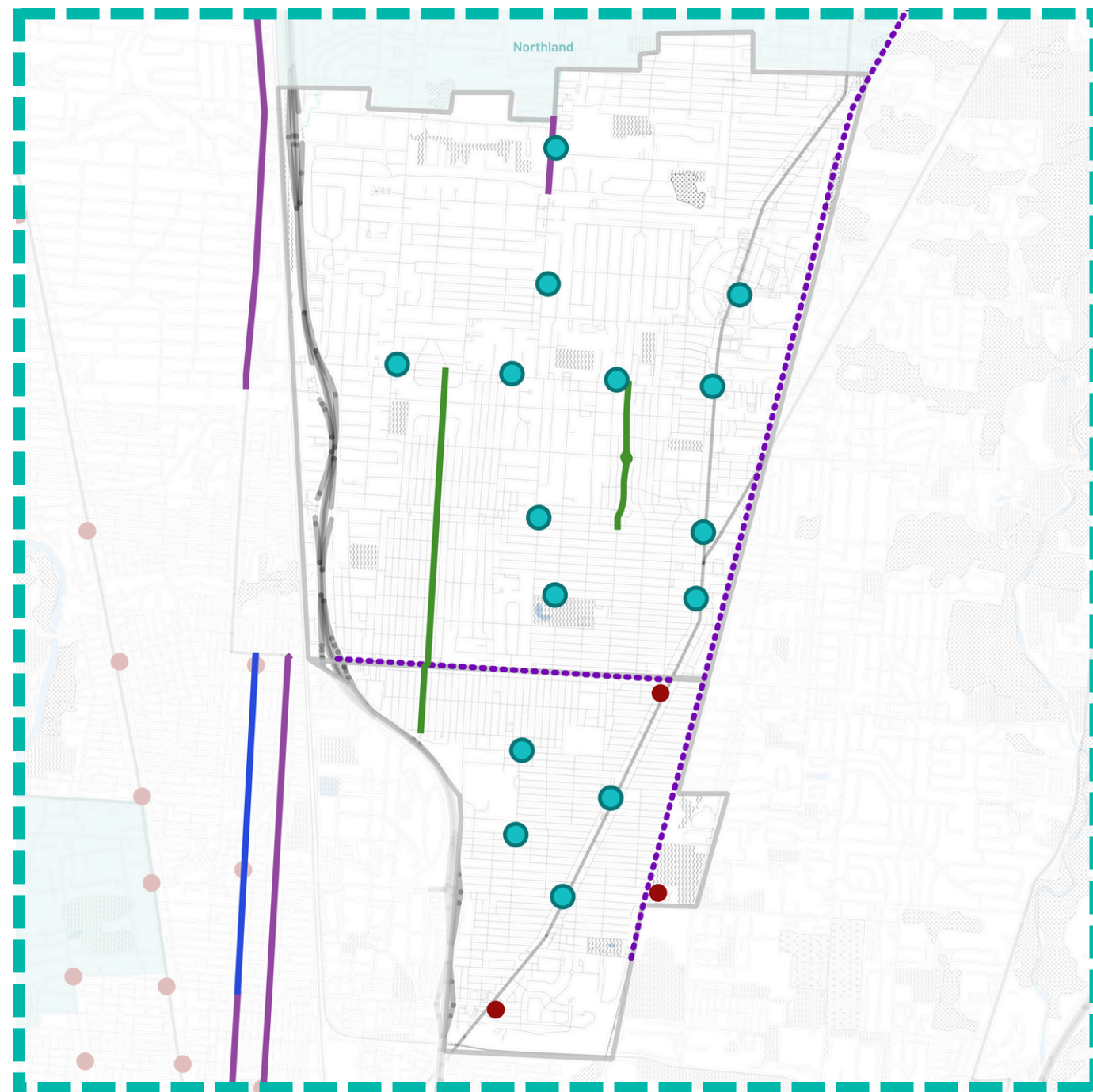
Franklinton

Proposal

- Proposed
- Existing CoGo Station

COTA Fixed Bus Lines

- Frequent (≤ 15 Mins)
- Standard (>15 to 60 Mins)



North and South Linden

Proposal

- Proposed
- Existing CoGo Station

Bike Infrastructure

- Protected Bicycle Lane
- Bicycle Lane
- Bicycle Boulevard
- Committed/Funded

CoGo Stations

Evaluate existing CoGo equipment and **repurpose** usable tools, spare parts, trucks, and other assets

Responsibly recycle assets that cannot be repurposed

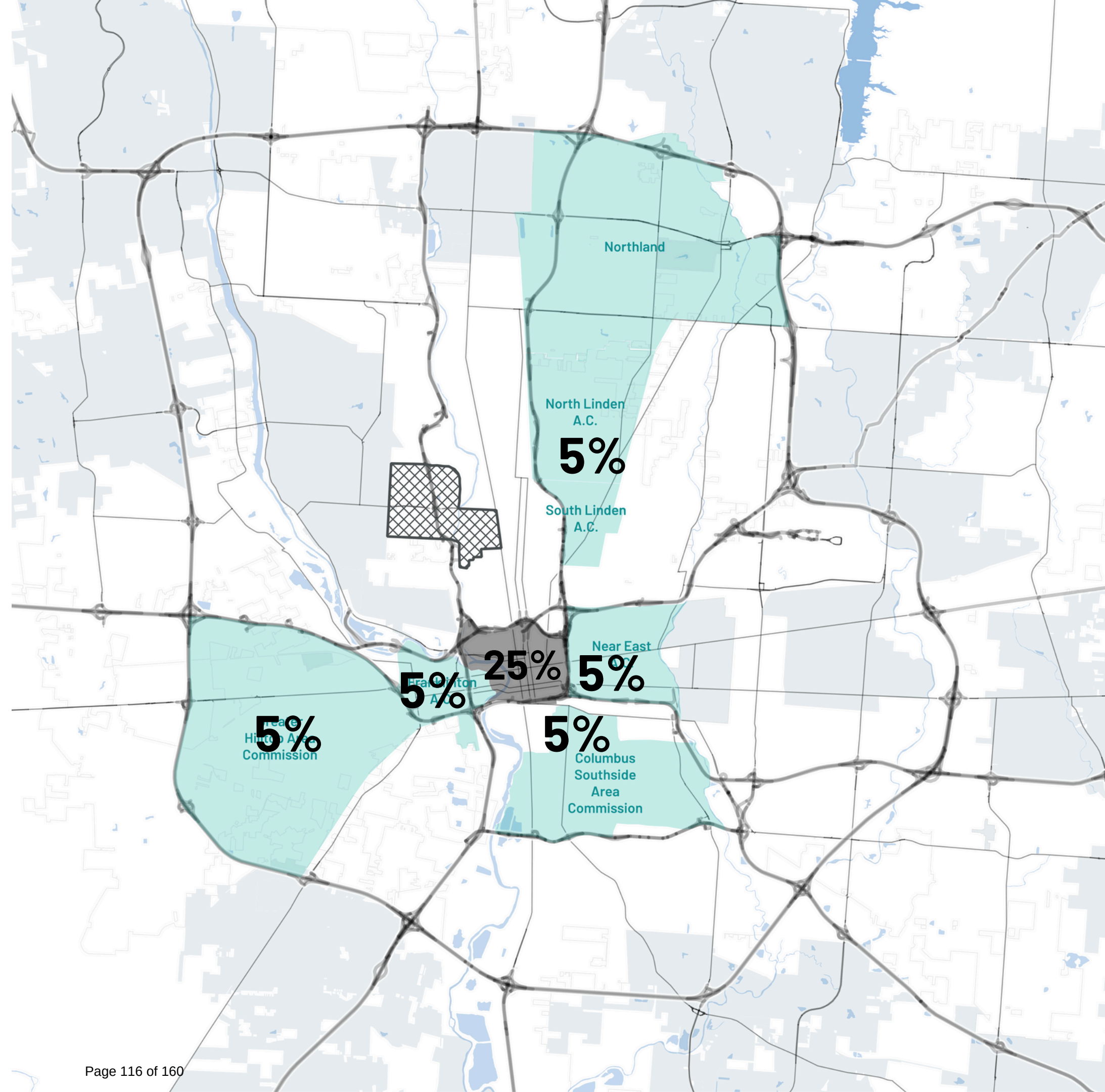
If possible, donate CoGo bicycles to low-income populations to ensure existing resources continue to benefit the community



Deployment & Rebalancing

Deployment Principles

- Availability = Equity
- The right vehicles in the right place
 - Cargo for shopping
 - Station-based halo-e for reliable service to and from city center
 - Seated vehicles for accessibility
 - Prioritize connections to COTA
- Appropriate parking strategies



3. Meet the Fleet

The Veo Fleet



Halo

Traditional pedal bike



Cosmo

Sit down e-scooter



Astro

Stand up e-scooter



Apollo

Dual-passenger
class 2 e-bike



Halo-e

Class 1 e-bike



Cosmo-e

Class 2 e-bike



More Options = More Riders

Majority of riders have a **preference** when it comes to **vehicle type**

Mixed vehicle fleets are crucial to providing options to get around

Vehicle preferences vary by **age and gender**



Astro stand up e-scooter

L x W x H	50.5" x 7.75" x 45"
weight	69 lbs
battery	swappable lithium ion
motor	350W
range	45+ miles
top speed	15 mph
brakes	dual mechanical brakes
lights	LED front + rear + underdeck
wheels	10" x 2.5" pneumatic tires



Cosmo sit down e-scooter

L x W x H	64" x 28.7" x 43"
weight	94 lbs
battery	swappable lithium ion
motor	750W
range	45+ miles
top speed	15 mph
brakes	dual mechanical brakes
lights	LED front + rear + underdeck
wheels	18" x 3" pneumatic tires



Halo e-bike

L x W x H	67" x 25" x 43"
weight	55 lbs
battery	swappable lithium ion
motor	350W
range	none
top speed	18mph
brakes	dual mechanical brakes
lights	LED front + rear
wheels	26" pneumatic tires



Apollo Cargo

class 2 e-bike

L x W x H	68" x 31" x 45"
weight	103 lbs
battery	swappable lithium ion
motor	750W
range	45+ miles
top speed	15 mph
brakes	dual mechanical brakes
lights	LED front + rear
wheels	20" x 3" pneumatic tires



Batteries

Swappable

IP67 certified waterproof batteries can be swapped in the field allowing vehicles to be available 24/7

Utilize **cargo e-bikes or modified seated scooters** to transport and swap batteries

