



6/17/2024 | 7:00 PM

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

If you are joining through Zoom, please click the link below to join the meeting:

<https://us06web.zoom.us/j/88268224042>

Or Telephone: 1 929 205 6099

Webinar ID:882 6822 4042

1. Call to Order/Roll Call

2. Pledge of Allegiance Led By Vice President Close

3. Consent Agenda

- a. Approve City Council Meeting Minutes for June 10, 2024
- b. Ordinance No. 47-2024 - An ordinance authorizing the City Manager to enter into contract with Mr. B's Cleaning Service for custodial and cleaning services for city buildings
- c. Ordinance No. 48-2024 - An ordinance authorizing the City Manager to enter into contract with Performance Pipeline, Inc. for the 2024 Sustainable Sewer Solutions Project
- d. Ordinance No. 49-2024 - An ordinance authorizing the City Manager to enter into contract with Newcomer Concrete for the 2024 Sidewalk Maintenance Program

4. Reports/Presentations

- a. Update on Street Renaming Process - Darren Shulman, City Attorney
- b. Finance Director Report for May 2024 - Brent Lewis, Finance Director

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

- a. Ordinance No. 38-2024 - An ordinance amending §525.01 - Definitions and §525.02 - Unlawful Discriminatory Practices of the Upper Arlington Code of Ordinances (*Adams*)

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

- a. Resolution No. 7-2024 - A resolution adopting the tax budget for the City of Upper Arlington, Ohio, for the fiscal year beginning January 1, 2025, and submitting the same to the Franklin County Budget Commission (*Close*)

7. Motions

- a. A motion to appoint board & commission members for terms commencing July 1, 2024, and to fill vacancies (as described in Exhibit A) (*Kulewicz*)

8. Liquor Control

- a. Legislative Notice: New liquor permit (D5, B) - Store Ops 2140 LLC, 2140 Tremont Center Rd., Upper Arlington, OH 43221

**No Council action required unless an objection is noted*

9. City Manager Update

10. Council Liaison Report

11. Adjournment



June 10, 2024

City Council met in regular session in the Council Chamber of the Municipal Services Center, 3600 Tremont Road, and was called to order by President Awakessien Jeter at 7:03 p.m.

Members Present: Vice President Brian Close, John J. Kulewicz, Heidi Munc, Todd Walter, and President Ukeme Awakessien Jeter

Staff Present: Assistant Finance Director Ryan Schneider, City Manager Steven Schoeny, Assistant City Manager Jackie Thiel, City Attorney Darren Shulman, City Clerk Krystal Gonchar, City Engineer Carla Odebralski, Community Affairs Director Emma Speight, Community Center Manager TJ Putnam, IT Director Jeff Kasson, Community Development Director Chad Gibson, Fire Chief Chris Zimmer, Human Resources Director Abby Cochran, Parks & Recreation Director Debbie McLaughlin, Police Chief Keith Hall, Public Service Director Gary Wilfong, Park Development and Arts Superintendent Jeff Anderson, Recreation Superintendent Matt Leber

Pledge of Allegiance

The Pledge of Allegiance was led by Mr. Kulewicz.

Consent Agenda

a. Approve City Council Meeting Minutes for June 3, 2024

Mr. Walter moved, seconded by Ms. Munc, to approve the Consent Agenda.

President Awakessien Jeter then called for a vote on the motion to approve the Consent Agenda.

Voting Aye: Close, Kulewicz, Munc, Walter, and President Awakessien Jeter
Voting Nay: None
Absent: Adams, Lynch
Abstain: None

The motion carried.

Reports/Presentations

a. Upper Arlington Public Library Presentation on the Master Facilities Plan and 2024 Priorities, Presented by Director Beth Hatch

Upper Arlington Public Library Director Beth Hatch presented on the upcoming Master Facilities Plan and results from their usability study (presentation attached hereto and incorporated herein as Exhibit A). Highlighted trends include: 1) average user visits are declining but program attendance is up with record high enrollments last year; 2) the usability study showed there was not enough meeting room or study space; and 3) there is a need for flexible open spaces for large events and less need for public computers.

Ms. Munc asked about the likelihood of impacts due to reduced funding by the state. Ms. Hatch stated that due to the recent income tax levy, the library should not be impacted by those measures in the short-term. Mr. Kulewicz asked what digital services are provided to customers. Ms. Hatch stated that there are three free digital subscription options that are offered to library card holders, as well as options for language-learning. Vice President Close asked about interaction between City Council and the Library Board, besides appointing members, what is the relationship between the two bodies. The City Attorney stated that Council approves the tax budget on behalf of the library and submits income tax levies to the county. The City owns the land underneath the various library branches, which are leased to the library.

President Awakessien Jeter asked how they anticipate bringing in additional traffic that has declined due to the use of digital options. Ms. Hatch stated that they are trying to offer additional spaces that are welcoming to the community, such as study spaces and office spaces. President Awakessien Jeter asked about options for teens. Ms. Hatch stated that they are continuously adding teen programming, such as arts and crafts classes. They welcome ideas from teens.

b. Bob Crane Community Center Operations Update, Presented by Parks & Recreation Director Debbie McLaughlin, Community Center Manager TJ Putnam, and Recreation Superintendent Matt Leber

The Parks and Recreation Director, Community Center Manager, and Recreation Superintendent provided an update on the operations of the Community Center, discussed community engagement results, access and hours, proposed fees, and upcoming next steps (presentation attached hereto and incorporated herein as Exhibit B). The City Manager stated that it is exciting that we are moving from construction to programming. The Parks and Recreation Director shared that they

have done extensive community engagement to gather ideas as they transition to the Community Center. This feedback will help structure the hours of operation, pricing, classes offered, play areas, pool use, fitness access, etc.

Mr. Kulewicz asked when memberships will be available to purchase. Ms. McLaughlin said their goal is to have certificates available during the holiday season for use when the facility opens.

Legislative Items for Fourth Reading/Public Hearing/Council Action

a. Ordinance No. 38-2024 - An ordinance amending §525.01 – Definitions and §525.02 – Unlawful Discriminatory Practices of the Upper Arlington Code of Ordinances

President Awakessien Jeter has postponed the vote on Ordinance No. 38-2024 until June 17, 2024.

Mr. Walter has a proposed amendment to the ordinance, which will be included in the agenda packet for the next meeting

In response to President Awakessien Jeter's invitation to speak, the following speakers came forward:

- Anna Teye-Kasongu - She is the Director of Community Partnerships at the Affordable Housing Alliance of Central Ohio and is in favor of the proposed ordinance. She supports all things that advance housing gap issues. This ordinance will help residents stay in their neighborhoods and put families on the path to independence.

The City Attorney described the changes included in the amendment. The "substantiated and verified" text was modified to be more descriptive and additional sources of income were included, such as Veteran's Benefits and tax filings for self-employed tenants. The amendment also includes protections for landlords, such as limiting the protections to cover ministerial tasks. President Awakessien Jeter asked how they would define ministerial tasks; would this be determined in mediation because it is opinion-based. Mr. Shulman agreed that mediation would cover these debates. Mr. Kulewicz said discretion could be utilized, similar to courts. Mr. Shulman indicated that this ordinance could be further adjusted if there are continued issues that arise from the wording.

Legislative Items for Third Reading/Public Hearing/Council Action

- a. **Ordinance No. 40-2024 – An ordinance authorizing the City Manager to amend the contract with Pizzuti Solutions for Owner's Representative Services for the Bob Crane Community Center**

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 40-2024.

Mr. Walter moved, seconded by Vice President Close, to adopt Ordinance No. 40-2024.

In order to comply with the Ohio Ethics Law, Mr. Kulewicz abstained from discussion and vote on Ordinance No. 40-2024 and left the Council Chambers at 8:46 p.m.

President Awakessien Jeter then called for a vote on the motion to approve Ordinance No. 40-2024.

Voting Aye:	Close, Munc, Walter, and President Awakessien Jeter
Voting Nay:	None
Absent:	Adams, Lynch
Abstain:	Kulewicz

The motion carried.

Mr. Kulewicz returned to the Council Chambers at 8:47 p.m. and was present for all further business.

Legislative Items for Second Reading/Public Hearing/Council Action

- a. **Ordinance No. 44-2024 – An ordinance authorizing the City Manager to enter into contract with the Edge Group, Inc. for master planning services for Fancyburg Park**

Ms. Munc moved, seconded by Vice President Close, to adopt Ordinance No. 44-2024.

In response to President Awakessien Jeter's invitation to speak, the following speakers came forward:

- Nancy Edwards - stated that friends near Fancyburg are nervous about the potential changes at the park due to previous issues. They are in favor of a

consultant study and would like them to visit the park. They would like to get good value for their tax dollars.

President Awakessien Jeter then called for a vote on the motion to approve Ordinance No. 44-2024.

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

Voting Nay: None

Absent: Adams, Lynch

Abstain: None

The motion carried.

b. Ordinance No. 45-2024 – An ordinance authorizing the City Manager to enter into contract with RedTree Investment Group for management and advisory services

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 45-2024.

Vice President Close moved, seconded by Ms. Munc, to adopt Ordinance No. 45-2024.

President Awakessien Jeter then called for a vote on the motion to approve Ordinance No. 45-2024.

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

Voting Nay: None

Absent: Adams, Lynch

Abstain: None

The motion carried.

c. Ordinance No. 46-2024 – An ordinance authorizing the City Manager to enter into contract with Performance Pipelining, Inc. for the 2023 & 2024 Sanitary Sewer Repairs Construction Project

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 46-2024.

Mr. Kulewicz moved, seconded by Vice President Close, to adopt Ordinance No. 46-2024.

President Awakessien Jeter then called for a vote on the motion to approve Ordinance No. 46-2024.

Voting Aye: Close, Kulewicz, Munc, Walter, and President Awakessien Jeter
Voting Nay: None
Absent: Adams, Lynch
Abstain: None

The motion carried.

Legislative Items for First Reading/Public Hearing/Council Action

- a. **Resolution No. 6-2024 – A resolution adopting the tax budget for the Upper Arlington Public Library for the fiscal year beginning January 1, 2025 and submitting the same to the Franklin County Budget Commission**

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Resolution No. 6-2024.

Vice President Close moved, seconded by Ms. Munc, to adopt Resolution No. 6-2024.

President Awakessien Jeter then called for a vote on the motion to approve Resolution No. 6-2024.

Voting Aye: Close, Kulewicz, Munc, Walter, and President Awakessien Jeter
Voting Nay: None
Absent: Adams, Lynch
Abstain: None

The motion carried.

Legislative Items for First Reading/Public Hearing

- a. **Ordinance No. 47-2024 - An ordinance authorizing the City Manager to enter into contract with Mr. B's Cleaning Service for custodial and cleaning services for city buildings**

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 47-2024.

President Awakessien Jeter advised the Second Reading/Public Hearing/Council Action is scheduled for June 17, 2024.

b. Ordinance No. 48-2024 - An ordinance authorizing the City Manager to enter into contract with Performance Pipeline, Inc. for the 2024 Sustainable Sewer Solutions project

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 48-2024.

President Awakessien Jeter advised the Second Reading/Public Hearing/Council Action is scheduled for June 17, 2024.

c. Ordinance No. 49-2024 - An ordinance authorizing the City Manager to enter into contract with Newcomer Concrete for the 2024 Sidewalk Maintenance Program

In response to President Awakessien Jeter's invitation to speak, there were no questions or comments from the public relative to Ordinance No. 49-2024.

The City Engineer stated this contract will cover the City's portion and the resident's responsibility of panel repairs.

President Awakessien Jeter advised the Second Reading/Public Hearing/Council Action is scheduled for June 17, 2024.

City Manager Update

The City Manager provided the following update:

- There will be a Juneteenth flag raising at the Municipal Services Center on June 17, 2024.
- Arts on Arlington is this Thursday at Mallway Park.
- There was a business bootcamp hosted by Upper Arlington in partnership with the Columbus Urban League.

* * *

There being no further business to come before City Council, Mr. Kulewicz moved, seconded by Ms. Munc to adjourn the meeting.

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

Voting Nay: None

Absent: Adams, Lynch
Abstain: None

Motion carried and the meeting was adjourned at 9:05 p.m.

President of Council

ATTEST: _____
City Clerk



Upper Arlington Public Library

Exhibit A

2024 Library Update



Trends

How library use, collections, and needs have shifted

Master Facilities

An overview of the findings of the Master Facilities Plan

2024 Priorities

A look at our 2024 priorities, planned maintenance and future plans

Our Locations



Tremont Road 2800 Tremont Road

Tremont Road is our largest building and offers a deep and robust collection, large program capacity, and specialized services such as passports and research help. This location has everything you need, like Giant Eagle.



Lane Road 1945 Lane Road

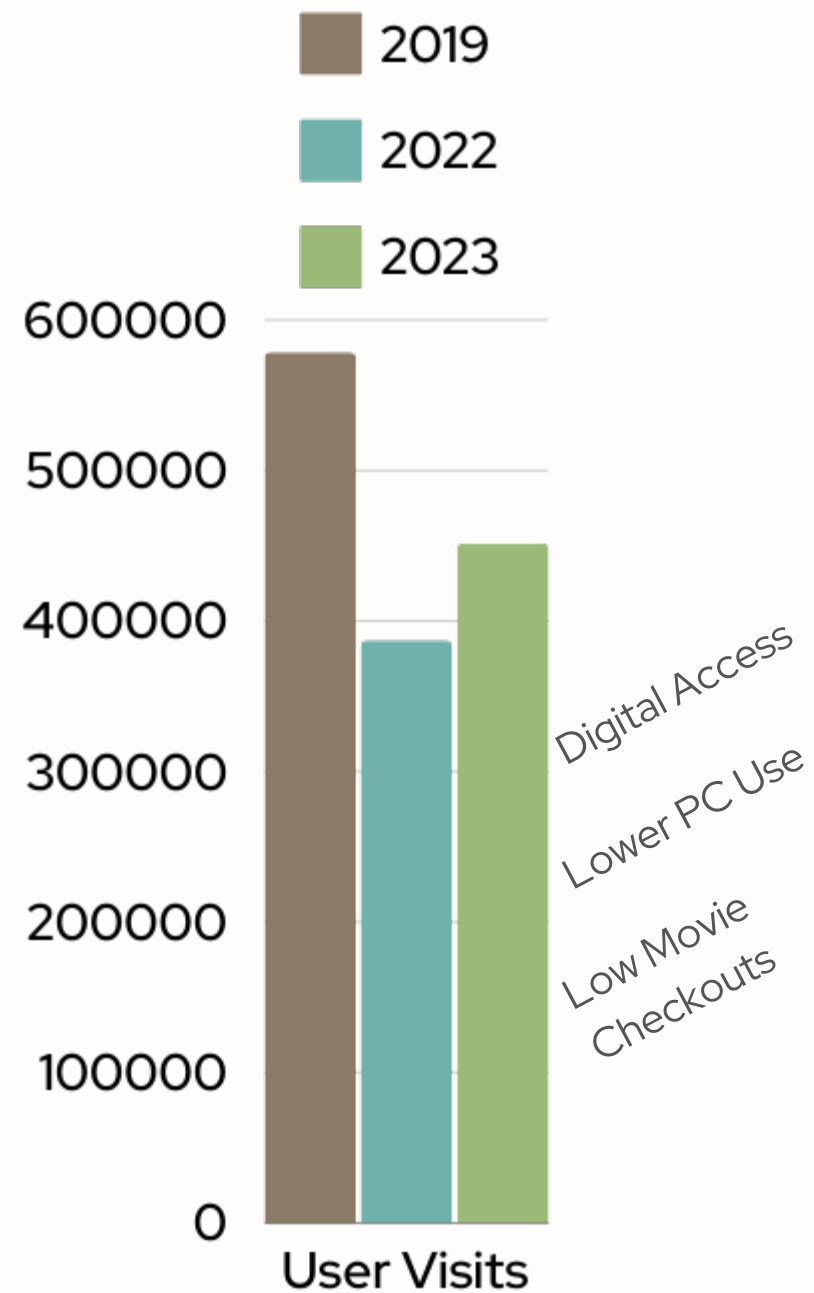
Lane Road is our mid-sized location that offers popular materials, computer access, small meeting spaces, and an active Early Learning Play Area. It caters to the local community with little bit of everything, like Littleton's Market.



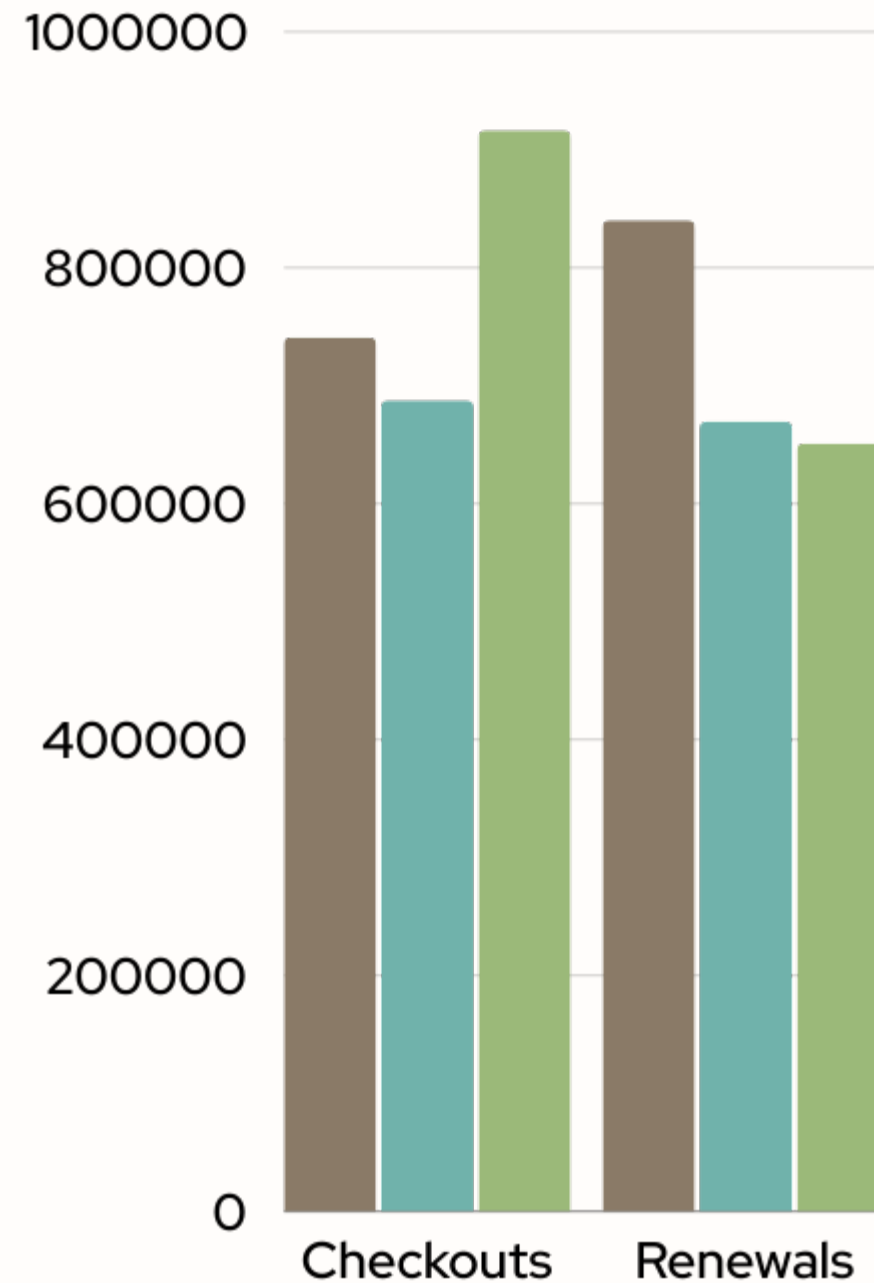
Miller Park 1901 Arlington Avenue

Miller Park is our smallest location that primarily serves youth and families. It has a quaint youth area with a perfect children's collection. They host large family programs outdoors in nice weather. It is sweet and specialized, like the Goodie Shop.

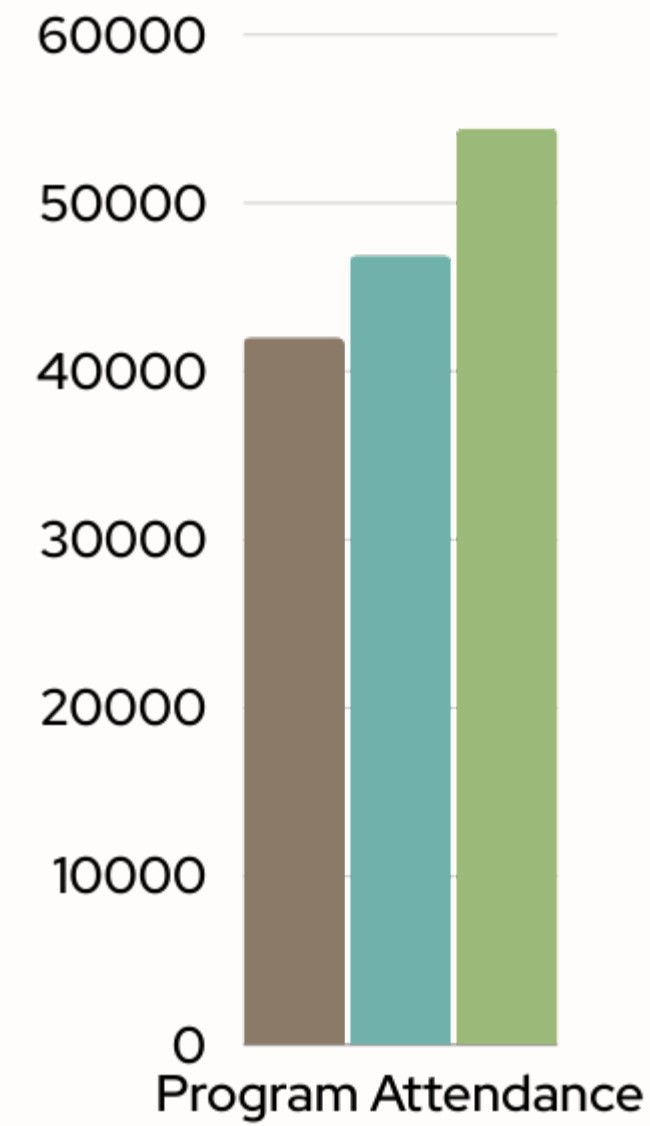
Trends in Library Use



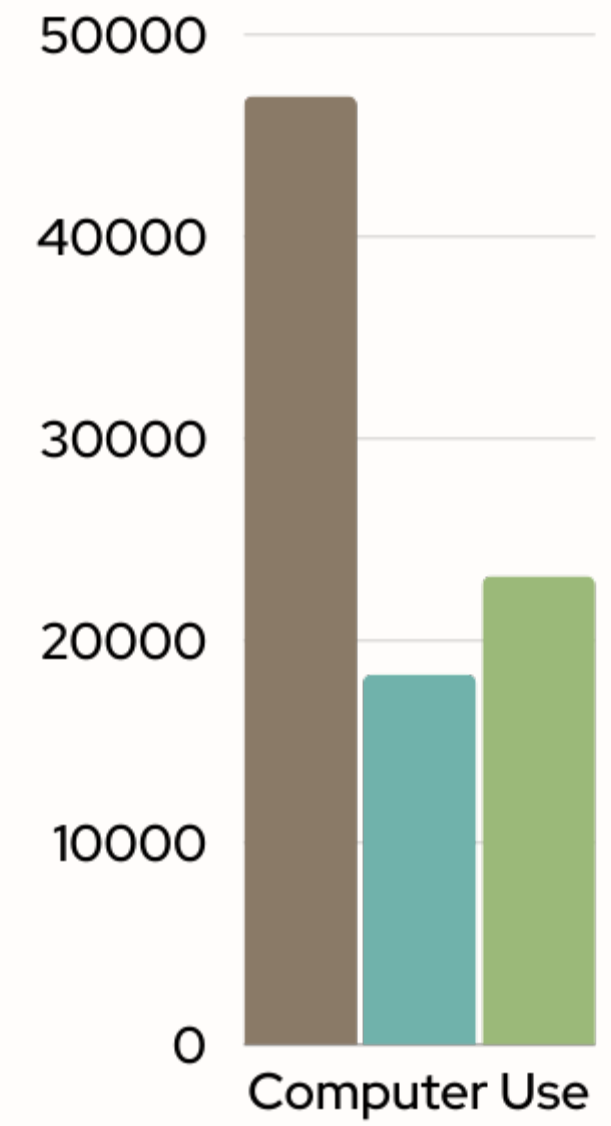
↓ 21%
-10,000 per month



↑ 24%
+175,402

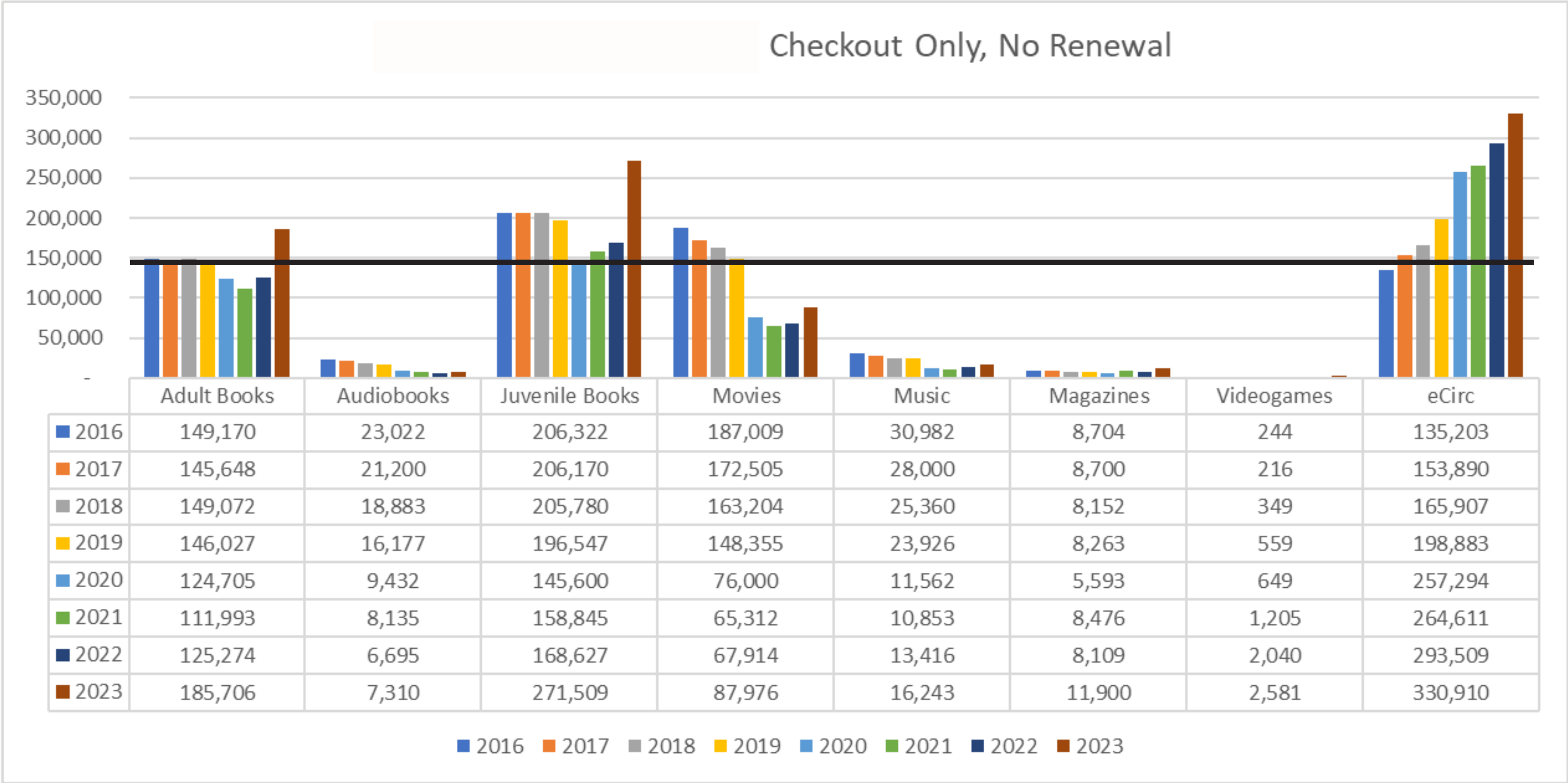


↑ 29%
+12,415



↓ 48%
-32,613 hours

Statistics - Number of Checkouts (non-renew)



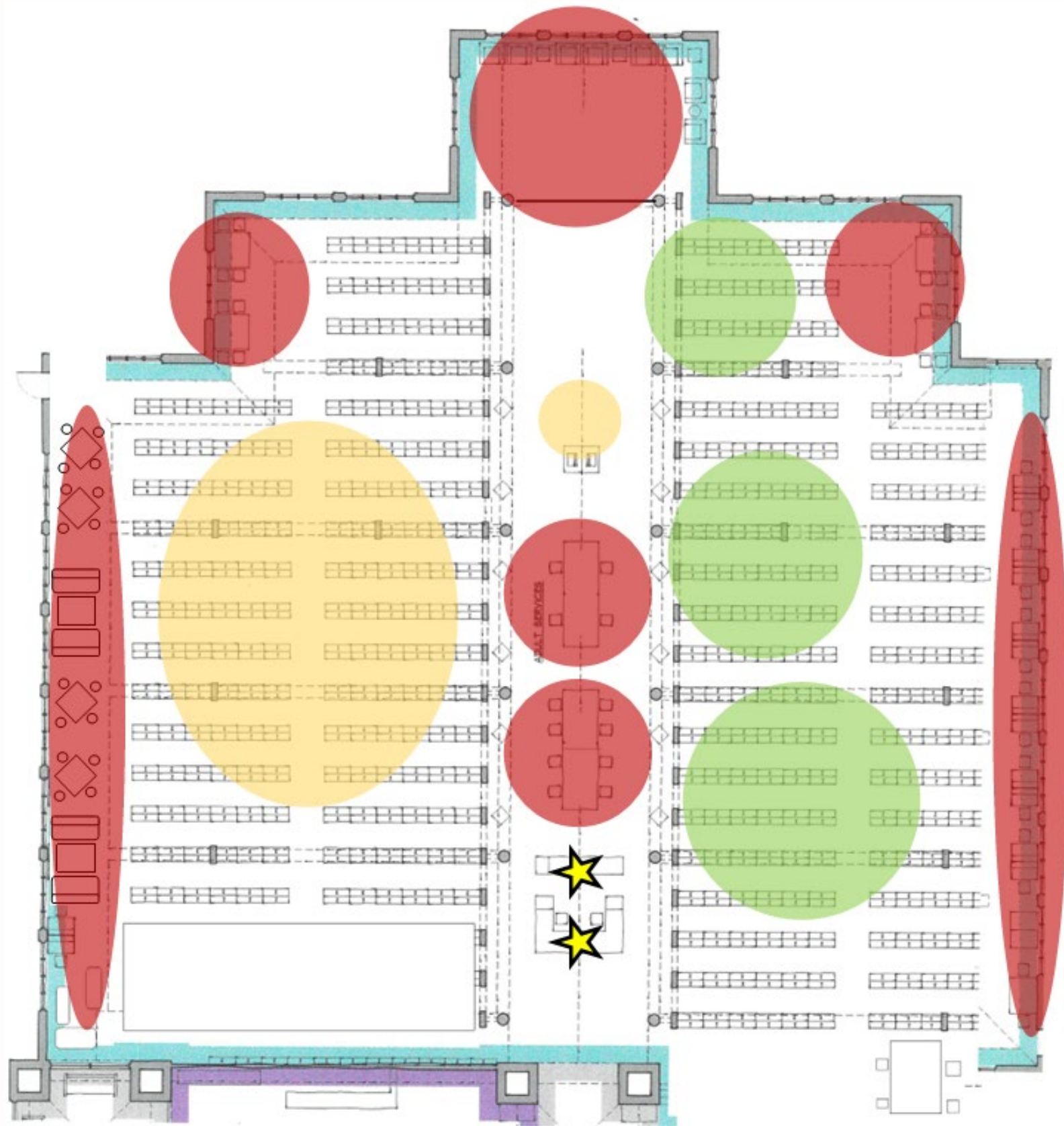
Usability Study

Not enough meeting rooms and enclosed study space

We need flexible open spaces for large programs and events

We have less need for public computers; more power and seating for laptop users

We need to curate collections for the needs of the community and a better balance of meeting, seating, and shelving



Staff and Community Engagement

Below are comments that were stated in relation to all three UAPL facilities from our community engagement sessions conducted by HBM Architects and Interior Designers.

- Maintain the inviting and warm feel of UAPL facilities
- Need for study and meeting rooms of all sizes. Both enclosed spaces and seating options
- Need for access to power everywhere
- Flexibility is key
- Continue to provide stellar children's and family spaces with interactive play, collections, and programming
- Need for a business center
- Continue to provide access to collections
- Covered outdoor seating for reading and programs would be nice, but should not duplicate park functions

HBM Architects Prioritized Recommendations

Priority 1	Priority 2	Priority 3
Lane Road Create a new layout for improved functionality, adding study rooms, and adapting to changes in how patrons are now using the library.	Tremont Road Create a new layout for improved functionality, wayfinding, and recapturing underutilized spaces. This would also include updates to all finishes, furnishings, and equipment inclusive of lighting and shelving. Needs include 2-4 person study rooms to large flexible event and program spaces.	Miller Park Furniture and shelving should be updated with mobile options that can help staff more easily reconfigure the space for popular programs. Some modifications to the layout may further support this endeavor in relocation of adult shelving

2024 Major Prioritized
Maintenance Items:
HVAC, Tremont Roof, Misc
\$1,938,000

2-5 Years Maintenance Items:
Tremont - \$175,000
Lane Road - \$54,750
Miller Park - \$28,000
\$257,750

6-10 Years Maintenance Items:
Tremont - \$538,850
Lane Road - \$0
Miller Park - \$2,800
\$541,650

Fund 402 Building Improvement Fund												
Beginning Cash		\$1,123,431	\$1,479,293	\$2,387,560	\$1,407,260	\$2,607,260	\$3,807,260	\$5,007,260	\$6,007,260	\$6,907,260	\$7,757,260	\$8,557,260
Transfer- In		\$700,000	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000	\$1,000,000	\$900,000	\$850,000	\$800,000	\$800,000
Additional Expenditures:	2022 ACTUAL EXPENDITURES	2023 Expendtiures	2024 Budget	2025 Budget	2026 Budget	2027 Budget	2028 Budget	2029 Budget	2030 Budget	2031 Budget	2032 Budget	
Building Periodic Maintenance & Replacement	279,109	67,972	1,938,000		-	-	-	-				
Furniture	15,686	81,294	-	-	-	-	-	-				
Equipment	45,051	8,139	77,300	-	-	-	-	-				
Professional Services	4,293	134,328	165,000	-	-	-	-	-				
Total BIF Expenditures	344,138	291,732	2,180,300	-	-	-	-					
Building Improvement Fund												
Ending Cash	\$1,479,293	\$2,387,560	\$1,407,260	\$2,607,260	\$3,807,260	\$5,007,260	\$6,007,260	\$6,907,260	\$7,757,260	\$8,557,260	\$9,357,260	

Board Retreat Prioritized Projects



Cost



Time



Community Impact

2024	2025-2028	2029-2032
Fix all urgent maintenance repair and replacements \$\$\$ ⌚⌚	Miller Park flexible floor plan \$ ⌚ 👍	Miller Park Outdoor Space Feasibility \$\$\$ ⌚⌚ 👍👍👍👍
Lane Road first floor reconfig, refresh, and renovation \$\$ ⌚⌚ 👍👍👍	Tremont Road reconfiguration and renovation \$\$\$\$ ⌚⌚⌚⌚ 👍👍👍👍👍	Miller Park Small Expansion \$\$\$ ⌚⌚⌚ 👍👍
		Expansion of Lane Road \$\$\$\$\$ ⌚⌚⌚⌚⌚ 👍👍👍 ???

Staff and Community Engagement

Lane Road Summary

The Lane Road Branch functions well for its size and being divided into two floors. However, updates are needed in order to provide the materials, services, and spaces requested in modern libraries.

This can be accomplished through the reconfiguration of the main level and recapturing underutilized spaces.

It is important that the children's area be maintained as an active space but the addition of some quiet study / tutoring rooms would be helpful on both the upper and lower levels .



The meeting room is constantly in use and lacks necessary storage to support both adult and children's programs without sacrificing space.

Lane Road

- A—Magazines
- B—Display
- C—New Books
- C-1—Large Print
- D—Holds
- E—Friends
- F-1—DVDs
- F-2—Teen and Graphic Novel
- G—Adult Fiction and Nonfiction



Lane Road Repairs & Replacements
\$549,000

Lane Road MFP
1st Floor Refurbish
\$225,000

Space Allocation Goals

Collection x Seating x Meeting x Computers

54%

22%

18%

6%

Collection x Seating x Meeting x Computers

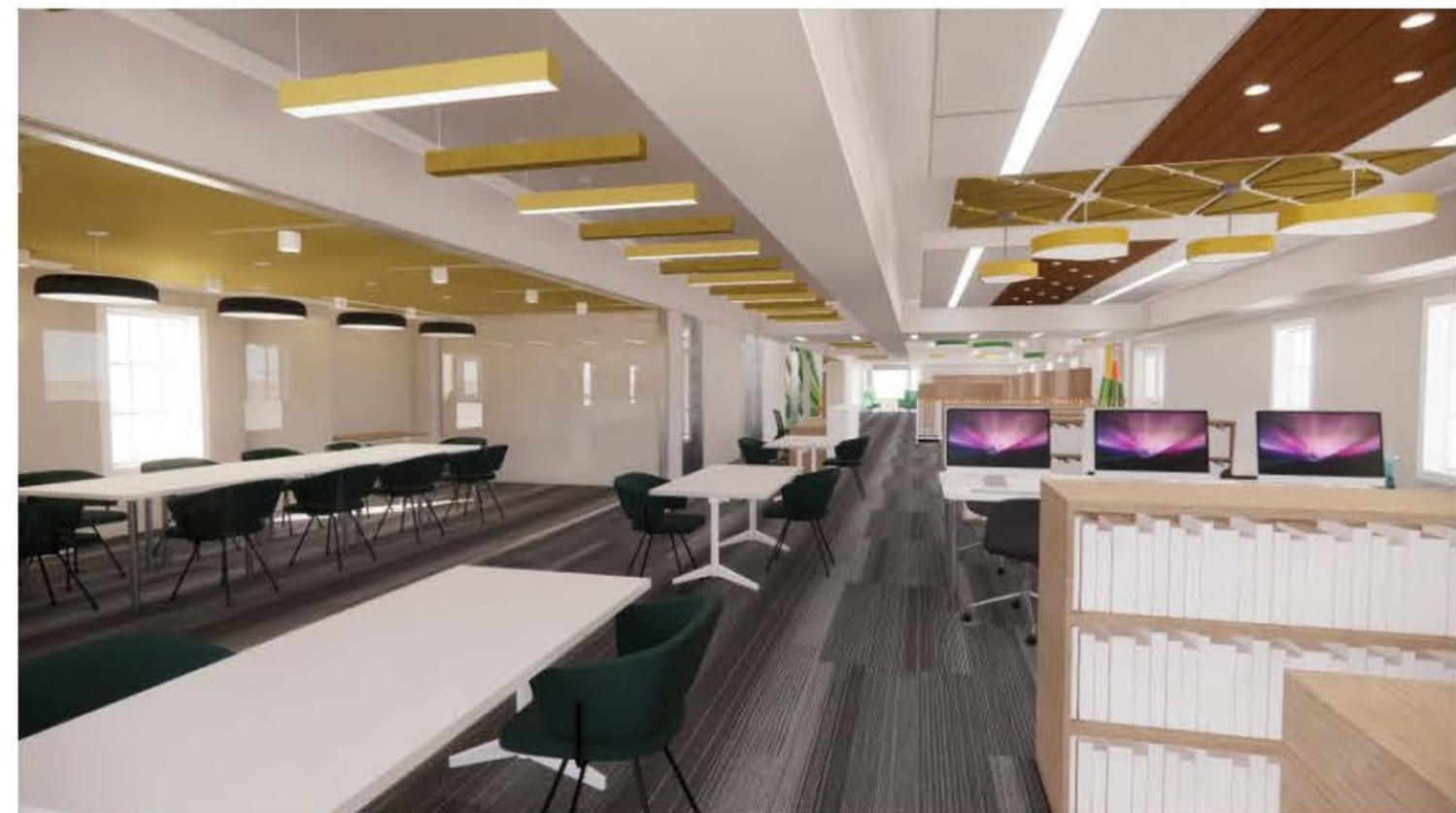
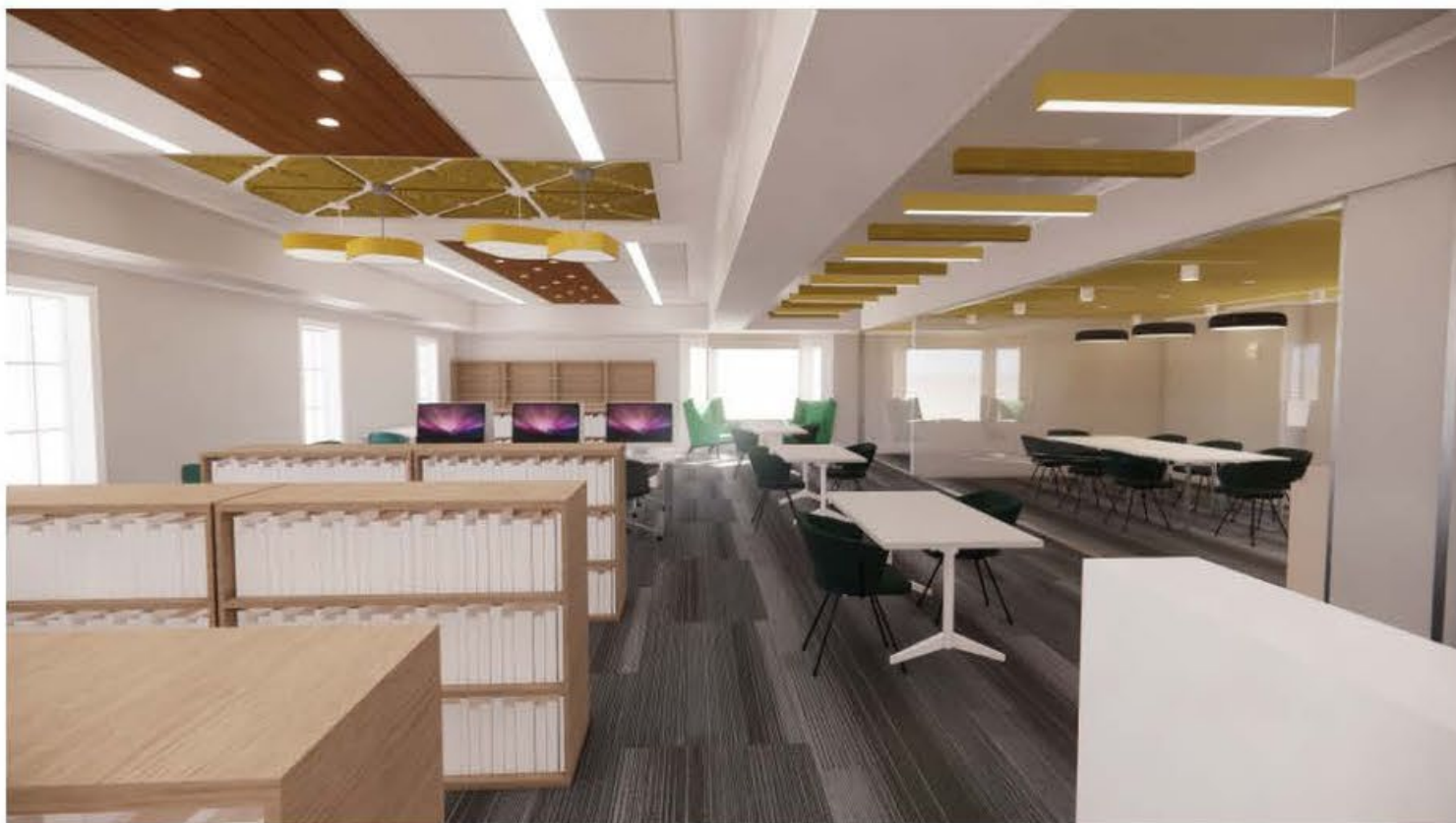
35%

35%

24%

6%

Lane Road Rendering



Timeline



Develop criteria for weeding collection and what items needs to move to Tremont

Move items to Tremont and curate collection for Lane

Move items to lower level to prepare for construction

Branch Closed for Renovation / HVAC / Ceiling / Shelving / Furniture

Grand Re-Opening

March - April

Jul to Oct

November

December

January
2025

Relocating Items to Tremont

We will be moving some of the Lane collection to Tremont, which has capacity. We will be reviewing the Lane Road collection looking for grubby items, duplicates, and underperforming items to weed.

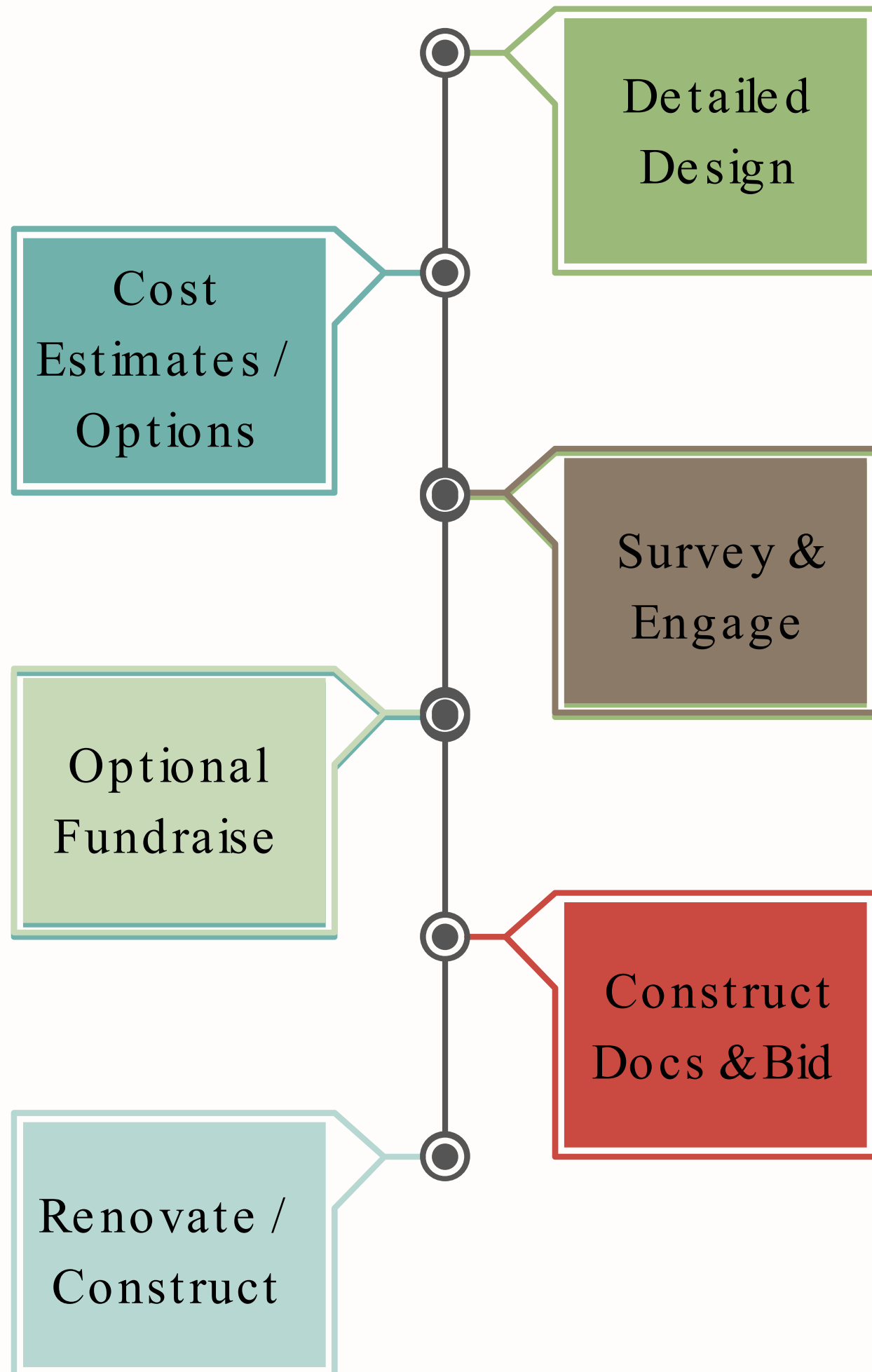
More meeting space

Meeting rooms are at a premium and we needed to make space for groups to gather. We are adding 2 enclosed study spaces on the first floor, increasing our enclosed meeting space by 6%.

Increased seating capacity

We now have more room for people to read, work, and gather. Currently, we only have space for several people comfortably; with the new floor plan, we've increased our capacity by 19% for laptop and computer users, readers, and groups.





20 24

- Administration and Board determined priority of focus at Board Retreat.
- Fix all urgent maintenance repair and replacements.
- Complete Lane Road first floor reconfiguration and refresh

20 25

- Hire an architect for a design phase to give us more specific details , space options and drill down cost estimates further.
- Board and administration will review cost estimates and select options to put before the community.
- Community engagement survey and presentations on renovations / refresh

20 26

- Renovation of Tremont Library

BOB CRANE COMMUNITY CENTER



Community Engagement

Focus Groups

- Adaptive Recreation
- Aquatics
- Arts, Music & Dance
- Businesses
- Teens (including at high school)
- Education & Enrichment
- Fitness & Wellness
- Operations
- Sports

Senior Center Info. Sessions

- Monthly Sessions
- Current Services
 - Programs
 - Social Activities
- Transition to Community Center
 - Senior Advisory Council
 - Programs and Operations
- Community Center Updates
 - Activity spaces, floor plan
 - Parking



Key Findings

Programs

- Very diverse array of program interests
- Multi-generational offerings within family and general attendees
- Plan for days school is out (early dismissal, Prof. Dev. Days)

E-Sports

- Teens - Need for high-speed gaming access
- Adults/Seniors - Desire to play

Overall

- High interest in the facility, excitement for it to open
- Shared experiences – what works, what doesn't



Key Findings

Aquatics

- Lap lane – reservation vs drop-in, time limits
- Swim lesson – structure, time of day, indoor option for program
- Consider noise when scheduling various uses

Fitness & Wellness – Adults / Seniors

- Class registration structure
- Childcare schedule, access

Fitness & Wellness – Youth

- Youth active play – structured and non-structured
- Early programs for preschool
- Like the indoor playground



Access, Hours & Ages



Access to the Bob Crane Community Center

- **Free Access**
 - Entrance lobby, playground and café
- **Membership or Daily Admission**
 - Access to the facility: fitness equipment, pool, gym, game tables, walking track, social areas
- **Fee Based Services**
 - Childcare, e-sports, private rentals
- **Program Fees**
 - Instructor-led programs require advance registration



Community Center Hours

Community Center

- Monday-Friday: 5:30 am-10 pm
- Saturday & Sunday: 8 am-8 pm

Child Care

- Monday-Friday: 8 am-1 pm, 4-8 pm
- Saturday: 8 am-Noon
- Sunday: Closed

E-Sports

- Monday-Friday: 3:30-8 pm
- Saturday & Sunday: 10:30 am-4:30 pm

Holidays

Most holidays – operate per normal or adjusted hours
Some holidays – closed for the day



Ages - Seniors

Region Comps	Seniors
Dublin	60
Westerville	65

Upper Arlington	Senior Age	2023 Seniors
Senior Center	50	Age 50-59: 43
Pools/Tennis	60	
Solid Waste Discount	60	
Community Center Feasibility Study	62	
Community Center	60	Current Senior Center members between ages 50-59 as of 6/1/24 will be granted Senior rate



Ages

	Building, Gym, Pool	Track	Fitness Equipment and Classes
Dublin	10	13	16
Westerville	10	14	14
Worthington	8	10	16
UA	10 Age 9 and under, when directly supervised by a responsible individual	13 Age 8-12, when directly supervised by a parent or guardian.	16 Age 12-15, when directly supervised by a parent or guardian or after passing Junior Fitness Orientation Program



Fees



Guiding Principles

- Simple Structure
- Favorable for Residents
- Incentivize Membership
- Ease into operations, respond to usage



Notes on Fees

- Fee structure is designed to offer reduced costs to residents and incentivize memberships
 - Fees are listed as **R-M** for any customer that is a **R**esident and/or a **M**ember
 - The **Non-Resident (NR)** rate applies to any customer that does not reside or work in UA and is not a current member
 - Unless otherwise specified, this fee structure applies
 - Play UA Financial Assistance
 - Assistance can be used for membership and program fees, not eligible for daily admission, childcare, e-sports or rentals
 - \$1 transaction fee applies
- Individuals employed in UA are eligible for resident rates for themselves and their household
- Annual adjustments for Membership and Daily fees



Fees – Membership & Daily Admission

Membership Monthly Rate	Resident	NR 100%
Individual (Age 3-59)	35	70
Senior (Age 60+)	22	44
Each Additional Person	22	44
Daily Admission	10	20*

Current Fees

Studio 55 Rates

\$ 28 Monthly pass

\$240 Annual pass

Medicare Advantage Program – To Be Determined

UA Senior Association

\$15R/\$20NR Annual fee - Eliminated in 2025

Membership Structure

- Simple Structure
 - Initial rate for first household member
 - One rate for each additional member
- Discount for Seniors

Daily Admission

- One rate all ages
- Consistent with pools and tennis
- Non-Residents
 - *Limited to one trial visit during start-up period
 - Member Guest packages available



Fees – Non-Resident Upcharge

		Membership - Individual		Daily - Individual	
NR Upcharge		Resident	Non-Resident	Resident	Non-Resident
Dublin	160% M / 70% D	\$24.33	\$64.33	\$10	\$17
Westerville	75% M / \$100% D	\$32	\$56	\$10	\$20
UA	100%	\$35	\$70	\$10	\$20*

M = Membership
D = Daily Admission

*Limited availability during opening



Fees – Regional Facilities

Resident Rates	Proposed 2025	Pro forma 2022	Dublin 2024	Westerville 2024	LifeTime Fitness 2024	McConnell 2024	Hilliard YMCA * 2024
Individual	\$35	\$22 Y \$33 A	\$24.33	\$23 Y \$32 A	\$106	\$88.15 + \$149 enrollment	\$43.99 A \$34.99 YA \$17.99 T
Senior (Age 60+)	\$22	\$22	\$12.67	\$25	\$95	\$74.18	10% discount
Additional Person	\$22	variable				\$58.05	variable
Household 2	\$57	\$80	\$40.17	Ind. rates	\$160	\$146.20	\$68.99
Household 3	\$79	\$80	\$53.5	\$85	\$192	\$204.25	\$74.99
Household 4	\$101	\$80	\$61	\$85	\$214	\$262.30	\$74.99
Daily Admission	\$10	\$7 Y/S \$10 A	\$8 Y/S \$10 A	\$7 Y/S \$10 A	N/A	Monthly fee	N/A

* plus tax and
join fee \$25/\$50

A=Adult S=Senior T=Teen YA=Young Adult Y=Youth



Fees & Ages – Child Watch

Community	Fee Comps – per 2-hour visit		Fee Comps – 10 visit pass	
	Member	Non-Member	Member	Non-Member
Dublin	\$5	\$6	\$50	\$60
Westerville	\$3	\$5	n/a	n/a
UA	\$6	\$12	\$60	n/a

Member only rates due to low childcare fees

Age Comps	
Dublin	6 weeks – 12 years
Westerville	6 months – 9 years
UA	3 months – 9 years



Fees – E-Sports

	90 Minute Session		5 visit pass	
	R-M	Non-Resident	R-M	Non-Resident
Dublin	\$4 R	\$6 NR	\$20 R	\$30 NR
Westerville	Access included in facility membership			
UA	\$4	\$8	\$20	\$40



Fees - Programs

Program Fee Structure

- Current
 - Youth – Adult
 - Resident and Non-Resident rates
 - Senior Center
 - Member and Non-Member rates
- New Structure
 - All Programs
 - Resident and Non-Resident rates



Fees – Rental Spaces

Community	Day	5th Floor Event Center (R-M/NR)		
		Per Hour Rate		
		1 room	2 room	3 room
Dublin	All	\$55/\$135	\$90/\$225	\$120/\$315
Westerville	All	\$70/\$105	\$90/\$135	\$110/\$165
Columbus	TU-TH			\$200
Northbank	F-SAT			\$350
Pavilion	SUN			\$250
UA Amelita	M-TH		\$90/\$138	
Mirolo Barn	F & SUN		\$188/\$264	
	SAT & Holiday		\$220/\$308	
UA	M-TH	\$75/\$105	\$105/\$158	\$145/\$218
	F & SUN	\$120/\$180	\$170/\$255	\$235/\$353
	SAT & Holiday	\$190/\$285	\$265/\$398	\$335/\$502

UA Notes:

- Pricing by day of week is consistent with Barn
- NR upcharge is 50% due to market rates



Fees – Rental Spaces

	Gym - full court (R-M/NR)	Program Room (R-M/NR)	Pool (R-M/NR)
	Per hour	Per hour	2-hours
Dublin	\$55/\$80	\$35/\$80	\$300/\$450
Hilliard	\$50/\$65	\$50/\$135	
UA	\$60/\$120	\$50/\$100	\$500/\$1000



Fees – Party Rates

	Party Room (R-M/NR)	Pool & Room (R-M/NR)	E-sports & Room (R-M/NR)	Gym Admission & Room (R-M/NR)
Dublin	\$150/\$225 3 hours, party supplies	Don't have package with pool admission	\$150/\$225 Teen lounge or gym and classroom	
Worthington	\$195/\$275 2 hours, 25 admissions	\$325/\$450 Sat. between Noon-3 pm 2 hours, 40 admissions		
Hilliard	\$150/\$185 ½ gym and ½ program room			
UA	\$125/\$250 2 hours, 20 people (playground access, no facility admission)	\$200/\$400 2 hours, 20 people, 10 admissions	\$300/\$600 2.5 hours, 20 people, 18 gamers	\$245/\$490 2 hours, 20 people



Next Steps:

- Feedback on fees and structure – June & July
- Budget Impact – Council presentation in August



Questions and Discussion



Authors: Suzanne Beach, Executive Assistant

Council Meeting Date: June 17, 2024

Subject/Legislative Item: Ordinance No. 47-2024 - An ordinance authorizing the City Manager to enter into contract with Mr. B's Cleaning Service for custodial and cleaning services for city buildings

Purpose: To provide custodial services to City Buildings

Executive Summary: To authorize the City Manager to enter into a one-year contract with an option to extend for an additional year with Mr. B's Cleaning Service for custodial services for City Buildings.

Purpose and Impact

To authorize the City Manager to enter into a one-year contract with an option to extend for an additional year with Mr. B's Cleaning Service (Minority-Owned Business) for custodial services for the Municipal Services Center, Public Services Center, Senior Center and Firehouse 72. The contract amount for one year is \$108,000, with an option to renew for a second year for \$108,000.

A Request for Proposals for custodial Services for City Buildings was issued on March 29, 2024. Responses were received on May 3, 2024. The breakdown of cost per is as follows:

Mr. B's Cleaning Services

Building	Year 1 Cost per Month	Annual Total	Year 2 Cost per Month
Municipal Services Center	\$5,250.00	\$63,000.00	\$5,250.00
Public Services Center	\$1,750.00	\$21,000.00	\$1,750.00
Senior Center	\$1,500.00	\$18,000.00	\$1,500.00
Fire Station Reed Road	\$500.00	\$6,000.00	\$500.00
Totals		\$108,000.00	

Other Bidders

Vendor	Year 1 Annual Total	Year 2 Annual Total
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Cleaning Unlimited	\$272,469.72	\$426,992.17
Elite National Building	\$125,061.15	\$129,558.36
GDI Integrated	\$186,557.16	\$198,216.96
Jonco	\$110,940.00	\$116,100.00
JSI Janitorial	\$119,695.68	\$122,089.68
ServiceMaster Elite	\$120,667.32	\$123,080.66
Square Janitorial	\$156,416.04	\$156,416.04

History

The current custodial contract with Servicemaster Elite expires August 31, 2024. The contract amount for the first year was \$108,219 and the second year was \$108,219. While ServiceMaster Elite did submit a bid this year, it was higher than Mr. B's Cleaning Services who we have a positive experience using through park shelter restroom custodial services.

In 2025, custodial services for the Bob Crane Community Center will be bid as a separate contract. After review of the first year of operation, we will have the opportunity to see if all city custodial services should be bid as one contract.

Alternatives

In the future, if costs of custodial services increase, the city could research cost/benefit ratio of providing these services in house vs. continuing to contract for custodial services.

Attachments

1.	Ordinance No. 47-2024
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RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 47-2024

TO AUTHORIZE THE CITY MANAGER TO ENTER INTO CONTRACT WITH MR. B'S CLEANING SERVICES FOR CUSTODIAL AND CLEANING SERVICES FOR CITY BUILDINGS

WHEREAS, the City's current contract for custodial and cleaning services will expire on August 31, 2024; and

WHEREAS, the City issued a Request for Proposals (RFP) on March 29, 2024, and received the responses below on May 3, 2024; and

Vendor	Year 1 Total	Year 2 Total
Mr. B's Cleaning Services	\$108,000.000	\$108,000.000
Cleaning Unlimited	\$272,469.72	\$426,992.17
Elite National Building	\$125,061.15	\$129,558.36
GDI Integrated	\$186,557.16	\$198,216.96
Jonco	\$110,940.00	\$116,100.00
JSI Janitorial	\$119,695.68	\$122,089.68
ServiceMaster Elite	\$120,667.32	\$123,080.66
Square Janitorial	\$156,416.04	\$156,416.04

WHEREAS, staff recommend awarding the contract to Mr. B's Cleaning Services as the lowest and best bid for a one-year contract, with an option to extend for an additional year.

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

SECTION 1. The City Manager is hereby authorized to enter into a one-year contract with Mr. B's Cleaning Services for custodial and cleaning services for the Municipal Services Center, Public Services Center, Senior Center, and Reed Road Fire Station, for an annual amount not to exceed \$108,000.00, with an option to extend for an additional year.

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

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

Authors: Gary Wilfong, P.E., Public Service Director
Carla Odebralski, P.E., City Engineer

Council Meeting Date: June 17, 2024

Subject/Legislative Item: Ordinance No. 48-2024 - An ordinance authorizing the City Manager to enter into contract with Performance Pipeline, Inc. for the 2024 Sustainable Sewer Solutions Project

Purpose: To Maintain and Improve the Wastewater System

Executive Summary: Legislation authorizes the City Manager to enter into contract with Performance Pipeline, Inc. for construction related services for the 2024 Sustainable Sewer Solutions Project

Purpose and Impact

This is an ordinance authorizing the City Manager to enter into contract with Performance Pipeline, Inc. in the amount of \$1,522,182.22 for the 2024 Sustainable Sewer Solutions (SSS) Project. On Friday, May 31, 2024, the City received bids from two contractors. The results are summarized below:

Contractor	2024 SSS Bid Prices
Performance Pipeline, Inc.	\$1,383,802.02
BDL Services, LLC	\$1,619,957.40
Engineer's Estimate	\$1,167,671.00

Performance Pipeline, Inc. had the lowest and best bid of \$1,383,802.02. With the standard 10% contingency, the contract totals \$1,522,182.22. The amount included in the 2024 budget for this project is \$1,650,800, split between the Local Fiscal Recovery (remainder of the federal ARPA dollars - \$1.05M), Bonded Improvement, and Sewer Funds.

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





EXHIBIT A: 2024 Sustainable Sewers Solution Project Locations (bordered by: Fishinger Road to the north, Nottingham Road to the south, Kioka Avenue to the east, and Riverside Drive to the west)

History

This project is part of the Ohio EPA approved 17-year plan to address inflow and infiltration with the sanitary sewer system. The total program cost over the 17-year plan is estimated at \$18,150,000. Construction of the program began in 2017 and must be completed by 2028 to meet EPA requirements. With this project we continue to be on schedule to meet those requirements.

A map of the overall SSS plan can be found on the city's website at: <https://upperarlingtonoh.gov/wp-content/uploads/2018/07/Sustainable-Sewer-Solutions-Map.pdf>

A video overview of the program can be found at: <https://www.youtube.com/watch?v=j3okYViZVPQ>

More information on the overall 2024 CIP can be found on the city's GIS system at: <https://storymaps.arcgis.com/stories/5fc9e0f24e86409abf0c5fcf200e4068>

Alternatives

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

Attachments

1.	Ordinance No. 48-2024
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RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON

STATE OF OHIO

ORDINANCE NO. 48-2024

TO AUTHORIZE THE CITY MANAGER TO ENTER INTO CONTRACT WITH PERFORMANCE PIPELINE, INC. FOR THE 2024 SUSTAINABLE SEWER SOLUTIONS PROJECT

WHEREAS, under the requirements of the Ohio Environmental Protections Agency (OEPA) Director's Final Findings and Orders, the Engineering Division studied the City's sewer systems and developed a remediation plan to reduce excessive inflow and infiltration (I/I) of rain water into the sanitary sewer system; and

WHEREAS, this investment supports both the OEPA and City's objectives to reduce water entering the sanitary sewer system, which will reduce water-in-basement events; and

WHEREAS, on May 31, 2024, the City received the following bids for the project; and

Contractor	Bid Price
Performance Pipeline, Inc.	\$1,383,802.02
BDL Services, LLC	\$1,619,957.40
Engineer's Estimate	\$1,167,671.00

WHEREAS, Performance Pipeline, Inc. had the lowest and best bid of \$1,383,802.02; and

WHEREAS, it is therefore recommended that the City Manager be authorized to enter into contract with Performance Pipeline, Inc. for an amount not to exceed \$1,522,182.22, which includes a 10-percent contingency for construction related services.

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

SECTION 1. The City Manager is hereby authorized to enter into contract with Performance Pipeline, Inc. for an amount not to exceed \$1,522,182.22, which includes a 10-percent contingency, for the 2024 Sustainable Sewer Solutions Project.

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

SECTION 3.

This ordinance shall take effect immediately upon passage.

Authors: Gary Wilfong, P.E., Public Service Director
Carla Odebralski, P.E., City Engineer

Council Meeting Date: June 17, 2024

Subject/Legislative Item: Ordinance No. 49-2024 - An ordinance authorizing the City Manager to enter into contract with Newcomer Concrete for the 2024 Sidewalk Maintenance Program

Purpose: To Maintain and Improve the Sidewalk System

Executive Summary: Legislation authorizes the City Manager to enter into a contract with Newcomer Concrete for construction related services for the 2024 Sidewalk Maintenance Program Construction Project.

Purpose and Impact

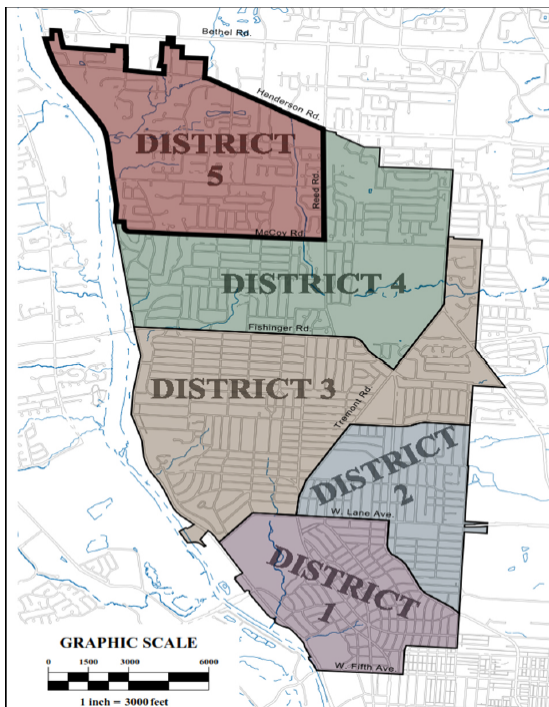
This is an ordinance authorizing the City Manager to enter into contract with Newcomer Concrete in the amount of \$238,975.00 for the 2024 Sidewalk Maintenance Program. On Friday, May 31, 2024, the City received bids for the project from two contractors. The results are summarized below:

Contractor	Base Bid	Alternate 1
Newcomer Concrete	\$210,750.00	\$6,500
Decker Construction	\$297,543.25	\$14,700.00
Engineer's Estimate	\$216,725.00	\$10,000.00

Staff recommends awarding both the base bid and alternate 1. Newcomer Concrete had the lowest and best bid of \$210,750 for the base bid and \$6,500 for alternate 1. Including 10% for contingency, the total contract amount for the base bid and alternate 1 is \$238,975.00. The 2024 budget for this project is \$273,000, therefore the project came in \$34,025 below budget.

The 2024 Sidewalk Maintenance Program addresses sidewalk in need of maintenance and repair in District 5. District 5 is the northern portion of the city north of McCoy Road and west of Reed Road, as shown in the exhibit below.





In March 2024, residents within this district received notices from the City if sidewalks adjacent to their property were in need of repair or replacement (see attached notification letter). An aerial view of their property was provided, indicating the location of the damage and whether the responsibility was of the property owner or of the City to make necessary repairs. Where repairs or replacements are the responsibility of the property owner, the City asks for the repairs to be made by July 1st, 2024. If the property owner does not make the repairs, the City will proceed by sending a follow-up notification with costs for the City to make the repairs based on the actual bid. The cost is \$245 per 4" depth sidewalk panel and \$270 per 6" depth sidewalk panel (note: 6" depth sidewalk panels are used on driveway approaches). Upon completion of the project, the property owner will be billed for the completed work, around January 2025. (Note: per code section 901.03, if the owner fails to pay the bill within thirty (30) days of the date on the City's bill, the rate shall be charged against the real estate upon which the sidewalk is located and shall be a lien upon such real estate).

Following the City's process and to save resources from re-inspecting the entire sidewalk after July 1st, the City bid out all of the resident responsibility portions of sidewalk, which is approximately \$175,710 of the total contract cost. The remaining portion of the contract, \$41,540, are sidewalks that are the City's responsibility to repair.

History

The City of Upper Arlington's public right-of-way Sidewalk Inspection Program 1st round began in 2018 with zone 5 and was completed with zone 1 in 2022. The 2024 Sidewalk Maintenance Program marks the second round of the 5-year program cycle. During the original 5-year cycle the programs annual budget was approximately \$700,000. Original projections assumed that, after completing the entire 5-year cycle, future budget needs would be reduced due to less sidewalk needing to be replaced. Past projections estimated budget needs to be approximately \$200,000 in 2024 and



beyond. Subsequent inspections have identified that budget needs are higher than anticipated with full replacement of all panels estimated to cost approximately \$330,000.

In an effort to reduce costs, staff has worked to identify sidewalk panels whose defects can be fixed by alternate methods to replacement. Staff originally put this program out to bid in early May, including alternate repair methods, and received bids that were over budget. In an effort to produce a project within the established budget, the project scope was reduced to only sidewalk panels that needed to be completely replaced. Sidewalk panels which can be remedied via sidewalk leveling or grinding have been removed from this program to be bid out at a later date or upon re-inspection.

Alternatives

An alternative is that the City can choose to not authorize the City Manager to enter into contract with Newcomer Concrete for this project. This would delay identified maintenance repairs that could negatively impact public safety.

Attachments

1.	Ordinance No. 49-2024
----	-----------------------



RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 49-2024

TO AUTHORIZE THE CITY MANAGER TO ENTER INTO CONTRACT WITH NEWCOMER CONCRETE FOR THE 2024 SIDEWALK MAINTENANCE PROGRAM

WHEREAS, the 2024 Sidewalk Maintenance Program addresses sidewalks in need of maintenance and repair in District 5, which is the northern portion of the City, north of McCoy Rd. and west of Reed Rd.; and

WHEREAS, on May 31, 2024, the City received bids for the project, with results summarized below; and

Contractor	Base Bid	Alternate 1
Newcomer Concrete	\$210,750.00	\$6,500.00
Decker Construction	\$297,543.25	\$14,700.00
Engineer's Estimate	\$216,725.00	\$10,000.00

WHEREAS, Newcomer Concrete had the lowest and best bid of \$210,750.00 and Alternate 1 option of \$6,500.00; and

WHEREAS, it is therefore recommended that the City Manager be authorized to enter into contract with Newcomer Concrete for the 2024 Sidewalk Maintenance Program, for an amount not to exceed \$238,975.00, which includes a 10-percent contingency.

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

SECTION 1. The City Manager is hereby authorized to enter into contract with Newcomer Concrete for the 2024 Sidewalk Maintenance Program, for an amount not to exceed \$238,975.00, which includes a 10-percent contingency.