Swappable batteries **reduce operations fleet VMT and emissions**

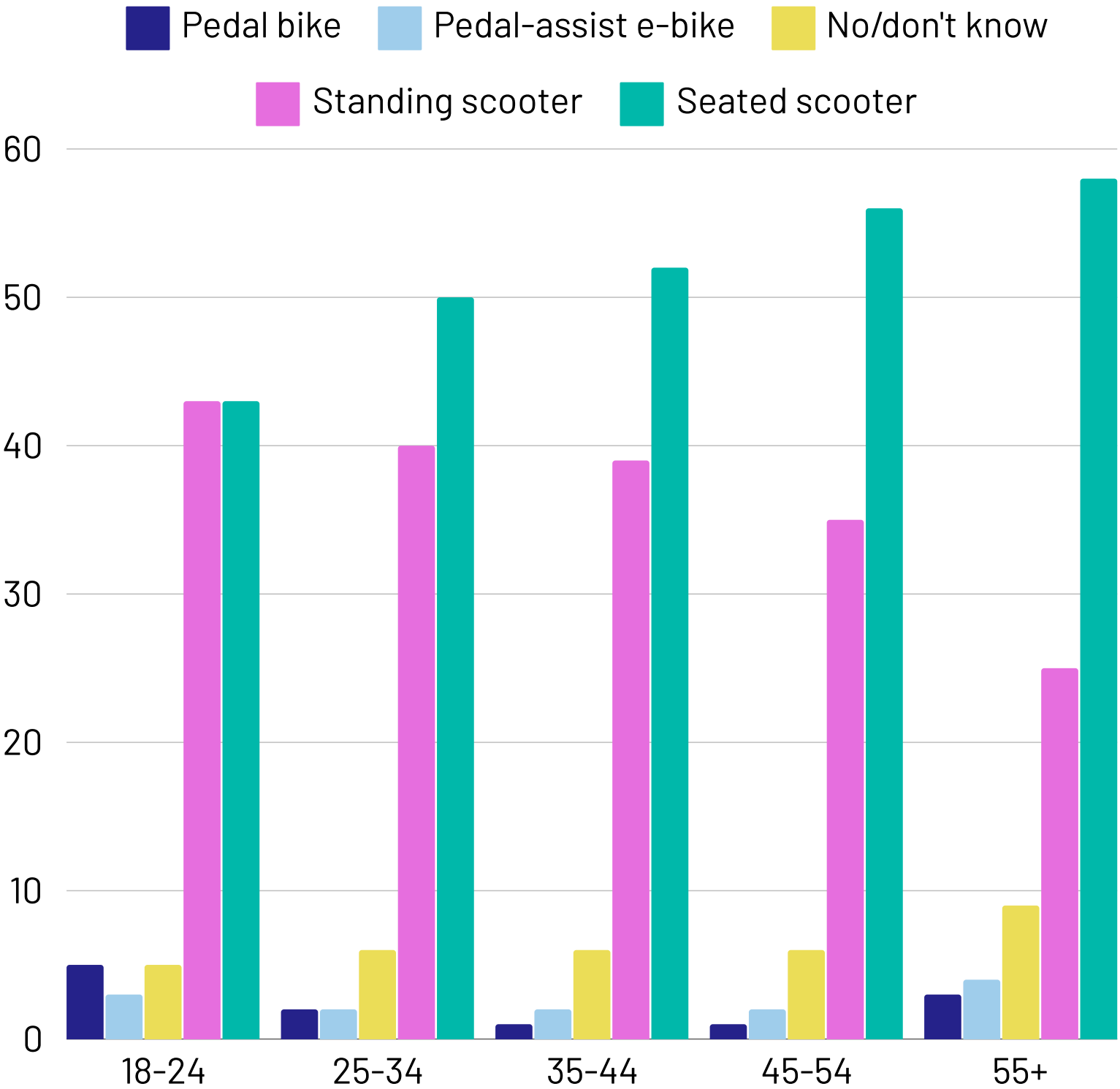


Safe Storage

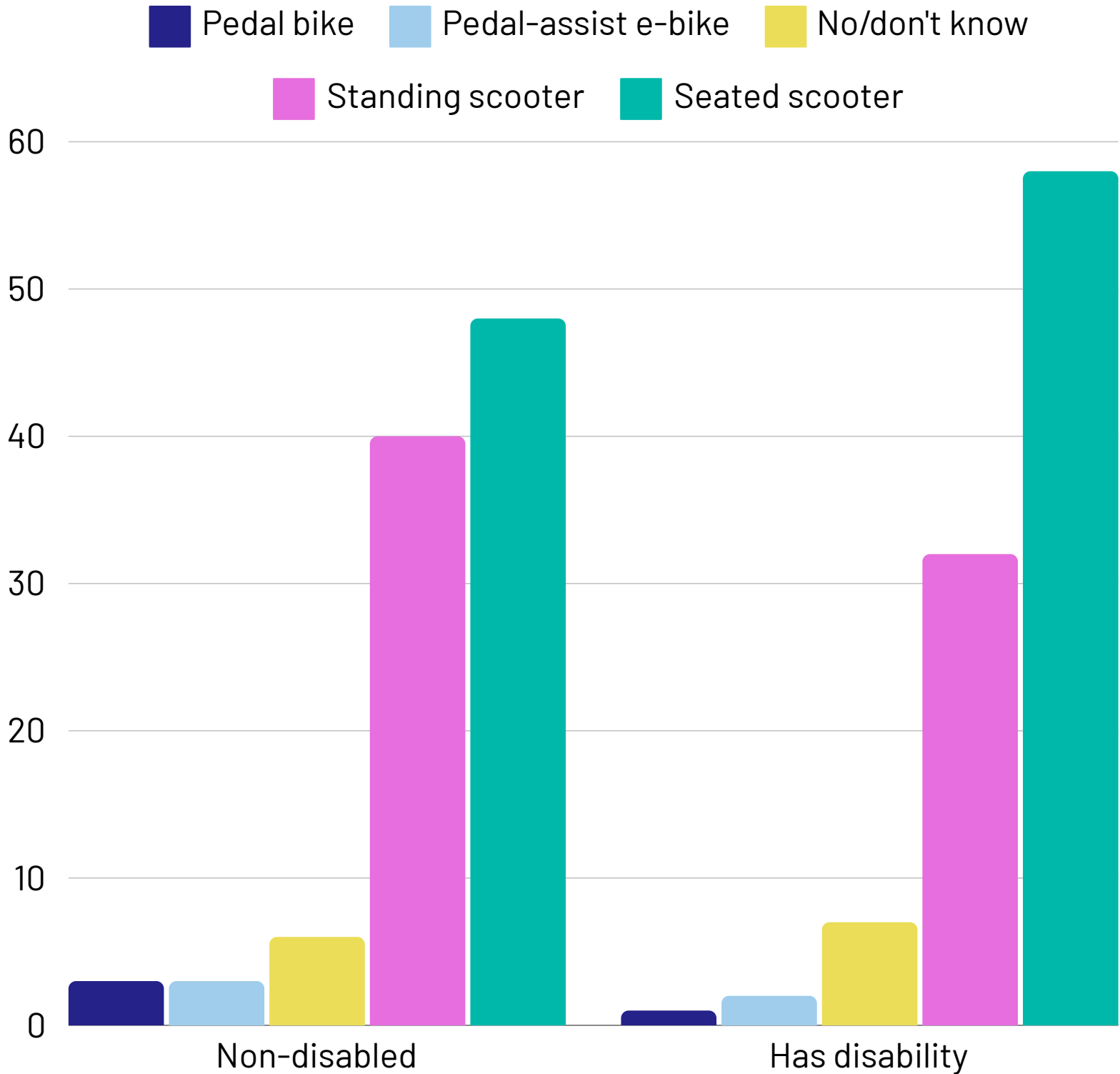
Custom-built charging stations equipped with smoke and temperature monitors, fire alarms, and fire suppression systems

Comply with **UL2271 and UN38.3**, leading international standards for battery safety

Vehicle Preference Among Riders by Age



Vehicle Preference Among Riders by Disability Status



Veo Trike

L x W x H	64" x 28.7" x 43"
weight	94 lbs
battery	swappable lithium ion
motor	750W
range	45+ miles
top speed	15 mph
brakes	dual mechanical brakes
lights	LED front + rear + underdeck
wheels	18" x 3" pneumatic tires



- Veo Voice audible alerts
- Digital display + phone holder + bluetooth speakers
- Throttle
- Front suspension
- Storage basket

Trike Design Charettes

Actively seeking community feedback on the trike design from communities that will likely use it (disabled, senior/aging)

Asking the important questions: “What about the trike excites potential riders? What is it missing? What design elements **must** be present to make it functional and safe? What are the primary use cases?”

Inviting and engaging with organizations already doing accessibility work, including:

- New Disabled South
- USDOT
- Capitol Hill Village/D.C. AARP
- City of Toledo
- City of Oakland, CA / Staceyfest Oakland
- AARP Wisconsin

Future Columbus Charette Partners

- Ohio AARP
- Ohio St. Wexner Medical Center Adaptive Sports Institute
- Adaptive Sports Club
- CACDI and COTA

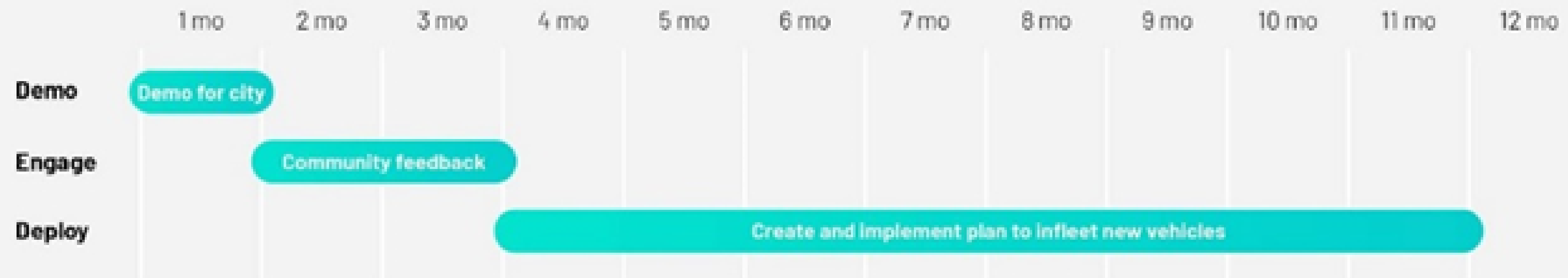


Adaptive Wheelchair Device



New Device and Technology Development

- Constant innovation and research
- Collaborative partnerships with cities and stakeholders
- Market tests and pilots - Trike in 2025