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

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

Monthly Financial Report As of May 2024

General Fund (101)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Income Tax	\$ 32,096,900	\$ 33,317,200	\$ 15,683,839	\$ 15,475,970	\$ (207,869)	-1.33%
Real & Personal Property Tax	8,863,000	9,977,100	5,468,363	5,468,363	-	0.00%
All Other Operating Revenues	9,238,970	9,394,070	4,217,075	5,356,914	1,139,839	27.03%
Transfers/Advances In	3,235,500	3,235,500	756,240	756,240	-	0.00%
Total Revenues and Other Sources	53,434,370	55,923,870	26,125,517	27,057,487	931,970	3.57%
Obligations:						
Police Division	11,714,300	11,714,300	5,739,721	5,695,019	44,702	0.78%
Fire Division	11,669,300	11,669,300	4,974,208	4,529,164	445,044	8.95%
Board of Health	388,600	388,600	386,579	386,579	-	0.00%
Parks and Recreation	5,834,500	5,834,500	2,723,938	2,629,612	94,326	3.46%
Community Development	1,531,000	1,531,000	884,917	805,974	78,943	8.92%
Public Service Administration	1,260,600	1,260,600	567,250	562,874	4,376	0.77%
Public Works	1,483,200	1,483,200	556,200	447,691	108,509	19.51%
City Manager	1,917,600	1,917,600	918,100	825,730	92,370	10.06%
City Attorney	934,200	934,200	407,325	337,874	69,451	17.05%
City Clerk	304,000	304,000	120,333	107,744	12,589	10.46%
City Council	150,800	150,800	75,400	74,904	496	0.66%
Finance	1,490,600	1,490,600	716,083	664,502	51,581	7.20%
Facilities Maintenance	3,068,400	3,068,400	928,100	750,903	177,197	19.09%
Information Technology	1,931,200	1,931,200	919,527	843,161	76,366	8.30%
General Administration	3,490,000	3,490,000	1,751,167	1,724,860	26,307	1.50%
Transfers/Advances Out	4,174,200	4,174,200	-	-	-	0.00%
Total Obligations	51,342,500	51,342,500	21,668,848	20,386,591	1,282,257	5.92%
Excess of Revenue and Other Sources over Obligations:	2,091,870	4,581,370	4,456,669	6,670,896		
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	-	-		
Total Ending Fund Balance	\$ 38,268,206	\$ 40,757,706	\$ 39,218,005	\$ 41,432,232	\$ 2,214,227	5.65%

Capital Asset Management Fund (102)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Income Tax	\$ 12,482,200	\$ 12,956,700	\$ 6,099,271	\$ 6,016,676	\$ (82,595)	-1.35%
Total Revenues and Other Sources	12,482,200	12,956,700	6,099,271	6,016,676	(82,595)	-1.35%
Obligations						
Transfers/Advances Out	9,776,200	9,776,200	-	-	-	0.00%
Total Obligations	9,776,200	9,776,200	-	-	-	0.00%
Excess of Revenue and Other Sources over Obligations:	2,706,000	3,180,500	6,099,271	6,016,676		
Beginning Fund Balance	20,368,117	20,368,117	20,368,117	20,368,117		
Ending Fund Balance	\$ 23,074,117	\$ 23,548,617	\$ 26,467,388	\$ 26,384,793	\$ (82,595)	-0.31%

Monthly Financial Report As of May 2024

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	\$ 1,127,730	\$ 1,279,960	\$ 639,980	\$ 695,804	\$ 55,824	0.00%
Homestead & Rollbacks	150,270	170,140	85,070	85,030	(40)	0.00%
Transfers In	240,000	240,000	-	-	-	0.00%
Total Revenues and Other Sources	1,518,000	1,690,100	725,050	780,834	55,784	0.00%
<u>Obligations</u>						
Capital Equipment	1,311,900	1,311,900	943,191	943,191	-	0.00%
Total Obligations	1,311,900	1,311,900	943,191	943,191	-	0.00%
Excess of Revenue and Other Sources over Obligations:	206,100	378,200	(218,141)	(162,357)		
Beginning Fund Balance	867,861	867,861	867,861	867,861		
Ending Fund Balance	\$ 1,073,961	\$ 1,246,061	\$ 649,720	\$ 705,504	\$ 55,784	8.59%

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	\$ 756,518	\$ 736,906	\$ (19,612)	-2.59%
Motor Vehicle License Taxes	450,000	450,000	176,156	194,339	18,183	10.32%
All Other Operating Revenues	23,000	23,000	13,916	30,329	16,413	117.94%
Total Revenues and Other Sources	2,273,000	2,273,000	946,590	961,574	14,984	1.58%
<u>Obligations</u>						
Public Service Administration	883,000	883,000	349,521	308,445	41,076	11.75%
Public Works	1,463,700	1,463,700	732,888	645,242	87,646	11.96%
Total Obligations	2,346,700	2,346,700	1,082,409	953,687	128,722	11.89%
Excess of Revenue and Other Sources over Obligations:	(73,700)	(73,700)	(135,819)	7,887		
Beginning Fund Balance	1,654,072	1,654,072	1,654,072	1,654,072		
Ending Fund Balance	\$ 1,580,372	\$ 1,580,372	\$ 1,518,253	\$ 1,661,959	\$ 143,706	9.47%

Bonded Improvement Fund (402)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
<u>Revenues and Other Sources</u>						
All Other Operating Revenues	600,000	600,000	600,000	1,530,531	930,531	155.09%
Total Revenues and Other Sources	600,000	600,000	600,000	1,530,531	930,531	155.09%
<u>Obligations</u>						
Capital Improvements - CIP	13,605,700	13,605,700	12,764,121	12,764,121	-	0.00%
Total Obligations	13,605,700	13,605,700	12,764,121	12,764,121	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(13,005,700)	(13,005,700)	(12,164,121)	(11,233,590)		
Beginning Fund Balance	18,241,845	18,241,845	18,241,845	18,241,845		
Ending Fund Balance	\$ 5,236,145	\$ 5,236,145	\$ 6,077,724	\$ 7,008,255	\$ 930,531	15.31%

Monthly Financial Report As of May 2024

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	\$ 7,937,000	\$ 7,937,000	\$ 925,983	\$ 752,374	\$ (173,609)	-18.75%
Transfers In	3,250,000	3,250,000	-	-	-	0.00%
Total Revenues and Other Sources	11,187,000	11,187,000	925,983	752,374	(173,609)	-18.75%
<u>Obligations</u>						
Capital Improvements - CIP	12,308,400	12,308,400	9,409,325	9,409,325	-	0.00%
Capital Improvements - Community Center/Office	2,800,000	2,800,000	615,864	615,864	-	0.00%
Total Obligations	15,108,400	15,108,400	10,025,189	10,025,189	-	0.00%
Excess of Revenue and Other Sources over Obligations:	(3,921,400)	(3,921,400)	(9,099,206)	(9,272,815)		
Beginning Fund Balance	11,601,775	11,601,775	11,601,775	11,601,775		
Ending Fund Balance	\$ 7,680,375	\$ 7,680,375	\$ 2,502,569	\$ 2,328,960	\$ (173,609)	-6.94%

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	\$ 3,800,000	\$ 3,800,000	\$ 1,863,035	\$ 1,955,812	\$ 92,777	4.98%
All Other Operating Revenues	151,250	151,250	69,736	78,291	8,555	12.27%
Total Revenues and other sources	3,951,250	3,951,250	1,932,771	2,034,103	101,332	5.24%
<u>Obligations</u>						
Public Works	4,112,200	4,112,200	1,857,998	1,828,239	29,759	1.60%
Total Obligations	4,112,200	4,112,200	1,857,998	1,828,239	29,759	1.60%
Excess of Revenue and Other Sources over Obligations:	(160,950)	(160,950)	74,773	205,864		
Beginning Fund Balance	1,449,715	1,449,715	1,449,715	1,449,715		
Ending Fund Balance	\$ 1,288,765	\$ 1,288,765	\$ 1,524,488	\$ 1,655,579	\$ 131,091	8.60%

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	\$ 792,000	\$ 792,000	\$ 301,345	\$ 380,601	\$ 79,256	26.30%
Total Revenues and other sources	792,000	792,000	301,345	380,601	79,256	26.30%
<u>Obligations</u>						
Public Works	442,300	442,300	150,575	127,020	23,555	15.64%
Capital Improvements	452,000	498,000	497,805	497,805	-	0.00%
Transfers Out (including intra-city services)	100,000	100,000	3,106	3,106	-	0.00%
Total Obligations	994,300	1,040,300	651,486	627,931	23,555	3.62%
Excess of Revenue and Other Sources over Obligations:	(202,300)	(248,300)	(350,141)	(247,330)		
Beginning Fund Balance	1,771,114	1,771,114	1,771,114	1,771,114	-	
Ending Fund Balance	\$ 1,568,814	\$ 1,522,814	\$ 1,420,973	\$ 1,523,784	\$ 102,811	7.24%

Monthly Financial Report As of May 2024

Sanitary Sewer Surcharge Fund (730)

	Original Budget	Amended Budget	Projected To Date	Actual	Dollar Variance	Percentage Variance
Revenues and Other Sources						
Charges for Services	\$ 1,175,000	\$ 1,175,000	\$ 470,133	\$ 633,739	\$ 163,606	34.80%
All Other Operating Revenues	1,500	1,500	1,581	1,581	-	0.00%
Total Revenue	1,176,500	1,176,500	471,714	635,320	163,606	34.68%
Obligations						
Public Works	934,700	934,700	430,615	423,180	7,435	1.73%
Capital Improvements	630,000	630,000	-	-	-	0.00%
Capital Equipment	347,500	347,500	56,656	56,656	-	0.00%
Transfers Out (including intra-city services)	27,600	27,600	13,491	13,491	-	0.00%
Total Obligations	1,939,800	1,939,800	500,762	493,327	7,435	1.48%
Excess of Revenue and Other Sources over Obligations:	(763,300)	(763,300)	(29,048)	141,993		
Beginning Fund Balance (**)	3,007,693	3,007,693	3,007,693	3,007,693		
Ending Fund Balance	\$ 2,244,393	\$ 2,244,393	\$ 2,978,645	\$ 3,149,686	\$ 171,041	5.74%

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	\$ 377,013	\$ 386,232	\$ 9,219	2.45%
Investment Earnings	40,000	40,000	40,000	45,001	5,001	12.50%
Miscellaneous income	-	-	-	62	62	100.00%
Total Revenues and other sources	793,000	793,000	417,013	431,295	14,282	3.42%
Obligations						
Public Works	719,400	719,400	273,577	255,750	17,827	6.52%
Capital Equipment	287,500	287,500	-	-	-	0.00%
Transfers Out (including intra-city services)	77,700	77,700	5,287	5,287	-	0.00%
Total Obligations	1,084,600	1,084,600	278,864	261,037	17,827	6.39%
Excess of Revenue and Other Sources over Obligations:	(291,600)	(291,600)	138,149	170,258		
Beginning Fund Balance (**)	2,565,637	2,565,637	2,565,637	2,565,637		
Ending Fund Balance	\$ 2,274,037	\$ 2,274,037	\$ 2,703,786	\$ 2,735,895	\$ 32,109	1.19%

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	\$ 454,097	\$ 487,455	\$ 33,358	7.35%
Total Revenues and other sources	1,013,800	1,013,800	454,097	487,455	33,358	7.35%
Obligations						
Parks and Recreation	1,054,700	1,054,700	251,362	232,802	18,560	7.38%
Total Obligations	1,054,700	1,054,700	251,362	232,802	18,560	7.38%
Excess of Revenue and Other Sources over Obligations:	(40,900)	(40,900)	202,735	254,653		
Beginning Fund Balance	344,087	344,087	344,087	344,087		
Ending Fund Balance	\$ 303,187	\$ 303,187	\$ 546,822	\$ 598,740	\$ 51,918	9.49%

Monthly Financial Report As of May 2024

Statement of Receipts and Disbursements (cash basis rounding)

Fund	Beginning Balance	Year to Date & Transfer In	Year to Date & Transfer Out	Ending Balance	Percentage Change
General	\$ 37,085,663	\$ 27,057,487	\$ 19,425,917	\$ 44,717,233	20.6%
Capital Asset Management	20,368,117	6,016,676	-	26,384,793	29.5%
Police Pension	1,167,500	468,500	141,946	1,494,054	28.0%
Fire Pension	1,167,500	468,500	141,946	1,494,054	28.0%
Self Insurance	1,003,601	48,057	13,546	1,038,112	3.4%
Capital Equipment	2,129,559	780,834	1,377,183	1,533,210	-28.0%
Police & Fire Pension	1,736,091	794,878	472,348	2,058,621	18.6%
Technology Fund	530,105	49,081	75,782	503,404	-5.0%
Tax Incentive Review Fund	1,270	-	-	1,270	0.0%
Street Maintenance and Repair Fund	1,795,847	961,574	898,670	1,858,751	3.5%
EMS Billing Fund	701,619	121,736	81,188	742,167	5.8%
Law Enforcement	453,163	75,240	104,653	423,750	-6.5%
Tree Planting Fund	49,640	35,590	-	85,230	71.7%
Enforcement Education	20,849	310	154	21,005	0.7%
Mayor's Court Computer	40,010	2,793	-	42,803	7.0%
Mayor's Court Special Project	156,791	9,300	-	166,091	5.9%
Local Fiscal Recovery Fund	2,450,228	-	-	2,450,228	0.0%
OneOhio Opioid Fund	53,506	3,815	3,351	53,970	0.9%
Economic Development	1,860,151	-	5,300	1,854,851	-0.3%
Arlington Centre TIF Fund	142,294	12,462	141	154,615	8.7%
Tremont Road TIF Fund	15,415	-	-	15,415	0.0%
Lane Avenue Mixed Use TIF Fund	638,001	728,213	325,355	1,040,859	63.1%
Lane Avenue TIF Fund	443,876	46,977	530	490,323	10.5%
Arlington Crossing TIF Fund	1,359,099	72,514	1,313	1,430,300	5.2%
Horizon TIF Fund	1,331,468	261,927	6,155	1,587,240	19.2%
Kingsdale West TIF Fund	439,920	40,046	452	479,514	9.0%
Kingsdale CORE TIF Fund	823,957	515,875	291,214	1,048,618	27.3%
Civil Service	72,800	-	8,840	63,960	-12.1%
Riverside North TIF Fund	18,976	1,399	16	20,359	7.3%
Riverside South TIF Fund	281,445	21,704	245	302,904	7.6%
W. Lane Northwest TIF Fund	17,157	-	-	17,157	0.0%
Lane II TIF Fund	1,188,865	645,335	126,598	1,707,602	43.6%
Kingsdale Center TIF Fund	756,632	542,956	755,417	544,171	-28.1%
Gateway TIF Fund	21,561	221,663	90	243,134	1027.7%
Neighborhood Lighting Utility	282,103	36,587	14,482	304,208	7.8%
Clerk of Courts Fund	20,135	2,793	4,360	18,568	-7.8%
UA Visitor's Bureau Fund	531,953	48,379	-	580,332	9.1%
General Bond Retirement	2,605,287	4,417	112,941	2,496,763	-4.2%
Bonded Improvements	65,561,099	1,530,531	23,190,059	43,901,571	-33.0%
Infrastructure Improvement Fund	24,655,170	752,374	2,150,756	23,256,788	-5.7%
Estate Tax Fund	25,373	-	22,761	2,612	-89.7%
Community Fiber Optic Fund	345,281	195,516	18,146	522,651	51.4%
Employee Benefit	1,434,410	2,445,456	2,500,151	1,379,715	-3.8%
BWC Administration Fund	1,216,593	140,271	114,137	1,242,727	2.1%
Solid Waste Management	1,793,773	2,034,103	1,653,252	2,174,624	21.2%
Water Surcharge	1,896,891	380,601	105,909	2,171,583	14.5%
Sanitary Sewer Surcharge	3,065,235	635,320	432,142	3,268,413	6.6%
Stormwater Management	3,295,610	431,295	461,063	3,265,842	-0.9%
UA Swimming Pools	363,048	487,455	154,099	696,404	91.8%
Unclaimed Funds	7,814	201	-	8,015	2.6%
Revolving Fund	39,331	634,088	539,041	134,378	241.7%
Construction Withholding	2,091,712	1,645,922	1,308,308	2,429,326	16.1%
Payroll Clearing Fund	557,720	16,748,348	16,777,367	528,701	-5.2%
Totals (ROUNDED)	\$ 190,111,214	\$ 68,159,100	\$ 73,817,325	\$ 184,452,989	ROUNDED TOTALS

Monthly Financial Report As of May 2024

Income Tax Comparisons

	Projections	Year to date	Difference	% Difference
Withholdings	\$ 13,851,715	\$ 14,767,836	\$ 916,121	6.61%
Individuals	4,906,426	4,434,376	(472,050)	-9.62%
Net Profits	3,058,024	2,290,434	(767,590)	-25.10%
Total	\$ 21,816,165	\$ 21,492,646	\$ (323,519)	-1.48%

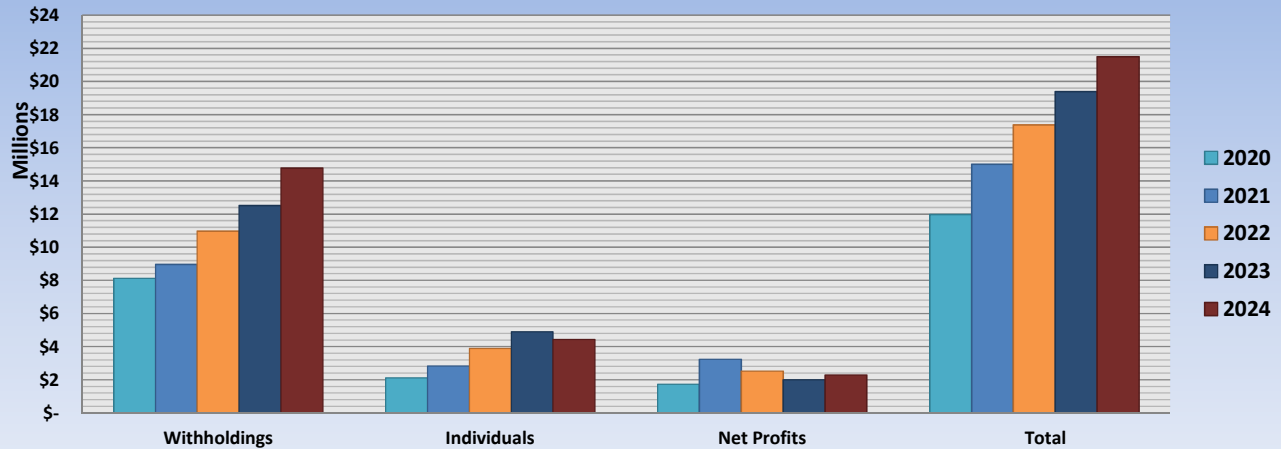
Income Tax Five Year Comparison

	2020	2021	2022	2023	2024
Withholdings	\$ 8,113,954	\$ 8,956,053	\$ 10,970,787	\$ 12,513,016	\$ 14,767,836
Individuals	2,122,111	2,824,452	3,894,305	4,890,766	4,434,376
Net Profits	1,736,358	3,234,294	2,515,715	1,988,936	2,290,434
Total	\$ 11,972,423	\$ 15,014,799	\$ 17,380,807	\$ 19,392,718	\$ 21,492,646

Percentage Increase (Decrease) From Prior Year

	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Withholdings	9.56%	10.38%	22.50%	14.06%	18.02%
Individuals	-36.30%	33.10%	37.88%	25.59%	-9.33%
Net Profits	5.58%	86.27%	-22.22%	-20.94%	15.16%
Total	-3.31%	25.41%	15.76%	11.58%	10.83%

Income Tax Five Year Trend vs Prior YTD Monthly



Interest & Investment Income

May-24

General Investments	Beginning Balance	Purchased	Matured/Sold	Deposited/Withdrawn	Investment Acct.	Ending Balance
Municipal Securities	1,929,046.00					\$ 1,929,046.00
Corporate / General Investments	11,760,691.18					\$ 11,760,691.18
Federal Agency	45,933,168.77	1,311,297.00				\$ 47,244,465.77
United States Treas NTS	14,935,985.37		(677,031.25)			\$ 14,258,954.12
Total Bonds	\$ 74,558,891.32	\$ 1,311,297.00	\$ (677,031.25)	\$ -	\$ -	\$ 75,193,157.07
Short Term Fixed Maturity Commercial Paper	7,050,835.66	720,743.33	(957,641.11)			\$ 6,813,937.88
Other Assets (Savings Cert - Market Traded)	\$ 3,196,847.55		(248,190.75)			\$ 2,948,656.80
Bond and Investments:						
2022						
Federal Agency	4,237,677.33					\$ 4,237,677.33
Corporate / General Investments	1,057,111.00					\$ 1,057,111.00
Short Term Fixed Maturity Commercial Paper	-					\$ -
United States Treas NTS	803,115.94		(577,328.44)			\$ 225,787.50
Community Center						
Federal Agency	12,716,349.71		(2,603,994.47)			\$ 10,112,355.24
US Government Bonds	3,067,415.82					\$ 3,067,415.82
Total Bonds & Investments	\$ 106,688,244.33	\$ 2,032,040.33	\$ (5,064,186.02)	\$ -	\$ -	\$ 103,656,098.64
Money Markets:						
General	69,204.03	(2,032,040.33)	1,889,715.33	(5,944.36)	212,195.63	\$ 133,130.30
Community Center	800,982.85		2,605,000.00	(2,605,000.00)	84,296.34	\$ 885,279.19
Bond 2020 & 2022	568,692.58		596,000.00	(596,000.00)	20,470.62	\$ 589,163.20
Total Money Markets	\$ 1,438,879.46	\$ (2,032,040.33)	\$ 5,090,715.33	\$ (3,206,944.36)	\$ 316,962.59	\$ 1,607,572.69
Star Ohio:						
General Investment	37,043,262.33			3,889,014.41	201,654.89	\$ 41,133,931.63
Bond Proceeds	13,962,537.28			(182,993.61)	63,842.50	\$ 13,843,386.17
Federal ARPA (Gen. Inv.)	2,306,354.54			(10,321.86)	10,631.37	\$ 2,306,664.05
Gateway	987,589.93				4,564.92	\$ 992,154.85
Kingsdale	225,413.16			(1,583.50)	1,037.44	\$ 224,867.10
Community Center	12,993,364.50			(4,791,806.05)	48,423.18	\$ 8,249,981.63
Office (Comm. Center)	7,138,082.28			(1,301,309.39)	29,307.14	\$ 5,866,080.03
Total STAR Ohio	\$ 74,656,604.02	\$ -	\$ -	\$ (2,399,000.00)	\$ 359,461.44	\$ 72,617,065.46
Total Investments	\$ 182,783,727.81	\$ -	\$ 26,529.31	\$ (5,605,944.36)	\$ 676,424.03	\$ 177,880,736.79
NW Huntington Bank	\$ 2,033,720.80					\$ 6,572,257.59
Total Cash & Investments	\$ 184,817,448.61					\$ 184,452,994.38

ITEMS PURCHASED BETWEEN \$25,000 & \$150,000 MAY 2024

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
5-7-24	Clark, Schaefer, Hackett & Co.	2023 Year End Audit	\$31,080.00
5-13-24	Lindsay Honda	Police Unmarked Car	\$32,455.00
5-24-24	Cargill	Road Salt	\$83,592.00
5-30-24	Priscilla Dobies	Fire Safety Consulting	\$25,000.00

QUALITY BASED SELECTION CONSULTANTS – MAY 2024

<u>DATE</u>	<u>VENDOR</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>

NOTIFICATION OF CHANGE ORDERS: NON-CONSTRUCTION, CITY MANAGER APPROVAL MAY 2024

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

GRANTS MAY 2024

<u>DATE</u>	<u>ORGANIZATION</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
5-16-2024	Common Greens	Facilitate Farmer's Market	\$8,000.00

Authors:	Steven Schoeny, City Manager
Council Meeting Date:	June 17, 2024
Subject/Legislative Item:	Ordinance No. 38-2024 - An ordinance amending §525.01 - Definitions and §525.02 - Unlawful Discriminatory Practices of the Upper Arlington Code of Ordinances (<i>Adams</i>)
Purpose:	To add source of income protections to the City's non-discrimination code
Executive Summary:	Ordinance to expand the City's prohibited discriminatory practices to include source of income in housing.

Purpose and Impact

The proposed legislation updates Section 525 - Unlawful Discriminatory Practices of the Upper Arlington Code of Ordinances to prohibit discrimination in housing on the basis of source of income. The legislation defines source of income as: "PAYMENTS FROM A LAWFUL OCCUPATION OR EMPLOYMENT, AS WELL AS OTHER SUBSTANTIATED AND VERIFIED PAYMENTS INCLUDING BUT NOT LIMITED TO SUPPLEMENTAL SECURITY INCOME, GOVERNMENT SUBSIDIES, AND SPOUSAL AND CHILD SUPPORT." The legislation then includes source of income as one of the prohibited reasons to refuse to lease or rent any real property, along with status within a protected class.

Source of income protection as provided in the legislation prohibits landlords from discriminating against renters who rely on substantiated and verified payments in the credit check process to obtain housing. Neither State nor Federal law provides protection for renters who rely upon Social Security, child or spousal support, Veterans benefits, Supplemental Security Income (SSI), or other government payments. With no protection, residents and potential residents of Upper Arlington can be denied housing despite having otherwise acceptable credit and rental histories. A complete Frequently Asked Questions document highlighting the numbers of residents who rely on such sources of income is attached to this staff report.

History

Upper Arlington has had protections against unlawful discriminatory practices for several decades. The code was most recently updated in 2021 to amend the enforcement mechanism under the code, provide an opportunity for parties to mediate disputes, and

include protections based on gender and sexual orientation. The City has not previously considered source of income protections.

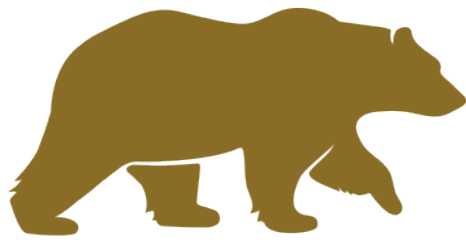
Alternatives

This protection does not exist today, and Council could choose to maintain the status quo.

Attachments

1.	UA Source of Income FAQ
2.	Ordinance No. 38-2024
3.	Ordinance No. 38-2024 Exhibit A- UNLAWFUL DISCRIMINATORY PRACTICES
4.	Proposed Amendment - Ordinance No. 38-2024 EXHIBIT A





City of Upper
Arlington®

PROPOSED SOURCE OF INCOME ANTI-DISCRIMINATION LEGISLATION ANSWERS TO FREQUENTLY ASKED QUESTIONS

What is *Source of Income (SOI) Discrimination*?

Source of income discrimination is a landlord's refusal to accept various lawful, verifiable source(s) of income as part of the process for determining a person's eligibility as a prospective tenant. Typically, almost all landlords will accept wage income. However, some will exclude legal, verifiable income like child support, spousal support, or loan programs, as well as federal, state, or local assistance payments, benefits, or subsidy programs.

Why is SOI legislation needed?

Source of income discrimination by landlords is *not* prohibited under the Federal Fair Housing Act of 1968 or Ohio fair housing laws. A study conducted by Franklin County Office of Justice Policy & Programs found that discrimination based on source of income is widespread in Franklin County. In their study, **35 landlords in total responded from UA's three zip codes—43221, 43220, and 43212**. Of the 35:

- 18 (51.4%) do not accept any source of income outside of employment
- 21 (60%) do not accept social security
- 27 (77%) do not accept child support

Who could be impacted by this in Upper Arlington?

Renters who rely on:

- **Social Security for older adults (over 65)**
19% of renters are older adults, despite making up 16.4% of the UA population
- **Supplemental Security Income (SSI) for individuals with disabilities**
144 households in Upper Arlington received Supplemental Security Income
- **Veterans benefits**
1,201 Veterans live in Upper Arlington; of those, 561 are reported to have a disability
- **Children**
1,195 children in UA live in single-parent households; a significant portion of those households likely rely on some form of child or spousal support

Why pass SOI non-discrimination legislation in Upper Arlington?

Having source of income protection treats everyone equally, regardless of age or family make up. If you can afford a home, have good credit and a good rental history, you should have an equal playing field to rent your home. You should not be disadvantaged because you rely on Social Security, child support, Veterans benefits or some other verifiable and regular source of income.

Source of income protection is not new to Central Ohio. The cities of Columbus, Bexley, Worthington, Grandview Heights, Gahanna, Reynoldsburg and Whitehall already have SOI protections. In fact, SOI protection has become so common that real estate search sites like Zillow list SOI protection as part of their community profile information.

Statistics show that the legislation works to reduce discrimination. HUD reports that without source of income protection, prospective tenants are denied rentals at a rate of 78%. With source of income protection, that rate falls below 15% on average.

Why don't landlords already accept these other legal forms of income?

Data indicates that many Upper Arlington landlords do accept other legal forms of income. The vast majority of landlords are good actors providing an absolutely vital service to the community, and follow federal, state and local laws. Sometimes, it takes a change in the law to overcome the inertia of "this is how we have always done it" or to demonstrate a shift in community values. This is why protecting a tenant's right to qualify for a rental home based on any legal and verifiable source of income they receive is critical.

Some general concerns and opinions typical of landlords include:

Concern: As a small-business owner, landlords should be able to choose their customers without oversight.

Response: As a business owner, landlords can—and should—continue to exercise lawful discretion when screening residents. Source of Income does not prohibit landlords from refusing to rent to individuals with poor credit, poor housing backgrounds, insufficient income, or other known risks. All it does is broaden the types of income you must consider, without looking at an applicant's individual circumstances.

Concern: Some landlords have concerns about renting to families with children, due to a perceived potential for increased noise and impacts on other tenants, and believe that there may be an increased risk for damage to their property.

Response: Familial status discrimination has been illegal under the Fair Housing Act since its amendment in 1988. Housing providers should seek the "housing for older persons" exemption if they intend to operate senior housing.

Concern: Non-wage-earning tenants won't be a good fit for the neighborhood or the community.

Response: Different sources of income are not a reliable means for determining a person's suitability as a renter. Various circumstances of hardship could cause a person

to require financial assistance at some point in their life – such as an injury, a death in the family, or a divorce.

Will source of income non-discrimination legislation bring Section 8 project housing to Upper Arlington?

No. Section 8 project housing relates to the development of affordable housing units in which Section 8 funds are stacked with other sources to finance the development. This is completely unrelated to a landlord or property manager’s decision to rent a unit to a tenant who is using a legal source of income to qualify for a unit.

In Upper Arlington, current and market rental rates for most rental homes exceed the rent limits that are the payment standards for individuals who hold a Housing Choice Voucher (tenant-based). It is unlikely that a voucher holder could apply for a unit in Upper Arlington unless the landlord were willing to lower the monthly rent and utility calculation to fall within the payment standard.

If a landlord has an available unit within the payment standard price point and a prospective tenant with a housing choice voucher applies and qualifies for the unit through that landlord’s application process, the landlord would then submit the unit to CMHA for an inspection. There are community resources available to provide landlords with technical assistance in navigating this process.

The following table shows current Fair Market Rents in Franklin County used to determine eligibility for housing vouchers:

Payment Standards for Housing Choice Vouchers Columbus & Franklin County	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
FY 2024	\$1,278	\$1,562	\$1,888	\$2,094

The following table shows 2024 median rents at market rate for 1, 2 and 3 bedrooms in Upper Arlington as of April 2024:

At Market Rate Sourced from Zillow	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Upper Arlington	\$1,595	\$1,600	\$2,650	\$3,275

How would the enforcement mechanism work?

Upper Arlington already has a non-discrimination ordinance in place. This legislation is an amendment to the current ordinance. Any person who believes they have been discriminated against may complete the City's [Discrimination Complaint Form](#).

When the City receives a complaint, the City follows the process outlined in municipal code [525.02 \(K\): Complaint procedure](#). In general, the City begins the process by offering mediation services contracted through an independent mediator, with the costs covered by the City. If the parties are unable to resolve the matter or if mediation services are declined, the City appoints a hearing officer, and an administrative hearing is conducted with the hearing officer providing a final decision and recommendation. This decision may be appealed pursuant to the provisions of ORC Ch. 2506.

RECORD OF ORDINANCES

CITY OF UPPER ARLINGTON
STATE OF OHIO

ORDINANCE NO. 38-2024

TO AMEND §525.01 – DEFINITIONS AND §525.02 – UNLAWFUL DISCRIMINATORY PRACTICES OF THE UPPER ARLINGTON CODE OF ORDINANCES

- WHEREAS,** the City has had protections against unlawful discriminatory practices for several decades, which were most recently updated in 2021 to amend the enforcement mechanism under the code, provide an opportunity for parties to mediate disputes, and include protections based on gender and sexual orientation; and
- WHEREAS,** source of income protection measures prevent landlords from discriminating against tenants who rely on substantiated and verified payments in the credit screening process for obtaining housing; and
- WHEREAS,** neither state nor federal laws provide protection for tenants who rely upon Social Security, child or spousal support, Veterans Benefits, Supplemental Security Income, or other government payments; and
- WHEREAS,** with no protection, current residents and potential residents of Upper Arlington can be denied housing despite having otherwise acceptable credit and rental histories; and
- WHEREAS,** this Council aims to uphold and enrich an inclusive environment where every individual feels welcomed and valued.

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

SECTION 1. Sections 525.01 and 525.02 of Chapter 525 – Unlawful Discriminatory Practices of the Upper Arlington Code of Ordinances are hereby amended as described in EXHIBIT A, attached hereto and made a part herein.

SECTION 2. This ordinance shall take effect 30 days after passage.

§ 525.01 DEFINITIONS.

As used in this chapter:

- (A) *Person*: includes one (1) or more individuals, partnerships, associations, organizations, corporations, legal representatives, trustees, trustees in bankruptcy, receivers and other organized groups of persons. It also includes, but is not limited to, any employee, lending institution; and the state, and all political subdivisions, authorities, agencies, boards and commissions thereof.
- (B) *Employer*: any person or entity employing four (4) or more persons within the state, and any person acting in the interest of an employer, directly or indirectly.
- (C) *Employee*: does not include any individual employed in the domestic service of any person.
- (D) *Labor organization*: includes any organization which exists for the purpose, in whole or in part, of collective bargaining or of dealing with employers concerning grievances, terms or conditions of employment or for other mutual aid or protection in relation to employment.
- (E) *Employment agency*: includes any person regularly undertaking with or without compensation to procure opportunities to work or to procure, recruit, refer or place employees.
- (F) *Discriminate*: to treat a person differently, or less favorably. Providing a reasonable accommodation to address a disability does not constitute discrimination.
- (G) *Unlawful discriminatory practice*: means any act prohibited by this chapter.
- (H) *Place of public accommodation*: means any inn, restaurant, eating house, barbershop, public conveyance by air, land or water, theater, store or other place for the sale of merchandise or any other place of public accommodation or amusement where the accommodation, advantages, facilities or privileges thereof are available to the public.
- (I) *Housing accommodations*: include any building or structure or portion thereof which is used or occupied or is intended, arranged or designed to be used or occupied as the home residence or sleeping place of one (1) or more individuals, groups or families whether or not living independently of each other; and any vacant land offered for sale or lease.

It also includes any housing accommodations held or offered for sale or rent by a real estate broker, salesman or agent, or by any other person pursuant to authorization of the owner, by the owner or by a legal representative.
- (J) *Restrictive covenant*: means any specification limiting the transfer, rental, lease or other use of any housing because of race, color, religion, national origin or ancestry, or any limitation based upon affiliation with or approval by any person, directly or indirectly, employing race, color, religion, national origin or ancestry as a condition of affiliation or approval.
- (K) *Burial lot*: means any lot for the burial of deceased persons within any public burial ground or cemetery, including but not limited to, cemeteries owned and operated by municipal corporations, townships or companies or associations incorporated for cemetery purposes.
- (L) *Protected class*: classification of individuals based on one (1) or more of the following characteristics: race, color, religion, sex, military or veteran status, national origin, age, ancestry, familial status, disability, sexual orientation, gender identity, or gender expression or any class of people designated as a protected class by state or federal law.
- (M) *Religious exemption*: includes the religious exemptions for hiring and housing provided by ORC 4112.02 and 4112.024 and exceptions established in C.O. § 525.03.

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- (N) SOURCE OF INCOME: PAYMENTS FROM A LAWFUL OCCUPATION OR EMPLOYMENT, AS WELL AS OTHER SUBSTANTIATED AND VERIFIED PAYMENTS INCLUDING BUT NOT LIMITED TO SUPPLEMENTAL SECURITY INCOME, GOVERNMENT SUBSIDIES, AND SPOUSAL AND CHILD SUPPORT.

(Ord. No. 50-2021 , § 1, 6-28-2021)

§ 525.02 UNLAWFUL DISCRIMINATORY PRACTICES.

Absent a religious exemption, it shall be an unlawful discriminatory practice:

- (A) For any employer to refuse to hire or otherwise to discriminate against any person based on a protected class with respect to hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment.
- (B) For an employment agency, based on a protected class to:
 - (1) Refuse or fail to accept, register, classify properly or refer for employment, or otherwise to discriminate against any person.
 - (2) Comply with a request from an employer for referral of applicants for employment, if the request indicates directly or indirectly that the employer fails to comply with the provisions of ORC §§ 4112.01 to 4112.07, inclusive or of this chapter.
- (C) For any labor organization to:
 - (1) Limit or classify its membership on the basis of a protected class.
 - (2) Discriminate against any person or limit that person's employment opportunities, or otherwise adversely affect their status as an employee or wages, hours or employment conditions based on a protected class.
- (D) For any employer, labor organization or joint labor-management committee controlling apprentice training programs to discriminate against any person based on a protected class in admission to or employment in any program established to provide apprentice training.
- (E) Except where based on a bona fide occupational qualification certified in advance by the Ohio Civil Rights Commission, for any employer, employment agency or labor organization prior to employment or admission to membership, to:
 - (1) Use any form of application for employment or personnel or membership blank seeking to elicit information regarding race, color, religion, national origin or ancestry; but an employer holding a contract containing a non-discrimination clause with the government of the United States or any department or agency thereof, may require an employee or applicant for employment to furnish documentary proof of United States citizenship and may retain such proof in personnel records and may use photographic or fingerprint identification for security purposes.
 - (2) Print or publish or cause to be printed or published any notice or advertisement relating to employment or membership indicating any preference, limitation, specification or discrimination, based upon membership in a protected class.
 - (3) Announce or follow a policy of denying or limiting, through a quota system or otherwise, employment or membership opportunities of any group because of the race, color, religion, national origin or ancestry of such group.

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- (4) Utilize in the recruitment or hiring of persons any employment agency, placement service, training school or center, labor organization or any other employee-referring source known to such employer to discriminate against persons because of membership in a protected class.
- (F) For any proprietor or employee, keeper or manager of a place of public accommodation to deny to any person, except for reasons applicable alike to all persons, the full enjoyment of the accommodations, advantages, facilities or privileges thereof based on the person's membership in a protected class.
- (G) For any person to aid, abet, incite, compel or coerce the doing of any act declared by this section to be an unlawful discriminatory practice or to obstruct or prevent any person from complying with ORC §§ 4112.01 to 4112.11, inclusive, or the provisions of this chapter; or any order issued thereunder, or to attempt directly or indirectly to commit any act declared by this section to be an unlawful discriminatory practice.
- (H) For any person to:
- (1) Refuse to sell, transfer, assign, finance or otherwise deny or withhold housing accommodation from any person based on the protected class of any prospective owner, occupant or user of such housing.
 - (2) Refuse to lease or rent any real property based on the protected class **OR SOURCE OF INCOME** of any current or prospective tenant.
 - (3) Represent to any person that housing is not available for inspection when in fact it is so available.
 - (4) Refuse to lend money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing or otherwise withhold financing of housing from any person based on the protected class of any present or prospective owner, occupant or user of such housing, provided such person, whether an individual, corporation or association of any type, lends money as one (1) of the principal aspects of their business or incidental to their principal business and not only as a part of the purchase price of an owner-occupied residence nor merely casually or occasionally to a relative or friend.
 - (5) Discriminate against any person in the terms or conditions of selling, transferring, assigning, renting, leasing or subleasing any housing or in furnishing facilities, services or privileges in connection with the ownership, occupancy or use of any housing because of the protected class of any present or prospective owner, occupant or user of such housing.
 - (6) Discriminate against any person in the terms or conditions of any loan of money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing because of the protected class of any present or prospective owner, occupant or user of such housing.
 - (7) Print, publish or circulate any statement or advertisement relating to the sale, transfer, assignment, rental, lease, sublease or acquisition of any housing or the loan of money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing which indicates any preference, limitation, specification or discrimination based upon a protected class.
 - (8) Make any inquiry, elicit any information, make or keep any record or use any form of application containing questions or entries concerning race, color, religion, ancestry or national origin in connection with the sale or lease of any housing or the loan of any money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing.
 - (9) Include in any transfer, rental or lease of housing any restrictive covenant concerning a protected class or honor or exercise or attempt to honor or exercise, any such restrictive covenant,

provided that the prior inclusion of a restrictive covenant in the chain of title shall not be deemed a violation of this provision.

- (10) Represent in the context of a housing sale that the presence or anticipated presence of persons of any protected class, in the area will or may have results such as the following:
 - (a) The lowering of property values.
 - (b) A change in the racial, religious or ethnic composition of the block, neighborhood or area in which the property is located.
 - (c) An increase in criminal or antisocial behavior in the area.
 - (d) A decline in the quality of the schools serving the area.
- (11) Deny any person access to or membership or participation in any multiple-listing service, real estate brokers' organization or other service, organization or facility relating to the business of selling or renting housing accommodations or to discriminate against them in the terms or conditions of such access, membership or participation, on account of a protected class.
- (12) Coerce, intimidate, threaten or interfere with any person in the exercise or enjoyment of, or on account of having exercised or enjoyed, or on account of having aided or encouraged any other person in the exercise or enjoyment of any right granted or protected in C.O. § 525.02(H).
- (13) Whether or not acting under color of law, by force or threat of force willfully injure, intimidate, or interfere with, or attempt to injure, intimidate or interfere with any of the following based on a protected class:
 - (a) Selling, purchasing, renting, financing, occupying or contracting or negotiating for the sale, purchase, rental, financing or occupation of any dwelling or applying for or participating in any service, organization or facility relating to the business of selling or renting housing accommodations.
 - (b) Participating, without discrimination on account of race, color, religion, national origin or ancestry, in any of the activities, services, organizations or facilities described in C.O. § 525.02(H).
 - (c) Participating in any of the activities, services, organizations or facilities described in C.O. § 525.02(H)(13)(a), or participating lawfully in speech or peaceful assembly opposing any denial of the opportunity to so participate.
- (14) Refuse to sell, transfer, assign, rent, lease, sublease, finance, or otherwise deny or withhold a burial lot from any person based on the protected class of any prospective owner or user of such lot.
- (I) For any person to discriminate in any manner against any other person because they opposed any unlawful practice defined in this section, or because they made a charge, testified, assisted, or participated in any manner in any investigation, proceeding, or hearing under ORC §§ 4112.01 to 4112.07, inclusive, or under this chapter.
- (J) Reserved.
- (K) *Complaint procedure:*
 - (1) *Filing of the complaint.*
 - (a) An aggrieved individual, complainant, may file with the Upper Arlington Clerk of Council a written complaint sworn under oath which alleges facts and circumstances, including the location, date(s), and time(s), of an unlawful discriminatory act(s) or practices, that such

acts did or are occurring within the city limits, that the discrimination was directed at the complainant, and which identifies the person who committed or continues to commit the alleged unlawful discriminatory act(s) or practices.

- (b) Concurrent with the filing of the complaint, the complainant shall provide to the clerk of council in writing the complainant's mailing address, telephone number, if any, and email address, if any.
- (c) The complaint shall not be accepted by the clerk of council if any of the following apply:
 - 1. The complaint is presented to the clerk of council more than one hundred eighty (180) days following the most recent unlawful discriminatory act alleged in the complaint;
 - 2. No incident location provided in the complaint is within the City of Upper Arlington;
 - 3. The complaint fails to include all the information required by division (1)(a) of this section;
 - 4. The complainant fails to concurrently provide a writing that includes the information required in division (1)(b) of this section.
- (d) Within sixty (60) days following the receipt of the complaint, the city shall:
 - 1. Issue a notice of complaint by certified mail or another form of mail that evidences receipt. The notice of complaint shall include an offer of mediation. If the respondent agrees to mediation, the city shall provide an independent mediator to work with the parties to resolve the matter.
 - 2. If the respondent declines to participate in mediation, fails to respond within the allotted time for a response, or the mediation is unsuccessful, the city shall appoint an independent hearing officer to hear the case.

(2) *Hearing officer, final decision, remedies, and appeal.*

- (a) If a hearing officer is appointed, the hearing officer shall have the authority to:
 - 1. Conduct an administrative hearing;
 - 2. Provide to all the parties, witnesses, and the law director timely notice of the hearing date, time, and location;
 - 3. Set, change as necessary, and timely communicate to the parties such reasonable procedural rules as the hearing officer shall deem appropriate;
 - 4. Issue subpoenas and direct the exchange of discovery.
- (b) At the conclusion of the administrative hearing the hearing officer shall issue to the parties and the city a final written decision to include findings of fact and conclusions of law:
 - 1. If the hearing officer finds the respondent did engage in, or continues to engage in, an unlawful discriminatory act or practice under this chapter, and the hearing officer, in the hearing officer's sole discretion, deems it appropriate, the hearing officer's final written decision may include the issuance to the respondent of orders to cease and desist, an award of actual damages and the imposition upon the respondent of such other sanctions as are provided in this chapter; or

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2. If the hearing officer, in the hearing officer's sole discretion, deems it appropriate, the hearing officer's final written decision may include the issuance of a notice of dismissal.
- (c) If the final decision of the hearing officer includes the issuance to the respondent of orders to cease and desist the unlawful discriminatory acts or practices or the award of damages such orders shall specify a time period for the respondent's compliance.
 - (d) The final decision of the hearing officer may include the imposition upon the respondent of reasonable costs of the hearing process. attorney fees and the cost of mediation shall not be assessed against the respondent.
 - (e) The final decision of the hearing officer may include the imposition upon the respondent of a civil penalty payable to the city as follows:
 1. If division (2)(e)2. or (2)(e)3. of this section does not apply, a civil penalty in an amount not to exceed one thousand dollars (\$1,000.00);
 2. If division (2)(e)3. of this section does not apply and if the respondent has been found by the hearing officer to have committed one violation of this chapter during the five-year period immediately preceding the date on which a complaint was filed with the clerk of council, a civil penalty in an amount not to exceed two thousand five hundred dollars (\$2,500.00);
 3. If the respondent has been found by the hearing officer to have committed two or more violations of this chapter during the five-year period immediately preceding the date on which a complaint was filed with the clerk of council, a civil penalty in an amount not to exceed five thousand dollars (\$5,000.00).
 - (f) The final decision of the hearing officer may not include any orders for reinstatement of employment.
 - (g) The final decision of the hearing officer may be appealed pursuant to the provisions of ORC Ch. 2506.

(Ord. No. 50-2021 , § 2, 6-28-2021)

§ 525.01 DEFINITIONS.

As used in this chapter:

- (A) *Person*: includes one (1) or more individuals, partnerships, associations, organizations, corporations, legal representatives, trustees, trustees in bankruptcy, receivers and other organized groups of persons. It also includes, but is not limited to, any employee, lending institution; and the state, and all political subdivisions, authorities, agencies, boards and commissions thereof.
- (B) *Employer*: any person or entity employing four (4) or more persons within the state, and any person acting in the interest of an employer, directly or indirectly.
- (C) *Employee*: does not include any individual employed in the domestic service of any person.
- (D) *Labor organization*: includes any organization which exists for the purpose, in whole or in part, of collective bargaining or of dealing with employers concerning grievances, terms or conditions of employment or for other mutual aid or protection in relation to employment.
- (E) *Employment agency*: includes any person regularly undertaking with or without compensation to procure opportunities to work or to procure, recruit, refer or place employees.
- (F) *Discriminate*: to treat a person differently, or less favorably. Providing a reasonable accommodation to address a disability does not constitute discrimination.
- (G) *Unlawful discriminatory practice*: means any act prohibited by this chapter.
- (H) *Place of public accommodation*: means any inn, restaurant, eating house, barbershop, public conveyance by air, land or water, theater, store or other place for the sale of merchandise or any other place of public accommodation or amusement where the accommodation, advantages, facilities or privileges thereof are available to the public.
- (I) *Housing accommodations*: include any building or structure or portion thereof which is used or occupied or is intended, arranged or designed to be used or occupied as the home residence or sleeping place of one (1) or more individuals, groups or families whether or not living independently of each other; and any vacant land offered for sale or lease.

It also includes any housing accommodations held or offered for sale or rent by a real estate broker, salesman or agent, or by any other person pursuant to authorization of the owner, by the owner or by a legal representative.
- (J) *Restrictive covenant*: means any specification limiting the transfer, rental, lease or other use of any housing because of race, color, religion, national origin or ancestry, or any limitation based upon affiliation with or approval by any person, directly or indirectly, employing race, color, religion, national origin or ancestry as a condition of affiliation or approval.
- (K) *Burial lot*: means any lot for the burial of deceased persons within any public burial ground or cemetery, including but not limited to, cemeteries owned and operated by municipal corporations, townships or companies or associations incorporated for cemetery purposes.
- (L) *Protected class*: classification of individuals based on one (1) or more of the following characteristics: race, color, religion, sex, military or veteran status, national origin, age, ancestry, familial status, disability, sexual orientation, gender identity, or gender expression or any class of people designated as a protected class by state or federal law.
- (M) *Religious exemption*: includes the religious exemptions for hiring and housing provided by ORC 4112.02 and 4112.024 and exceptions established in C.O. § 525.03.

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- (N) SOURCE OF INCOME: PAYMENTS FROM A LAWFUL OCCUPATION OR EMPLOYMENT, AS WELL AS PAYMENTS THAT ARE SUBSTANTIATED AND VERIFIED BY AN EMPLOYER, COURT ORDER OR OTHER OFFICIAL GOVERNMENT RECORD INCLUDING BUT NOT LIMITED TO SUPPLEMENTAL SECURITY INCOME, VETERANS BENEFITS, GOVERNMENT SUBSIDIES, SPOUSAL AND CHILD SUPPORT, AND TAX FILINGS DEMONSTRATING SELF EMPLOYMENT.

(Ord. No. 50-2021 , § 1, 6-28-2021)

§ 525.02 UNLAWFUL DISCRIMINATORY PRACTICES.

Absent a religious exemption, it shall be an unlawful discriminatory practice:

- (A) For any employer to refuse to hire or otherwise to discriminate against any person based on a protected class with respect to hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment.
- (B) For an employment agency, based on a protected class to:
 - (1) Refuse or fail to accept, register, classify properly or refer for employment, or otherwise to discriminate against any person.
 - (2) Comply with a request from an employer for referral of applicants for employment, if the request indicates directly or indirectly that the employer fails to comply with the provisions of ORC §§ 4112.01 to 4112.07, inclusive or of this chapter.
- (C) For any labor organization to:
 - (1) Limit or classify its membership on the basis of a protected class.
 - (2) Discriminate against any person or limit that person's employment opportunities, or otherwise adversely affect their status as an employee or wages, hours or employment conditions based on a protected class.
- (D) For any employer, labor organization or joint labor -management committee controlling apprentice training programs to discriminate against any person based on a protected class in admission to or employment in any program established to provide apprentice training.
- (E) Except where based on a bona fide occupational qualification certified in advance by the Ohio Civil Rights Commission, for any employer, employment agency or labor organization prior to employment or admission to membership, to:
 - (1) Use any form of application for employment or personnel or membership blank seeking to elicit information regarding race, color, religion, national origin or ancestry; but an employer holding a contract containing a non-discrimination clause with the government of the United States or any department or agency thereof, may require an employee or applicant for employment to furnish documentary proof of United States citizenship and may retain such proof in personnel records and may use photographic or fingerprint identification for security purposes.
 - (2) Print or publish or cause to be printed or published any notice or advertisement relating to employment or membership indicating any preference, limitation, specification or discrimination, based upon membership in a protected class.
 - (3) Announce or follow a policy of denying or limiting, through a quota system or otherwise, employment or membership opportunities of any group because of the race, color, religion, national origin or ancestry of such group.

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- (4) Utilize in the recruitment or hiring of persons any employment agency, placement service, training school or center, labor organization or any other employee-referring source known to such employer to discriminate against persons because of membership in a protected class.
- (F) For any proprietor or employee, keeper or manager of a place of public accommodation to deny to any person, except for reasons applicable alike to all persons, the full enjoyment of the accommodations, advantages, facilities or privileges thereof based on the person's membership in a protected class.
- (G) For any person to aid, abet, incite, compel or coerce the doing of any act declared by this section to be an unlawful discriminatory practice or to obstruct or prevent any person from complying with ORC §§ 4112.01 to 4112.11, inclusive, or the provisions of this chapter; or any order issued thereunder, or to attempt directly or indirectly to commit any act declared by this section to be an unlawful discriminatory practice.
- (H) For any person to:
- (1) Refuse to sell, transfer, assign, finance or otherwise deny or withhold housing accommodation from any person based on the protected class of any prospective owner, occupant or user of such housing.
 - (a) Refuse to lease or rent any real property based on the protected class **OR SOURCE OF INCOME** of any current or prospective tenant.
 - (b) **THIS ARTICLE DOES NOT PROHIBIT REFUSING TO RENT ANY PROPERTY IF THE PROSPECTIVE TENANT'S SOURCE OF INCOME IS INSUFFICIENT TO PAY THE RENT PURSUANT TO THE LANDLORD'S REGULAR RENT COLLECTION SCHEDULE, OR CREATE AN OBLIGATION FOR A LANDLORD TO TAKE AFFIRMATIVE ACTIONS BEYOND MINISTERIAL TASKS TO APPLY FOR PARTICIPATION IN A HOUSING ASSISTANCE PROGRAM.**
 - (2) Represent to any person that housing is not available for inspection when in fact it is so available.
 - (3) Refuse to lend money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing or otherwise withhold financing of housing from any person based on the protected class of any present or prospective owner, occupant or user of such housing, provided such person, whether an individual, corporation or association of any type, lends money as one (1) of the principal aspects of their business or incidental to their principal business and not only as a part of the purchase price of an owner-occupied residence nor merely casually or occasionally to a relative or friend.
 - (4) Discriminate against any person in the terms or conditions of selling, transferring, assigning, renting, leasing or subleasing any housing or in furnishing facilities, services or privileges in connection with the ownership, occupancy or use of any housing because of the protected class of any present or prospective owner, occupant or user of such housing.
 - (5) Discriminate against any person in the terms or conditions of any loan of money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing because of the protected class of any present or prospective owner, occupant or user of such housing.
 - (6) Print, publish or circulate any statement or advertisement relating to the sale, transfer, assignment, rental, lease, sublease or acquisition of any housing or the loan of money, whether or not secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing which indicates any preference, limitation, specification or discrimination based upon a protected class.
 - (7) Make any inquiry, elicit any information, make or keep any record or use any form of application containing questions or entries concerning race, color, religion, ancestry or national origin in connection with the sale or lease of any housing or the loan of any money, whether or not

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secured by mortgage or otherwise, for the acquisition, construction, rehabilitation, repair or maintenance of housing.

- (8) Include in any transfer, rental or lease of housing any restrictive covenant concerning a protected class or honor or exercise or attempt to honor or exercise, any such restrictive covenant,

provided that the prior inclusion of a restrictive covenant in the chain of title shall not be deemed a violation of this provision.

- (9) Represent in the context of a housing sale that the presence or anticipated presence of persons of any protected class, in the area will or may have results such as the following:
 - (a) The lowering of property values.
 - (b) A change in the racial, religious or ethnic composition of the block, neighborhood or area in which the property is located.
 - (c) An increase in criminal or antisocial behavior in the area.
 - (d) A decline in the quality of the schools serving the area.
- (10) Deny any person access to or membership or participation in any multiple-listing service, real estate brokers' organization or other service, organization or facility relating to the business of selling or renting housing accommodations or to discriminate against them in the terms or conditions of such access, membership or participation, on account of a protected class.
- (11) Coerce, intimidate, threaten or interfere with any person in the exercise or enjoyment of, or on account of having exercised or enjoyed, or on account of having aided or encouraged any other person in the exercise or enjoyment of any right granted or protected in C.O. § 525.02(H).
- (12) Whether or not acting under color of law, by force or threat of force willfully injure, intimidate, or interfere with, or attempt to injure, intimidate or interfere with any of the following based on a protected class:
 - (a) Selling, purchasing, renting, financing, occupying or contracting or negotiating for the sale, purchase, rental, financing or occupation of any dwelling or applying for or participating in any service, organization or facility relating to the business of selling or renting housing accommodations.
 - (b) Participating, without discrimination on account of race, color, religion, national origin or ancestry, in any of the activities, services, organizations or facilities described in C.O. § 525.02(H).
 - (c) Participating in any of the activities, services, organizations or facilities described in C.O. § 525.02(H)(13)(a), or participating lawfully in speech or peaceful assembly opposing any denial of the opportunity to so participate.
- (13) Refuse to sell, transfer, assign, rent, lease, sublease, finance, or otherwise deny or withhold a burial lot from any person based on the protected class of any prospective owner or user of such lot.
- (I) For any person to discriminate in any manner against any other person because they opposed any unlawful practice defined in this section, or because they made a charge, testified, assisted, or participated in any manner in any investigation, proceeding, or hearing under ORC §§ 4112.01 to 4112.07, inclusive, or under this chapter.
- (J) Reserved.
- (K) *Complaint procedure:*
 - (1) *Filing of the complaint.*
 - (a) An aggrieved individual, complainant, may file with the Upper Arlington Clerk of Council a written complaint sworn under oath which alleges facts and circumstances, including the location, date(s), and time(s), of an unlawful discriminatory act(s) or practices, that such

acts did or are occurring within the city limits, that the discrimination was directed at the complainant, and which identifies the person who committed or continues to commit the alleged unlawful discriminatory act(s) or practices.

- (b) Concurrent with the filing of the complaint, the complainant shall provide to the clerk of council in writing the complainant's mailing address, telephone number, if any, and email address, if any.
- (c) The complaint shall not be accepted by the clerk of council if any of the following apply:
 - 1. The complaint is presented to the clerk of council more than one hundred eighty (180) days following the most recent unlawful discriminatory act alleged in the complaint;
 - 2. No incident location provided in the complaint is within the City of Upper Arlington;
 - 3. The complaint fails to include all the information required by division (1)(a) of this section;
 - 4. The complainant fails to concurrently provide a writing that includes the information required in division (1)(b) of this section.
- (d) Within sixty (60) days following the receipt of the complaint, the city shall:
 - 1. Issue a notice of complaint by certified mail or another form of mail that evidences receipt. The notice of complaint shall include an offer of mediation. If the respondent agrees to mediation, the city shall provide an independent mediator to work with the parties to resolve the matter.
 - 2. If the respondent declines to participate in mediation, fails to respond within the allotted time for a response, or the mediation is unsuccessful, the city shall appoint an independent hearing officer to hear the case.

(2) *Hearing officer, final decision, remedies, and appeal.*

- (a) If a hearing officer is appointed, the hearing officer shall have the authority to:
 - 1. Conduct an administrative hearing;
 - 2. Provide to all the parties, witnesses, and the law director timely notice of the hearing date, time, and location;
 - 3. Set, change as necessary, and timely communicate to the parties such reasonable procedural rules as the hearing officer shall deem appropriate;
 - 4. Issue subpoenas and direct the exchange of discovery.
- (b) At the conclusion of the administrative hearing the hearing officer shall issue to the parties and the city a final written decision to include findings of fact and conclusions of law:
 - 1. If the hearing officer finds the respondent did engage in, or continues to engage in, an unlawful discriminatory act or practice under this chapter, and the hearing officer, in the hearing officer's sole discretion, deems it appropriate, the hearing officer's final written decision may include the issuance to the respondent of orders to cease and desist, an award of actual damages and the imposition upon the respondent of such other sanctions as are provided in this chapter; or

-
2. If the hearing officer, in the hearing officer's sole discretion, deems it appropriate, the hearing officer's final written decision may include the issuance of a notice of dismissal.
- (c) If the final decision of the hearing officer includes the issuance to the respondent of orders to cease and desist the unlawful discriminatory acts or practices or the award of damages such orders shall specify a time period for the respondent's compliance.
 - (d) The final decision of the hearing officer may include the imposition upon the respondent of reasonable costs of the hearing process. attorney fees and the cost of mediation shall not be assessed against the respondent.
 - (e) The final decision of the hearing officer may include the imposition upon the respondent of a civil penalty payable to the city as follows:
 1. If division (2)(e)2. or (2)(e)3. of this section does not apply, a civil penalty in an amount not to exceed one thousand dollars (\$1,000.00);
 2. If division (2)(e)3. of this section does not apply and if the respondent has been found by the hearing officer to have committed one violation of this chapter during the five-year period immediately preceding the date on which a complaint was filed with the clerk of council, a civil penalty in an amount not to exceed two thousand five hundred dollars (\$2,500.00);
 3. If the respondent has been found by the hearing officer to have committed two or more violations of this chapter during the five-year period immediately preceding the date on which a complaint was filed with the clerk of council, a civil penalty in an amount not to exceed five thousand dollars (\$5,000.00).
 - (f) The final decision of the hearing officer may not include any orders for reinstatement of employment.
 - (g) The final decision of the hearing officer may be appealed pursuant to the provisions of ORC Ch. 2506.

(Ord. No. 50-2021 , § 2, 6-28-2021)

Authors:	Brent Lewis, Finance Department Director
Council Meeting Date:	June 17, 2024
Subject/Legislative Item:	Resolution No. 7-2024 - A resolution adopting the tax budget for the City of Upper Arlington, Ohio, for the fiscal year beginning January 1, 2025, and submitting the same to the Franklin County Budget Commission (<i>Close</i>)
Purpose:	Per the Ohio Revised Code, City Council is required to adopt the City's annual tax budget prior to submittal to the Franklin County Budget Commission.
Executive Summary:	Staff requests passage of the resolution to adopt the tax budget for the City of Upper Arlington for the fiscal year beginning January 1, 2025 and submitting the same to the Franklin County Budget Commission.

Purpose and Impact

Franklin County is responsible for establishing the property tax rates for all taxing entities within the county. The Ohio Revised Code requires a tax budget to be prepared and submitted to the County Budget Commission, unless waived (Franklin County does not waive this provision), by July 20th of each year.

With minor exceptions (i.e. appropriation amendments passed by Council, revenue updates year to date, etc.), this document replicates the amounts provided in the 2024 and 2025 columns included in the most recently updated 2023-2024 Municipal Program of Services Biennial Budget Supplement. It is important to note, that any adjustments (revenue or expenditure) needed to be made during the year will not have an impact on the establishment of the property tax rates. All the City's tax rates are fixed (meaning taxes increase or decrease with property value), except for the rates associated with the voted police and fire pension levies which fluctuate annually to generate a specific dollar amount.

The tax budget is a separate required document by the County and is not the guiding document for the upcoming budget process or annual appropriation ordinance.

History

Per the Ohio Revised Code, City Council is required to adopt the City's annual tax budget prior to submitting to the Franklin County Budget Commission.



Alternatives

There are no alternatives at this time. Any entity that does not have their tax budget submitted by the required date is subject to losing its apportionment of the local government fund for the ensuing calendar year.

Attachments

1.	Resolution No. 7-2024
2.	Resolution No. 7-2024 Exhibit A - Tax Budget for 2025



RECORD OF RESOLUTIONS

CITY OF UPPER ARLINGTON
STATE OF OHIO

RESOLUTION NO. 7-2024

TO ADOPT THE TAX BUDGET FOR THE CITY OF UPPER ARLINGTON, OHIO, FOR THE FISCAL YEAR BEGINNING JANUARY 1, 2025, AND SUBMITTING THE SAME TO THE FRANKLIN COUNTY BUDGET COMMISSION

WHEREAS, the 2025 Tax Budget has been prepared upon forms submitted by the County Budget Commission; and

WHEREAS, said budget is on file with the Finance Director and is available for public inspection as required by Ohio Revised Code § 5705.30.

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

SECTION 1. The Tax Budget for the City of Upper Arlington, Ohio, for the fiscal year beginning January 1, 2025 (attached hereto and incorporated herein by reference as Exhibit A), be and is hereby adopted by the City Council of the City of Upper Arlington.

SECTION 2. The City Clerk is hereby authorized and directed to certify a copy of said budget and a copy of this resolution and to transmit the same to the Budget Commission of Franklin County, Ohio, on or before July 20, 2024.

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

Revised County Auditor's Form No. Aud 622 Rev. 4-88
Prepare in triplicate
On or before July 20th two copies of this Budget must be submitted to County Auditor

City or
Village of CITY OF UPPER ARLINGTON
FRANKLIN County, Ohio
(Date) _____ **2024**

This Budget must be adopted by the Council or other legislative body on or before July 15th, and two copies must be submitted to the County Auditor on or before July 20th. FAILURE TO COMPLY WITH SEC.5705.28 R.C. SHALL RESULT IN LOSS OF LOCAL GOVERNMENT FUND ALLOCATION.

To the Auditor of said County:
The following Budget year beginning January 1, 2025, has been adopted by Council and is herewith submitted for consideration of the County Budget Commission.

Signed _____
Title _____

SCHEDULE A

SUMMARY OF AMOUNTS REQUIRED FROM GENERAL PROPERTY TAX APPROVED BY BUDGET COMMISSION,
AND COUNTY AUDITOR'S ESTIMATED RATES

For Municipal Use		For Budget Commission Use		For County Auditor Use	
FUND (Include only those funds which are requesting general property tax revenue)	Budget Year Amount Requested of Budget Commission Inside/ Outside	Budget Year Amount Approved by Budget Commission Inside 10 Mill Limitation	Budget Year Amount to be Derived From Levies Outside 10 Mill Limitation	County Auditor's estimate of Tax Rate to be Levied	
				Inside 10 Mill Limit Budget Year	Outside 10 Mill Limit Budget Year
	Column 1	Column 2	Column 3	Column 4	Column 5
GOVERNMENT FUNDS					
GENERAL FUND	11,417,000				
CAPITAL IMPROVEMENT FUND	1,465,000				
FIRE PENSION	879,000				
POLICE PENSION	879,000				
POLICE & FIRE PENSION	1,493,000				
GENERAL BOND RETIREMENT	-				
PROPRIETARY FUNDS					
FIDUCIARY FUNDS					
TOTAL ALL FUNDS	16,133,000				

SCHEDULE B

LEVIES OUTSIDE 10 MILL LIMITATION, EXCLUSIVE OF DEBT LEVIES[illegible]

Exhibit I

FUND NAME: General Fund

FUND TYPE/CLASSIFICATION:

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
REVENUE				
Local Taxes				
General Property Tax - Real Estate	8,004,072	7,992,425	9,977,100	10,060,040
Municipal Income Tax	29,631,959	32,277,263	33,317,200	34,595,400
Other Local Taxes- Hotel/Motel	325,084	370,446	318,000	321,000
Total Local Taxes	37,961,115	40,640,134	43,612,300	44,976,440
Intergovernmental Revenues				
State Shared Taxes and Permits				
Local Government	1,351,582	1,360,139	1,397,200	1,397,200
Cigarette Tax	371	298	-	-
Property Tax Allocation	1,064,039	1,065,495	1,327,100	1,356,960
Total State Shared Taxes and Permits	2,415,992	2,425,932	2,724,300	2,754,160
Other Grants or Aid	242,627	219,453	-	-
Total Intergovernmental Revenues	2,658,619	2,645,385	2,724,300	2,754,160
Special Assessments	67,525	64,639	-	-
Charges for Services	1,820,538	1,837,949	1,863,500	4,750,000
Fines, Licenses, and Permits	2,035,777	2,135,965	1,825,000	1,692,000
Miscellaneous	2,318,391	4,111,909	2,615,000	3,327,000
Other Financing Sources:				
Transfers	2,678,402	2,687,290	2,986,000	3,053,200
Advances	923,100	249,000	249,500	3,250,000
Other Sources	57,203	103,588	48,270	47,000
TOTAL REVENUE	50,520,670	54,475,859	55,923,870	63,849,800

Exhibit I

FUND NAME: General Fund

FUND TYPE/CLASSIFICATION:

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
EXPENDITURES				
Security of Persons and Property				
Personal Services	17,097,158	18,406,029	20,580,700	21,043,800
Travel Transportation	94,614	158,410	183,000	187,100
Contractual Services	1,348,026	1,477,254	1,679,400	1,717,200
Supplies and Materials	498,193	537,318	940,500	961,700
Total Security of Persons and Property	19,037,991	20,579,011	23,383,600	23,909,800
Public Health Services				
Contractual Services	348,153	366,018	388,600	397,300
Total Public Health Services	348,153	366,018	388,600	397,300
Leisure Time Activities				
Personal Services	2,949,891	3,183,389	3,813,900	7,199,700
Travel Transportation	38,330	52,785	49,800	51,000
Contractual Services	464,291	433,020	520,100	531,800
Supplies and Materials	1,041,630	1,205,110	1,450,700	1,483,300
Total Leisure Time Activities	4,494,142	4,874,304	5,834,500	9,265,800
Community Development				
Personal Services	962,687	1,086,139	1,172,500	1,198,900
Travel Transportation	7,589	10,200	15,000	15,200
Contractual Services	296,230	559,084	300,000	306,800
Supplies and Materials	30,914	29,597	43,500	44,500
Total Community Development	1,297,420	1,685,020	1,531,000	1,565,400

Exhibit I

FUND NAME: General Fund

FUND TYPE/CLASSIFICATION:

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
Transportation				
Personal Services	1,255,949	1,298,333	1,557,400	1,592,400
Travel Transportation	15,326	19,959	25,500	26,100
Contractual Services	67,500	75,311	76,000	77,700
Supplies and Materials	68,960	201,098	109,800	112,300
Total Transportation	1,407,735	1,594,701	1,768,700	1,808,500
General Government				-
Personal Services	4,776,231	5,235,075	6,127,100	6,224,400
Travel Transportation	93,864	150,426	197,500	201,900
Contractual Services	366,291	487,589	870,400	890,000
Supplies and Materials	8,024,914	6,210,677	7,066,900	7,375,900
Capital Outlay	-	-	-	-
Total General Government	13,261,300	12,083,767	14,261,900	14,692,200
Other Uses of Funds				
Transfers	8,182,503	9,786,502	4,174,200	3,780,900
Total Other Uses of Funds	8,182,503	9,786,502	4,174,200	3,780,900
TOTAL EXPENDITURES	48,029,244	50,969,323	51,342,500	55,419,900
Revenues Over (Under) Expenditures	2,491,426	3,506,536	4,581,370	8,429,900
Beginning Unencumbered Fund Balance	28,445,687	31,089,824	34,792,547	40,788,917
Ending Cash Fund Balance	30,937,113	34,596,360	39,373,917	49,218,817
Estimated Encumbrances (outstanding at end	152,711	196,187	1,415,000	1,549,000
Estimated Ending Unencumbered Fund Balan	31,089,824	34,792,547	40,788,917	50,767,817

Exhibit II

FUND NAME: Police Pension

FUND TYPE/CLASSIFICATION:

To be used for any fund receiving property tax revenue except the General Fund.

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
REVENUE				
General Property Tax-Real Estate	616,001	615,105	767,970	776,000
Intergovernmental Revenues:				
Property Tax Allocation	81,849	81,961	102,100	103,000
TOTAL REVENUE	697,850	697,066	870,070	879,000
EXPENDITURES				
Other Uses of Funds				
Transfers	611,182	574,246	560,500	573,000
TOTAL EXPENDITURES	611,182	574,246	560,500	573,000
Revenues Over (Under) Expenditures	86,668	122,820	309,570	306,000
Beginning Unencumbered Fund Balance	958,008	1,044,676	1,167,496	1,477,066
Ending Cash Fund Balance	1,044,676	1,167,496	1,477,066	1,783,066
Estimated Ending Unencumbered Fund Balance	1,044,676	1,167,496	1,477,066	1,783,066

Exhibit II

FUND NAME: Fire Pension

FUND TYPE/CLASSIFICATION:

To be used for any fund receiving property tax revenue except the General Fund.

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
REVENUE				
General Property Tax-Real Estate	616,001	615,105	767,970	776,000
Intergovernmental Revenues:				
Property Tax Allocation	81,849	81,961	102,100	103,000
TOTAL REVENUE	697,850	697,066	870,070	879,000
EXPENDITURES				
Other Uses of Funds				
Transfers	611,182	574,245	560,500	573,000
TOTAL EXPENDITURES	611,182	574,245	560,500	573,000
Revenues Over (Under) Expenditures	86,668	122,821	309,570	306,000
Beginning Unencumbered Fund Balance	958,009	1,044,677	1,167,498	1,477,068
Ending Cash Fund Balance	1,044,677	1,167,498	1,477,068	1,783,068
Estimated Ending Unencumbered Fund Balance	1,044,677	1,167,498	1,477,068	1,783,068

Exhibit II**FUND NAME: Police and Fire Pension****FUND TYPE/CLASSIFICATION:**

To be used for any fund receiving property tax revenue except the General Fund.

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
REVENUE				
General Property Tax-Real Estate	1,420,224	1,299,608	1,309,190	1,322,000
Intergovernmental Revenues:				
Property Tax Allocation	185,984	170,863	169,370	171,000
TOTAL REVENUE	1,606,208	1,470,471	1,478,560	1,493,000
EXPENDITURES				
Other Uses of Funds				
Transfers	1,407,507	1,538,799	1,865,000	1,907,200
Capital Outlay				
TOTAL EXPENDITURES	1,407,507	1,538,799	1,865,000	1,907,200
Revenues Over (Under) Expenditures	198,701	(68,328)	(386,440)	(414,200)
Beginning Unencumbered Fund Balance	1,605,724	1,804,425	1,736,097	1,349,657
Ending Cash Fund Balance	1,804,425	1,736,097	1,349,657	935,457
Estimated Ending Unencumbered Fund Balance	1,804,425	1,736,097	1,349,657	935,457

Exhibit II

FUND NAME: General Obligation Bond Retirement

FUND TYPE/CLASSIFICATION:

To be used for any fund receiving property tax revenue except the General Fund.

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
REVENUE				
General Property Tax-Real Estate	15	7	-	-
Miscellaneous	-	8,000		
Other Financing Sources				
Proceeds from Sale of Debt/Refunded Debt	660,500	-	-	-
Transfers	7,854,528	10,291,450	14,272,800	17,654,400
Other Sources	850,421	3,245,966	-	-
TOTAL REVENUE	9,365,464	13,545,423	14,272,800	17,654,400
EXPENDITURES				
Debt Service:		14,075,154		17,232,100
Redemption of Principal	5,932,428	14,075,154	8,041,372	7,343,366
Interest	3,432,700		8,751,928	9,888,734
Other Uses of Funds				
Treasurer collection fees	2,702	3,201	2,000	3,200
TOTAL EXPENDITURES	9,367,830	14,078,355	16,795,300	17,235,300
Revenues Over (Under) Expenditures	(2,366)	(532,932)	(2,522,500)	419,100
Beginning Unencumbered Fund Balance (Use actual cash balance in Col.2 and 3)	3,140,585	3,138,219	2,605,287	82,787
Ending Cash Fund Balance	3,138,219	2,605,287	82,787	501,887
Estimated Encumbrances (outstanding at end of year)				
Estimated Ending Unencumbered Fund Balance	3,138,219	2,605,287	82,787	501,887

Exhibit II

FUND NAME: Capital Equipment Fund

FUND TYPE/CLASSIFICATION:

To be used for any fund receiving property tax revenue except the General Fund.