**Rides on the Cosmo seated scooter result in
62% fewer crashes than stand-up scooter rides.**

Safety Features

Vehicles designed in-house for with rider and pedestrian safety at the core of all vehicle design concepts

VeoVoice verbally communicate rules and regulations to riders

Training Mode limits device speed during a user's first ride

In-app Safety Checklist and Quiz to remind and educate riders on safe riding practices

Geofencing technology to set slow-ride and no ride zones

AI Helmet Detection to ensure rider safety



Maintenance

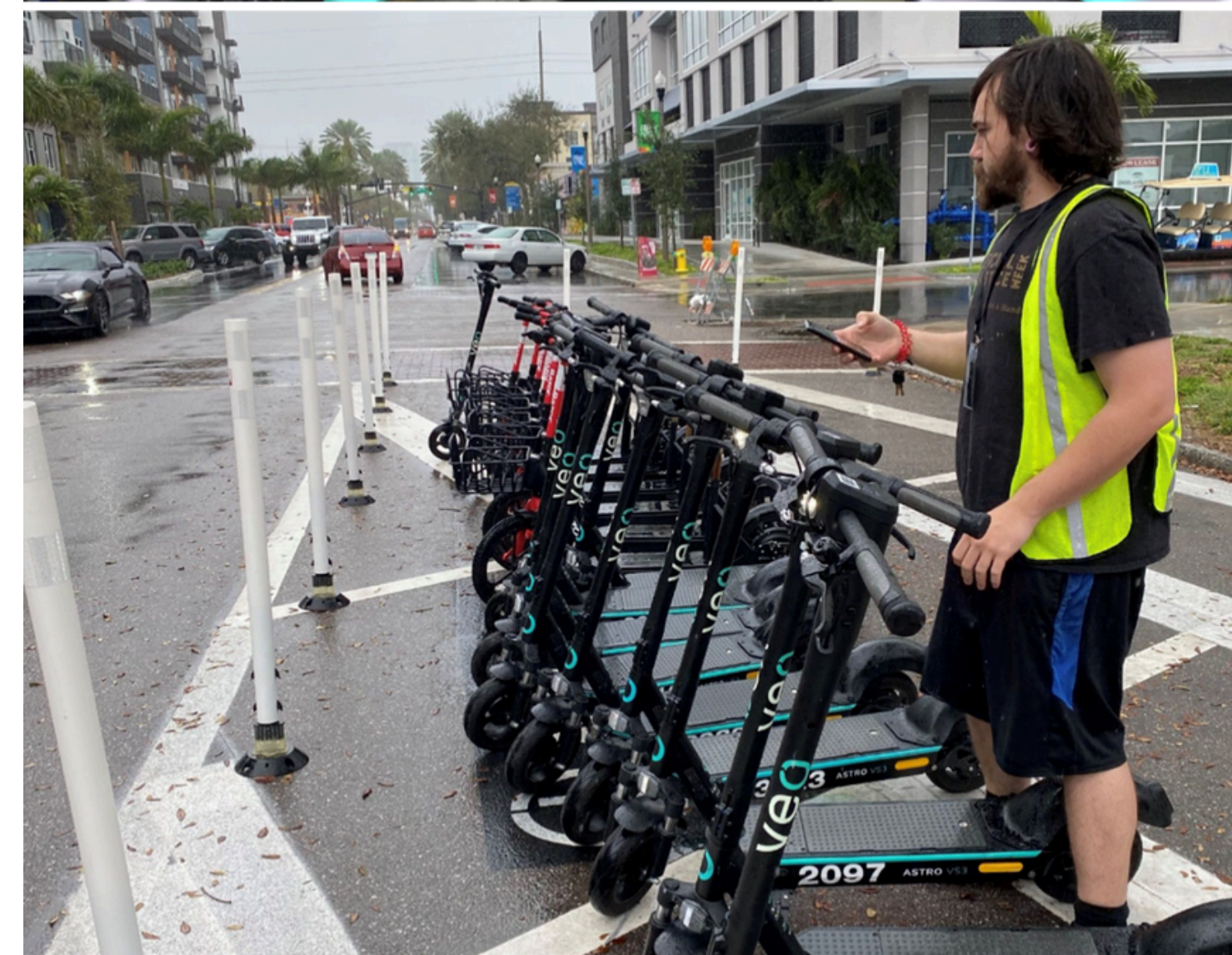
Issues detected using **self-monitoring system and customer reports**

In-field inspections conducted at least once every three days per device; conduct preventative and corrective maintenance

Detailed warehouse inspections conducted at least once a week per device

W-2 in-house trained technicians and mechanics at local warehouse

Proprietary VeoMech app tracks maintenance records and device health at the component level



4. Parking and Device Management

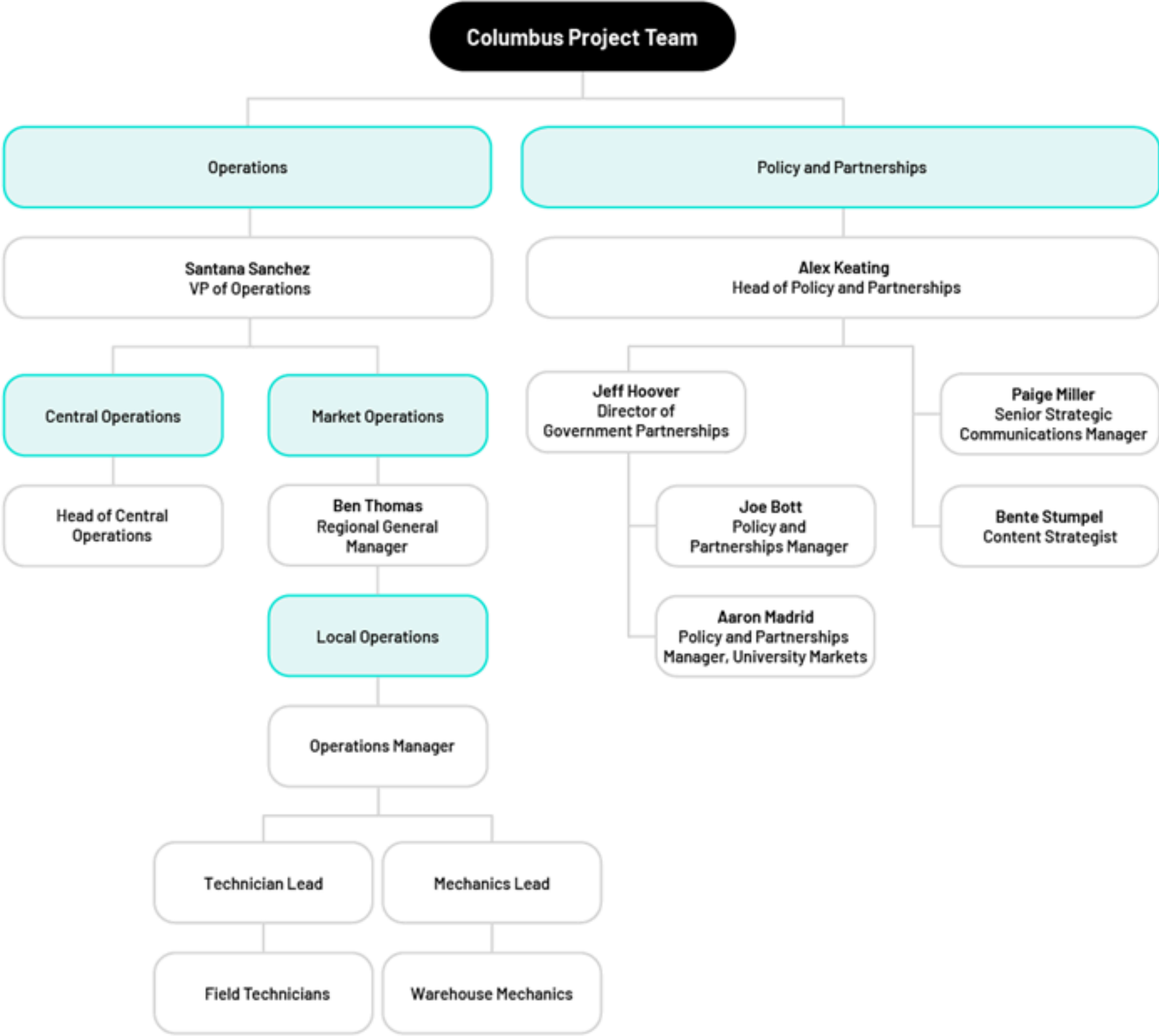
Local Operations Team

Local warehouse in Columbus

100% **W-2 workforce**

Prioritize **Local, Veteran & Student** hiring

1 staff person for every 25 devices



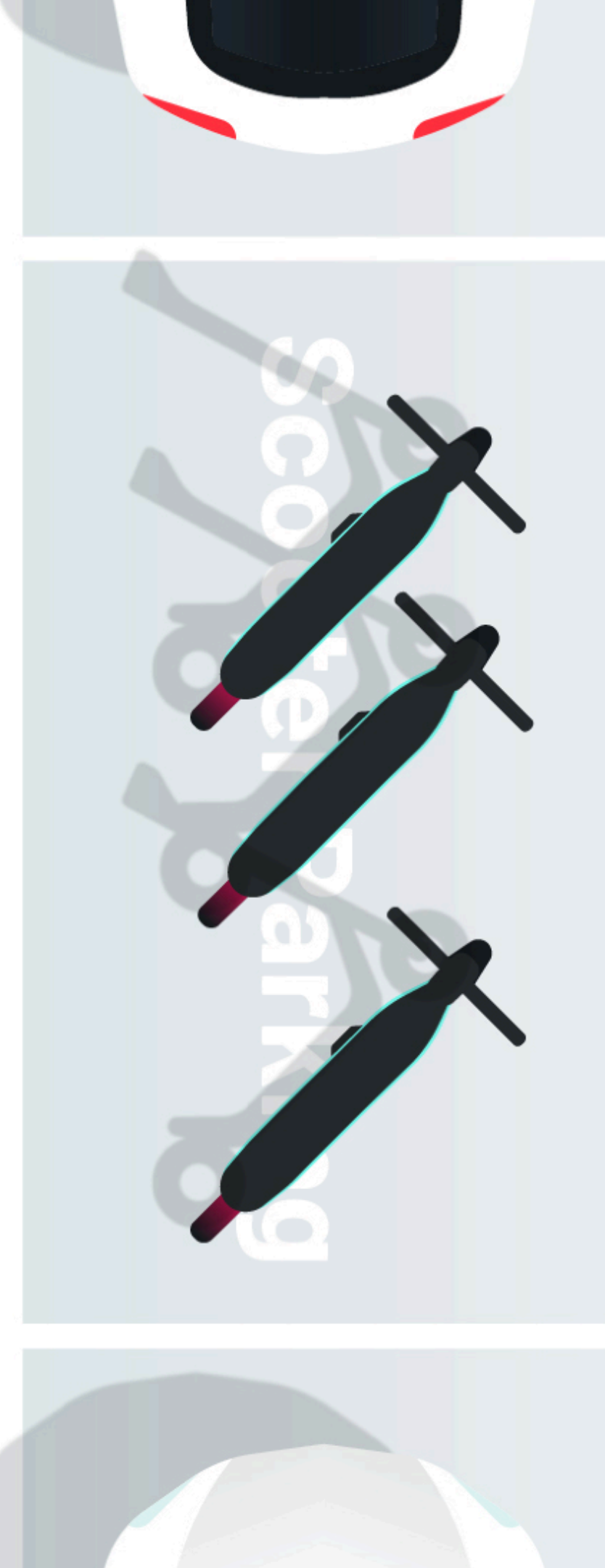
Hybrid Parking Approach

Install painted **parking corrals and signage**, repurpose **CoGo stations**

Geofencing technology and Virtual Parking Coach ensure riding and parking compliance in dockless zones