DESCRIPTION (1)	FOR 2022 ACTUAL (2)	FOR 2023 ACTUAL (3)	CURRENT YEAR ESTIMATE FOR 2024 (4)	BUDGET YEAR ESTIMATE FOR 2025 (5)
REVENUE				
General Property Tax-Real Estate	1,026,669	1,025,176	1,279,960	1,284,600
Intergovernmental Revenues:				
Property Tax Allocation	136,415	136,602	170,140	180,400
Other Financing Sources				
Transfers	240,000	240,000	240,000	240,000
TOTAL REVENUE	1,403,084	1,401,778	1,690,100	1,705,000
EXPENDITURES				
Capital Outlay	1,215,217	1,682,359	1,311,900	-
TOTAL EXPENDITURES	1,215,217	1,682,359	1,311,900	-
Revenues Over (Under) Expenditures	187,867	(280,581)	378,200	1,705,000
Beginning Unencumbered Fund Balance	910,390	1,147,785	867,861	1,246,061
Ending Cash Fund Balance	1,098,257	867,204	1,246,061	2,951,061
Estimated Encumbrances (outstanding at end of year)	49,528	657	-	-
Estimated Ending Unencumbered Fund Balance	1,147,785	867,861	1,246,061	2,951,061

EXHIBIT III

FUND List all funds individually unless on Exhibit I or II	ESTIMATED UNENCUMBERED FUND BALANCE 1/1/2025	BUDGET YEAR ESTIMATED RECEIPTS	TOTAL AVAILABLE FOR EXPENDITURES	BUDGET YEAR EXPENDITURES AND ENCUMBRANCES			ESTIMATED UNENCUMBERED BALANCE 12/31/25
				PERSONAL SERVICES	OTHER	TOTAL	
GOVERNMENTAL:							
SPECIAL REVENUE:							
Capital Asset Management	23,548,617	13,453,700	37,002,317	-	11,716,100	11,716,100	25,286,217
Street Maintenance and Repair	1,580,372	2,273,000	3,853,372	1,496,600	902,900	2,399,500	1,453,872
Self-Insurance	975,601	22,000	997,601	-	50,000	50,000	947,601
Law Enforcement	316,163	137,000	453,163	260,200	20,000	280,200	172,963
Clerk of the Courts Fund	20,135	8,000	28,135	-	8,000	8,000	20,135
Tree Planting Fund	46,267	15,000	61,267	-	15,000	15,000	46,267
Life Long Learning & Leisure	-	-	-	-	-	-	-
Emergency Medical Service Fund	277,664	675,000	952,664	-	684,600	684,600	268,064
Civil Service Fund	42,800	-	42,800	-	20,000	20,000	22,800
Enforcement Education	20,849	2,500	23,349	-	2,600	2,600	20,749
Mayor's Court Computer Fund	35,410	8,000	43,410	-	13,200	13,200	30,210
Mayor's Court Special Project Fund	162,291	25,000	187,291	-	19,900	19,900	167,391
Upper Arlington Visitors' Bureau Fund	539,453	100,000	639,453	-	92,500	92,500	546,953
Local Fiscal Recovery Fund	-	-	-	-	-	-	-
Economic Development Fund	1,748,051	250,000	1,998,051	-	250,000	250,000	1,748,051
Technology Fund	230,725	197,000	427,725	-	51,100	51,100	376,625
Tax Incentive Review Fund	-	-	-	-	-	-	-
Neighborhood Lighting Utility Fund	225,592	67,000	292,592	33,700	58,300	92,000	200,592
One Ohio Opiod Fund	53,506	13,700	67,206	-	12,800	12,800	54,406
TOTAL SPECIAL REVENUE FUNDS	29,823,496	17,246,900	47,070,396	1,790,500	13,917,000	15,707,500	31,362,896
DEBT SERVICE FUNDS							
TOTAL DEBT SERVICE FUNDS							
CAPITAL PROJECTS							
Infrastructure Improvement Fund	7,680,375	4,600,000	12,280,375	-	7,982,000	7,982,000	4,298,375
Bonded Improvement Fund	5,236,146	21,196,200	26,432,346	-	8,540,700	8,540,700	17,891,646
Community Fiber Optic Fund	273,881	263,900	537,781	-	270,300	270,300	267,481
Tremont Road TIF Fund	15,615	39,600	55,215	-	39,500	39,500	15,715
Arlington Centre TIF Fund	116,194	25,100	141,294	-	33,000	33,000	108,294
Horizon Tax Incentive Fund	1,021,168	452,600	1,473,768	-	408,600	408,600	1,065,168
Kingsdale Core TIF Fund	942,357	1,319,700	2,262,057	-	1,144,400	1,144,400	1,117,657
Kingsdale West TIF Fund	394,120	55,600	449,720	-	50,800	50,800	398,920
Arlington Crossing TIF Fund	1,088,599	141,100	1,229,699	-	205,300	205,300	1,024,399
Lane Avenue Mixed Use TIF Fund	751,701	1,074,400	1,826,101	-	976,300	976,300	849,801
Lane Avenue TIF Fund	302,776	112,500	415,276	-	122,600	122,600	292,676
Riverside Drive N. TIF Fund	19,876	2,800	22,676	-	1,900	1,900	20,776
Riverside Drive S. TIF Fund	223,745	43,800	267,545	-	51,100	51,100	216,445
West Lane-Northwest TIF Fund	22,157	17,700	39,857	-	12,500	12,500	27,357
Lane Avenue II TIF Fund	1,163,465	1,304,600	2,468,065	-	1,324,200	1,324,200	1,143,865
Gateway TIF Fund	463,861	1,572,300	2,036,161	-	1,575,600	1,575,600	460,561
Kingsdale Center TIF Fund	935,432	1,760,100	2,695,532	-	1,759,900	1,759,900	935,632
TOTAL CAPITAL PROJECTS	20,651,468	33,982,000	54,633,468	-	24,498,700	24,498,700	30,134,768

EXHIBIT III

FUND List all funds individually unless on Exhibit I or II	ESTIMATED UNENCUMBERED FUND BALANCE 1/1/2025	BUDGET YEAR ESTIMATED RECEIPTS	TOTAL AVAILABLE FOR EXPENDITURES	BUDGET YEAR EXPENDITURES AND ENCUMBRANCES			ESTIMATED UNENCUMBERED BALANCE 12/31/25
				PERSONAL SERVICES	OTHER	TOTAL	
PROPRIETARY: ENTERPRISE FUNDS							
Solid Waste Management Fund	1,288,765	3,820,000	5,108,765	38,000	3,855,000	3,893,000	1,215,765
Sanitary Sewer Fund	2,213,182	1,188,500	3,401,682	-	1,402,600	1,402,600	1,999,082
Water Distribution Fund	1,568,814	800,000	2,368,814	-	1,052,200	1,052,200	1,316,614
Stormwater Management Fund	2,274,037	793,000	3,067,037	-	1,185,900	1,185,900	1,881,137
U.A. Swimming Pool	303,187	1,018,900	1,322,087	-	1,078,400	1,078,400	243,687
TOTAL ENTERPRISE FUNDS	7,647,985	7,620,400	15,268,385	38,000	8,574,100	8,612,100	6,656,285
INTERNAL SERVICE FUNDS							
Employee Benefits Fund	2,150,167	5,785,800	7,935,967	-	5,184,800	5,184,800	2,751,167
BWC Administration Fund	1,228,593	307,000	1,535,593	-	301,000	301,000	1,234,593
TOTAL INTERNAL SERVICE FUNDS	3,378,760	6,092,800	9,471,560	-	5,485,800	5,485,800	3,985,760
TRUST AND AGENCY FUNDS:							
Returnable Bonds		-	-	-	-	-	-
Unclaimed Funds	8,814	1,000	9,814	-	1,000	1,000	8,814
Construction Withholding	3,091,712	1,000,000	4,091,712	-	1,000,000	1,000,000	3,091,712
Revolving Fund	189,331	900,000	1,089,331	-	900,000	900,000	189,331
Mayors Court Collection Fund	630,716	600,000	1,230,716	-	600,000	600,000	630,716
TOTAL TRUST AND AGENCY FUNDS	3,920,573	2,501,000	6,421,573	-	2,501,000	2,501,000	3,920,573
TOTAL FOR MEMORANDUM ONLY	65,422,282	67,443,100	132,865,382	1,828,500	54,976,600	56,805,100	76,060,282

EXHIBIT IV**STATEMENT OF PERMANENT IMPROVEMENTS**

(Do not include expense to be paid from bond issues)

Section 5705.29 Revised Code

Description	Estimated Cost of Permanent Improvement	Amount to be Budgeted During Current Year	Name of Paying Fund
2025 Street Maintenance Program	\$ 1,499,200	\$ 1,499,200	Infrastructure Improvement Fund
2025 Redding Rd. Resurfacing	1,435,000	1,435,000	Infrastructure Improvement Fund
2025 Sidewalk Incentive	102,000	102,000	Infrastructure Improvement Fund
2025 Waterline Replacements	1,594,100	500,000	Water Surcharge Fund
2025 Sustainable Sewer Replacements	1,687,000	200,000	Sewer Surcharge Fund
2025 Sanitary Sewer Repairs from Inspection and Emergency	219,300	219,300	Sewer Surcharge Fund
2025 Park Improvements	1,430,400	162,500	Infrastructure Improvement Fund
2025 Arlington Center Blvd Street Lights	230,500	230,500	Infrastructure Improvement Fund
2025 Sidewalk Maintenance	279,300	279,300	Infrastructure Improvement Fund
2026 Street Maintenance	39,000	39,000	Infrastructure Improvement Fund
2026 Sidewalk Maintenance	40,000	40,000	Infrastructure Improvement Fund
2026 Park Improvements	158,200	46,000	Infrastructure Improvement Fund
2026 Zollinger Rd Improvements	740,500	740,500	Infrastructure Improvement Fund
2026 Five Points Intersection Study	408,000	408,000	Infrastructure Improvement Fund
2025 Stormwater Master Plan	357,000	357,000	Infrastructure Improvement Fund
2026 Stormwater Projects	15,300	15,300	Infrastructure Improvement Fund
TOTAL	\$ 10,234,800	\$ 6,273,600	

For the year being budgeted, list each contemplated disbursement for permanent improvement, exclusive of any expenses to be paid from bond issues, by the fund from which the expenditures are to be made. Examples for describing the permanent improvements are: window replacement, vehicle purchase, furnishing offices, appliances for the fire department kitchen.

EXHIBIT V

STATEMENT OF AMOUNTS REQUIRED FOR PAYMENT OF FINAL JUDGEMENTS

Section 5705.29 Revised Code

[illegible]

List the amounts required for the payment of each judgement expected to be paid during the year being budgeted.

EXHIBIT VI

PURPOSE OF BONDS AND NOTES	Authority for Levy Outside 10 Mill Limit*	Date of Issue	Date Due	Ordinance or Resolution	Serial or Term	Rate of Interest	Amounts of Bonds and Notes Outstanding at beginning of budgeted year Jan 1, 2025	BUDGET YEAR	
								Amount Required for Principal and Interest 1/1/25 - 12/31/25	Amount Receivable from Other Sources to Meet Debt Payments 1/1/25 - 12/31/25
Payable from Bond Retirement Fund: INSIDE 10 MILL LIMIT:									
2014 Refunding Bonds		7-14	12-30	30-2014	Serial	1.5-3.5%	3,495,000	639,750	-
2015 Refunding Bonds		4-15	12-28	15-2015	Serial+ Term	1.5-4%	3,222,000	723,880	
2015 Various Purpose		4-15	12-34	14-2015	Serial+ Term	1.5-4%	12,073,000	1,341,595	-
2016 Various Purpose		12-16	12-36	61-2016	Serial+ Term	2.45-3.11%	9,785,000	307,988	-
2017 Various Purpose		1-17	12-27	61-2016	Serial	3.00%	2,285,000	988,550	-
2018 Various Purpose		12-18	12-38	76-2018	Serial+ Term	3-4%	9,490,000	355,550	-
2019 Various Purpose		1-19	12-27	76-2018	Serial	2.5-4%	2,545,000	693,425	-
2020 Refunding Bonds		9-20	12-42	44-2020	Serial+ Term	.233-4%	3,045,000	628,558	-
2020 Various Purpose		9-20	12-49	45-2020	Serial+ Term	1-4%	19,270,000	1,278,925	-
2022-Various Purpose GO Bonds		10-22	12-49	65-2022	Serial+ Term	5-5.75%	17,530,000	1,556,950	
TOTAL							82,740,000	8,515,170	-
OUTSIDE 10 MILL LIMIT:									
2019 Non-Tax Revenue (Lane II)	ORC 133.05	11-19	12-52	45-2019	Serial+ Term	2-4%	19,755,000	966,300	-
2021 Non-Tax Revenue (Gateway)	ORC 133.05	9-21	12-53	56-2021	Serial+ Term	3-4%	25,460,000	1,378,500	-
2022 Non-Tax Revenue (Kingsdale)	ORC 133.05	12-22	12-53	59-2022	Serial+ Term	4.5-5.25%	17,925,000	1,194,105	-
2023 Income Tax Revenue (Community Center)	ORC 133.05	04-23	12-55	02-2021	Serial+ Term	3-5%	48,465,000	2,586,750	-
2023 Income Tax Revenue (Office Portion CC)	ORC 133.05	12-23	12-53	59-2022	Serial+ Term	5-5.25%	11,670,000	629,863	-
TOTAL							123,275,000	6,755,518	-

*If the levy is outside the 10 mill limit by vote enter the words "by vote" and the date of election. If outside the 10 mill limit without a vote, enter the reference to the statute under which the levy is exempt from the 10 mill limit.

OFFICIAL CERTIFICATE OF ESTIMATED RESOURCES

The Budget Commission of Franklin County, Ohio, hereby makes the following Official Certificate of Estimated Resources for the **City of Upper Arlington, Ohio** for the BUDGET YEAR beginning January 1, 2025.

FUND	Estimated Unencumbered Balance January 1, 2025	Real Estate Property Tax	Personal Property Tax	Local Government Allocation	Rollback, Homestead, and Personal Property Tax Exemption	Other Sources	Total
GOVERNMENTAL FUND TYPE							
General Fund							
Special Revenue Funds							
Debt Service Funds							
Capital Project Funds							
PROPRIETARY FUND TYPE							
Enterprise Funds							
Internal Service Funds							
FIDUCIARY FUND TYPE							
Trust and Agency Funds							
<u>TOTAL ALL FUNDS</u>							

The Budget Commission further certifies that it's action on the foregoing budget and the County Auditor's estimate of the rate of each tax necessary to be within and outside the 10 mill limitation is set forth in the proper columns of the preceding pages and the total amount approved for each fund must govern the amount of appropriation from such fund.

Date _____, 20__

Budget
Commission

OFFICIAL CERTIFICATE OF ESTIMATED RESOURCES - CONTINUED

FUND	Estimated Unencumbered Balance January 1, 2025	Real Estate Property Tax	Personal Property Tax	Local Government Allocation	Rollback, Homestead, and Personal Property Tax Exemption	Other Sources	Total
GOVERNMENTAL FUNDS:							
GENERAL FUND							
General Fund							
SPECIAL REVENUE FUNDS:							
Street Const Maintenance/Repair							
State Highway Improvement Fund							
Cemetary Fund							
Parks and Recreation Fund							
Federal Grant Fund							
State Grant Fund							
Law Enforcement Trust Fund							
Drug Law Enforcement Fund							
Other Special Revenue Funds							
TOTAL SPECIAL REVENUE FUNDS							
DEBT SERVICE FUNDS:							
General Obligation Bond Fund							
Other Debt Service Fund							
TOTAL DEBT SERVICE FUNDS							
CAPITAL PROJECT FUNDS:							
Construction Fund							
Federal Grant Fund							
Other Capital Project Funds							
TOTAL CAPITAL PROJECT FUNDS							

OFFICIAL CERTIFICATE OF ESTIMATED RESOURCES - CONTINUED

FUND	Estimated Unencumbered Balance January 1, 2025	Real Estate Property Tax	Personal Property Tax	Local Government Allocation	Rollback, Homestead, and Personal Property Tax Exemption	Other Sources	Total
SPECIAL ASSESSMENT FUNDS							
Special Assessment Bond Retirement							
Special Assessment Improvement Fund							
Special Assessment Operating Fund							
Other Special Assessment Funds							
TOTAL SPECIAL ASSESSMENT FUNDS							
ENTERPRISE FUNDS:							
Water Fund							
Sanitary Sewer Fund							
Electric Fund							
Parking Fund							
Swimming Pool Fund							
First Mortgage DSF							
Debt Service Reserve Fund							
Utilities Improvement Fund							
Other Enterprise Funds							
TOTAL ENTERPRISE FUNDS							
INTERNAL SERVICE FUNDS							
Revolving Fund							
Other Internal Service Funds							
Employee Benefit Fund							
TOTAL INTERNAL SERVICE FUNDS							

OFFICIAL CERTIFICATE OF ESTIMATED RESOURCES - CONTINUED

FUND	Estimated Unencumbered Balance January 1, 2025	Real Estate Property Tax	Personal Property Tax	Local Government Allocation	Rollback, Homestead, and Personal Property Tax Exemption	Other Sources	Total
TRUST AND AGENCY FUNDS							
TOTAL TRUST AND AGENCY FUNDS							
TOTAL ESTIMATED RESOURCES (memorandum only)							

COUNTY AUDITOR'S ESTIMATE

Tax Levies and Rates for 2025, in the City of Upper Arlington

Tax Valuation \$

	Amount Approved By Budget Commission	County Auditor's Estimate of Rate in Mills
LEVIES WITHIN 10 MILL LIMITATION		
County		
Township		
School		
Village		
City		
TOTAL		
LEVIES OUTSIDE OF 10 MILL LIMITATION		
County		
Township		
School		
Village		
City		
State		
TOTAL		
TOTAL LEVY FOR ALL PURPOSES		

BUDGET OF COUNTY

City/Village
FOR FISCAL YEAR
BEGINNING
JANUARY 1, 2023

County Auditor

Deputy Auditor

, 20_

EXHIBIT A

2024 City Council Appointments to Boards & Commissions

Board of Tax Review	Term Commencing	Term Expiration
Edward Bernert	7/1/2024	6/30/2026
Dr. Ann Gabriel	7/1/2024	6/30/2026
Board of Zoning and Planning	Term Commencing	Term Expiration
Shannon Tolliver (reappointed)	7/1/2024	6/30/2027
Marianne Mitchell (reappointed)	7/1/2024	6/30/2027
Richard Todd Boyer	7/1/2024	6/30/2027
City Tree Commission	Term Commencing	Term Expiration
JP Ratajczak (reappointed)	7/1/2024	6/30/2027
Blythe Arielle Price	7/1/2024	6/30/2027
Laura Oldham	7/1/2024	6/30/2027
Community Relations Committee	Term Commencing	Term Expiration
Brent Theaker (reappointed)	7/1/2024	6/30/2028
Deborah Carvalho (reappointed)	7/1/2024	6/30/2028
Monica Lee	7/1/2024	6/30/2028
Sumia Mohamed (for unexpired term)	7/1/2024	6/30/2026
Cultural Arts Commission	Term Commencing	Term Expiration
Rebecca Kemper (reappointed)	7/1/2024	6/30/2027
Cheryl Smoot	7/1/2024	6/30/2027
Michael Paulus	7/1/2024	6/30/2027
Sheryl Pfeil	7/1/2024	6/30/2027
Library Board of Trustees	Term Commencing	Term Expiration
Peter Hahn (reappointed)	7/1/2024	6/30/2028
John Yesso (reappointed)	7/1/2024	6/30/2028
Matthew Courser	7/1/2024	6/30/2028
Tax Incentive Review Council	Term Commencing	Term Expiration
Dennis Miller	7/1/2024	6/30/2027

Edward Bernert

City of Upper Arlington | Generated 5/2/2024 @ 6:15 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Edward Bernert	Board of Tax Review	2	Pending
Application Date	3/1/2024			
Expiration Date	3/1/2026			
Board Member	Edward Bernert			
Status	Validated			

Basic Information

Name
Edward Bernert

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
David Ebersole, Partner at Baker& Hostetler and Upper Arlington resident.

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
Retired

Occupation
Attorney

Job Title
Partner

Yes, I am a city employee
No

Professional Licenses
Attorney

Registrations/Certifications
Ohio Registration 25808

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Voting member of Commission to study whether to increase income tax rate to 2 1/2%

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Charity Newsies

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I am concerned about the fiscal health of Upper Arlington. I have experience in state and lcoal taxation.

Check the box next to your area(s) of expertise.
Legal

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?
Yes

Are you a registered voter?
Yes

RESUME

Edward J. Bernert



Professional

Former partner - Baker & Hostetler LLP litigating state and local tax cases
Member of Upper Arlington Commission to study whether to increase tax rate to 2 1/2%
Adjunct Professor for State and Local Tax, Capital University Law School 1994-present
Organizer of Capital Law School Symposium on Taxation of Remote Workers, March 6, 2024.
Former Chair of American Bar Association State and Local Taxes Committee 2017-2019
Fellow of American College of Tax Counsel

Personal

Married to Sharon, two adult children and two grandchildren
Charity Newsies

Deborah Carvalho

Status

Name Deborah Carvalho
Application Date 4/12/2024
Expiration Date 4/12/2026
Board Member [Deborah Carvalho](#)
Status Validated

Board	Vacancies	Status
Community Relations Committee	1	Pending

Basic Information

Name
Deborah Carvalho
Date of Birth
List 3 Personal and/or Professional References (at least one required)
Michaela Burris
Robyn Harper
Judy Rojas

Contact Information

Occupation

Employer
Mount Carmel Foundation
Occupation
Fundraiser
Job Title
Sr. Development Officer
Yes, I am a city employee

No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Yes. I currently serve on the Community Relations Committee
Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Board member Asian American Community Services

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
My family and I immigrated from Kenya in 2000, seeking the quintessential American Dream of security, vibrant neighborhoods, excellent schools, and boundless opportunities. As an immigrant, I bring a unique perspective to Upper Arlington, driven by my personal journey and experiences. Throughout the majority of my career, I have been dedicated to the nonprofit sector. Notably, at the American Red Cross, I spearheaded the creation of the Diversity Leadership Council and Partners for Life Programs, initiatives designed to cultivate inclusivity and collaboration within our organization and the broader community. Subsequently, my tenure at the United Way provided me with invaluable insights into effectively advocating for the diverse needs of our community, particularly in educating corporate partners. In my current role, I am deeply involved in raising funds for outreach programs, such as street medicine, addressing critical issues such as infant mortality, crime and trauma assistance, substance abuse, and community health initiatives. My aspiration is to foster a more inclusive environment in Upper Arlington, where immigrants like myself

feel a sense of belonging, and where respect and mutual understanding are paramount. While I currently serve on the CRC and actively participate in the "Improving from the Inside" group, my true passion lies in engaging with the community at events. I am committed to sharing the message of our welcoming city, ensuring that all residents, both longstanding and new arrivals, feel empowered to contribute their voices. I have found great satisfaction in reviewing grants and awards applications, as well as representing the CRC at various events. I am eager to continue our collective efforts in building a more inclusive and welcoming community. Thank you for considering my application. I am enthusiastic about the opportunity to contribute my skills and experiences to the Community Relations Committee and to work collaboratively towards our shared vision of a more inclusive Upper Arlington.

Check the box next to your area(s) of expertise.

Fundraising, Marketing, Grant Writing

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

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SENIOR DEVELOPMENT OFFICER

A passionate leader and advocate for social and philanthropic causes, connecting donors with missions to make transformational gifts



executive summary

An innovative, strategic, and goal-driven relationship builder and program leader with over 20 years of non-profit leadership. I bring extensive experience in collaborating with boards and diverse communities, successfully recruiting, and cultivating partnerships with board volunteers to enhance organizational inclusivity and engagement. I specialize in creating and implementing strategies that engage beneficiaries in building meaningful connections with supporters. This has resulted in significant year-over-year growth in major giving programs and the cultivation of transformational gifts. My expertise encompasses all phases of the donor cycle, from generating leads to executing gifts and honoring donors.



critical skill set

- Capital Campaigns
- Grateful Patient Programs
- Stewardship
- Major gifts
- Event sponsorship
- Corporate and foundational grant relations
- Planned and Blended Gifts
- Colleague Giving Campaigns
- CRM



professional employment history

SENIOR DEVELOPMENT OFFICER | Mount Carmel Foundation

2016 – Present

A highly motivated development professional committed to facilitating genuine connections between donors' passions and funding needs, I am responsible for fundraising efforts for various critical initiatives within the Mount Carmel Health System, including the under-construction Mount Carmel Dublin, Mount Carmel community health and wellbeing programs, scholarships for Mount Carmel College of Nursing, and other colleague and hospital-related activities. I lead corporate fundraising and actively engage in foundation grant writing, while efficiently managing all aspects of the major gift cycle, from prospecting and qualifying to cultivating, soliciting, and stewarding donors.

- *CAPITAL CAMPAIGN - Raised over \$6 Million in capital for transformation and expansion of hospital exceeding goal of \$4.5 Million.*
- *GRATEFUL PATIENT PROGRAM: Engaged physicians in connecting with grateful patients and families, raising close to \$900,000 during the pilot.*
- *COLLEAGUE GIVING CAMPAIGN: Consistently surpassed participation and fundraising targets year after year. In fiscal year 2023, exceeded participation objectives by 117% and fundraising goals by 119%.*
- *PLANNED AND BLENDED GIFTS: Accomplished significant achievements in planned giving, showcasing strong donor relationship-building and legacy gift acquisition skills.*
- *GRANTS: Proficiently conducted research, prepared grant proposals, and successfully secured funding, highlighting strong grant application and award acquisition abilities.*
- *STEWARDSHIP: Planned and executed stewardship activities to establish donor connections with the institution and fostered an environment for major philanthropic gifts.*

DIRECTOR OF DEVELOPMENT | United Way of Central Ohio (UWCO)

2013 – 2016

A visionary and inspirational leader, overseeing a substantial personal portfolio exceeding \$6 Million, focused on corporate accounts within the energy, retail, and banking sectors, each comprising 500+ employees. Successfully recruited and managed a dedicated team of relationship managers and volunteers who share a fervent commitment to community development and unwavering dedication to strategic objectives. Collectively, we managed a portfolio exceeding \$10 million. Demonstrates exceptional retention of high-level corporate partners and individual leadership donors by offering astute analysis, evaluation, and identification of growth opportunities that seamlessly align with their philanthropic aspirations.

- *GOAL ATTAINMENT: Generated over \$16 Million from corporate workplace campaigns, individual leadership donors and sponsorships delivering 105% of goal.*
- *STRATEGIC INITIATIVES: Defined United Way value proposition for its corporate partners and created a benefits playbook for employee engagement and volunteer opportunities that would lead to professional development.*
- *LEAN PROCESS: Recouped three hours of preparation and approvals per donor visit through value stream mapping of CEO Visit/Callbook process.*
- *SKILLS-BASED RECRUITMENT: Developed Skills-Based volunteer recruitment platform to engage highly skilled volunteers in supporting philanthropic organizations with critical needs.*

RECRUITMENT MANAGER | American Red Cross (ARC)

2011 – 2013

Progressed quickly during 12-year tenure, launching pivotal minority donor recruitment program, and shifting organizational paradigm on several fronts. Assumed reins of 10-member team and all specialty recruitment programs, including Ohio State University (OSU) with largest blood collections from a single university in the nation; streamlined collections of large Franklin County territory accountable for 30%+ of regional collections; restructured Nationwide Insurance fixed site. Compelled positive transformation as a key contributing member to 10 policy and planning committees while ensuring strict FDA compliance.

- *OVER-GOAL ACHIEVEMENT: Met OSU's aggressive yearly collection goal of 12,000 units by beating University of Michigan (U of M) in 2012 Blood Battle, collecting 10% over previous goal within 3 weeks via social media outreach, special events, and networking.*
- *NEW PROGRAM INNOVATION: Tripled volume of rare donor registrants and cut reference laboratory costs by promoting personally created Rare and Matched Donor Program.*
- *PARTNER SUCCESSES: Assisted Nationwide Insurance, top-10 ARC account, in surpassing targets for both fixed and mobile sites, positioning company as only fixed-site partner in the U.S. on upward trend for account growth and goal achievement.*
- *COMMUNITY OUTREACH: Improved awareness and engagement within untapped donor populations with launch of 9 different campaigns/programs/councils and vigilant relationship building with local government, non-profits, cultural organizations, special interest groups, businesses, and schools.*
- *STRATEGIC FUNDING WINS: Raised more than \$250K for Partners for Life Program by securing sponsorships and in-kind donations for events such as Partners for Life Luncheons, Pastor's Brunch, and Interfaith Reception.*
- *AWARD WINNING ACHIEVEMENTS: American Red Cross National Award for Diversity Outreach/ American Red Cross National Tiffany Award for Excellence/ American Red Cross Luminary Award*

DONOR RECRUITMENT SUPERVISOR, DONOR RECRUITMENT REPRESENTATIVE, MARKET RESEARCH ANALYST | American Red Cross

2001-2011

**education and other credentials**

- Bachelor of Arts, University of Lucknow, Lucknow, India
- Diploma in Business Administration, Association of Business Executives, London UK
- Diversity Trainer Certification, Diversity Training University International
- Board member, Asian American Community Services
- Member, Community Relations Committee, City of Upper Arlington

Deborah Carvalho



April 12, 2024

Upper Arlington City Council
3600 Tremont Road
Upper Arlington, Oh 43221

Dear Upper Arlington City Council,

I am writing to express my sincere interest in continuing to serve on the Community Relations Committee for Upper Arlington. As an immigrant who moved to the United States from Kenya in 2000, I have a deep appreciation for the opportunities and sense of security that this country offers. My experiences have shaped my perspective on Upper Arlington, and I am passionate about contributing to its growth and inclusivity.

Throughout my career in the non-profit sector, I have dedicated myself to fostering diversity, equity, and inclusion in various communities. During my tenure at the American Red Cross, I established the Diversity Leadership Council and Partners for Life Programs, initiatives aimed at promoting inclusivity and collaboration within the organization and the communities it serves. Additionally, my time at the United Way provided me with valuable insights into educating corporate partners on the diverse needs of our community.

In my current role, I am involved in raising funds for outreach programs addressing critical issues such as infant mortality, crime and trauma assistance, substance abuse, and community health initiatives. These experiences have equipped me with the skills necessary to effectively advocate for the needs of our residents and promote initiatives that foster a sense of belonging for all.

I am currently serving on the CRC and actively participating in the "Improving from the Inside" group. However, my true passion lies in engaging with the community at events and sharing the message of inclusivity and belonging. Whether it's reviewing grant applications, representing the CRC at events, or supporting ongoing initiatives, I am committed to continuing the work we have started to ensure that Upper Arlington remains a welcoming and inclusive city for all residents, both old and new.

I am excited about the opportunity to contribute my skills and experiences to the Community Relations Committee and to work collaboratively with fellow members to advance our shared goals of promoting respect, mutual understanding, and inclusivity within Upper Arlington. Thank you for considering my application.

Sincerely,

Deborah Carvalho

Dr. Matthew W. Courser

City of Upper Arlington | Generated 5/2/2024 @ 6:52 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Dr. Matthew W. Courser	Library Board of Trustees	0	Pending
Application Date	3/30/2024			
Expiration Date	3/30/2026			
Board Member	Matthew W. Courser			
Status	Validated			

Basic Information

Name
Dr. Matthew W. Courser

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Lewis Horner, PhD: [REDACTED]
Cheryl Davis: [REDACTED]
Holly Raffle, PhD: [REDACTED]

Contact Information

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Occupation

Employer
Pacific Institute for Research and Evaluation (PIRE)

Occupation
Program Evaluator/Prevention & Treatment Project Lead

Job Title
Senior Research Scientist

Yes, I am a city employee
No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Leadership UA class of 2024 Wickliffe Woods Playground Project--Core Parent Team

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
My cover letter explains in more detail why I am interested in this position. In general, our library system has become a gathering place for UA and strategic planning and capital improvements planning processes are beginning. This is a critically important time for the library system. What will our libraries look like in 5 years? What services and roles do UA residents need from the library? What should our facilities look like? How do we adapt them with a limited capital budget, especially when the main library and the Lane branch probably are in need of full renovations and expansions? I bring the ability to work constructively with a wide variety of stakeholders, experience with strategic planning, and a strong commitment to our community.

Check the box next to your area(s) of expertise.
Fundraising, Grant Writing, Strategic Planning

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:52 pm

Matthew W. Courser, Ph.D.
curriculum vitae

Education

Ph.D. in Political Science. The Ohio State University, August 2003

Dissertation: “Elite Messages and Public Opinion: The Case of the Ohio Supreme Court”

Major Areas: Public Opinion and Mass Behavior

Minor Areas: Judicial Politics and Political Psychology

M.A. in Political Science. The Ohio State University, June 2000.

B.A. in Political Science, *summa cum laude*. Albion College, May 1996

Gerald R. Ford Institute for Public Policy and Service, 1992-1996.

Summer Institute in Political Psychology, The Ohio State University, 1998

Professional Experience

Senior Research Scientist. Pacific Institute for Research and Evaluation, Louisville, KY. Responsibilities include: providing strategic leadership to Louisville Center and PIRE as a whole; day-to-day management of Columbus, OH office; grant, contract, and project development, collaborative work with national, state, and local organizations, designing research studies and data collection instruments, conducting statistical analyses, training staff in research and project protocols, supervising staff involved in project research and evaluation activities, preparing reports, presenting research findings to clients, presenting results at state and local events and conferences, and providing technical assistance as needed to clients. 12/18 to present.

Principal Investigator, Evaluation of DOMES Initiative. Project Funded by the U.S. Department of State through OAS-CICAD and the Colombo Plan for Cooperative Economic and Social Development in Asia and the Pacific. \$1,271,901. 10/1/19-9/30/25.

PIRE Project Lead, Communities of Practice Planning to Reduce Opioid Use Disorders Consortium – Behavioral Health Care Support Project. Grant G28RH46290 to Ohio University from HRSA’s Rural Communities Opioid Response Program (RCORP-PHS). \$320,000. 9/1/22-8/30/26.

PIRE Project Lead, Ohio’s 988 Capacity and Quality Improvement Project. Funding from SAMHSA and Mental Health Block Grant appropriations through the Ohio Department of Mental Health and Addiction Services. \$1,107,108. 7/1/22-6/30/25.

Principal Investigator, Communities of Practice Planning to Reduce Opioid Use Disorders Consortium – Psychostimulant Support Project. Grant H7NR42563 from HRSA’s Rural Communities Opioid Response Program – Psychostimulant Support (RCORP-PS). \$500,000. 9/1/21-8/30/24.

PIRE Project Lead, Ohio Healthy Youth Environments Survey Support Project. \$406,154. 1/1/20 to 9/30/23. Project funded by the CURES Act and Mental Health Block Grant appropriation through the Ohio Department of Mental Health and Addiction Services.

Principal Investigator, Communities of Practice Planning to Reduce Opioid Use Disorders Consortium Project. Grant GA1RH33532 from HRSA's Rural Communities Opioid Response Program – Implementation (RCORP-Implementation). \$1,000,000. 9/1/19-8/30/23.

PIRE Project Lead, Planning for Ohio's Transition of Lifeline Services to 988. Funding from Vibrant Emotional Health and Mental Health Block Grant appropriations through the Ohio Department of Mental Health and Addiction Services. \$808,000. 4/1/21-6/30/22.

Principal Investigator, CQI Field Agent for Ohio's Problem Gambling Service System. Project funded by the Ohio Department of Mental Health and Addiction Services. \$120,000. 7/1/19-6/30/23.

PIRE Lead, Community Collective Impact Model for Change Project. \$215,712. 7/1/18 to 4/30/19. Project funded by the CURES Act through the Ohio Department of Mental Health and Addiction Services.

Principal Investigator, Work Attributes Toward Careers in Health (WATCH2), subcontract with the Central Susquehanna Intermediate Unit (project funded by the Administration for Children and Families). \$510,000. 4/1/16-9/30/20.

Research Scientist. Pacific Institute for Research and Evaluation, Louisville, KY. Responsibilities included: day-to-day management of Columbus, OH office; grant, contract, and project development, collaborative work with national, state, and local organizations, designing research studies and data collection instruments, conducting statistical analyses, training staff in research and project protocols, supervising staff involved in project research and evaluation activities, preparing reports, presenting research findings to clients, and providing technical assistance as needed to clients. 9/14 to 12/18.

Principal Investigator, Communities of Practice Planning to Reduce Opioid Use Disorders Consortium Project. Grant G25RH32461 from HRSA's Rural Communities Opioid Response Program – Planning (RCORP-Planning). \$200,000. 10/1/18-9/30/19.

Principal Investigator, Evaluation of Drug Treatment in Afghanistan. Project Funded by the U.S. Department of State through the Colombo Plan for Cooperative Economic and Social Development in Asia and the Pacific. \$1,027,005. 10/1/15-7/30/19.

Principal Investigator, CQI Field Agent for Ohio's Problem Gambling Service System. Project funded by the Ohio Department of Mental Health and Addiction Services. \$200,000. 7/1/15-6/30/19.

Principal Investigator, Evaluation of the CSIU Math-Science Partnership Project, subcontract with the Central Susquehanna Intermediate Unit (project funded by the U.S. Department of Education through the Pennsylvania Department of Education). \$80,628. 7/1/16-9/30/18.

Principal Investigator, Assessing the Impact of Parental Characteristics, Parental Attitudes, and Parental Engagement on Mentoring Relationship Outcomes. Project funded by the Department of Justice, Office of Juvenile Justice and Delinquency Prevention. \$482,617. 10/1/13-6/30/17.

Principal Investigator, Work Attitudes Toward Careers in Health (WATCH), subcontract with the Central Susquehanna Intermediate Unit (project funded by the Administration for Children and Families). \$99,118. 10/1/14-9/30/15.

Principal Investigator, Statewide Evaluation and CQI for Ohio's Problem Gambling Service System. Project funded by the Ohio Department of Mental Health and Addiction Services. \$68,333. 10/1/14-6/30/15.

Research Scientist. NORC at the University of Chicago, Chicago, IL. Assigned to AP-NORC Center for Public Affairs Research. Responsibilities included: development and management of complex multimode surveys utilizing ABS samples, design and implementation of journalism fellowship on community resilience, business development, and designing survey instruments, and survey-based experiments. Also responsible for training staff in research and project protocols, supervising staff involved in project research and evaluation activities, preparing reports, presenting research findings to clients, funders, and AP partners, and providing technical assistance as needed to clients and funders. 9/13 to 9/14.

Principal Investigator, Assessing the Impact of Parental Characteristics, Parental Attitudes, and Parental Engagement on Mentoring Relationship Outcomes. Project funded by the Department of Justice, Office of Juvenile Justice and Delinquency Prevention. \$482,617. 10/1/13-9/30/16.

Evaluation Manager, Mid-term Performance Evaluation of the Global Labor Program. Project Funded by USAID. 7/1/14-12/30/14.

Research Scientist. Pacific Institute for Research and Evaluation, Louisville, KY. Responsibilities included: day-to-day management of Columbus, OH office; grant, contract, and project development, collaborative work with national, state, and local organizations, designing research studies and data collection instruments, conducting statistical analyses, training staff in research and project protocols, supervising staff involved in project research and evaluation activities, preparing reports, presenting research findings to clients, and providing technical assistance as needed to clients. Day-to-day management of research activities and oversight of field work for projects in El Salvador and Afghanistan. 12/11 to 9/13.

Principal Investigator, Evaluation of Intergenerational Mentoring Initiative, subcontract with Big Brothers Big Sisters of Kentuckiana (project funded by the Humana Foundation). \$20,000. 11/1/2012-4/30/14.

Principal Investigator, Improving Relationship Outcomes With Additional Training and Enhanced Match Support for Mentors. Project funded by the Department of Justice, Office of Juvenile Justice and Delinquency Prevention. \$499,782. 10/1/11-9/30/13.

Principal Investigator, Work Attitudes Toward Careers in Health (WATCH), subcontract with the Central Susquehanna Intermediate Unit (project funded by the Administration for Children and Families). \$396,782. 4/19/11-9/30/13.

Principal Investigator, Evaluation of the Inquiry into Science Math-Science Partnership Project, subcontract with the Central Susquehanna Intermediate Unit (project funded by the U.S. Department of Education through the Pennsylvania Department of Education). \$112,789. 7/1/10-9/30/13.

Principal Investigator, Evaluation of the Keystones of the Federal Union Teaching American History Project, subcontract with the Central Susquehanna Intermediate Unit (project funded by the U.S. Department of Education Office of Innovation and Improvement). \$109,091. 7/1/10-6/30/13.

Principal Investigator, Evaluation of the Tri-Counties History Project, subcontract with Tri-County Educational Service Center (project funded by the U.S. Department of Education Office of Innovation and Improvement). \$138,144. 7/1/09-6/30/13.

Principal Investigator, Evaluation of the Greene County History Project, subcontract with Xenia Community Schools (project funded by the U.S. Department of Education Office of Innovation and Improvement). \$193,334. 7/1/08-6/30/13.

Associate Research Scientist. Pacific Institute for Research and Evaluation, Louisville, KY.

Responsibilities included: day-to-day management of Columbus, OH office; proposal development, project development, designing research studies and data collection instruments, conducting statistical analyses, training staff in research and project protocols, supervising staff involved in project research and evaluation activities, preparing reports, presenting research findings to clients, and providing technical assistance as needed to clients. Day-to-day management of research activities and oversight of field work for projects in El Salvador, Afghanistan, and Brazil. 1/06 to 12/11.

Principal Investigator, Gallia-Jackson-Meigs Capacity-building Project, subcontract with the Alcohol, Mental Health, and Drug Addiction Services Board of Gallia, Jackson, and Meigs Counties (project funded by SAMHSA's Center for Substance Prevention, through the Ohio Department of Alcohol and Drug Addiction Services). \$33,494. 3/31/11-8/15/11.

Principal Investigator, Evaluation of the Explore History Project, subcontract with the Mid-Ohio Educational Service Center (project funded by the U.S. Department of Education Office of Innovation and Improvement). \$150,000. 7/1/06-6/30/10.

Principal Investigator, The Impact of Active Consent on Student Survey Data Project, funded by the National Institutes on Drug Abuse (Grant 1R01DA019972-01A1). \$406,322. 9/30/06-9/30/09.

Principal Investigator, Evaluation of the Teaching American History in Pennsylvania Project, subcontract with the Central Susquehanna Intermediate Unit (project funded by the U.S. Department of Education Office of Innovation and Improvement). \$61,400. 10/1/07-9/30/09.

Co-Principal Investigator, Brazil DARE Evaluation, funded by the U.S. Department of State. \$740,640. 10/1/05-4/30/08.

Principal Investigator, Ohio Capacity Project, funded by the Ohio Department of Alcohol and Drug Addiction Services. \$50,000. 4/1/07-4/30/08.

Senior Program Manager. Pacific Institute for Research and Evaluation, Louisville, KY.

Responsibilities included: process and outcome instrument construction, data collection, processing, analysis, and reporting for Ohio's State Incentive Grant; assisting with the implementation of a sustainability model with state agencies and local community organizations; serving as liaison to the Ohio Department of Alcohol and Drug Addiction Services (ODADAS) and local community grantees on evaluation matters; training state and local personnel on evaluation matters. 1/03 to 1/06.

Research Associate and Project Manager. Center for Survey Research, The Ohio State University, Columbus, OH. Responsibilities included: questionnaire development, project management, monitoring interview productivity; ensuring data quality; supervision and training of telephone interviewers and other Center staff; interaction with internal and external clients and University offices; data analysis using SPSS for Windows; preparation of technical and statistical reports for clients. 6/00 to 1/03.

Graduate Research Associate. Center for Survey Research, The Ohio State University, Columbus, OH. Responsibilities included: questionnaire development; programming using the CASES CATI software package; sample management; monitoring data collection; data analysis using SPSS and other software; supervising telephone interviewing staff; training telephone interviewers and other staff members; updating training materials. 8/98 to 6/00.

Business Analyst. Electronic Data Systems, Inc., Troy, MI. Telemanagement position assigned to General Motors Pontiac Account. Responsibilities included: evaluating requests for goodwill cost assistance; screening vehicle repurchase/replacement requests; working with Pontiac dealerships, customers, and field offices to resolve vehicle service concerns; training new account employees; responding to Pontiac product questions. Intensive interaction with Pontiac customers and dealership personnel. 6/96-8/97.

Consulting

National Council on Problem Gambling (NCPG). Evaluation consultant. 11/22 to present.

Garrett Consulting, LLC. Evaluation consultant. 6/1/13 to present.

Ohio State University Historic Costumes and Textiles Museum. Evaluation consultant. 7/1/13 to 9/30/14.

History Teaching Institute (HTI) at The Ohio State University. Evaluation consultant. 12/09 to 6/30/12.

Associated Press. Election year survey analysis consultant. 9/08 to 11/08.

Public Service

Intern. White House Office of National Drug Control Policy (ONDCP), Washington, DC. Assigned to Public and Congressional Affairs Departments. Responsibilities included: working with staff members in White House and Congressional offices; researching policy-related topics of interest to agency leadership; preparing daily press summaries of agency media coverage; creating and distributing press releases; responding to phone inquiries from media members and the general public; assisting in preparing briefing books for Director Lee Brown; assisting in preparing for Congressional hearings; attending hearings pertaining to agency concerns. 1/95 to 5/95.

Institutional Service

Board of Directors, Pacific Institute for Research and Evaluation, Staff Director. 2015-2021.

Chair, Governance Committee, 2020

Chair, Nominating Committee, 2017-2019

Board of Directors CEO Search Committee, Pacific Institute for Research and Evaluation. 2019

Chair, Survey Capacity Workgroup, Pacific Institute for Research and Evaluation. 2013-2016.

Member, Institutional Review Board #2, Pacific Institute for Research and Evaluation. 2004-2013; 2014-present.

Advisory Board Member, Ohio Resource Network. 2006-2008.

Board of Trustees, Albion College. Student Member of Buildings and Grounds Committee, 1995-1996.

Publications

Courser, M., & Raffle H. (2024). Addressing the Opioid Crisis as a Wicked Problem. In Wieczorek, W., & Waller, M (Eds.), *Responding to the Opioid Epidemic: A Guide for Public Health Practitioners*. APHA Press.

- Kruse-Diehr, A. J., Shamblen, S. R., & Courser, M. W. (2022). Longitudinal Assessment of a Manualized Group Treatment Program for Gambling Disorder: The Ohio Problem Gambling Treatment Model for Adults with Co-Occurring Disorders. *Journal of Gambling Studies* 38, 1493-1502.
- Schweinhart, A., Shamblen, S., Shepherd, C., Courser, M., Young, L., Morales, B., & Redpath, B. "Gender Differences in Patient Outcomes Following Drug Abuse Treatment in Afghanistan: Results from a New Evaluation." (2021) *Journal of Substance Abuse Treatment*.
- Burggraf, C., Milazzo, L., Raffle, H., & Courser, M. "Stronger together: the role of a rural community of practice in implementing a culturally relevant response to the opioid epidemic during the COVID-19 pandemic." (2021) *Journal of Family and Community Health* 44(3), 113-116. doi: 10.1097/FCH.0000000000000299
- Courser, M. & Raffle, H. "With crisis comes opportunity: Unanticipated benefits resulting from pivots to take-home naloxone (THN) programs during the COVID-19 pandemic." (2020); *Journal of Substance Abuse Treatment*, <https://doi.org/10.1016/j.jsat.2020.108220>.
- Miller, T., Courser, M., Shamblen, S., Lange, J., DeJong, W., & Ringwalt, C. "The Efficacy and Cost Effectiveness of Subsidized Ridesharing as a Drunk Driving Intervention in Columbus, Ohio." (2020) *Accident Analysis and Prevention*, (146) <https://doi.org/10.1016/j.aap.2020.105740>.
- Shamblen, S., Courser, M., Young, L. *et al.* "The Efficacy of Drug Treatment in Afghanistan: Overall Results and Implications from a New Evaluation." (2020) *International Journal of Mental Health & Addiction*. <https://doi.org/10.1007/s11469-020-00382-1>.
- Shamblen S., Courser M., Schweinhart A., & Thompson K. "If momma ain't happy with the mentoring relationship, ain't nobody happy with the mentoring relationship: Parental satisfaction as a predictor of mentoring match strength and length." (2020) *Journal of Community Psychology*, 48(3), 879-890.
- Milazzo, L., Raffle, H., & Courser, M. "Moving upstream: An intersectoral collaboration to build sustainable planning capacity in rural and Appalachian communities." (2019) *The Foundation Review* (11)4 <https://doi.org/10.9707/1944-5660.1491>.
- Courser, M., S. Shamblen, K. Thompson, L. Young, A. Schweinhart, C. Shepherd, S. Hamilton-Nance, C. Aramburu, C. Burrmeister. (2017). "Assessing the Impact of Parental Characteristics, Parental Attitudes, and Parental Engagement on Mentoring Relationship Outcomes" Final report for Office of Juvenile Justice and Delinquency Prevention, grant number 2013-JU-FX-0010. NCJ 251114, available at <https://www.ncjrs.gov/app/publications/abstract.aspx?id=273294>
- Abadi, M., Shamblen, S., Courser, M., Johnson, K., Young, L., Thompson, K., & Browne, T. "Differences Among Afghan Women and Men in Drug Abuse Treatment: An Assessment of Treatment Entry Characteristics, Dropout, and Outcomes." (2014) *Journal of Ethnicity and Health*, 20(5), 1-21.
- Shamblen, S., Courser, M., Abadi, M., Johnson, K., Young, L., & Browne T. (2013) "An international evaluation of DARE in São Paulo, Brazil." *Drugs: Education, Prevention, and Policy*, 21(2), 110-119.
- Courser, M., Johnson, K., Abadi, M., Shamblen, S., Young, L., Thompson, K., & Browne, T. (2013) "Building an Evidence Base for Drug Treatment in Afghanistan: Lessons Learned and Implications for Future Research." *International Journal of Prevention and Treatment of Substance Use Disorders* (1) 1: 12-27.

- Johnson, K., Shamblen, S., Courser, M., Young, L., Abadi, M., & Browne, T. (2013) "Drug Use and Treatment Success Among Gang and Non-gang members in El Salvador: A Prospective Cohort Study." *Substance Abuse Treatment, Prevention, and Policy* (8) 20: ISSN: 1747-597X.
- Courser, M., & Lavrakas, P. (2012) "Item-Nonresponse, Measurement Error, and the 10-Point Response Scale." *Survey Practice* (5) 4: ISSN: 2168-0094.
- Abadi, M., Shamblen, S., Johnson, K., Thompson, K., Young, L., Courser, M., & Vanderhoff, J. (2012) "Examining Human Rights and Mental Health Among Women in Drug Abuse Treatment in Afghanistan." *International Journal of Women's Health*, 4: 155-165.
- Johnson, K., Grube, J., Ogilvie, K., Collins, D., Courser, M., Dirks, L., Ogilvie, D., & Driscoll, D. (2012) "A Community Prevention Model to Prevent Youth from Inhaling and Ingesting Harmful Legal Products in Frontier Communities." *Evaluation and Program Planning*, 35: 113-123.
- Courser, M., Holder, H., Collins, D., Johnson, K., & Ogilvie, K. (2009) "Evaluating Retailer Behavior in Preventing Youth Access to Harmful Legal Products: A Feasibility Test." *Evaluation Review*, 33: 497-515.
- Courser, M., Shamblen, S., Lavrakas, P., Collins, D., & Ditterline, P. (2009) "The Impact of Active Consent Procedures on Student Survey Data: Evidence from a New Experiment." *Evaluation Review*, 33: 370-395.
- Courser, M. "Busies," "Callbacks," "Completed Interview," "Consent Form," "Contacts," "Contact Rate," "Dispositions," "Fast busy," "Final dispositions," "Household refusal," "Ineligible household," "Ineligibles," "Language barrier," "Noncontacts," "Nonresidential," "Out of order," "Out of sample," "Partial interview," "Privacy manager," "Respondent refusal," "Respondent unavailable," "Temporary dispositions," "Unable to participate," "Unknown eligibility," and "Unpublished number" entries for *Encyclopedia of Survey Research Methods*, Paul J. Lavrakas, ed. Sage Publications, 2008.
- Collins, D. Pan, Z., Johnson, K., Courser, M., & Shamblen, S. (2008). Individual and Contextual Predictors of Inhalant Use Among 8th Graders: A Multilevel Analysis. *Journal of Drug Education*, 38(3), 191-208.
- Livet, M., Courser, M., & Wandersman, A. (2008) "The Prevention Delivery System: Organizational Context and Implementation of Comprehensive Programming Frameworks." *American Journal of Community Psychology*. 41: 361-378.
- Courser, M., Holder, H., Collins, D., Johnson, K., & Ogilvie, K. (2007). "An Evaluation of Retailer Sales Outlets as Part of a Community Prevention Trial to Reduce Sales of Harmful Legal Products to Youth." *Evaluation Review*, 31: 343-363.
- Johnson, K., Courser, M., Holder, H., Miller, B., Ogilvie, K., Moore, R., Collins, D., Saltz, B., Ogilvie, D., & Saylor, B. (2007). A Community Prevention Intervention to Reduce Youth From Inhaling and Ingesting Harmful Legal Products. *Journal of Drug Education*, 37(3), 227-247.
- Courser, M. (1997) "Two Sides to Magnet Schools." *Albion Journal of Contemporary Affairs* 6(1).

Works in Progress

Conference Presentations

- 2022 “Using an Innovative Community-Driven Survey Approach to Understand Stigma Around Mental Health and Substance Use Disorder in Four Ohio Communities: Results and Methodological Implications.” Presentation co-developed with Holly Raffle and April Schweinhart. Presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 18-19.
- 2022 “Addressing Stigma Through the Health Stigma and Discrimination Framework: Experiences of Ashtabula, Fairfield, Sandusky, and Seneca Counties. Presentation co-developed with Holly Raffle, Stephen R. Shamblen, April Schweinhart, and members of the COP-RCORP Consortium. Presented at the 2022 Ohio Opiate and Other Drugs Conference, June 6-7.
- 2019 “Evaluating Drug Treatment in Afghanistan Using Multimethod Data Collection Approaches: Results and Methodological Implications.” Presentation co-developed with Stephen R. Shamblen, Linda Young, Cassandra Shepherd, and April Schweinhart. Presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 22-23.
- 2019 “Websites as a path forward for community-based research.” Presentation co-developed with April Schweinhart, Holly Raffle, and Carrie Burggraf. Presented at the 2019 Conference of the American Evaluation Association, November 11-16.
- 2019 “We Rise By Lifting Others: Using a Community of Practice Model as an Approach for HRSA’s RCORP-Planning Grant.” Presentation co-developed with Holly Raffle, Ph.D. Presented at 2019 Annual Meeting of the National Rural Health Association, May 8-10.
- 2018 “Penetration and Self-Reported Outcome of a Brief Alcohol Intervention in Three Midwestern Cities.” Poster Presentation co-developed with Ted Miller, Chris Ringwalt, and Bina Ali. Presented at 2018 Meeting of the American Public Health Association, November 10-14.
- 2018 “Using Survey Data and Biomarkers as Part of an Evaluation of Drug Treatment in Afghanistan: Methodological Considerations and the Importance of Context in Respondent Tracking. Presentation co-developed with Stephen R. Shamblen, Linda Young, Cassandra Shepherd, and April Schweinhart. Presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 21-22.
- 2018 “A Community-driven Needs Assessment Process: Innovations and Lessons Learned” co-presented with Holly Craycraft and April Schweinhart. Presented at the 2018 Conference of the American Evaluation Association, October 29-November 3.
- 2017 “The Impact of Parental Involvement on Match Outcomes,” co-presented with Stacey Hamilton-Nance and Kirsten Thompson. Presented at the 2017 Big Brothers Big Sisters National Conference, June 25-18.
- 2016 “Using the Tri-Ethnic Model of Community Readiness to Address Important Issues in Ohio Communities,” co-presented with Mary Haines and Holly Raffle. Presented at the 2016 Ohio Prevention and Education Conference, June 27-29.
- 2016 “Using the Tri-Ethnic Model of Community Readiness to Address Important Issues in Ohio Communities,” co-presented with Mary Haines and Holly Raffle. Presented at the 2016 Ohio Problem Gambling Conference, March 3-4.

2014. "Conducting a Longitudinal Survey with Drug Treatment Patients in Afghanistan: Methodological and Contextual Challenges," co-authored with Linda Young, Steve Shamblen, Melissa Abadi Kirsten Thompson, Knowlton Johnson, and Amanda Bajkowski. Presented at the Annual Meeting of the American Association for Public Opinion Research, May 15-18.
2013. "Improving Relationship Outcomes With Additional Training and Enhanced Match Support for Mentors: Preliminary Findings," co-authored with Linda Young, Steve Shamblen, Kirsten Thompson, Melissa Hutchins, and Stacey Hamilton-Nance. Presentation at the Annual Meeting of the American Society of Criminology, November 20-23.
2011. "Conducting a Longitudinal Survey With Former Drug Treatment Patients in El Salvador: The Importance of Considering Context in Survey Design and Respondent Tracking." Paper presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 18-19.
2010. "Is Post-stratification Weighting a Sufficient Adjustment for Nonresponse in a Student Survey? Preliminary Evidence." Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 13-16.
2009. "The Impact of the Economic Crisis on the Vote in the 2008 Election," co-authored with Trevor Thompson, Dennis Junius, and Paul Lavrakas. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 14-17.
2009. "Parent Engagement in the Parental Consent Process: Evidence From Four Parental Surveys," co-authored with Paul Lavrakas, Stephen Shamblen, Paul Ditterline, and David Collins. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 14-17.
2008. "Differences between Hispanic 'Origin' and Hispanic 'Identity' and their Implications: Part III," co-authored with Paul J. Lavrakas, Trevor Thompson, and Lillian Diaz-Hoffman. Paper presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 21-22.
2008. "Strategies to Increase Parental Consent in Active Consent Situations: Lessons Learned from Two Studies, co-authored with Kristen Ogilvie, Stephen Shamblen, and Knowlton Johnson. Paper presented at the Annual Meeting of the American Evaluation Association, November 5-8.
2008. "The Impact of Active Consent Procedures on Student Survey Data: Evidence from a New Experiment," co-authored with Paul J. Lavrakas, David Collins, and Paul Ditterline. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 15-18.
2007. "Developing and Validating a Measure of Student Performance in American History," co-authored with Brent Garrett, Stuart Hobbs, and Betsy Hedler. Presentation at the Teaching American History Project Director's Conference, October 17-19.
2007. "Improving Data Quality from Student Surveys: A Natural Experiment in South Africa to Test the Impact of Audio-Personal Digital Assistants (Audio PDAs)," co-authored with Pamela Cupp, Rick Zimmerman, and Scott Johnson. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 17-20.

2006. "Methodological Challenges in Conducting Evaluation Research in Rural Alaska," co-authored with Linda Young, Knowlton Johnson, Kristen Ogilvie, Brian Saylor, and David Collins. Presentation at the Annual Meeting of the American Evaluation Association, November 1-4.
2006. "Prevention Systems Development: A Commitment to Collaborative Prevention in Ohio," co-authored with David Collins, Mike Magnusson, and Molly Stone. Presentation at the National Prevention Network Conference, August 27-30.
2005. "New Research on the Differences Between Hispanic "Origin" and Hispanic "Identity" and Their Implications," co-authored with Paul J. Lavrakas and Lillian Diaz-Castillo. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 12-15.
2004. "The Impact of Changing From Passive to Active Consent in a Student Survey: A Case Study Examining Response Rates, Sample Bias, and Implications for Public Policies," co-authored with Rachelle Seger, David Collins, and Linda Young. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 14-16.
2003. "Rationalization and Derivation Processes in the 2000 Presidential Election - New Evidence About the Determinants of Citizens' Vote Choices," co-authored with Alison Marie Pfent and Jon Krosnick. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 15-18.
2002. "Public Opinion and The Ohio Supreme Court: The Impact of Elite Messages." Paper presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 22-23.
2002. "Elite Messages and Public Opinion: The Case of The Ohio Supreme Court." Paper presented at The Annual Meeting of the American Association for Public Opinion Research, May 16-19.
2002. "Differences Between Hispanic Origin and Hispanic Identity and Their Implications," co-authored with Paul J. Lavrakas and Lillian Diaz-Castillo. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 16-19.
2001. "Item-Nonresponse, Measurement Error, and the 10-Point Response Scale," co-authored with Paul J. Lavrakas. Paper presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 16-17.
2001. "Exploring the Determinants of Vote Choices in the 2000 Presidential Election: Longitudinal Analyses to Document Causality," co-authored with Jon A. Krosnick, Kenneth Mulligan, and LinChiat Chang. Paper presented at Annual Meeting of the American Political Science Association, August 30 - September 2.
2001. "Item-Nonresponse, Measurement Error, and the Ole 10-Point Response Scale," co-authored with Paul J. Lavrakas. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 19-22.
2000. "Does Thinking Make it So? Interviewer Expectations and Data Quality," co-authored with Lewis Horner and Paul J. Lavrakas. Paper presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 20-21.
2000. "The Attributions of Blacks and Whites in Explaining Socio-Economic Differences Between Blacks and Whites," co-authored with Paul J. Lavrakas. Paper presented at the Annual Meeting of the American Association for Public Opinion Research, May 18-21.

1999. "Attributions that Blacks and Whites Make About SES Differences Between Blacks and Whites," co-authored with Paul J. Lavrakas. Paper presented at the Annual Meeting of the Midwest Association for Public Opinion Research, November 19-20.

Other Professional Activity

Manuscript Reviewer: *Foundation Review, Public Opinion Quarterly, Social Forces, Evaluation and Program Planning, British Journal of Education Research, Substance Abuse: Research and Treatment* and *Journal of Adolescence*

Committee Member: AAPOR Membership and Chapter Relations committee (2018-present). Served as reviewer for 2019, 2020, 2021, 2022 Roper travel awards and student/faculty diversity pipeline awards.

Past President: (2017-2018) for Midwest Association for Public Opinion Research (MAPOR)

President: (2016-2017) for Midwest Association for Public Opinion Research (MAPOR)

Vice-President/President Elect: (2015-2016) for Midwest Association for Public Opinion Research (MAPOR)

Associate Conference Chair/Conference Chair: (2014-2015) for Midwest Association for Public Opinion Research (MAPOR)

Board Member: At-large Executive Committee Member (2009-2011) for Midwest Association for Public Opinion Research (MAPOR)

Conference Panel Chair/Discussant:
2015, 2013, 2010, 2009, 2007, 2003, & 2002 Annual Meetings of the American Association for Public Opinion Research (AAPOR)

2022, 2019, 2018, 2017, 2016, 2014, 2013, 2011, 2010, 2007 & 2004 Annual Meetings of the Midwest Association for Public Opinion Research (MAPOR)

Honors and Awards

AAPOR Roper Fellow (2013)
PIRE Staff Development Award (2016, 2015, 2011, 2008, 2007, 2005)
Ohio State University Program for Enhancement of Graduate Studies Dissertation Grant (2000)
Ohio State University Fellowship (1997-1998)

Professional Memberships

Alcohol and Drug Abuse Prevention Association of Ohio
American Association for Public Opinion Research
International Society for Substance Use Professionals
Midwest Association for Public Opinion Research
National Rural Health Association
National Council on Problem Gambling
Problem Gambling Network of Ohio
Opioid Research Consortium of Central Appalachia

References

References will be provided upon request.

[REDACTED]
[REDACTED]
Honorable City Council Members
City of Upper Arlington
3600 Tremont Road
Upper Arlington, OH 43221

March 30, 2024

Dear City Council Members:

I am grateful for the opportunity to apply to serve on the City's Library Board of Trustees. I have lived in Upper Arlington since 2004 and am the proud parent of two children—Isabella (13) and Olivia (9). My wife, Maria, is a physician who practices in Marble Cliff and who serves a significant number of Upper Arlington residents through her practice.

Our library system has been a pivotal part of my children's growth and development. We have spent countless hours playing at the library, have used services such as the passport fair, and have participated in programs and the seasonal reading challenges. As our kids have grown, we now use the library for study space and as a source of new book and media discoveries. I have been amazed at the breadth of programmatic activities, how well programs and initiatives are run by the Library, and how the creatively and effectively the library has evolved to meet the changing needs of Upper Arlington. During the pandemic, I was impressed with how quickly the library pivoted to continue services to UA. A primary motivation for my application is to be of service to the library and to help support its planning and programmatic efforts. This is a critical time for the library as it works to improve facilities and plan for the future.

In my professional capacity, I work with communities around Ohio to build capacity around strategic planning. Having an opportunity to support and catalyze additional planning in my home community would be amazing and personally rewarding. I am a current member of Leadership UA and our evening at the library last month highlighted not only how important the library is to UA but also the opportunities and challenges facing the library: adapting programs and services to recognize its growing role as a gathering place for UA residents, responding to changing media usage patterns, and improving aging facilities with a limited capital budget.

Currently, I am working with Wickliffe's Principal and a core group of parent volunteers to co-lead efforts to replace the Big Toy, which is beyond its useful life and which will be removed in July 2024. Through these efforts, we have been able to raise approximately \$120,000 and to leverage a district investment of \$175,000 in a new play structure. New equipment already has been installed and we are planning a community build process in June for the new structure. This work, while incredibly challenging, has been immensely rewarding as it is providing new play opportunities for my younger daughter (a 3rd grader at Wickliffe) and for the entire Wickliffe school community. This work will begin to

wind down this summer, providing time and space for me to engage in new ways to serve Upper Arlington.

I am employed as a Senior Research Scientist by the Pacific Institute for Research and Evaluation (PIRE), which is a national 501(c)3 organization dedicated to improving the health and wellbeing of individuals and communities around the world. Much of my work involves building community capacity to implement and sustain evidence-based prevention and treatment strategies. I work in partnership with communities and coalitions and support community of practice approaches to improving policy, systems, and environmental conditions. In addition, I served for six years (2015-2021) as a Staff Director of PIRE. This experience enhanced my leadership and management skills, increased my abilities to work in partnership with individuals of widely varying perspectives and backgrounds, and instilled a strong orientation to service leadership. This experience will help ensure that I can support and contribute effectively to the Library Board of Trustees.

Thank you for considering my application to the Board. I can be reached via email at [REDACTED] or via phone [REDACTED] if questions arise.

Sincerely,



Matthew Courser, Ph.D

Dr Ann Gabriel

City of Upper Arlington | Generated 5/2/2024 @ 6:13 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Dr Ann Gabriel	Board of Tax Review	2	Pending
Application Date	4/10/2024			
Expiration Date	4/10/2026			
Board Member	Ann Gabriel			
Status	Validated			

Basic Information

Name
Dr Ann Gabriel

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Jessica Grisez, Kip Greenhill, Sue Ralph

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
Retired

Occupation
CPA/Accounting Professor

Job Title
Associate Professor Emeritus

Yes, I am a city employee
No

Professional Licenses
CPA

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Citizens Financial Review Task Force 2019, Chair

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
NO

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
UA Community Foundation, UA Civic Association Alumni Directors, UA Citizens Police Academy Alumni Association, Ohio University Foundation, Northwest United Methodist Church, Friends of the Upper Arlington Public Library

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I believe my background as a practicing CPA and an accounting professor is a good fit for this Board. I served in a similar role for the City of Athens and I believe that experience will be beneficial to the UA Board of Tax Review.

Check the box next to your area(s) of expertise.
Finance and/or budgeting, Professional Expertise

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?
Yes

Are you a registered voter?
Yes

E. ANN GABRIEL, CPA PhD



EDUCATION

Doctor of Philosophy, 1993, The Ohio State University, Columbus, Ohio, Department of Accounting and MIS, major concentration in Accounting, minor concentrations in Microeconomic Theory and Statistics.

Master of Arts, 1993, The Ohio State University, Columbus Ohio.

Bachelor of Business Administration, 1971, University of Michigan, Ann Arbor, Michigan.

ACADEMIC APPOINTMENTS AND PROFESSIONAL EXPERIENCE

James E. Daley Professor of Accountancy and Director, Ohio University School of Accountancy, Athens, OH, July 1, 2012 – July 1, 2016

Associate Professor of Accounting, Ohio University School of Accountancy, Athens, OH, September 2008 – June 30, 2012; July 1, 2016 to December 31, 2018

Assistant Professor of Accounting, Ohio University School of Accountancy, Athens, OH, September 2001 – September 2008

Assistant Professor of Accounting, University of Notre Dame, South Bend, IN, August 1993 - August 2001

Graduate Research and Teaching Assistant, The Ohio State University, Columbus, OH, September 1989 - August 1993

Controller, Columbus Together (not-for-profit government-business partnership), Columbus, Ohio, March 1989 - January 1990

Controller, ChemLawn Corporation, Columbus, Ohio, May 1984 - February 1989

Staff Accountant - Senior Manager, Coopers & Lybrand, Columbus, Ohio, June 1971 - April 1984. From October 1975 to October 1977 served in the Accounting, Auditing and SEC Directorate of the National Office in New York City.

CERTIFICATION

Certified Public Accountant, 1973. Current Permit to Practice in the State of Ohio.

PROFESSIONAL SERVICE

OHIO SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

Political Action Committee Board of Trustees (2009 -)

Review Society endorsements for office. Meet with legislative members at state and national levels.

Legislative Key Person (2001 -)

Develop relationship with federal and state legislators, contact legislators regarding legislation important to the practice of accounting.

CPA/PAC East/Southeast Screening Committee (2005 - 2018, Chair 2012 - 2018)

Recommended candidates for Senate and House of Representatives for endorsement by the Ohio Society of CPA.

CPA/PAC Statewide Endorsement Committee (2012 -)

1Professional Ethics Committee (2003 – 2009, 2023 -)

Review cases brought before the committee, administer sanctions or other disciplinary measures as deemed necessary

Treasurer, Executive Committee 1988 - 1991

Member, Board of Directors 1987 - 1988

Member, Mission and Future Issues Task Force 1984 - 1985

Continuing Professional Education Committee 1979 - 1985

Columbus Chapter Activities

President 1984 - 1985

President Elect 1983 - 1984

Secretary 1982 - 1983

Treasurer 1981 - 1982

Chair, Continuing Professional Education Committee 1978 – 1980

NATIONAL COLLEGIATE ATHLETIC ASSOCIATION
High School Review Committee (2016 - 2018)

MID-AMERICAN CONFERENCE
Student Athlete health and Wellness Task Force (2014 - 2018)
Diversity and Inclusion Task Force (2016 – 2018)

AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS
Business, Industry and Education Committee (2016 - 2019)

OHIO BAR LIABILITY INSURANCE CORPORATION
Board of Directors (2014 -)
Treasurer (2017 - 2019)
Investments Committee (2014 –)
Audit Committee (Chair) (2014 -)

STATE AUDIT COMMITTEE, State of Ohio
Committee Member (2018 -)

COMMUNITY SERVICE
CITY OF UPPER ARLINGTON
Friends of Upper Arlington Public Library Board of Directors (2023 -)
Financial Secretary (2023 -)

Upper Arlington Alumni Council, (2022 -)

Upper Arlington Citizen Financial Review Task Force, Chair 2019

Upper Arlington Community Foundation Board of Directors (2018 -)
Treasurer (2019 -)

Upper Arlington Public Library Board of Trustees (1987 – 1993)

Upper Arlington Civic Association, Director (1983 – 1984)

OTHER SERVICE
Crichton Club Board of Directors (2020 -)
Treasurer (2020 -)

Riverside Child Care Center Board of Directors (2018 - 2022)
Treasurer (2018 -)

City of Athens Board of Tax Appeals (2012 - 2018)

League of Women Voters of Athens County
Board of Directors (2011 - 2014)

1Riverside United Methodist Church, Upper Arlington, OH.
Lay Delegate to Annual Conference (2009 - 2022)
Finance Committee (2008 -)
Staff - Parish Relations Committee, Chair (2003 - 2007)
Confirmation Mentor (2003 - 2013)
Middle School Youth Fellowship Advisor (2003 - 2010)

The Wesley Foundation at The University of Michigan, Ann Arbor, MI.
Board of Trustees (1995 - 2005, 2008 -)
Personnel Committee (2008 -)

HONORS AND AWARDS

Upper Arlington Super Senior 2022

Ohio University Outstanding Accounting Educator 2019

Ohio Society of CPAs and Ohio Region of the American Accounting Association 2012
Outstanding Ohio Accounting Educator.

Ohio University College of Business Excellence in Service and Professional Activity Award,
2009

James Dincolo Teaching Award, University of Notre Dame, 1995

Department of Accountancy Teaching Citation, University of Notre Dame, 1994

Coopers & Lybrand Teaching Award, The Ohio State University, 1992

Phi Kappa Phi - The Ohio State University Chapter, 1992

Coopers & Lybrand Teaching Award, The Ohio State University, 1991

Upper Arlington (Ohio) Rotary Club Service Above Self Award, 1988

April 10, 2024

Ukeme Awakessien Jeter, President
Upper Arlington City Council
3600 Tremont Rd
Upper Arlington, OH 43221

Dear President Awakessien Jeter

I am applying for a position on the Upper Arlington Board of Tax Review. I believe my professional background, as indicated in the attached resume, prepares me to serve on this Board. In particular, I served in a similar capacity on the City of Athens Ohio Board of Tax Appeals.

Thank you for your consideration.

Ann Gabriel

Peter W Hahn

City of Upper Arlington | Generated 5/2/2024 @ 6:49 pm by OnBoardGOV - Powered by ClerkBase

Status

Name Peter W Hahn
Application Date 4/30/2024
Expiration Date 4/30/2026
Board Member **Peter Hahn**
Status **Validated**

Board	Vacancies	Status
Library Board of Trustees	0	Pending

Basic Information

Name
Peter W Hahn
Date of Birth
[REDACTED]
List 3 Personal and/or Professional References (at least one required)
Beth Hatch (UAPL Director)
Andy Geistfeld (UA Schools CFO/Treasurer)
Jeff Bibbo (UA Resident, Attorney)

Contact Information

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Occupation

Employer
Taft Stettinius & Hollister LLP
Occupation
Attorney
Job Title
Partner
Yes, I am a city employee
No
Professional Licenses
Licensed Attorney (Ohio and Kentucky)

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
I am a current member of the Upper Arlington Public Library Board of Trustees.

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No.

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Upper Arlington Public Library Board of Trustees

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
Please see attached cover letter.

Check the box next to your area(s) of expertise.
Finance and/or budgeting, Fundraising, Legal, Policy Making, Strategic Planning, Professional Expertise

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?
Yes

Are you a registered voter?
Yes

Generated 5/2/2024 @ 6:49 pm

Peter W. Hahn

PARTNER / COLUMBUS, NORTHERN KENTUCKY



Practices

Contracts
Commercial Litigation

Industries

Construction
Construction Litigation

Education

Washington University School
of Law (1998)
The College of Wooster
(1995)

Admissions

State - Ohio
State - Kentucky
Federal - U.S. Court of
Federal Claims
Federal - U.S. Court of
Appeals for the Federal
Circuit
Federal - U.S. Court of
Appeals for the Sixth Circuit
Federal - U.S. District Court
for the Northern District of
Ohio
Federal - U.S. District Court
for the Southern District of
Ohio

Peter represents commercial contractors and project owners through each stage of a construction project, from procurement to dispute resolution after completion. His experience and extensive construction industry knowledge allow him to advise public and private clients through disputes and liability avoidance, from drafting and negotiating construction contracts to post-project issues, such as construction defect claims.

In addition to advising clients on the challenges that arise in commercial and public construction projects, Peter is adept at guiding clients through potential schedule and cost risks such as change orders and directives, differing site conditions, delay and acceleration claims, project safety concerns, problems with coordination of work, construction defect claims, state and federal prevailing wage law, mechanics' liens, appropriate project delivery methods, payment and delivery performance bond claims, and publicly bid projects.

Peter is a member of the Board of Directors of the Builders Exchange of Central Ohio, one of only a few lawyers to have served on the Board of this 130+ year-old trade association. He is also a member of the Associated General Contractors of Central Ohio, the Associated Builders and Contractors of Central Ohio, the Columbus Bar Association's Construction Law Committee, and the Ohio State Bar Association's Construction Law Committee. He also has leadership roles in the American Bar Association's Forum on Construction Law. Peter's active involvement in these organizations provides him with a thorough understanding of the ever-changing developments, legislation, and regulations within the construction industry. His proficiency in the field allows him to offer clients unique insight, perspective, and guidance.

Peter earned his J.D. from the Washington University in St. Louis School of Law and received his Bachelor of Arts in Psychology from The College of Wooster.

Speeches and Publications

- Speaker, “Artificial Intelligence in Construction: Change is Good. So is Being Cautious,” Ohio Construction Conference, presented by the Builders Exchange of Central Ohio (Columbus, OH), (March 2024)
- Speaker, “The State of Implementation of Incentive Measures in Procurements in the Infrastructure and Inflation Reduction Acts (Including Public-Private Partnership Risks),” ABA Section on Public Contract Law, 2023 Public Procurement Symposium (New Orleans, LA), (Nov. 2023)
- Author, “Onerous Terms in a Construction Contract: Which Are Void and Which Are Enforceable?,” Columbus Bar Lawyers Quarterly (Summer 2023)
- Speaker, “Price Escalation – Protect Yourself from the Unpredictable,” Builders Exchange of Central Ohio (BX) Law & Finance Group (Columbus, OH), (June 2023)
- Speaker, “The Future of Public-Private Partnerships (P3s) in Infrastructure,” ABA Forum on Construction Law Annual Meeting (Vancouver, BC), (April 2023)
- Speaker, “AIA & Other Documents: Contract Changes and Expectations,” Builders Exchange of Central Ohio (BX) (Columbus, OH), (Aug. 2022)
- Speaker, “The Most Heavily Negotiated Terms in Construction Contracts from the Perspective of the Owner, Contractor and Subcontractor,” Construction SuperConference (Orlando, FL), (Dec. 2021)
- Speaker, “Mandated: Can They Really Do This? Here’s What You Need to Know,” Builders Exchange of Central Ohio (BX) (Columbus, OH), (Nov. 2021)
- Speaker, “Construction Project Documents,” HalfMoon Education Webinar – Focus on Project Documents and Contract Disputes (Nov. 2021)
- Editor, “The AIA Construction Management Contracts: A Concise Analysis of the 2019 Revisions,” ABA Forum on Construction Law (2020)
- Speaker, “Managing Your Company in a Pandemic Crisis,” Builders Exchange of Central Ohio (BX) (Columbus, OH), (May 2020)
- Speaker, “Public Projects – What’s Happening Now? What’s Ahead For

New Projects?," ABA Forum on Construction Law – Leadership Roundtable Series on Impacts of COVID-19 Webinar (May 2020)

- Speaker, "Writing Outside the Lines: The Most Commonly Modified Terms of the Owner Agreements," ABA Forum on Construction Law Fall Meeting (Boston, MA), (October 2017)
- Editor, "The 2017 A201 Deskbook," ABA Forum on Construction Law (2017)
- Author, "State and Local Construction Projects: An Attorney's Handbook" (Chapters 2 and 16), ABA Forum on Construction Law (2017)
- Speaker, "Getting Paid on Public Projects," ABA Forum on Construction Law Webinar (2015)
- Author, "When Are Public Procurement Documents 'Public Records'?", Government Construction Newsletter (published by Division 13 of the ABA Forum on Construction), Vol. 1, Issue 4 (Dec. 2015)
- Author, "Private Rights of Action for Procurement Violations," The Construction Lawyer, 35 Constr. Law 17 (2015)
- Author, "Ohio Supreme Court Upholds Pay-if-Paid Provisions," Lexology (2014)
- Author, "Prevailing Wage Laws: What Are They and How Are They Changing?", Lexology (2011)
- Author, "Ohio's Budget Contains Key Changes to Public Construction," Lexology (2011)

Awards

- Honoree, Best Lawyers in America®, Litigation-Construction (Lawyer of the Year 2020, 2024)
- Honoree, Ohio *Super Lawyers*, Construction Litigation (2022-2024)
- Honoree, U.S. News & World Report – Best Lawyers, Construction (2017-2024)
- Rated AV® Preeminent by Martindale-Hubbell
- Top Lawyers, *Columbus CEO Magazine*

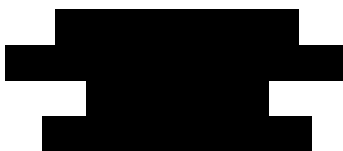
Professional Affiliations

-
- Builders Exchange of Central Ohio
Member, Board of Directors
 - Associated General Contractors of Central Ohio
 - Associated Builders and Contractors of Central Ohio
 - Ohio State Bar Association
Construction Law Committee, Former Chair
 - Columbus Bar Association
Construction Law Committee, Former Chair
 - American Bar Association
Forum on Construction Law, Chair, Division 13: Government Construction
 - American Bar Association Section of Public Contract Law
 - Construction Lawyers Society of America
Fellow

Community Involvement

- Upper Arlington Public Library
Board of Trustees, President (2022-2024)

Peter W. Hahn



April 29, 2024

Upper Arlington City Council
City of Upper Arlington
3600 Tremont Road
Upper Arlington, Ohio 43221

Dear Honorable Members of City Council:

I respectfully submit my application for the renewal of my position on the Upper Arlington Public Library Board of Trustees.