Mandatory Parking at repurposed CoGo stations (e-bikes) and parking corrals in high traffic areas

Real-time tip-over detection technology deployed on all devices to ensure that devices are upright

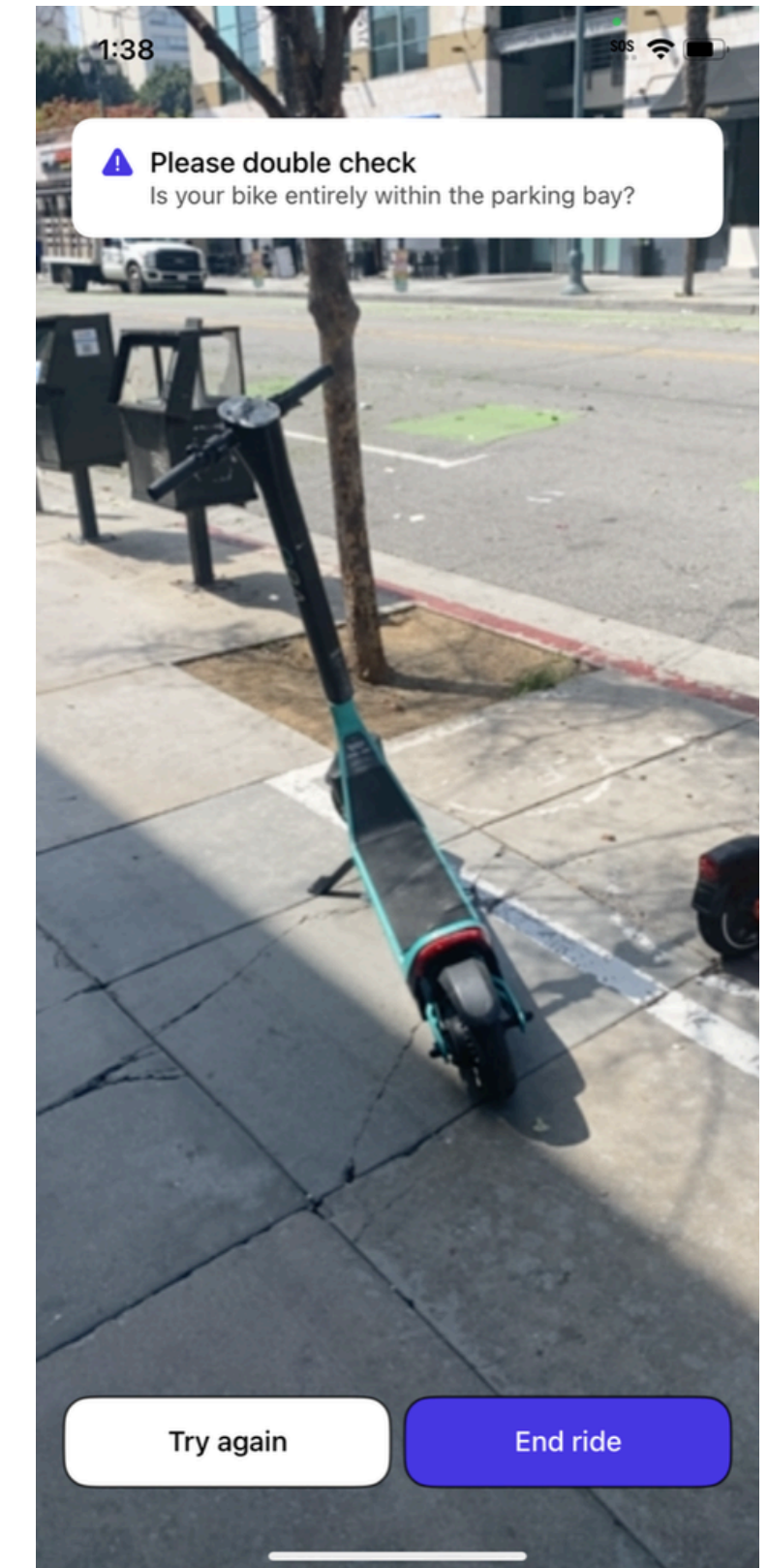
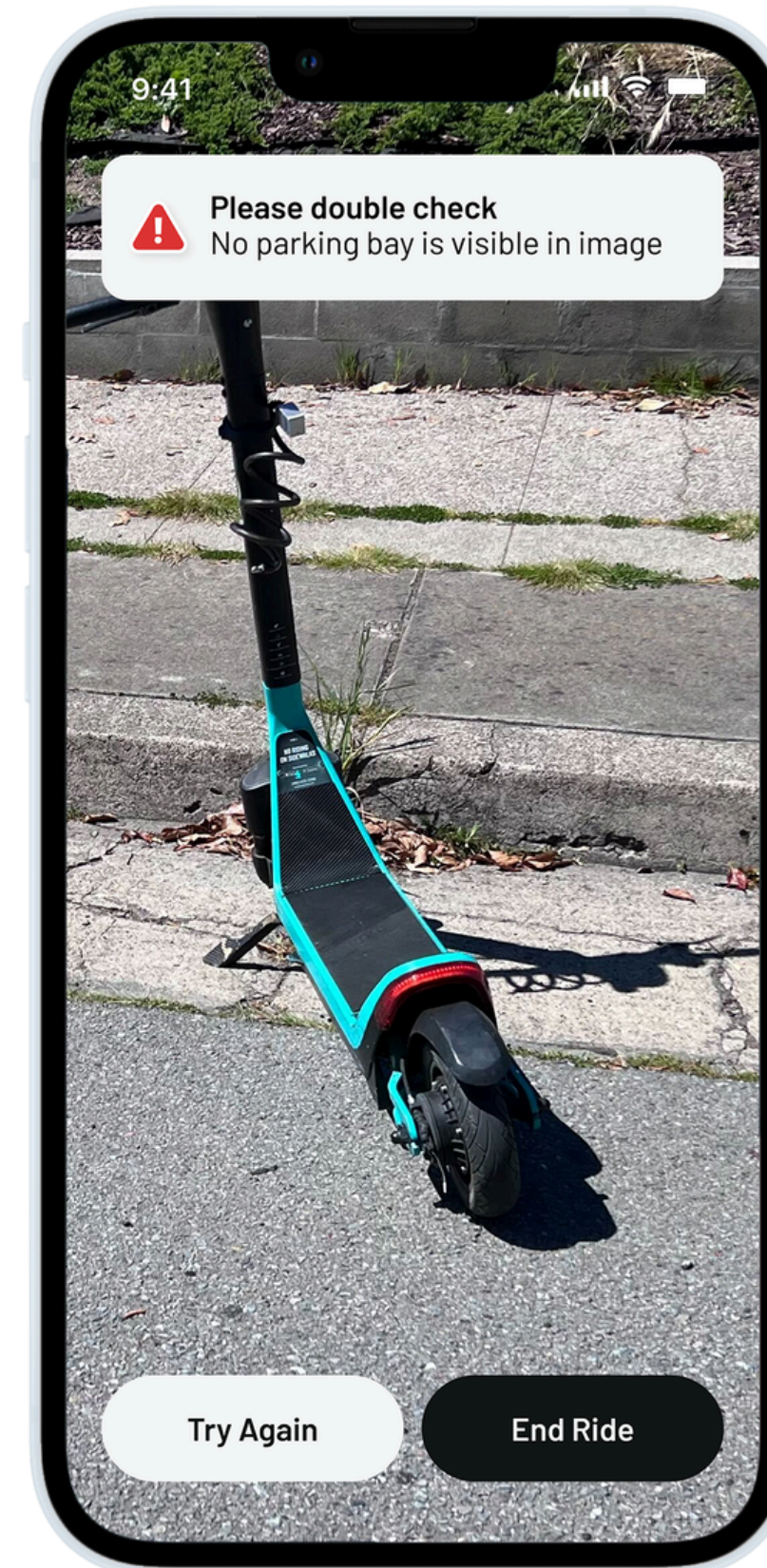


Virtual Parking Coach

Identifies in real-time if a vehicle is properly parked

Reduces non-compliant parking by over 90%

Works in **corrals**, bike racks, and other designated areas

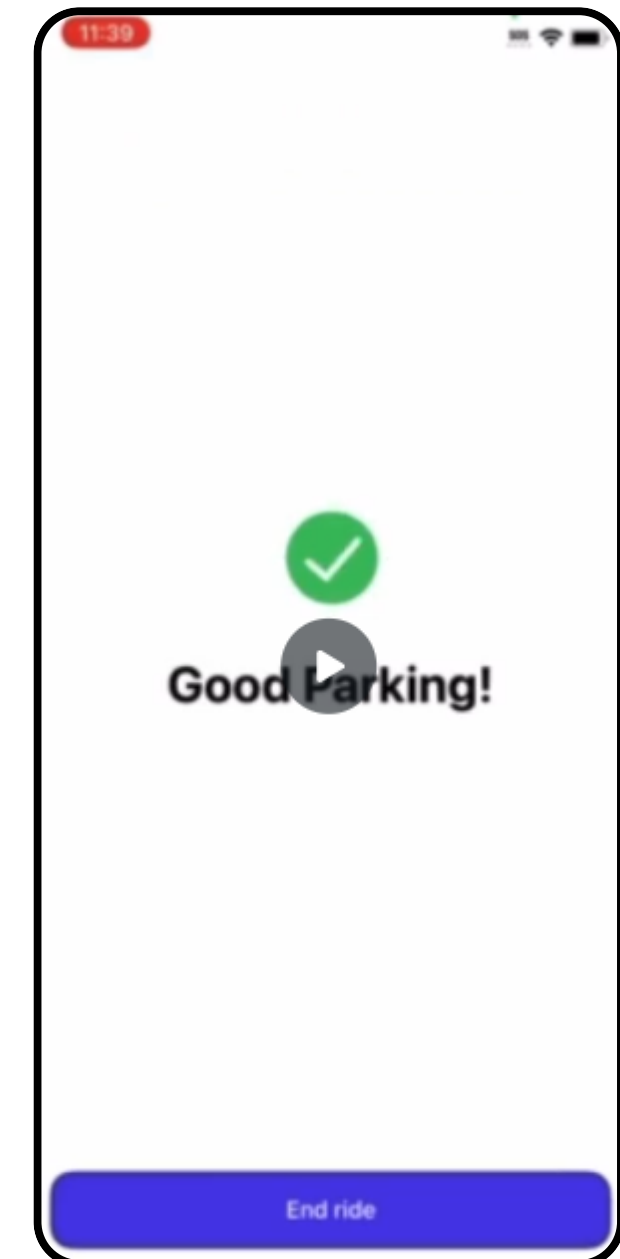
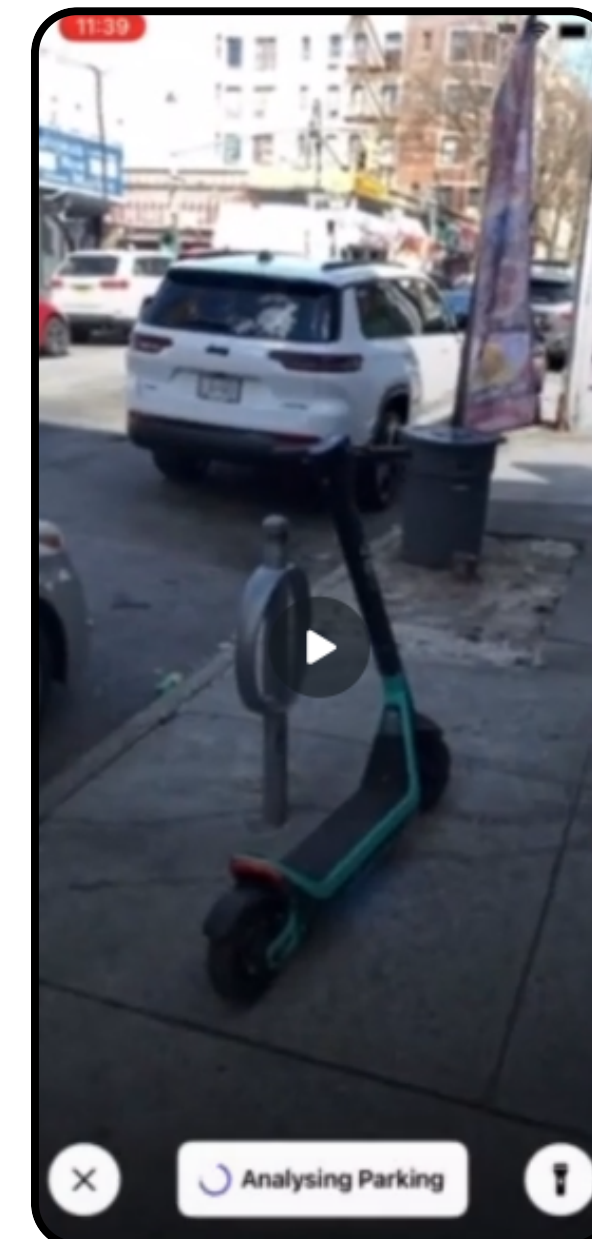
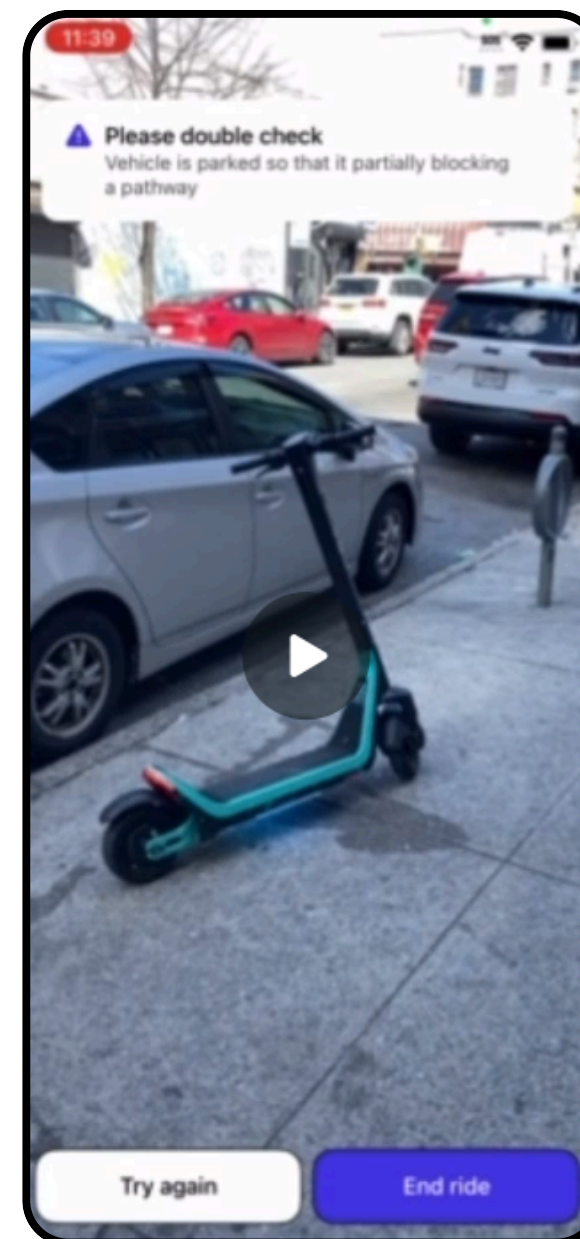


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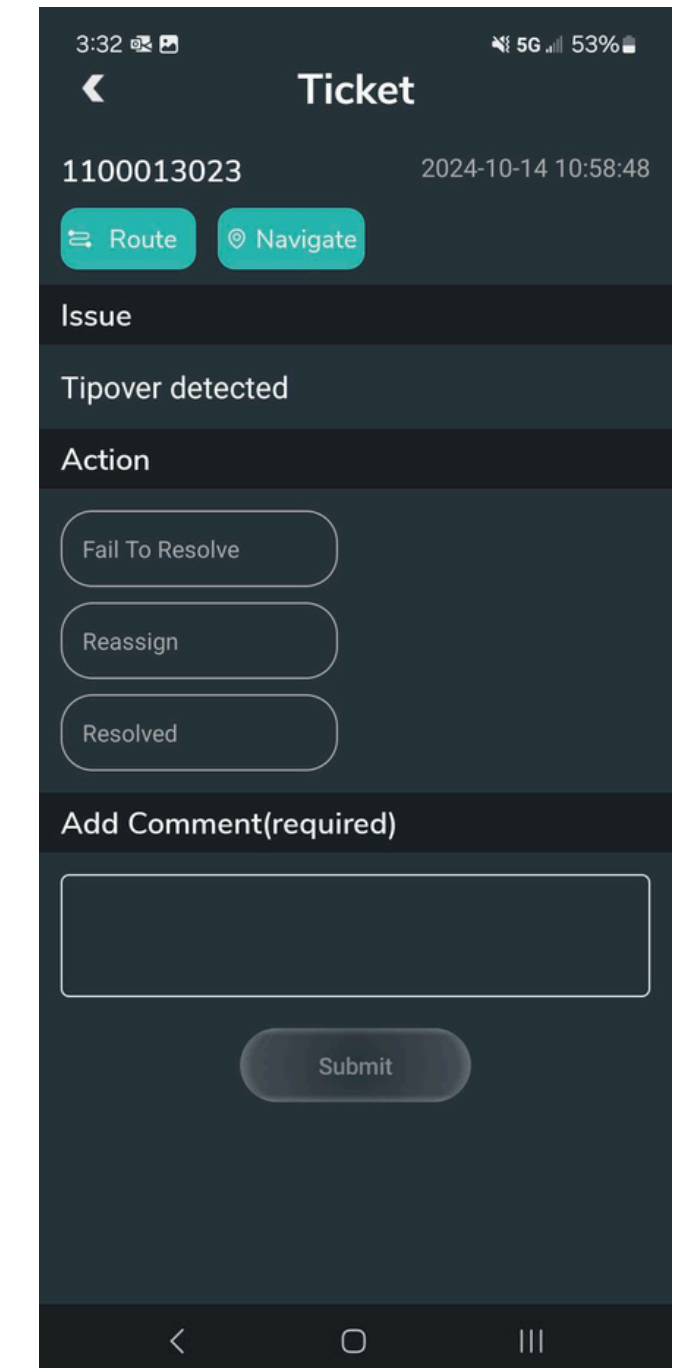
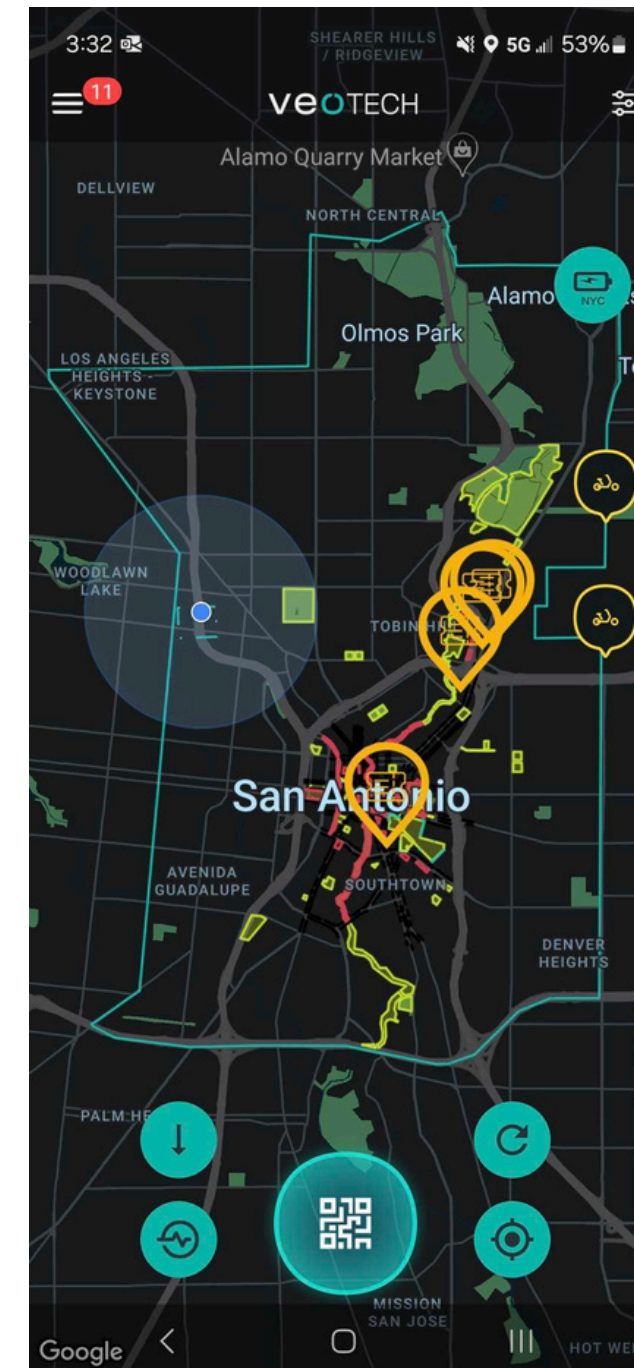