I have been honored to be a member of the Upper Arlington Public Library Board of Trustees for eight years and have served as the President of the Board for over two years. In my capacity as President, I have led the Board during two of the most significant issues facing the library in the last several years: implementing our master facilities plan and navigating a unionization effort.

I offer a unique perspective to the Library Board for both of these issues. As a construction attorney, I have first-hand professional experience in the development and improvement of public spaces, working to ensure timely and economic delivery of public projects. And as a long-term member of the Board, I have gained the trust and respect not only of other Board members but also of library leadership and staff. I bring fair-minded, even-handed leadership to the Board in this important moment for the entire UAPL community. I believe my input, experience, and perspectives are respected by UAPL's staff and leadership, and I have worked hard to earn that respect. It would be my honor to continue serving as a UAPL Board member.

Our Library is in a period of transition. I have no doubt that the transition is for the better—as a Board member and now as an officer, I have always believed that stagnation is the enemy of progress. Our master facilities plan looks far into the future to envision a library system that goes beyond the lending of media resources to more thoroughly meeting the intellectual, educational, and practical needs of our users. And no matter how the unionization effort turns out after a vote of the union's prospective members, we will be a stronger library because our staff has been more engaged in its own future. At times like this, institutional knowledge and experience are critical. The Board needs leaders who have both the historical experience to appreciate the Library's progress to date and the vision to see how we can improve going forward. I offer both.

I have served as chair of both the finance committee and the operations committee of the Board, so I understand the nuances of the opportunities and challenges our Library faces. And I have a strong working relationship with both our Director, Beth Hatch, and our Vice President, Kevin Fix, so I offer a continuity of leadership in a time of transition.

But more importantly, I offer the passion to continue serving the UAPL, its Board, and its patrons, as well as the energy to do so effectively. Having lived in Upper Arlington for almost 20 years, I know first-hand how valuable this Library is to our community. I know how valuable it was to my two daughters, who spent countless hours in the Lane Road branch collecting their favorite books and movies. And I appreciate how proud this community is of the Library as an institution, like our City and our Schools. If selected to serve another term, I commit to honoring that pride and the highest level of quality our community expects of our Library.

Thank you for the opportunity to serve.

Sincerely yours,

A handwritten signature in blue ink, appearing to read "Peter W. Hahn". The signature is fluid and cursive, with the first name "Peter" being the most prominent part.

Peter W. Hahn

Dr Rebecca Kemper

City of Upper Arlington | Generated 5/2/2024 @ 6:43 pm by OnBoardGOV - Powered by ClerkBase

Status

Name	Dr Rebecca Kemper
Application Date	4/30/2024
Expiration Date	4/30/2026
Board Member	Rebecca Kemper
Status	Validated

Board (Rank)	Vacancies	Status
Cultural Arts Commission (1)	1	Pending
Board of Zoning & Planning (2)	0	Rejected
Library Board of Trustees (3)	0	Rejected
City Tree Commission (4)	0	Rejected
Community Relations Committee (5)	1	Rejected
Board of Building Standards (6)	0	Pending
Parks & Recreation Advisory Board (7)	0	Pending
Tax Incentive Review Council (8)	1	Rejected
Records Commission (9)	0	Pending
Medical Advisory Board (10)	0	Pending
Civil Service Commission (11)	0	Pending
Board of Tax Review (12)	2	Rejected
Board of Health (13)	0	Pending

Basic Information

Name
Dr Rebecca Kemper

Date of Birth

List 3 Personal and/or Professional References (at least one required)
Judy Yesso, former Cultural Arts Commission Chair -
Dr. Shoshanah B.D. Goldberg-Miller (co-author on Art & Culture research) -
Peter Krajnak (current board president) -

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Yes - currently the chair of the Cultural Arts Commission and would like to stay on this committee

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Buckeye Executive Women in Leadership (BEWEL) - Board to OSU's College of Engineering Junior League (joining in June 2024)

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents,

Contact Information

Occupation

Employer
Columbus Landmarks Foundation

Occupation
Preservation & STEAM Education

Job Title
CEO

Yes, I am a city employee
No

interests, training or experience that you bring to the Board & Commission.

It has been a pleasure to serve on the Cultural Arts Commission to review our city's art collection, preserve its legacy, and support new, innovative ways to elevate the arts - and area artists -- for our city.

Check the box next to your area(s) of expertise.

Finance and/or budgeting, Marketing, Grant Writing, Strategic Planning, City Planning, Landscape Architect, Architect, Economic Development

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

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PROFESSIONAL APPOINTMENTS

- 2022-Present **Chief Executive Officer**, Columbus Landmarks Foundation
- Launched our Endangered Properties Fund, bringing in over \$109,000 in donations and services fees as part of a 1772 Foundation Grant
 - Spearheaded the first Request for Proposals and the acceptance of a historic preservation easement with the Franklin County Landbank and an area developer
 - Increased grant awards, resulting in 130%+ of avg. annual revenue
 - Rebuilt the staff to be 100% underrepresented identities
 - Forged press relationships resulting in over 20 media features in a year regarding our property rehabilitation and community education efforts
 - Increased digital and social media platform following by an average of 27%
 - Partnered with Columbus City Council, Mid-Ohio Regional Planning Association, State Historic Preservation Office, Center for Urban Research Association, & CoGo / Lyft on programming
 - Elevated programming recognized by the Advisory Council on Historic Preservation
 - Operational wins resulted in the '23 *Columbus Business First* 40 under 40 Award
- 2019-2022 **Researcher (RA)**, Center for Research and Evaluation, COSI Science Museum
- Forecasted division's finances (\$100k+ a month revenue) during COVID
 - Evaluated \$4 mil+ in grants with Aspen Arts Museum, Space Force (Dayton), MIT, etc
- 2019 **Manager of Design / Manager of Communications**, Gateway Film Foundation
- Spearheaded the center's membership lifecycle mapping, increasing passive revenue
 - Drafted press releases regarding programming, operational changes, and partnerships
 - Managed run-of-show process updating
- 2007-19 Cultural Arts & Nonprofit Research /Facilities Administrator, Ohio State University
Graduate Apartment Manager, Office of Student Life, Ohio State University
- Staff received the 2013-14 Social Justice & Inclusion Faculty Program Award
 - Responsible for the welfare and community engagement of over 400 students
 - Managed facility and financial compliance
 - Created emergency response protocols for the atypical residential apartment complex
- Guest Lecturer**, John Glenn School of Public Affairs
Graduate Teaching Associate, The Knowlton School of Architecture
Graduate Research/Administrative Associate, Department of Arts Administration, Education and Policy for Dr. Shoshannah Goldberg-Miller Creative Cities research

EDUCATION

- Ph.D. **City and Regional Planning**, College of Engineering, Ohio State University, 2021
[Latino and Latina Engineering Graduate Student Association, President \('17-'18\)](#)
- M.S. **City and Regional Planning**, College of Engineering, Ohio State University, 2014
- B.A. **Psychology**, College of Arts & Sciences, Ohio State University, 2008
- B.S. **Architecture**, College of Engineering, Ohio State University, 2007

ACADEMIC PUBLICATIONS

- Journals Meyer, Justin Reeves, Heimlich, Joe E., Horr, Elaine T., **Kemper, Rebecca F.**, & Börner, Katy. (2023) Museum Visitor Comfort When Sharing Personal Information for Evaluation, *Journal of Museum Education*, 48:2, 136-152, DOI: [10.1080/10598650.2022.2135353](https://doi.org/10.1080/10598650.2022.2135353).
- Kemper, R. F.** & Bertley, Frederic., Wisne, Joseph (2022). Catching Health Messages! The Translational Role Cultural Institutions Play in their Cities. *Carolina Planning Journal*, 47, 36-45.
- Goldberg-Miller, S., Heimlich, J., & **Kemper, R. F.** (2021). Arts consumers' place-visioning as a tool for planning creative neighborhoods. *Journal of Urban Affairs*, 43 (10), 1441-1467. <https://doi.org/10.1080/07352166.2020.1768102>.
- Kemper, R. F.** (2019). Artist Residencies as Placekeepers under Creative District Displacement Pressure in Columbus, Ohio. *Carolina Planning Journal*, 44, 24-29.
- ISSN: [0164-0070](https://issn.org/0164-0070).
- Book Chapter(s) Kleit, R. G., & **Kemper, R. F.** (2020). Planning the Just City. In N. G. Leigh, S. P., French, S. Guhathakurta., & B. Stiftel (Eds.), *The Routledge Handbook of International Planning Education* (323-331). New York: Routledge. ISBN 9781138958777.

EDITORIALS & PRESS COVERAGE

- Kemper, Rebecca**, Durst, Charissa W., DeHays, Brad, Meleca, David. (10 August 2022) Columbus Landmarks Reborn and Repurposed. Columbus Metropolitan Club. *National Public Radio (NPR)*. <https://www.npr.org/podcasts/1071831472/columbus-metropolitan-club>.
- Kemper, Rebecca**. (3 August 2022). Protecting historic buildings in Columbus. *All Sides with Ann Fisher*. (NPR / WOSU Broadcasting). <https://news.wosu.org/show/all-sides-with-ann-fisher/2022-08-03/protecting-historic-buildings-in-columbus>
- Weiker, Jim. (28 July 2022). Brewery District's South Wind Motel restored to mid-century style. [**Kemper, R.** commentary on South Wind Motel]. *The Columbus Dispatch*. <https://www.dispatch.com/story/business/2022/07/28/columbus-brewery-district-south-wind-motel-restored-mid-century-vibe/7829819001/>
- Ferenchik, Mark and Bush, Bill. (27 July 2022). Could city of Columbus do more to make sure building collapses don't happen? [**Kemper, R.** commentary on building collapse]. <https://www.dispatch.com/story/news/2022/07/27/columbus-building-collapse-city-no-regular-inspection-old-structures/10117451002/>

Behrens, Cole. (1 June 2022). Columbus Landmarks names new CEO and 2022 Preservation Award winners. [Kemper, R. F. CEO announcement]. *The Columbus Dispatch*. <https://www.dispatch.com/story/news/2022/06/02/cosi-researcher-named-ceo-columbus-building-preservation-group/7477230001/>

Kemper, Rebecca, Stiner-Jones, La'Tonia, Schloenbach, Kyra, & Dewitt, David. (14 February 2022). Chasing the Promise of Equitable Education panel discussion for the Columbus Metropolitan Club. *National Public Radio (NPR)*. <https://www.npr.org/podcasts/1071831472/columbus-metropolitan-club>

Harper, Dennis O. & Kemper, Rebecca F. (20 September 2021). Technology literacy as a catalyst for systemic change. *Technological Horizons in Education Journal (T.H.E.)* <https://thejournal.com/articles/2021/09/20/technology-literacy-as-a-catalyst-for-systemic-change.aspx>

Boinodiris, Phaedra & Kemper, R. F. (9 April 2020). Reprioritising workforce development. *The Royal Society (RSA)*. <https://www.thersa.org/comment/2020/04/reprioritising-workforce-development>

Kemper, R. F. (2020 Spring Edition). A place in STEM – LLEGA helps OSU graduate students pursue their dreams. *¿Qué Pasa, Ohio State?*, 29(2), 5.

Abukar, Z. & Kemper, R. F. (2020, April). Diversity is not enough! Transcending persistent barriers faced by underrepresented students in STEM. *Columbus and Dayton African American News Journal*, 30, 37–38.

Kemper, R. F. (2017, July 1). Navigating discriminatory interviews in an unequal world. *Columbus and Dayton African American News Journal*, 24.

Kemper, R. F. (2017, June 1). It still takes a village: Experiencing education & mentorship. *Columbus and Dayton African American News Journal*, 18.

Steele, E. (2017, March 27). Equitable Urban Futures and Second Sight working to combat gentrification through art [Kemper, R. F. as featured artist]. *The Lantern*, A1.

Ohio State University. (2016, May 5). Recognizing Excellence at OSU: Publications & Presentations [Kemper, R. F. as highlighted researcher]. *¿Qué Pasa, Ohio State?* 25, p. 22. Print.

Ohio State University. (2015, December 3). Recognizing Excellence at OSU: Publications & Presentations [Kemper, R. F. as highlighted researcher]. *¿Qué Pasa, Ohio State?* 24, p. 21. Print.

Kemper, Rebecca F. & de Jesus Gemelli, L. V. (In progress). ¡Despiértate! What universities need to know to ensure the future of land-grant graduate programs, mothers. *¿Qué Pasa, Ohio State?* Print.

FUNDED RESEARCH & EVALUATION WORK

2023-2025	"Building Arts Studio." Elevate! 2.0 Grant. Role: Principle Investigator. City of Columbus, Department of Development. \$150,000 (\$50,000 per year for three years).
2023-2024	"3D Digital Reconstruction of Lost Urban Streetscapes: Historic Mt. Vernon Ave in Columbus." Battelle Engineering, Technology and Human Affairs Grant. Role: Evaluator for the Center of Urban & Regional Analysis. Ohio State University. \$11,964
2021-2025	"WaterMarks: An art/science framework for community-engaged learning around water and water management in an urban area" Role: Program Evaluator to Co-PI Donnelley Hayde. National Science Foundation-Advancing Informal STEM Learning (NSF-AISL). Award No. 2115637. \$1,529,522.
2021-2023	"All Forces Workshops in DoD STEM Best Practices to Promote STEM Education and Workforce Development" Role: Program Evaluator with Dr. Joe E. Heimlich for U.S. Naval Academy's Department of Defense Grant. Solicitation No. N0016121RC00FA5. \$188,976.
2020-2022	"Spatial Ability and Blind Engineering Research" Role: Program Evaluator with Dr. Gary Timko & Dr. Joe E. Heimlich to the National Federation for the Blind. National Science Foundation-Advancing Informal STEM Learning (NSF-AISL). Award no. 1712887. \$1,799,194.
2020-2021	"Data visualization literacy: Research and tools that advance public understanding of scientific data." Role: Program Evaluator under Co-PI, Dr. Joe E. Heimlich, National Science Foundation-Advancing Informal STEM Learning (NSF-AISL). Award no. 1713567. \$1,355,236.
2019-2023	"The Circuit: A platform for increasing access to, deepening and researching patterns of family and adult participation in informal science." Role: Researcher, under Co-PI, Dr. Joe E. Heimlich, National Science Foundation-Advancing Informal STEM Learning (NSF-AISL). Award No. 1906998. \$1,456,337.
2019-2022	"Rural arts connect." Role: Program Evaluator with Donnelley Hayde and Dr. Justin R. Meyer. Institute of Museum and Library Services' Museums (IMLS) for America Award. Evaluator for the Aspen Art Museum. \$54,200.
2019-2022	"Food for thought: Igniting, engaging, and measuring family STEM learning using a food lab." Role: Program Evaluator with Dr. Joe E. Heimlich for Principle Investigators Dr. Bradley Morris, Dr. John Dunlosky, and Whitney Owens. National Science Foundation-Advancing Informal STEM Learning (NSF-AISL). Award No. 1906706. \$854,026.
2019-2021	"Convergent learning from divergent perspectives: Interdisciplinary collaborations in informal science communication." Role: Research Senior Personnel under Co-PI, Dr. Justin Reeves Meyer. National Science Foundation-Advancing Informal STEM Learning (NSF-AISL). Award no. 1811119. \$812,888.

2009–2011 “Agrarian urbanist overlay in Weinland Park, US Department of Housing and Urban Development Community Challenge Grant.” Role: Research Senior Personnel under Co-PIs: Professor Kay Bea Jones & Dr. Michael Webb. \$864,989.

ACADEMIC PRESENTATIONS

Kemper, R. F. (2023, April 26-29). *Walking Ethically - Investigating Ethical Practice in Walking Tours*. [Full paper]. Urban Affairs Association. Nashville, Tennessee, United States.

Kemper, R. F. (2022, April 12-14). *Is this an Art District? A Visual Sociological Analysis of University Creative Placemaking*. [Full paper]. Urban Affairs Association. Washington D.C., United States.

Kemper, R. F. (2021, October 21–24). *Telling the tale of creative placemaking adoption through stakeholder voices, an application of Spradley's universal semantic relationships to understand place-based identity perceptions* [Full paper]. Association of Collegiate Schools of Planning. Track 2: Community Development, Miami, FL, United States.

Heimlich, J.E., Weiss, L., & **Kemper, R.** (2021, October 15). *What Emerging Leaders in EE Need to Lead* [Paper Presentation]. North American Association for Environmental Education (NAAEE) Annual Conference.

Heimlich, J.E., **Kemper, R.**, & Weiss, L. (2021, October 7). Exploring Pathways Through the Field of Environmental Education. North American Association for Environmental Education (NAAEE) Research Symposium. Virtual.

Hayde, D., O'Brien, K., Brenner, C., Weiss, L., Meyer, J. R., **Kemper, R. F.**, & Gopalakrishnan, S. (2021, July 15). *Don't stop the party! When social experience and evaluation converge* [Poster presentation]. Visitor Studies Association Annual Conference (Virtual).

Kemper, R. F. & Heimlich, J. E. (2021, June 28–30). *Work it out! Apps as fitness circuits for cultural institutions engaging in their local ecology* [Full paper]. Urban Assemblage: The City as Architecture, Media, AI and Big Data, London, United Kingdom (Virtual).

Kemper, R., Hayde, D. & Meyer, J. R. (2021, May 19–23). *Full steam ahead? Slowing down to understand communal, place-based environmental education art installations* [Abstract]. Environmental Design Research Association 52 Detroit: Just Environments: Transdisciplinary Border Crossing (Virtual).

Kemper, R. F., & Meyer, J. R. (2020, November 5-8). *Suburban youthification, immersive art experiences, and how they are altering the provincial fabrics surrounding Denver, Columbus, and Santa Fe* [Full paper]. Association of Collegiate Schools of Planning Conference Proceedings (Virtual).

Kemper, R. F. (2020, June 29–30). *Digitally dividing the public? Assessing equitable access concerns with application-based arts & culture patron engagement technologies*. Connections: Exploring Heritage, Architecture, Cities, Art, Media - Architecture, Media,

Politics & Society Conference Proceedings, 336–342, Canterbury, United Kingdom (Virtual). ISSN 2398-9467.

Mattern, S. & **Kemper, R. F.** (2020, June 17–19). *Grasping for the tech keys - South Bend seeks economic relevance through tech brand development & private partnerships*. Architecture, Media, Politics & Society London 2020 Conference Proceedings, London, United Kingdom (Virtual).

Kemper, R. F. (2020, May 29). *A (Pandemic) Night in the Museum - How Cities Can Watch Over their Cultural Institutions in a Time of COVID-19* [Presentation]. University of Washington at Seattle Pandemic Urbanism Conference Proceedings, Seattle, WA, United States (Virtual).

Kemper, R. F. & Meyer, J. R. (2019). *Mewing at a RiNo? How Santa Fe's suburban, immersive arts organization -- MEOW WOLF -- is expanding into the urban arena* [Full paper]. In Association of Collegiate Schools of Planning 59th Conference Proceedings, 46.

Kemper, R. F. (2019, May 22–26). *Creative city agenda policy adoption within higher education campus plans* [Full paper]. In Environmental Design Research Association 50th Conference Proceedings, 24, Brooklyn, NY, United States.

Kemper, R. (2019, October 8–11). *Changing ways, making change* [Author Panel]. In North Carolina-American Planning Association Conference Proceedings, 17, Wilmington, NC, United States.

Kemper, R. F. (2018). *Creative placemaking w/o displacement | A Franklinton artist residency with place-keeping in mind* [Full paper]. In Architecture, Media, Politics & Society Conference Proceedings, Cleveland, OH, United States.

Kemper, R. F. (2017). *Educational choice and social capital in struggling communities* [Full paper]. In Urban Affairs Association Conference Proceedings.

Kemper, R. F. (2016). *Bigger, faster, stronger? Why social justice theorists hate “Big Data” and the word “resiliency”* [Full paper]. In European Urban Research Association Conference Proceedings, Torino, Italy.

Kemper, R. F., Jones, K. B., & Conte, S. (2016). *A catalysts for culture: Adriano Olivetti's Ivrea and planning in the Canavese Region* [Full paper]. In European Urban Research Association Conference Proceedings, Torino, Italy.

Kemper, R. F. (2016). *Revisiting the spatial dimensions of social capital: Neighborhood crime perceptions & school choice* [Full paper]. Association of Collegiate Schools of Planning Conference Proceedings.

Kemper, R. F. (2016). *The (walking) tour as a pedagogical tool and as planning intervention* [Invited full paper discussant]. In Association of Collegiate Schools of Planning Conference Proceedings.

Kemper, R. (2015). "Neighborhood Disorder or Resiliency: Analyzing Crime Patterns Using Agent-Based Modeling" [Full paper]. In Association of Collegiate Schools of Planning Conference Proceedings.

Kemper, R. (2014). *Towards a new & complex understanding of neighborhood change* [Full paper]. In Association of Collegiate Schools of Planning Conference Proceedings.

Kemper, R. (2012). *Using NetLogo Free-agent Modeling to assess the sustainability of Weinland Park Neighborhood corner stores* [Abstract & poster]. In Hawaii International Conference on Business (HICB) Proceedings.

Kemper R. F. & Forrest, T. M. (2011). *Precedent corner store revitalization efforts: Implications for Weinland Park* [Abstract & poster]. In IPSC | Building Solutions to Poverty: Methods & Metrics Conference Proceedings.

Kemper, R. (2010). *The aging American Dream: the impacts of the impending demographic shift* [Full paper]. In Environmental Design Research Association 41st Conference Proceedings.

Kemper, R. (2009). *The effect of voting venues on voter preferences* [Poster]. In Association of Collegiate Schools of Planning Conference Proceedings.

Kemper, R. (2009). *Holistic processing in architects, but not in non-architects, in environmental comprehension* [Abstract & poster]. In Environmental Design Research Association 40th Conference Proceedings.

Symposia **Kemper, Rebecca F.,** Qin, Rongjun, Toone, Shelbi, and Miller, Harvey (2023, November 9) *Challenges and Advances in Virtually Reconstructing Historical Columbus Neighborhoods: Research and Community Engagement* [Invited Panelist]. Interdisciplinary Fall Forum Columbus, Ohio.

Heimlich, Joe E., Weiss, L., & **Kemper. R.** (2021, October 7). *Exploring Pathways Through the Field of Environmental Education*. [Roundtable]. North American Association for Environmental Education (NAAEE) Research Symposium. Online.

Ferdig, R., Kosko, K., & Gandolfi, E., **Kemper, R. F.** & Chambers, J. (2021, June 30). 'Being There' with socially enabled Virtual and Augmented Reality [Invited panelist]. Cultural Heritage Industry Vertical: VRARA Columbus Chapter. Columbus, Ohio

Kemper, R. F., & Meyer, J. R. (2020, June 9). *Howling to Gen-Z > The Immersive ARTrepreneurship of Santa Fe's Meow Wolf* [Invited talk]. Arts, Entrepreneurship, and Innovation (AEI) Lab, Leveraging Creativity Conference Proceedings, School of Public and Environmental Affairs, Indiana University. Indianapolis, IN, United States (Virtual).

Kemper, R., Sreekumar, V., & Dennis, S. (2013). *Event memory: A cue analysis* [Poster]. In Context and Episodic Memory Symposium Proceedings. University of Pennsylvania in Philadelphia, PA.

- Workshops Record, E., Börner, K., Peppler, K., Han, J. Y. A., Heimlich, J. E. & **Kemper, R. F.** (Accepted, date TBD). *Transferring data literacy technology to small museum settings* [Panel discussion]. Association of Science and Technology Centers (ASTC) Virtual Workshop.
- Public Panels **Kemper, Rebecca F.** & Lama Berner, A. (14 May 2022). *Being a Present Leader in Times of Crisis*. KTC Buddhist Temple Workshop. Columbus, Ohio.
- Kemper, R.**, Blust, T., & Mikicic, A., Chambers, J. (2021, December 4). *Finding the Narrative Flow in VR: A Look at UNDR H2O*. [Invited Moderator]. Ohio LinuxFest Conference / MakerX / Virtual Reality / Augmented Reality Association Columbus Chapter, Columbus, Ohio.

PROFESSIONAL REPORTS

Kemper, R. F., & Heimlich, J. E. (2021). *The Circuit: Needs Assessment High-level findings – Science Museums/Centers and Festivals*. NSF-Circuit Project. COSI.

Horr, E. E., **Kemper, R. F.**, & Rice, L. (2021). *2021 Momentum Evaluation Report*. Momentum-Excellence, Inc.

Timko, G., Hayde, D., Heimlich, J. E., Horr, E. E., **Kemper, R. F.**, Meyer, J. R., & Wasserman, D. L. (2020). *Perceptions of the Coronavirus and the COVID-19 pandemic by central Ohio residents* [Technical report for COSI]. COSI's Center for Research and Evaluation.

Jones, K. B., Boswell, J., Bennett, K., **Kemper, R. F.**, Seyedsadry, R., & Bongiorno, M. (Eds.). (2011). *Urban farmscapes: For communities, markets and new ecologies - precedent studies for Weinland Park*. Knowlton School of Architecture/Mid-Ohio Regional Planning Commission.

Jones, K. B., Bennett, K., Boswell, J., **Kemper, R. F.**, Love, R., Orban, J., Sabini, M., and Van Till, E. V. (Eds.). (2011). *Revisioning Weinland Park: Volume 2 design for the local food in the public realm*. OSU Knowlton School of Architecture and International Poverty Solutions Collaborative.

Kemper R. F. & Forrest, T. M. (2011). *Cliff effects in a post-'third way' political world: How welfare policy has created economic mobility barriers for the working poor*. International Poverty Solutions Collaborative (IPSC) / Ohio State University.

Kemper R. F. & Forrest, T. M. (2011). *Precedent corner store revitalization efforts: Implications for Weinland Park*. International Poverty Solutions.

TEACHING

- Instructor **PUB AFRS 2110: Introduction to Public Affairs**
Ohio State University

	CRPlan 4597: The Global Environment in Planning Ohio State University
	CRPlan 3500: The Socially Just City Ohio State University
	CRPlan 2100: Reading the City through History & Law Ohio State University
Invited lecturer/Juror	ARCH 8410: Advanced Architectural Design III Ohio State University: Professor Kay Bea Jones (formerly Architecture 844.01)
	ARCH 4420: Architectural Design VI Ohio State University: Professor Kay Bea Jones
	ARCH 601 / ARCH 23: Studio One – Structure / Environment / Construction University of Cincinnati: Professor Michael Pride
	ARTEDU 7200.2: Overview of Research for Arts Policy and Administration Ohio State University: Associate Professor Dr. Shoshanah B.D. Goldberg-Miller
	ARTEDU 5686: Cultural Institution Programs Design, Implementation, and Evaluation Ohio State University: Associate Professor Dr. Shoshanah B.D. Goldberg-Miller
	CRP 7200: Advanced Planning Theory Ohio State University: Dr. Rachel G. Kleit (teaching practicum)
	CRPlan 6080: Advanced GIS for Professional Planning Practice Ohio State University: Assistant Professor Dr. Charisma Acey
	CRPlan 4950: Professional Planning Skills Development assistantships. Ohio State University: Professor of Practice E. Kyle Ezell
	CRPlan 4200: Arts & Entertainment Planning Ohio State University: Associate Professor Dr. Shoshanah B.D. Goldberg-Miller
	LARCH 7780: Research Methods in Landscape Architecture Ohio State University: Professor Dr. Jesus Lara (formerly Landscape Architecture 740)
	MBA 6905: Strategic Foresight and Innovation Otterbein University: Visiting Professor Merce Graell
	Urban Design 60703/003 + UD 60703/005: Urban Design Studio III Kent State University / Cleveland Urban Design Collaborative (CUDC): Professor Maurizio Sabini
Peer Instructor	LARCH 7600S: Graduate Landscape Topics in Research and Theory University of Seoul / Chulalongkorn University: Assistant Professor Katherine Bennett
Preparatory programs	John Glenn School of Public Graduate Student Boot Camp - Technical Writing Lecture Ohio State University: Assistant Dean Professor Dr. Jennifer Evans-Cowley & Professor Robert Greenbaum

Teaching assistantships **CRPlan 4950: Professional Planning Skills Development**
Ohio State University: Professor of Practice E. Kyle Ezell

CRPlan 2600: Designing Communication for Planning
Ohio State University: Instructor Dr. Justin Reeves Meyer

CRPlan 2110: Creating Innovative Cities and Regions
Ohio State University: Professor of Practice E. Kyle Ezell & Dr. Kareem Usher

SCHOLARSHIPS, AWARDS, & RECOGNITIONS

2023 **40 Under 40**, Columbus Business First

2023 **Hidden Figures, Women in Science**, College of Arts & Sciences, Ohio State University

2022 **Outstanding Leadership Award**, Education 2.0 Conference

2020 **Inspire Challenge Coin**, Office of the President, Center of Science and Industry (COSI)

2017 **Essay Winner**, Zornes Family SmartPen Contest

2013 **Critical Difference for Women Scholarship**, Office of Diversity & Inclusion, Ohio State University

2012 **Critical Difference for Women Scholarship**, Office of Diversity & Inclusion, Ohio State University

2009 **Travel Abroad Scholarship**, Knowlton School

2009 **Department Travel Grant for Conference Presenters**, Knowlton School, Ohio State University

DESIGN INSTALLATIONS, SUMMITS, & CHARRETTES

2020 **Kemper. R. F.** "Color Kabob" City of Upper Arlington, Ohio Alternative Labor Day Arts Festival outdoor installation. Upper Arlington, OH, USA.

2019 **Kemper, R. F.**, Lara, J., Harris, C., LeForce, B., Poolpol, N., & Larrimer, B. "The City Remembers." Banvard Gallery at The Knowlton School. Columbus, OH, United States.

2018 **Kemper. R. F.** "Hide Your Tired, Hungry Masses" Bottoms-up Coffee Advocacy Fundraiser. Columbus, OH, United States.

2016 **Kemper. R. F.** "(Dis)Placed Children" Global Gallery & Second Sight Advocacy Fundraiser. Columbus, OH, United States.

2014 **Kemper. R. F.** "Lost Children." Playasophy Camp Art Offering, Black Rock City, NV, United States.

2012 Bennett, K., Grewal, P., Kovach, J., McMahon, P., Williams, E. M., Silva, L., Meeker, R., Robertson, A., Warnock, N., Dehnbostel, T., Gottardt, N., Reder, M., Kim, A. Y., Hwang, J. E., Arunita, A., Inchompoo, P., Ling, P., Carvin, N., Chandler, T., Haupt, W., Hetrick, T., Hiatt, M., Longoria, Y., McKinley, R., Najjar, L., Oshanski, K., Peller, H., Shelby, H., Simko, J., Spangler, P., Viccellio, K., & **Kemper. R. F.** "Modular Habitats." Godman Guild Weinland Park Community Garden, Columbus, OH, United States.

- 2010 **Kemper. R. F.** "Swarm Boundaries." *The Megacity: Seoul South Korea US Army Yongsan-Casey Garrison Site Design Charrette*, Ohio State University & University of Seoul: Seoul, South Korea.
- 2009 **Kemper. R. F.** "Walking Sketches to Evaluate Public Spaces in Rome, Italy" Ohio State University The Knowlton School, Columbus, OH, United States.
- 2009 **Kemper. R. F.,** Ha, H., Fischer, D., & Miller, K. "Adaption of Plattenbau Housing to Aging Populations" Ohio State University & Technische Universität Dresden: Columbus, OH, United States / Dresden, Germany.

PROFESSIONAL AFFILIATIONS

AAHHE	General Member , American Association of Hispanics in Higher Education
ACSP	General Member , Association of Collegiate Schools of Planning
ASTC	General Member , Association of Science and Technology Centers
NCWIT	Invited K-12 Alliance Organization Representative , National Center for Women & Information Technology
EDRA	General Member , Environmental Design Research Association
OAS	General Member , Ohio Academy of Science
SHPE	General Member , Society of Hispanic Professional Engineers
SWE	General Member , Society of Women Engineers
UAA	General Member , Urban Affairs Association

ACADEMIC SERVICE

- 2023-Present **Co-Editor**, *Informal Learning Review*
- 2022-Present **Founder**, #PreserveCBUS Annual Conference, Columbus Landmarks Foundation
- 2023 **Expert-Reviewer**, Ohio History Connection Grant Programs
- 2022-Present **Peer-Reviewer**, *Journal of Urban Affairs*
- 2022-Present **Peer-Reviewer**, *Sustainability*
- 2022-Present **Peer-Reviewer**, *Urban Affairs*

CITY AND COMMUNITY PLANNING, OUTREACH, & SERVICE

- 2020-Present **Cultural Arts Commissioner**, City of Upper Arlington, OH, United States
- *Appointed Chair*, 2023
- Appointed to Vice-Chair, 2022
- Labor Day Arts Festival Community On-Site Coordinator (2021, 2022, & 2023)
- Labor day Arts Festival Development & Sponsorship Committee lead (2021)
- 2017-2018 **President & Co-founder**, Latino & Latina Engineering Graduate Student Association (LLEGA), Ohio State University, Columbus, OH, United States

Dr. Monica Lee

Status

Name Dr. Monica Lee
Application Date 5/8/2023
Expiration Date 5/8/2025
Board Member [Monica Lee](#)
Status Validated

Board	Vacancies	Status
Community Relations Committee	1	Pending

Basic Information

Name
Dr. Monica Lee
Date of Birth
[Redacted]
List 3 Personal and/or Professional References (at least one required)
Sara Trogdon, Office Manager OhioHealth Primary Care [Redacted]
[Redacted]
Heidi Bobek, Assistant Clinical Professor, [Redacted]
Deborah Battles, Medical Assistant, [Redacted]

Contact Information

Address
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Occupation

Employer
The Ohio State University and OhioHealth
Occupation
Faculty/Nurse Practitioner
Job Title
Clinical Assistant Professor of Practice (OSU) and Family Nurse Practitioner (OhioHealth)
Yes, I am a city employee
No
Professional Licenses
Registered Nurse and Advanced Practice Registered Nurse
Registrations/Certifications
Family Nurse Practitioner Certification (ANCC), Controlled Substance Registration Certificate

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No
Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No
Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
Please see my cover letter.
Check the box next to your area(s) of expertise.
Professional Expertise
Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?
Yes
Are you a registered voter?
Yes

THE OHIO STATE UNIVERSITY
College of Nursing

CURRICULUM VITAE

Monica Lee, DNP, APRN-CNP
Assistant Professor of Clinical Practice



EDUCATION

<u>Degree</u>	<u>Institution</u>	<u>Field of Study</u>	<u>Date</u>
D.N.P.	University of Illinois at Chicago	Nursing	May 2014
M.S.	Medical University of Ohio at Toledo	Nursing	June 2006
B.S.	Denison University	Biology	May 2002

LICENSE AND CERTIFICATIONS

Ohio Registered Nurse License	exp. 10/31/23	#RN.327634	Ohio Board of Nursing
Ohio Advanced Practice Registered Nurse License	exp. 10/31/23	#APRN.CNP.021078	Ohio Board of Nursing
Family Nurse Practitioner Certification	exp. 10/6/23	#2013007491	American Nurses Credentialing Center
Controlled Substance Registration Certificate	exp. 03/31/26		US Department of Justice

ACADEMIC APPOINTMENTS

October 2021 - Present	Clinical Assistant Professor of Practice (50% FTE) The Ohio State University College of Nursing, Columbus, Ohio
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PROFESSIONAL EXPERIENCE

January 2022 – Present	Family Nurse Practitioner (60% FTE) OhioHealth Physician Group – West Broad Primary Care, Columbus, OH
February 2018 – December 2021	Family Nurse Practitioner OhioHealth Physician Group – West Broad Primary Care, Columbus, OH
November 2017 – February 2018	Family Nurse Practitioner Consilium Staffing Agency – Locum Tenens, Corrections, Marysville, OH
September 2017 – November 2017	Family Nurse Practitioner Life Line Community Healthcare, Columbus, OH

March 2015 – August 2017	Family Nurse Practitioner University of West Florida, Student Health Services, Pensacola, FL
September 2014 – March 2015	Family Nurse Practitioner CVS MinuteClinic, Mary Esther, FL
June 2011 – August 2014	Clinical Research Registered Nurse Hektoen Institute of Medicine, Adolescent Trials Network, Chicago, IL
August 2010 – June 2011	Registered Nurse Northwestern Memorial Hospital, Float Pool, Chicago, IL
January 2009 – July 2010	Registered Nurse Veritacare Home Health Agency, Mayfield Heights, OH
February 2008 – July 2010	Registered Nurse Maxim Healthcare Services, Beachwood, OH
August 2006 – August 2010	Registered Nurse Cleveland Clinic Foundation, Urology/Gynecology Unit, Cleveland, OH

PUBLICATIONS

D'Souza, A., **Lee, M.**, Taverner, N., Mason, J., Carruthers, S., Smith, J.C., Amaya, E., Papalopulu, N., Zorn, A.M. (2003). Molecular components of the endoderm specification pathway in *Xenopus tropicalis*. *Developmental Dynamics*, 226, 118-27.

Costa, R.M., Mason, J., **Lee, M.**, Amaya, E., Zorn, A.M. (2003). Novel gene expression domains reveal early patterning of the *Xenopus* endoderm. *Gene Expr Patterns*, Aug. 3(4), 509-19.

Sinner, D., Rankin, S., **Lee, M.**, Zorn, A.M. (2004). Sox17 and beta-catenin cooperate to regulate the transcription of endodermal genes. *Development*, 131, 3069-3080.

RESEARCH PRESENTATIONS

Poster presentations

Casler, K., Bobek, H., **Lee, M.**, & Nikolai, C. (2023, April) Innovative approaches to integrating evidence-based competency assessment across the practicum curriculum. National Organization of Nurse Practitioner Faculties 49th Annual Conference, Orlando, FL.

Lee, M., Jones, K.L, Bergren, M.D., & Bojan, K. (2015, July) Development and pilot testing of a social media-based educational sexual health intervention. Sigma Theta Tau International's 26th International Nursing Research Congress, San Juan, Puerto Rico.

Lee, M., Jones, K.L, Bergren, M.D., & Bojan, K. (2014, September) Development and pilot testing of a social media-based educational sexual health intervention. Council for the Advancement of Nursing Science's State of the Science Congress on Nursing Research, Washington, DC.