Automated Tip-over Detection: San Antonio

Identifies in real-time when a vehicle is tipped-over, delivering a proactive operator response

86% two-hour cure rate YTD

Flexible prioritization: focus by zone, concentrating pedestrian-heavy areas or streets with narrow sidewalks, or by date/time for football games, special events and conferences



By the numbers (YTD 2024):

Fleet vehicles: 1,000

Recorded tip-over events: 37,636 (~130/day)

Average cure time per recorded event: 65 minutes, 18 seconds

Two-hour cure rate: 86% of recorded events

Vehicle Reporting Channels



**Self-Diagnostic
Sensors**



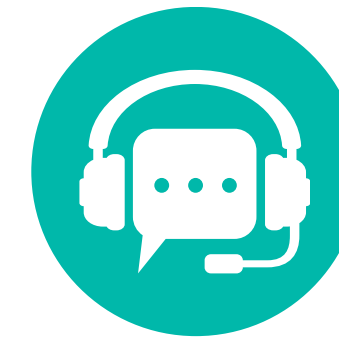
**End-of-Ride
Photos**



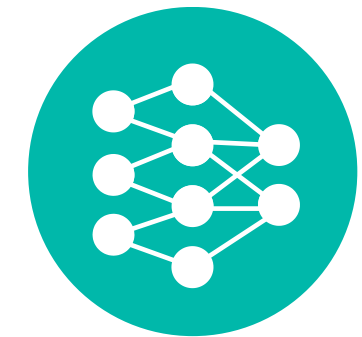
User Reports



311



**Internal
Support**



**Machine
Learning**

Response Times



URGENT PRIORITY

**Device obstructing
travel or pedestrian
path, ADA access or
immediate safety-
related infractions**

Response Time:

1 hour



HIGH PRIORITY

**Damaged or
inoperable device,
tip-over alert, private
property notification**

Response Time:

2 hours



MUST RESOLVE

**Device located
outside of service
area, or other non-
emergency requests**

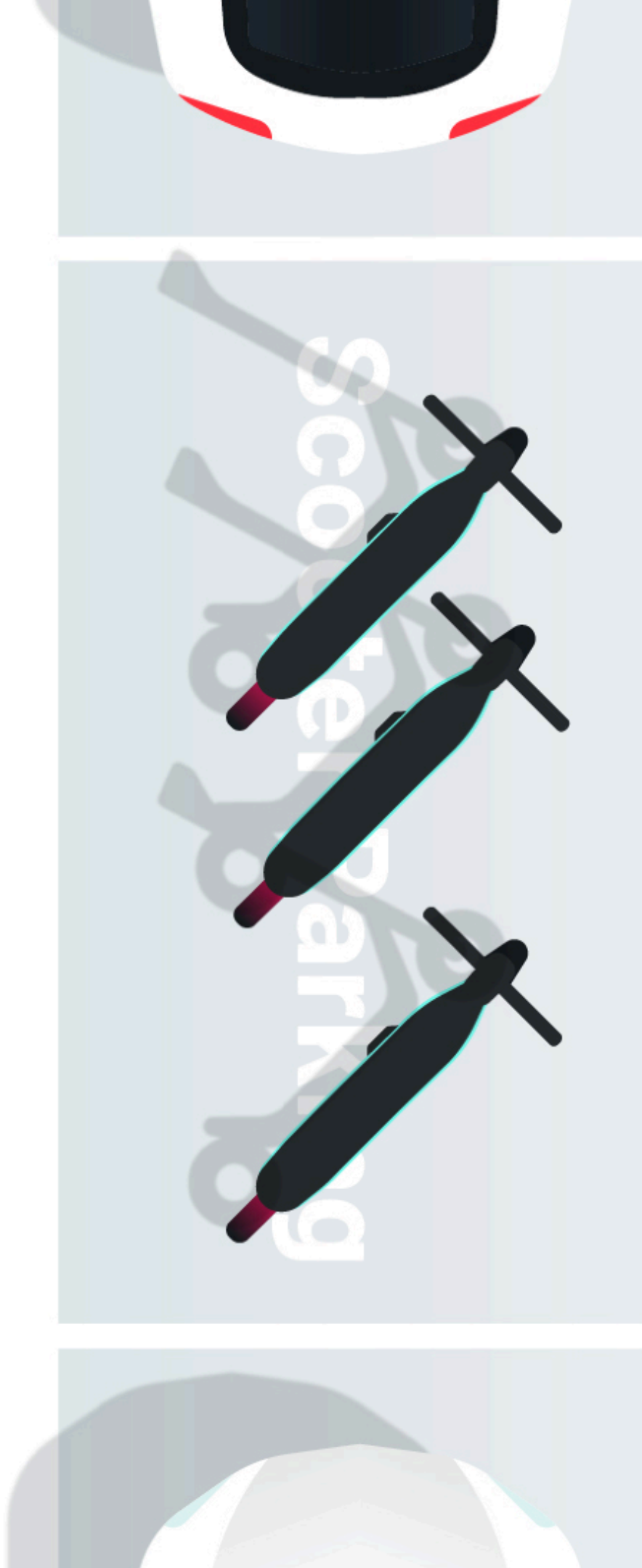
Response Time:

24 hours

Enforcement

Offense	Fine/Warning	CS Team Corrective Actions
First	First warning	Explain the specific parking compliance issue and remind riders that further offenses will lead to fines and account suspension
Second	Second and final warning	Reach out directly to better understand reasons preventing riders from properly parking vehicles
Third	\$5 fine*	Remind rider of specific rules broken and better understand reasons preventing riders from properly parking vehicles
Fourth	\$10 fine* + suspension	Rider must successfully complete a Rider Education module and Parking Quiz in the Veo app to be reinstated

***Veo will agree to remit 50% of these fines to partner jurisdictions as part of a revenue sharing agreement**



Scoot Sweep

Effective, proactive, and community-oriented alternative approach that eliminates the risk of Scoot Sweep's damaging approach:

Veo x Downtown SID Case Study

- Outreach to the SID for staff training and engagement to support parking monitoring
- **Private property support by SID street team staff, supported by no-cost use of Veo fleet**
- Commitments to deliver new technology, regulatory improvements, downtown C-pass support, and CoGo transition

Replicable results

- All SID areas
- Short North Arts District
- Select Neighborhood Commissions within service area
- **Events facilities and game day locations, vendor markets, historic neighborhood zones**

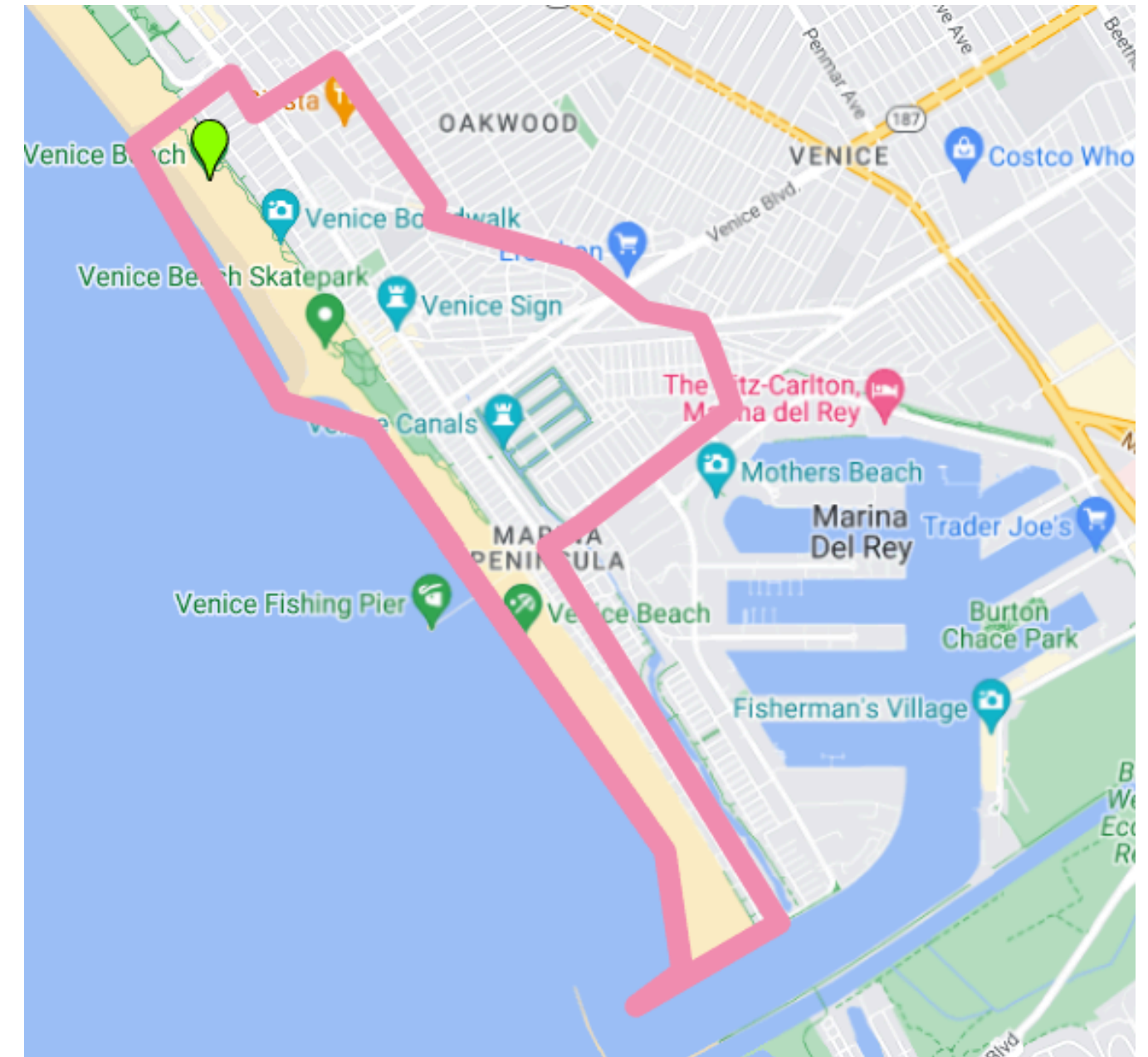


Focused Staffing: Venice Beach, CA

Venice Beach Special Operations Zone (SOZ) is LADOT enforcement focus;

Veo was not meeting performance metrics to standard. As a result, we overhauled local team and implemented a new staffing structure focused on SOZ.

Veo combined dedicated staff and a proactive approach to cure expected issues before tickets were written, and dedicated staff and resources enabled rapid response when needed.



2024: By the numbers (Pre / post strategy change):

Monthly average tickets (pre-strategy shift): 80
Monthly average tickets (post strategy shift): 44
Average cure time per ticket (pre): 112 min
Average cure time per ticket (post): 35 min
SLA compliance (pre): 68%
SLA compliance (post): 91%

Deployment and Rebalancing

Hub-based smart deployment and rebalancing

Proprietary VeoTech app used to track real-time hub conditions

Dedicated rebalancing teams sweep assigned zones three times a day to correct misparked devices and rebalance devices

Utilize big data analysis and real-time ridership volume to **predict zone overconcentration**

Lucky Program to incentivize users to help rebalance devices out of overcrowded areas



Event/Game Day Operations

Establish **Event Management Plan** designed effectively manage special events like football games, concerts, and community events

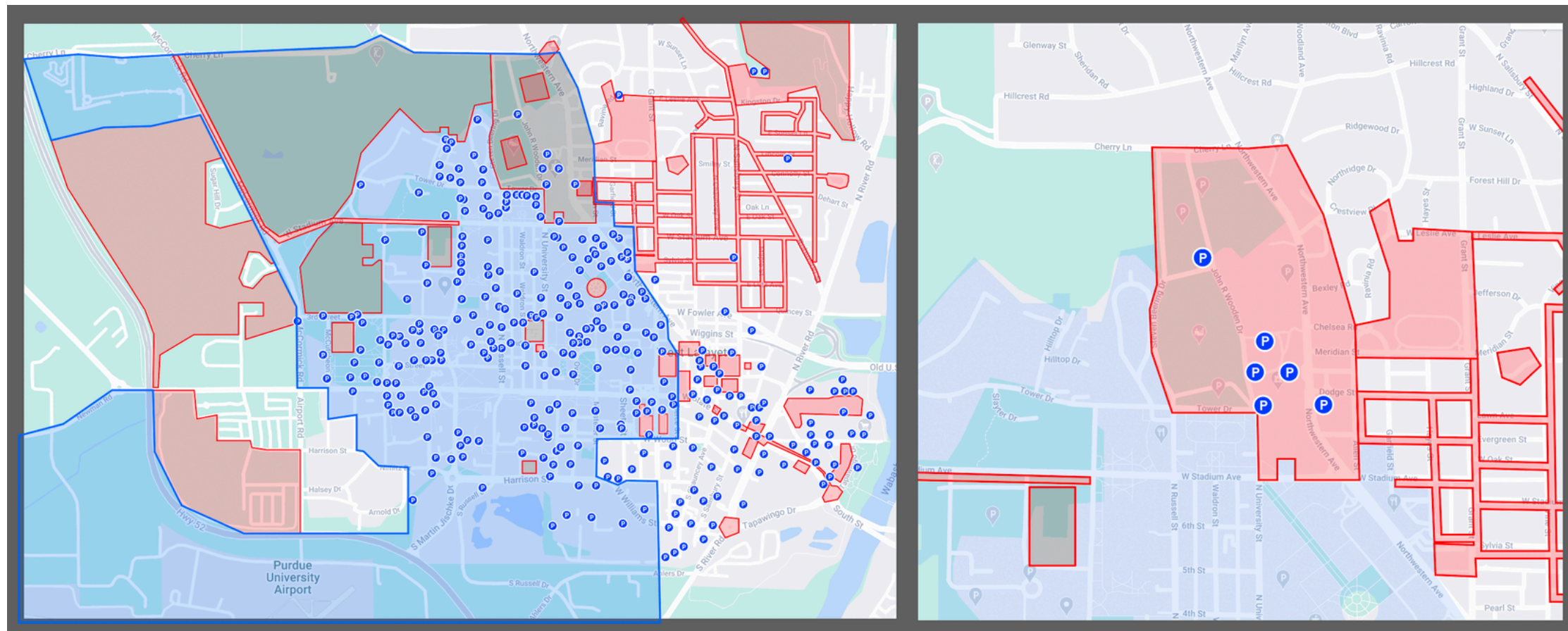
Pre-Event Preparation

- Implement **No Ride, Slow Ride, and No Park Zones**
- Send timely **in-app notifications** to users about special zones
- **Adjust fleet size** and relocate vehicles based on event needs
- Coordinate with city officials for optimized **vehicle management**

During Event Operations

- **Real-time monitoring** of device distribution to prevent oversaturation
- **On-site staff** for large events to manage parking, redistribute devices, and ensure safety
- Use **Lucky Zones** to incentivize parking in low-traffic areas
- Deploy **temporary parking signage** and provide proactive user updates

Case Study: Purdue University



Game Day Operations

- Dedicated game day technician shifts (parking/rebalancing)
- Automated Game Day Geofences:
 - No Parking on non-Game Days
 - Forced Parking Zones on Game Day goes into effect until 10am
 - NRZ/NPZ during game
 - Riding reopened after game

5. Customer Service and Engagement

Customer Support

Customer Support Channels



Toll-Free Number/311



E-mail



Website



Mobile App



Social Media



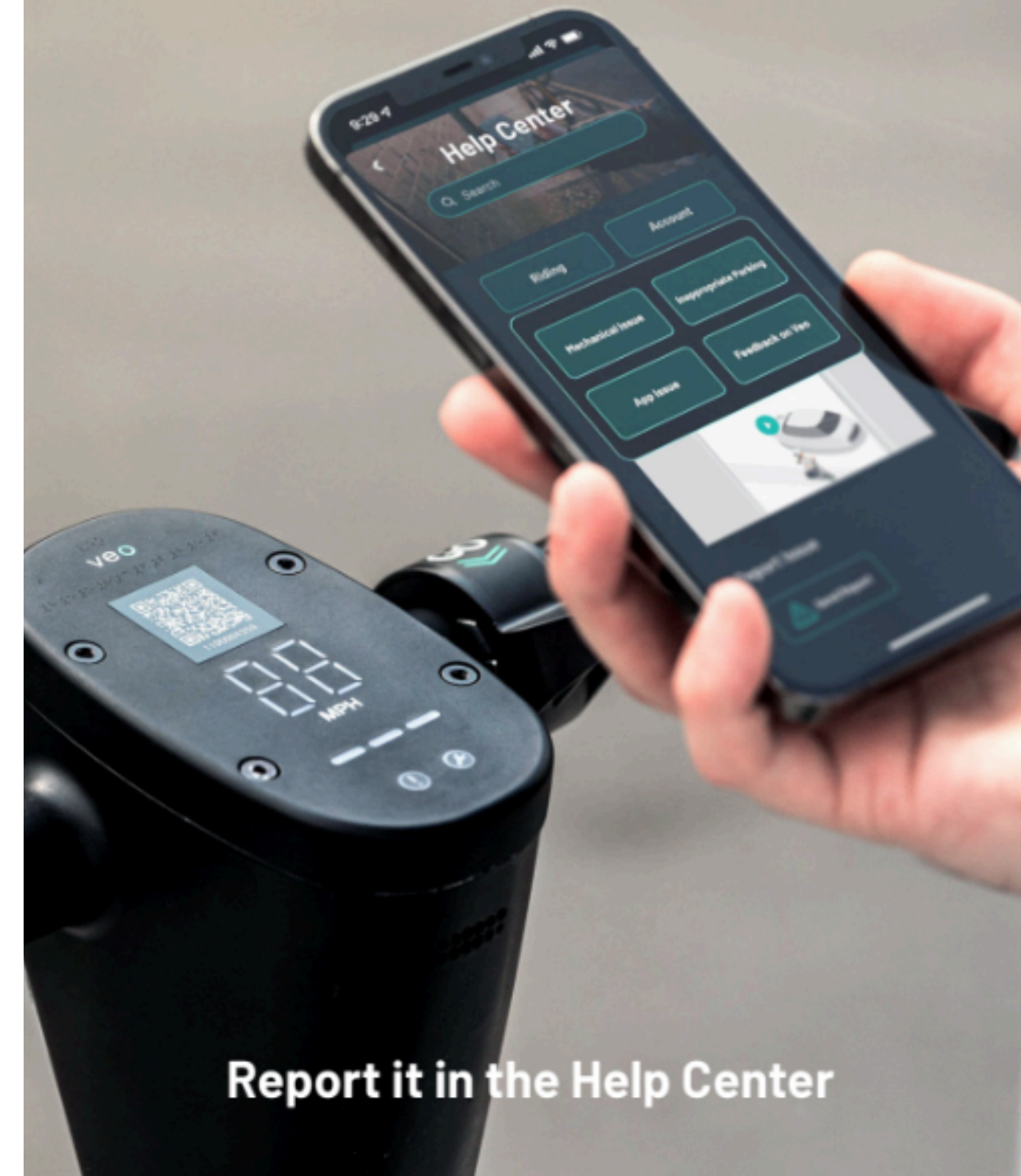
Customer Support team
available **24/7**

Internal Customer Support
team's service level
agreement (SLA) is to **resolve
tickets within 20 minutes**

Local Operations Team on call
during normal business hours
to respond within **1 hour to
reported vehicle issues**



See a problem?



Report it in the Help Center

Customer Support

Customer Support Channels



Toll-Free Number/311



E-mail



Website



Mobile App



Social Media



Customer Support team
available **24/7**

Internal Customer Support
team's service level
agreement (SLA) is to **resolve
tickets within 20 minutes**

Local Operations Team on call
during normal business hours
to respond within **1 hour to
reported vehicle issues**



Ma aragtaa dhibaato?



Ku soo sheeg Xarunta Caawinta

Marketing/Community Engagement

Strategy	Description	Frequency
Tabling	Potential Events: CBUS Soul Events, including CBUS Soul Fest, CBUS Soul Itineraries. Budd Dairy Vendor Market (year-round) and neighborhood markets.	Prior to launch at least once a quarter
Safety Events/Demo Days	In partnership with the Community/University organizations	Prior to launch, once a quarter after
Helmet Giveaways	Giveaway helmets at tabling events, safe ride trainings, demonstration days	Once a quarter
Partnership Programs	Potential orgs: CBUS Soul/Experience Columbus, Social Work Club, downtown SID, Columbus Relief, Alliance for Students with Disabilities in STEM Columbus Works, Yay Bikes!, University groups at The Ohio St., Capital U Law School, Central Ohio Technical College, and Columbus St Community College	Prior to launch and ongoing
Print/Online Communication	Provide physical educational materials to our partners and at events in English, Spanish, Somali, Chinese, Arabic. Maintain communications across our social media channels and hold safety campaigns	Prior to launch and ongoing



Partnership Programs

Downtown Columbus SID

- Began collaboration in June 2024, showcasing VPC technology on High Street
- Proposed solutions: VPC, tip-over detection, Group Ride constraints, ID scans
- Discounted commuter memberships & free vehicle use for SID staff

Columbus Relief

- Support outreach to Columbus' unhoused population
- Offer free vehicles for staff/volunteers to conduct casework

Columbus Works

- Provide job interview ride vouchers for clients
- Low-cost transportation through Veo Access seminars

CBUS Soul/Experience Columbus

- Partnership to engage with Columbus’ Black community
- Safety classes, demos, and trip vouchers for event attendees

Columbus Housing Authority

- Veo Access program outreach events
- Discounted trips with Lucky Zones, waiving the \$1 unlock fee

Alliance of Students with Disabilities

- Partner on Trike scooter design process
- Feedback and opportunities for consulting, internships, and employment



Incentive Programs

Lucky Zones

Geofenced parking zones where users are incentivized to park vehicles through a \$1 discount

Peak Hour Rides

Discounted fares for trips that start from overcrowded hubs and/or end at under-deployed hubs

Helmet Discount

Veo has created AI Facial Detection for helmet use that gives riders a \$1 discount if they are wearing a helmet when they start their trip

Equity Zone Pricing

Offer 30% off rides that start or end in identified equity zones (Opportunity Areas)



Q&A

Thank you!



RECORD OF ORDINANCES
CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 16-2025

TO AUTHORIZE UPPER ARLINGTON'S PARTICIPATION IN THE CENTRAL OHIO SHARED MOBILITY PROGRAM AND AUTHORIZING THE CITY MANAGER TO ENTER INTO A SERVICE AGREEMENT WITH VEORIDE, INC. FOR THE OPERATION OF SCOOTERS, BIKES, AND OTHER MOBILITY DEVICES WITHIN THE CITY

- WHEREAS,** the City of Columbus led a regional RFP process in 2024 and selected Veo as the sole micromobility provider for the Central Ohio Shared Mobility Program, based on fleet quality, safety features, and a revenue-sharing model; and
- WHEREAS,** Upper Arlington staff have worked with Veo to define parking areas, mobility hub locations, and exclusion zones to support safe device use; and
- WHEREAS,** authorizing the City's participation in the Central Ohio Shared Mobility Program and a service agreement with Veo allows continued access to alternative transportation options, ensures local control over operations, and provides the City with a share of trip-generated revenue.

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

- SECTION 1.** City Council hereby authorizes the City of Upper Arlington to participate in the Central Ohio Shared Mobility Program.
- SECTION 2.** The City Manager is hereby authorized to enter into a service agreement with Veoride, Inc. through December 31, 2029, for micromobility operations within the City of Upper Arlington.
- SECTION 3.** The City Manager, Finance Director, and the City Attorney are hereby authorized to take all actions necessary to enter into, implement, and administer the service agreement, including the execution of all documents and amendments, provided such actions are not substantially inconsistent with this ordinance.
- SECTION 4.** Veo devices shall operate under City-approved parking, safety, and geo-fencing requirements, in coordination with the Central Ohio Shared Mobility Program and Upper Arlington Codified Ordinances.
- SECTION 5.** This ordinance shall take effect immediately upon passage.



Authors: Suzanne Beach, Executive Assistant

Council Meeting Date: May 12, 2025

Subject/Legislative Item: Ohio Division of Liquor Control Notice to Legislative Authority: Transfer of Liquor Permit from Bonsai Restaurant to US Restaurant and Catering LLC (*no action needed from Council unless there is an objection*)

Purpose: To review a liquor permit transfer from Bonsai Restaurant to US Restaurant and Catering LLC

Executive Summary: The City Clerk's Office received a request from the Ohio Division of Liquor Control, to transfer existing D1, D2 and D6 liquor permits from Bonsai Restaurant to US Restaurant and Catering LLC

Purpose and Impact

If the City Council has no objection to the transfer of liquor permits to US Restaurant and Catering LLC, located at 3108 Kingsdale Center, no further action is needed. If the City Council has an objection to the liquor permit transfer, they may request a hearing through the Ohio Division of Liquor Control.

Permit privilege requested:

D1 - beer sales on/off premises until 1AM

D2 - wine and pre-packaged low proof mixed beverages sales on/off until 1AM

D6 - Sunday sales of liquor

History

The Ohio Department of Commerce, Division of Liquor Control, submits legislative notice of liquor permit applications. Within 30 days from the date listed on the notice, the City must provide a response that indicates whether the City objects and requests a hearing on the application, requests a one-time only 30-day extension for review, or that the City has no objection to the application.

Alternatives

If there is no objection, the City Clerk will send notice that no hearing is requested.

Attachments



1.	US RESTAURANT AND CATERING LLC
----	--------------------------------



NOTICE TO LEGISLATIVE
AUTHORITY

OHIO DIVISION OF LIQUOR CONTROL
6808 TUSSING ROAD, P.O. BOX 4005
REYNOLDSBURG, OHIO 43068-9005
(614)644-2360 FAX(614)644-3168

TO

9176308		TRFO	US RESTAURANT AND CATERING LLC 3108 KINGS DALE CTR UPPER ARLINGTON OH 43221
PERMIT NUMBER		TYPE	
02	01	2025	
ISSUE DATE			
03	19	2025	
FILING DATE			
D1 D2 D6			
PERMIT CLASSES			
25	242	B	F33159
TAX DISTRICT			RECEIPT NO.

FROM 04/14/2025

4637376			KIM HYUNSOOK AUN LLC DBA BONSAI RESTAURANT 3108 KINGS DALE CTR UPPER ARLINGTON OH 43221
PERMIT NUMBER		TYPE	
02	01	2025	
ISSUE DATE			
03	19	2025	
FILING DATE			
D1 D2 D6			
PERMIT CLASSES			
25	242		
TAX DISTRICT			RECEIPT NO.



MAILED 04/14/2025

RESPONSES MUST BE POSTMARKED NO LATER THAN. 05/15/2025

IMPORTANT NOTICE

PLEASE COMPLETE AND RETURN THIS FORM TO THE DIVISION OF LIQUOR CONTROL
WHETHER OR NOT THERE IS A REQUEST FOR A HEARING.
REFER TO THIS NUMBER IN ALL INQUIRIES **B TRFO 9176308**

(TRANSACTION & NUMBER)

(MUST MARK ONE OF THE FOLLOWING)

WE REQUEST A HEARING ON THE ADVISABILITY OF ISSUING THE PERMIT AND REQUEST THAT
THE HEARING BE HELD ☐ IN OUR COUNTY SEAT. ☐ IN COLUMBUS.

WE DO NOT REQUEST A HEARING. ☐

DID YOU MARK A BOX? IF NOT, THIS WILL BE CONSIDERED A LATE RESPONSE.

PLEASE SIGN BELOW AND MARK THE APPROPRIATE BOX INDICATING YOUR TITLE:

(Signature)

(Title) ☐ Clerk of County Commissioner

(Date)

☐ Clerk of City Council

☐ Township Fiscal Officer

CLERK OF UPPER ARLINGTON CITY COUNCIL
3600 TREMONT RD
UPPER ARLINGTON OHIO 43221-1595



Dear Local Legislative Authority Official:

Please find enclosed the legislative notice that is being sent to you regarding the applied for liquor permit as captioned on the notice. You **must**, within 30 days from the "mailed" date listed on the notice under the bar code:

- Notify the Division whether you object and want a hearing; or
- Ask for your one-time only, 30-day extension. o Any requests for a one-time, 30-day extension will be reviewed by the Division upon timely receipt. If granted, your additional 30-days runs from the expiration of the original 30-day period.

To be considered **timely**, your above response **MUST** be faxed, emailed, or mailed to the Division no later than the postmark deadline date stated on the form. To speed up processing times and reduce paper, the Division respectfully asks that you either fax or email your response. Please send your response to:

FAX: (614) 644 – 3166
EMAIL: Liquordocs@com.ohio.gov
MAIL: Ohio Division of Liquor Control
Attn: Licensing Unit
6606 Tussing Road
PO Box 4005
Reynoldsburg, Ohio 43068-9005

To find out who has disclosed an ownership interest in the permit application to us you can:

- Visit com.ohio.gov/liquorinfo. Select the "Search who has disclosed an ownership interest" tab. Where asked, enter the permit number listed on the legislative notice; or
- Contact your police department or county sheriff (if you are a township fiscal officer or county clerk). We also sent them detailed ownership information to review for any criminal background issues involving the disclosed persons.

We have resources for you at com.ohio.gov/govhelp. Never miss out on when renewal objections are due! Sign-up for our emails at com.ohio.gov/stayinformed.

Thank you in advance for your cooperation,

Division Licensing Section

(rev. 2.12.25)