Lee, M., Jones, K.L, Bergren, M.D., & Bojan, K. (2014, March) Development and pilot testing of a social media-based educational sexual health intervention. Midwest Nursing Research Society's Annual Conference, St. Louis, MO.

PROFESSIONAL SOCIETIES

August 2022 – Present	National Organization of Nurse Practitioner Faculties
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June 2020 – Present American Association of Nurse Practitioners
June 2020 – Present American Nurses Association & Ohio Nurses Association
June 2020 – Present Ohio Association of Advanced Practice Nurses

COMMUNITY SERVICE

April 2023 – Present OhioHealth Mission Matters, Columbus, OH
Volunteer
October 2017 – February 2018 Columbus Free Clinic, Columbus, OH
Nurse Practitioner Preceptor to medical students
May 2018 Doctor's Hospital Women's Health Fair, Columbus, OH
Medical Volunteer
December 2005 Intercambio Cultural Maya, Dzoyolá, Quintana Roo, Mexico
Medical Volunteer

UNIVERSITY SERVICE

2023 – 2026 Diversity Committee, Elected faculty member
April 2023 Graduate Scholarship Committee Reviewer
April 2023 Focus group member with the Center for Healthcare Innovation and Leadership to create a workshop to build confidence through effective assertive communication

AWARDS/HONORS

2011 Induction as member in the Sigma Theta Tau International Honor Society of Nursing
Alpha Lambda Chapter

INSTRUCTIONAL ACTIVITIES

Course:

Year	Term	Course	Students Enrolled	Level
2021 – 2022	Autumn	N7268.02: Advanced Nursing Practice FNP Clinical Practicum II (Course Head 2022)	2021 – 32 2022 – 32	Graduate, Master
2022 – 2023	Spring	N7268.03: Advanced Nursing Practice FNP Clinical Practicum III	2022 – 32 2023 – 32	Graduate, Master
2022 – 2023	Spring	N7410: Advanced Health Assessment Lab	2022 – 16 2023 – 21	Graduate, Master
2022 – 2023	Summer	N7268.01: Advanced Nursing Practice FNP Clinical Practicum I	2022 – 33 2023 – 30	Graduate, Master

Clinical Precepting:

Spring 2023	Ama Aidoo, 161 hrs
Spring 2022	Emily Spanos, 136 hrs
Autumn 2021	Tionna Coley, 100 hrs
Autumn 2019	Christopher Bollinger, 144 hrs

MONICA LEE

May 8, 2023

DEAR COMMUNITY RELATIONS COMMITTEE -

I am applying to serve on the Community Relations Committee as announced on the Upper Arlington website. I am a Family Nurse Practitioner, with a Doctorate of Nursing Practice, and currently employed part-time with OhioHealth and part-time with The Ohio State University College of Nursing. I am interested in volunteering my time because I am committed to serving my community to foster a welcoming, diverse, and inclusive community.

I am currently practicing in a Primary Care office, located on the west side of Columbus, where a large part of my patient population is underserved, uninsured, non-English speaking, and have a high rate of health disparities. Because of my patient population, I am extremely dedicated to providing the best care possible given everyone's unique situation. Many of my patients are low income and may not be able to afford the best medications that can be used to treat their condition. Thus, I do have to think creatively and ensure that I am taking that into consideration. If I prescribe medications that I know have the best outcome, but the patient is unable to afford it, or I do not know the patient is not able to afford it, then the patient will not achieve the best health outcomes. This is how I would like to approach my participation in the committee - ensuring that all angles are considered to provide an inclusive community.

I also am a Clinical Assistant Professor of Practice at OSU College of Nursing teaching in the graduate Master of Science in Nursing program for Family Nurse Practitioners. I have recently been elected to be a member in the College of Nursing's Diversity Committee, serving a term from 2023-2026.

Finally, I am the child of immigrant parents, so I am familiar with struggles we experienced growing up. Some of these experiences were difficult as I would be the recipient of derogatory comments or actions. However, these experiences helped me grow as an individual and motivated me to ensure I treat others with inclusivity and mutual respect.

I believe my background and experiences make me an excellent candidate for serving on the Community Relations Committee. Thank you for considering my application. I look forward to discussing my qualifications with the committee further.

Sincerely,

Monica Lee

Mr Richard Todd Boyer

City of Upper Arlington | Generated 5/2/2024 @ 6:17 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Mr Richard Todd Boyer	Board of Zoning & Planning	0	Pending
Application Date	4/26/2024			
Expiration Date	4/26/2026			
Board Member	Richard Todd Boyer			
Status	Validated			

Basic Information

Name
Mr Richard Todd Boyer

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
James Goodman, City of Columbus, Historic Preservation Officer. [REDACTED]

Jeff Moe, Simon Kenton Council CEO
[REDACTED]

Rick Posey, AIA - Principal, K4 Architecture
[REDACTED]

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
SSOE Group

Occupation
Architect

Job Title
Business Leader

Yes, I am a city employee
No

Professional Licenses
Licensed Architect
State of Georgia #RA016752
State of Illinois #001.026038
State of Indiana #AR12200036
State of Kentucky #8952
State of Massachusetts #952593
State of Michigan #1301068465
State of North Carolina #16350
State of Ohio #0513909
State of Pennsylvania #RA409652

Registrations/Certifications
NCARB Certification #61253

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Village of Plain City - Chair, Design Review Board
Boy Scouts of America, Simon Kenton Council - Vice President of Properties
American Institute of Architects - Columbus Chapter

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
For the past 18 years, I have served the City of Columbus and the Village of Plain City in a leadership role to sustainably and respectfully evolve critical historic districts in each city. I am interested in bringing my experience and insights to my community of 13 years. Community development initiatives are evolving the fabric of Upper Arlington. My experience has

taught me that the keys to success with such initiatives are communication, collaboration, and consistency. I have honed these skills leading neighboring communities through similar evolutions. I am confident that my passion for urban planning, coupled with my professional expertise as a licensed architect, as well as my dedication to service, will enable me to make significant contributions to the City Zoning & Planning Board's objectives.

Check the box next to your area(s) of expertise.

Professional Expertise, City Planning, Landscape Architect, Architect

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:17 pm

R. TODD BOYER, AIA

Boyer offers a national design perspective while placing emphasis on inspiring and innovative workplace, academic, and adaptive re-use environments. As a trusted advisor and leader, Boyer's passionate pursuit of quality design, through mission driven architecture, reflects his client's values and identity within their community.

EDUCATION

Master of Architecture 2001

Arizona State University Tempe, Arizona

Thesis award finalist

Graduate college scholarship award recipients

Sun Devil Alumni, Power 100 Honoree 2022

Bachelor of Science in Architecture 1999

The Ohio State University Columbus, Ohio

Cum Laude

Knowlton School of Architecture Honors Program

England and Scotland Study Abroad 1997

The Ohio State University

PROFESSIONAL REGISTRATION

Licensed Architect

State of Georgia #RA016752

State of Illinois #001.026038

State of Indiana #AR12200036

State of Kentucky #8952

State of Massachusetts #952593

State of Michigan #1301068465

State of North Carolina #16350

State of Ohio #0513909

State of Pennsylvania #RA409652

NCARB

Certification #61253

LEED Accredited Professional

Accredited Professional 2004 - 2017

PROFESSIONAL HISTORY

WSA Studio 2005 - Pr.

Partner/Principal Columbus, Ohio

3rd Generation of ownership in 53 year history.

Transformed a local 12 associate firm into a 40 person regional, multi-disciplinary firm in 7 year ownership period.

HMC Architects 2002 - 2005

Lead Designer/Architect San Diego, California

Lead designer on numerous K-12 campuses.

Designed HMC's downtown 50 associate San Diego office.

WareMalcomb Architects 2001 - 2002

Designer Irvine, California

One of two designers for all Southern California office projects.

R. Todd Boyer, AIA

PROFESSIONAL SERVICE AND LEADERSHIP

AMERICAN INSTITUTE OF ARCHITECTS

Todd serves the AIA in numerous capacities since 2005.

2022

Public Service Award Honoree- AIA Ohio, AIA Ohio Honor Award

_Boyer was honored with the 2022 Public Service Award by the AIA Ohio Board of Directors.

2018 - Pr.

Advisor - AIA Columbus, ARCHwayMentorship Program

_The AIA Columbus mentorship/leadership initiative connects young architects with firm leaders in the Columbus architectural community.

_Selected as one of nine firm leaders for every ARCHway class since the 2018 inception of the program.

2019

Juror - AIA Ohio, AIA Ohio Honor Awards

_Selected those across Ohio who have shown excellence in the profession.

2009

Juror - AIA Rochester, New York, Design Excellence Awards

_Coordinated with a delegate of architects from the Columbus area to select Honor and Merit design awards for AIA Rochester's Design Excellence Awards.

2009

Juror - AIA Rochester, New York, "Light&Shadow" Photography Contest

2009

AIA Columbus - Committee on Design

_Selected the jurors for the Chapter's design awards

2008 - 10

Secretary - AIA Columbus, Architecture Awareness Committee

_Created window signage graphics for the grand opening of the Columbus Center for Architecture.

ACADEMIC INVOLVEMENT

2019 - Pr.

Professional Advisor - Office Associateship Graduate Student Advisor Program, The Ohio State University, Knowlton School of Architecture

_Mentor a graduate student from the Knowlton School for the academic calendar year through casual discussions, project tours, and studio visits.

2011

Advisor - Portfolio Review, The Ohio State University, Knowlton School of Architecture

_Provided feedback to over fifty student portfolio's and held discussion with each student to provide direct and honest feedback.

2010 - 11

Professional Mentor -The Young Professionals Academy, Dublin City Schools

_Planned and conducted monthly visits with high school mentee who was interested in the design and construction industry. Each month a new topic was explored based on the mentee's topic of interest.

FIRM MENTORSHIP

2017 - Pr.

Tea Time with Todd -Mentorship for emerging professionals.

_Hosted a weekly, half an hour, internal mentorship program for emerging professional to connection to their day to day experiences.

_As a result of the program, WSA has tripled its number of licensed professionals.

2014 - Pr.

WSA Cornhole Tournament - Annual fundraiser

_Hosted over 700 guests over eight consecutive years, for a fund raising event to support multiple non-profit organizations.

_The cornhole tournament has raised over \$30,000.

2009 - 17

1 X 2 WSA Development Sessions

_Planned and conducted bi-monthly professional development sessions featuring guest speakers and experts as well as one hour design problems for the WSA staff.

AIA & IIDA DESIGN AWARDS

- 2022 **AIA Columbus, Merit Award**
_Nestle 1918
- 2021 **AIA Ohio, People's Choice Award**
_COhatch Noblesville
- 2019 **AIA Columbus, Merit Award**
_The Point at Otterbein University
- 2019 **IIDA Columbus, Merit Award**
_The Point at Otterbein University
- 2017 **IIDA Columbus, Merit Award**
_The PAST Foundation Innovation Labs
- 2014 **AIA Ohio, Honor Award**
_The Jack
- 2013 **AIA Columbus, Merit Award**
_The Jack
- 2009 **AIA Columbus, Honorable Mention**
_Sparks pharmacy
- 2006 **AIA Columbus, Project Merit Award**
_Sparks pharmacy

DESIGN & BUSINESS AWARDS

- 2021 **Columbus Business First, Fast 50 award**
_WSA #28
- 2021 **Columbus CEO, Best of Business**
_Best Architecture Firm Runner up
_Best Commercial Interior Design Firm
- 2021 **AAF Columbus, ADDY Silver Award**
_The Forge Short North, 3rd Floor
- 2021 **AAF Columbus, ADDY Silver Award**
_Brick House Blue
- 2020 **Building Industry Association of Central Ohio, Best Showroom Award**
_Bathworks
- 2020 **Columbus CEO, Best of Business**
_Best Architecture Firm Runner up
- 2020 **Columbus Business First, Fast 50 award**
_WSA #32
- 2020 **AAF Columbus, ADDY Gold Award**
_WSA rebrand
- 2020 **AWWWARDS.COM, Honorable Mention**
_WSA website, wsastudio.com
- 2019 **Columbus Business First, Fast 50 award**
_WSA #35
- 2017 **Columbus Landmarks Foundation, James B. Recchie Award, Finalist**
_738 Bryden Road
- 2014 **Columbus Landmarks Foundation, James B. Recchie Award, Finalist**
_The Jack
- 2008 **Columbus Landmarks Foundation, James B. Recchie Award, Finalist**
_The Seneca
- 2007 **Mason Contractors Association of America (MCAA), National Excellence in Masonry Design Award**
_San Elijo Elementary School
- 2005 **Design Competition Award**
_Wislon Jr. High Gymnasium, El Centro

COMMUNITY SERVICE AND LEADERSHIP

CITY OF COLUMBUS

Todd has lived, worked, and continuously served to enrich the experience of the Short North Arts District.

The Short North Arts District is a hip, culture-rich area centered on N. High Street. The district is the most vibrant spot in the City of Columbus and is home to over 300 exciting businesses, the majority of which are locally owned or headquartered. It has received numerous national accolades, is considered a model for urban revitalization, and is the heart and soul of Columbus.

2006 - 2021 **Vice Chair - City of Columbus, Italian Village Historic Design Review Commission**

_Led one of two Short North Commissions, which serve an important role to guide Columbus' growth in a manner that preserves and enhances the unique character of each neighborhood. He was responsible for reviewing development proposals for permit, in relation to their corresponding area plans, historic design guidelines, and as-applicable, city code standards.

_Actively engaged in the largest redevelopment of the Short North in the history of the City of Columbus.

_Reviewed and approved over \$930 million dollars of public and private development in the district over fifteen year tenure.

2018 **Juror - City of Columbus, "Art on High" International Artist Selection Jury**

153 artists responded to a nationwide RFQ, which the selection jury (an eightmember panel of professional artists and community representatives) narrowed to three finalists: Mark Fornes, Mark Reigelman and Christian Moeller.

_Reviewed 153 artists qualifications and worked with fellow panel members to select three finalists.

_Selected Mark Reigelman through an interview process of the finalists.

_Recommended Mark's final design concept (titled the "Makers Monument") to the Columbus Art Commission for approval.

_\$420,000 investment is the largest single public art investment by the City of Columbus in its history.

2017 - 2018 **Advisory BoardMember - City of Columbus, "Art on High" Public Art Strategic Plan for the Short North**

The Art on High strategic plan defined the High Street corridor by honoring its history, celebrating its culture, and creating rich experiences for residents and visitors through public art. The purpose of the Art on High Strategic Plan was to advise the City of Columbus as it invests in public art. The first installation is meant to inspire ongoing investment in public art from business and community leaders, as well as residents. www.artonhigh.org

_Engaged stakeholders and consultants to coordinate appropriate locations and impact for public art in the historic neighborhood.

2017 **Panelist - Columbus DesignWEEK, "Changing Columbus"**

_Contributed development trends and neighborhood direction as part of a three person panel.

VILLAGE OF PLAIN CITY

Todd serves to assist Plain City as the growth of suburban Columbus brings investment to the historical uptown district. Through design leadership, Todd honors the preservation of uptown's heritage while embracing purposeful redevelopment of under utilized properties in the district.

2019 - Pr. **Chair - Village of Plain City, Design Review Board**

_Responsible for reviewing development proposals for permit, in relation to their corresponding area plans, historic design guidelines, and as-applicable, city code standards.

_Guides the board in the importance of contextual relationships and the principles of contextual design.

2021 - 2022 **Advisory BoardMember - Village of Plain City, Board of Zoning**

_Provided advice and feedback to proposed zoning code revisions addressing village growth and evolution.

SIGNIFICANT WORK

- 2023 **Global Impact Stem Academy**
_New Upper Campus
- 2023 **New River Electrical**
_Corporate Headquarters
- 2022 **BX of Central Ohio, Master Plan**
- 2022 **Plain City LibraryMakerspace Addition**
- 2021 **C-TEC**
_Facade Renovation, Cosmetology Lab Reno.
- 2020 **Nestle Beverage R+D, 1918**
_Innovation and Collaboration Center
- 2019 **The Forge by Accenture**
_Multiple locations; Columbus, Ann Arbor, San Francisco, Chicago, Boston, Seattle
- 2018 **99P Labs**
_ OSU/Honda Innovation Center
- 2018 **The Ohio State University**
_College of Law, Saxbe Auditorium
_College of Pharmacy, Riffe Hall
_Faculty Club, Anvil and Bellows Center
- 2016 **Otterbein University**
_The Point Innovation Center
- 2016 **The Graham**
- 2015 **Motorists Mutual Insurance**
_Intersection Innovation Center
_Master Plan, Vision 2021
- 2015 **The PAST Foundation, Innovation Labs**
- 2015 **738 Bryden Road Luxury Apartments**
- 2015 **Robertson Construction Services**
_Corporate Headquarters & Dublin Office
- 2014 **Priority Designs**
_Corporate Headquarters
- 2013 **L Brands**
_DC-3, DC-4, DC-7 Breakroom
_La Senza Design Studio
- 2011 **Ohio University, AthenaTheater**
- 2010 **The Jack/WSA Office**
- 2008 **Ohio State Highway Patrol, Post 23**
- 2007 **Sparks Medical Office Building**
- 2005 **The Seneca**
- 2004 **San Marcos Elementary School**
- 2003 **Golden Hill Elementary School**
- 2002 **HMC Architect's San Diego Office**

PROFESSIONAL PRESENTATIONS

- 2021 **Columbus Business First, Fast 50 Town Hall**
_ "Sustained Growth Town Hall"
- 2019 **AIA Florida Regional Conference**
_ "Foster the People"
- 2018 **AIA Columbus, ARCHway**
_ "Foster the People"
- 2017 **AIA Columbus, Master of Business Series**
_ "Designing for Innovation"
- 2017 **AIA Ohio Valley Regional Conference**
_ "Foster the People"
- 2017 **Design WEEK, Panelist**
_ "Changing Columbus"
- 2016 **AIA Indian/Kentucky Regional Conference**
_ "Crafting Innovation"

COMMUNITY SERVICE AND LEADERSHIP

BOY SCOUT OF AMERICA, SIMON KENTON COUNCIL

The Simon Kenton Council is one of the largest councils in the nation, serving 18 counties in central and southern Ohio and Greenup County in northern Kentucky. The council is staffed by more than 20 professional and administrative Scouters with more than 4,500 adult volunteers delivering the Scouting program to nearly 12,000 youth. In addition, the council maintains and operates four year-round camps that include 1,152 acres of woods, forests, ponds, trails and camping sites. Youth served include boys and girls ages 5-20 living in urban, rural and suburban areas. design reflects his client's identity within their community.

- 2022 - Pr. **Vice President of Properties - Executive Committee, Boy Scouts of America, Simon Kenton Council**
_ Provide strategic leadership to the development, maintenance, and overall use of all council owned properties, including camps, Leadership Development Center, and satellite offices.

_Ensure consistent practices are utilized among all facilities in operating and maintaining each site.

_Develop and recommend budget and schedule for capital needs for existing and new build-ings and infrastructure within each camp, utilizing the Council's strategic plan and national BSA initiatives as a guide.

_Plan and lead meetings of the coordinated council properties committee as needed to ensure communication and address big-picture needs at each camp.
- 2022 - Pr. **Properties Master Plan Committee Chair, Boy Scouts of America, Simon Kenton Council**
_ Provide strategic leadership in the master plan development of Camp Falling Rock.
- 2019 - 2022 **Vice President of Revenue Development - Executive Committee, Boy Scouts of America, Simon Kenton Council**
_ Provide strategic leadership to the Friends of Scouting Annual Campaign. This campaign raises funds through scout families, volunteers and staff, as well as board members.

_Collaborate with development team and other departments on the management and planning of fundraising events and donor cultivation events.

_Actively identify prospective individual and corporate donors; volunteer manpower; solicit funds.
- 2021 - Pr. **Chair - Leadership Luncheon Event, Boy Scouts of America, Simon Kenton Council**
The Leadership Luncheon is one of Simon Kenton Council's premier fundraising events. With a focus on the construction industry, the luncheon is designed to recognize several businesses and leaders for their contribution to the community, their partnership with Scouting, and to celebrate leadership in central Ohio.

_Actively identify prospective community leadership honoree and Whitney M. Young Jr. Service award honoree for the event.

_Coordinate with honoree and luncheon committee members to meet the established financial goal of the event through individual and corporate donors.

- 2016 - Pr. **Executive Board Member - Boy Scouts of America, Simon Kenton Council**
_ Develop the annual budget and ensure proper financial controls are in place.
_Create and review a statement of mission and purpose that articulates the council's goals, means, and primary constituents.
- 2014 - 2019 **Advancement Chair - Pack 417, Boy Scouts of America, Simon Kenton Council**
_Plan and conduct pack induction and advancement recognition ceremonies.

R.TODD BOYER, AIA



April 25, 2024

Upper Arlington City Council
3600 Tremont Road
Upper Arlington, Ohio 43221

Dear Council Members,

I am writing to express my keen interest in serving on the City Board of Zoning & Planning. With a profound dedication to urban planning and a deep-seated commitment to fostering sustainable development practices within our community, I am confident in my ability to contribute effectively to the board's mission.

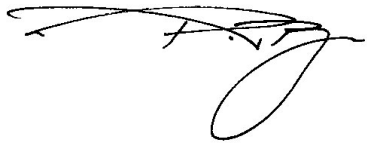
As an architect and business owner, I have amassed 23 years of experience in design, development, and construction, where I have honed my skills in communicating the importance of planning, forward thinking, and collaboration. My professional background has equipped me with a comprehensive understanding of the intricate dynamics that shape our urban landscape, including land use regulations, zoning ordinances, and community development initiatives.

Moreover, my former involvement and leadership in serving design review boards for the City of Columbus and the Village of Plain City has instilled in me a profound appreciation for the importance of balanced, equitable, and sustainable urban development. I am eager to leverage this experience to contribute meaningfully to the City Zoning & Planning Board's deliberations and decisions.

I am confident that my passion for urban planning, coupled with my professional expertise and dedication to service, will enable me to make significant contributions to the City Zoning & Planning Board's objectives.

Thank you for considering my application. I am eager for the opportunity to further discuss how my background and skills align with the needs of the board. I look forward to the possibility of serving our community in this capacity.

Warm regards,

A handwritten signature in black ink, appearing to read 'R. Todd Boyer', with a large, stylized loop at the end.

R. Todd Boyer, AIA

Marianne K Mitchell

City of Upper Arlington | Generated 5/2/2024 @ 6:20 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Marianne K Mitchell	Board of Zoning & Planning	0	Pending
Application Date	3/20/2024			
Expiration Date	3/20/2026			
Board Member	Marianne Mitchell			
Status	Validated			

Basic Information

Name
Marianne K Mitchell

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Catherine Kennedy, [REDACTED]
[REDACTED]
Chris Taylor, [REDACTED]
Anita DiPasquale, [REDACTED]
[REDACTED]

Contact Information

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Occupation

Employer
retired, previously employed as attorney and a school teacher

Occupation
retired

Job Title
retired

Yes, I am a city employee
No

Professional Licenses
JD

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
yes, I am currently a member of the zoning board

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
no

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Member of Upper Arlington Zoning Board, Member of Board of Directors of Equal Upper Arlington, Treasurer of Equal Upper Arlington, and Member of Board of Upper Arlington Progressive Action

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
See cover letter

Check the box next to your area(s) of expertise.
Finance and/or budgeting, Fundraising, Marketing, Legal, Grant Writing

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?
Yes

Are you a registered voter?
Yes

Marianne K. Mitchell



Objective: To contribute my skills as an attorney, educator, and leader who offers a proven ability to handle multiple tasks as well as an outgoing personality which allows me to establish a warm working relationship with others.

Education

The Ohio State University College of Law
Juris Doctor, December 1989
Ohio State Law Journal, Articles Editor
University of Utah
Bachelor of Arts, Magna Cum Laude, 1980
Major: English Education, Minor: Political Science

Executive Director Experience

Executive Director of the Ohio Jury Management Association
(2005 through 2006)
Organized two annual conventions of jury managers, judges, and court personnel
Sought & received grants for funding of jury management programs
Built & maintained website for jury managers
Proactively compiled data on jury management related issues
Maintained corporate minute books

Legal Experience

Associate at Bricker & Eckler (August 1994 through December 1998)
Practiced in areas of litigation, alternative dispute resolution & environmental law
Instrumental in development of the Lambros Center, alternative dispute resolution center
Appeared in trial & appellate courts in state & federal courts
Conducted depositions of witnesses
Drafted motions, affidavits, and pleadings
Conducted interviews with clients
Extensive research of numerous legal issues utilizing research databases, including Westlaw, Lexis & Casemaker

Federal Court Experience

Senior Clerk to Judge Sandra S. Beckwith
United States District Court, Southern District of Ohio
(February 1992 through August of 1994)

Judicial Clerk to Chief Judge John D. Holschuh
United States District Court, Southern District of Ohio
(March 1990 through August 1991)

Teaching Experience

Teacher of English, French & Journalism at Valley Junior High School in West Valley City, Utah (1980-1984)

Community Involvement

Member of Upper Arlington Zoning Board
Member of Board of Directors of Equal Upper Arlington
Treasurer of Equal Upper Arlington
Member of Board of Upper Arlington Progressive Action
President of Leadership Upper Arlington Board of Trustees, 2008-2010
Organized Leadership Upper Arlington Candidate & Issue Night 2007 through 2020
Coordinated & Planned Curriculum for Leadership Upper Arlington 2006 through 2020
Chair of Philanthropic Committee for Upper Arlington Senior Celebration, 2005-2006
Recruited high school seniors as volunteers for Habitat for Humanity, 2006
Coordinator of Silver Ribbon Project at Jones Middle School, 2001-2002

March 20, 2024

UA City Council Members

I am applying to serve another term on the Upper Arlington Board of Zoning.

During my tenure on BZAP, I have gained a deep appreciation for all of the Upper Arlington staff members that work with the zoning board to consider the many unique issues faced by the residents and property owners within our community. I would be remiss if I did not preface this letter with a sincere thank you to the hard-working members of the Building Division and Planning & Zoning Division.

Also, as a member of BZAP for the last several years, I have gained a deep appreciation for the complex and conflicting interests which underlie the zoning decisions within our city. The City of Upper Arlington contains many uniquely configured lots which can be difficult to utilize to their fullest potential. As a board member, it is our responsibility to attempt to balance the needs of the community as we consider the application of our zoning ordinances with respect to each individual lot. And truly, each lot that we consider as a board is unique and thus must be examined upon its own set of circumstances.

One of the most important aspects of our work on the zoning board is obtaining input, listening to input from the residents, and evaluating the input of our residents and property owners. As a board, we are indeed fortunate that many within our community are willing to offer their viewpoints for us to consider.

Within Upper Arlington, our zoning ordinances serve to protect and promote the character of our community character by organizing land into defined districts based on the type and intensity of use. These districts allow Upper Arlington to guide and regulate the growth and development while still preserving our community's character.

Serving on the zoning board has allowed me to give back to the community that my family and I have called home since 1991. Continuing to serve on the board would allow me to contribute the knowledge and expertise that I've developed while helping to guide Upper Arlington's future vision.

Sumia Mohamed

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Status

Name Sumia Mohamed
Application Date 4/29/2024
Expiration Date 4/29/2026
Board Member Sumia Mohamed
Status Validated

Board	Vacancies	Status
Community Relations Committee	1	Pending

Basic Information

Name
Sumia Mohamed
Date of Birth
[Redacted]
List 3 Personal and/or Professional References (at least one required)
Michaela Burriss [Redacted]
Dr. Stacey Fineran [Redacted]

Contact Information

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Occupation

Employer
Lawhon and Associates Inc.
Occupation
Environmental Consultant/PM
Job Title
NEPA Specialist / DPM
Yes, I am a city employee
No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No
Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No
List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Faculty Advisor - North and South Sudanese Students Association at Ohio State University. Co-Founder of Azza Women and Children Development Organization
Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I am expressing my sincere interest in the Community Relations Committee Volunteer position. I am an environmental scientist and practitioner, double Master's degree holder, lecturer at The Ohio State University, project manager, and mother with two sons. Since choosing Upper Arlington as my home eight years ago, I volunteered extensively both in our schools and throughout our local community. As a strong believer in applying all learning to real life experiences, I frequently give back to the community and country that has given much to me. As a member of 3 Parent Teacher Organizations (PTO), I honored our educators by assisting with teacher appreciation events and elevated the uniqueness of all UA students by leading diversity, equity, and inclusion (DEI) programs such as the high school's hUmAn Connection Festival (Celebrating Cultures & Diversity). This inaugural, school wide, day-long event is considered to be the premier DEI event in Upper Arlington Schools and received a Community Relations Commission grant from the City of Upper

Arlington. Working in different locations in the Middle East, Africa, and the U.S. made me a recognized communication and communicative collaboration expert. My previous roles in multinational corporation, professional certificates, and graduate studies have strengthened my critical thinking and leadership capabilities, including attention to detail and accuracy. All these qualifications have prepared me to continue serving my community.

Check the box next to your area(s) of expertise.

Fundraising, Policy Making, Strategic Planning, Professional Expertise, Environmental management, Training / Teaching, Community Awareness

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:34 pm



Key Skills

- More than 10 years of experience
- Diverse experience in providing high-level management of technically oriented projects, including Environmental Assessment, Environmental Management System, environmental compliance process, wastewater monitoring projects.
- Knowledge of project management planning and implementation, including: a project charter, communications plan, Gantt chart, work breakdown structure, task list, risk management plan, and project evaluation plan
- Extensive experience on environmental assessment and environmental management consultancy projects
- Experience in reviewing environmental permit documents related to oil & gas aspects
- Experience in research using quantitative, qualitative, and mixed approach for environmental data collection and analysis and interpretation techniques.
- Experience in teaching Environmental Impact Assessment (EIA) as developed and practiced within the U.S. specifically, the legal and institutional framework; the EIA process; the practice and performance of EIA.
- Knowledge of National Environmental Protection Act (NEPA)
- Experience in teaching Environmental Impact Assessment (EIA) in an international context, specifically EIA as practiced by nation states; International Financial Institutions (IFIs); and International Governmental Organizations (IGOs).
- Extensive experience in designing Environment, Health, and Safety (EH&S) training and evaluation plans using Training Needs Analysis (TNA) methods
- Knowledge of using system dynamic models of environment
- Experience in support and grow Environment, Health, and Safety (EH&S) business development plans
- Proposal writing and customer interface
- Experience in managing proactively the relationship with corporate clients
- Capacity building and training experience in environmental management, occupational safety, and health
- Critical thinking and analytical skills with regards to assessing climate change risks; assessing climate change vulnerability, exposure, and resilience; addressing the linkages between ecosystem services and human livelihood.
- Professional trainer
- Certified ISO 19001 Quality Management System internal auditor
- Experience in auditing and evaluating the following standards:
 - Environmental Management System standard ISO 14001
 - Occupational Health and Safety Management System standard OHSAS 18001
- Experience in working with multidisciplinary teams
- High aptitude to perform and deliver, either in a team (as leader or member) or independently
- Experience in conducting data Quality Assurance and Quality Control (QAQC)
- Computer Skills (Microsoft Office, Vensim simulation and modeling software, Tableau, SPSS)
- Technical report writing skills
- Strong interpersonal, cross-cultural, and communication skills.
- Verbal and written communication skills
- Leadership skills
- Compliance and inspection
- Presentation skills
- Native Arabic speaker, experienced in translating environment, health, and safety (EH&S) training courses from English to Arabic.

Lecturer | School of Environment and Natural Resources

August 2022 – To date

The Ohio State University, College of Food, Agricultural, and Environmental Science, USA**Fall semester course: US Environmental Impact Assessment**

Teach the fundamental concepts of Environmental Impact Assessment, including the laws, regulations, guidelines, and judicial interpretations that shape EIA's implementation.

Spring semester course: International Environmental Impact Assessment

Teach the fundamental concepts of International Environmental Impact Assessment, including the legal and institutional frameworks, practice and performance, and social and cultural contexts that shape EIA practice and implementation worldwide.

NEPA Specialist - Dupuety Project Manager | Lawhon & Associates Inc.

August 2022 – To date

Projects for: Ohio Department of Transportation (ODOT) and Federal Transit Administration (FTA) 40 hours/week

Provide consultancy and support for roadway and transit projects requiring compliance with the National Environmental Policy Act (NEPA) in both technical and project management roles. The tasks including NEPA documentation and supporting studies, environmental site assessment, and public involvement.

Program Assistant | Ohio Water Resources Center

May 2021 – Jun 2022

The Ohio State University, Department of Civil, Environmental and Geodetic Engineering, USA 40 hours/week**Research Project: Wastewater SARS-COV-2 Monitoring – Ohio Coronavirus Monitoring Network**

- Acted as the lead point of contact for the project that studying samples of wastewater to look for the presence of gene copies of coronavirus specifically related to gathering and inputting data from multiple stakeholders involved with the Statewide Wastewater SARS-CoV-2 Monitoring project.
- Arranged and communicated with statewide wastewater monitoring 74 Ohio partners in compiling wastewater monitoring data from the project.
- Compiled the wastewater monitoring results data for calculation from the assigned universities laboratories in Ohio and submit it to Ohio Department of Health (ODH) in a timely manner to allow them to send alerts to local health officials of impending surges of SARS-COV-2.
- Managed data Quality Assurance and Quality Control (QAQC) to meet the requirements of Ohio Department of Health (ODH) and Center for Disease Control and Prevention (CDC).
- Assisted with preparing and writing the Ohio universities dormitory wastewater monitoring of SARS-COV-2 technical summary report to evaluate the research project performance and achievement criteria.

Graduate Teaching Associate | The Ohio State University, USA 20 hours/week

Jan 2019 – Apr 2021

Courses taught:

- US Environmental Impact Assessment (Fall semester)

This course teaches the fundamental of Environmental Impact Assessment (EIA) including NEPA and environmental policy and regulations. It covers the three components of Environmental Impact Assessment as developed and practiced within the US: (1) the legal and institutional framework; (2) the EIA process; and (3) the practice and performance of EIA, as demonstrated through selected case studies at both the federal and state-level.

- International Environmental Impact Assessment (Spring Semester)

This course covers Environmental Impact Assessment in an international context, specifically EIA as practiced by nation states, International Financial Institutions (IFIs), and International Governmental Organizations (IGOs).

Operations Manager, Environment, Occupational Health, & Safety (EH&S) | RRC International

Nov 2008 – Aug 2014

Middle East office – Manama, Bahrain & Dubai, UAE, 40 hours/week

- Served as consultancy team lead. Consultancy projects carried out are included: Environmental Management System ISO 14001 evaluation, Environmental Assessment, and environmental compliance for different types of industries to determine the environmental aspects and impacts on land, air, and water.

- Performed final Environmental Assessment reviews, analysis documents, and evaluation for the identified impacts on land, air, and water and prepared post Environmental Assessment consultancy project reports.
- Conducted EH&S Risk Assessment consultancy projects.
- Prepared and wrote EH&S training and consultancies project technical/financial proposals.
- Managed proactively the relationship with RRC customers and corporate clients
- Prepared business analysis report.
- Developed and implemented daily EH&S operations business development plans such as clients' meetings, supervised sales staff assignments/tasks, and promotional business strategies.
- Taught the British National Examination Board for Occupational Safety and Health (NEBOSH) professional certificate training courses namely: NEBOSH Environmental Management, and NEBOSH General Certificate in Occupational Safety & Health.
- Developed and implemented policies and standards operating procedures (ISO 19001:2008 Quality Management) and monitoring protocols to evaluate RRC projects performance for continuous performance improvement.
- Conducted bi-annually Quality Management System RRC internal audits.

Quality, Health, Safety, & Environment

Apr 2004 – Sep 2008

(QHSE) Supervisor | Schlumberger Oilfield Services

Middle East & Africa Region – Khartoum, Sudan & Manama, Bahrain, 40 hours/week

- Developed managers' awareness and provided the advice regarding implementation of organization's QHSE policies and environmental management plans and ensured that these policies and plans are integral part of the line management responsibilities and objectives.
- Advised management on the compliance of the local environment, safety, and health regulations of the country and liaise accordingly with the related government authorities.
- Defined and implemented the QHSE objectives considering the company policy regarding cost, feasibility, and acceptability.
- Conducted regular environmental management and compliance location audit and location's environmental self-assessment audit.
- Developed and maintained the Site Environmental History File for the working location according to the local environmental laws and regulations.
- Represented the company in the national oil and gas clients' meetings and represented the QHSE department in the Middle East area and regional geo-market meetings and events.
- Assisted with providing and uploading Material Safety Data Sheets (MSDS) for hazardous materials.
- Conducted QHSE planned regular inspections, specifically, water quality inspections, oil water separator underground tank inspection, spill prevention control inspection.
- Developed written standard and guidance for Environmental Accident Prevention Plan, Injury Prevention Plan, and conducted accidents and near accidents investigation.
- Gather required data and assessed the environment, safety, and health local risks, developed the required control measures, and maintained the relevant records.
- Conducted QHSE planned internal audits and management review meetings to assess the effectiveness of the QHSE Management System and identify required improvements.
- Monitored the related QHSE training records of all personnel, including subcontractors.
- Applied strong leadership talents and problem-solving skills to maintain team efficiency and organize workflows in a busy oil rig location.
- Delivered relevant environment, safety, and health training programs to all personnel including newly hired engineers.

EDUCATION

The Ohio State University | Columbus, OH

Graduation May 2022

Master of Science (MS) in Environment and Natural Resources

Area of Specialization: Ecosystem Restoration

Thesis Title: Assessing vulnerability and the potential of Ecosystem-based Adaptation (EbA) in Sudan's Blue Nile Basin

The Ohio State University | Columbus, OH
Master of Environment and Natural Resources (MENR)
Graduate Minor in Public Policy and Management

Graduation December 2018

CERTIFICATES AND PROFESSIONAL AFFILIATION

NEBOSH International General Certificate in Occupational Health and Safety. (Distinction) National Examination Board for Occupational Safety and Health (NEBOSH), UK	2009
CIEH Professional Trainer Certificate (Credit) Chartered Institute for Environmental Health (CIEH), UK	2010

INVITED TALKS

THE Ohio State University | Columbus, OH
 School of Environment and Natural Resources

Presented series of guest lectures about International Environmental Impact Assessment course:

- Post Conflict Environmental Assessment, Sudan – UNEP
The challenges and the positive vision March 2017
- Post Conflict Environmental Assessment, Sudan – UNEP
Going forward March 2018
- Post Conflict Environmental Assessment, Sudan – UNEP
Challenges under current situation in Sudan March 2019
- The Nile, and Vulnerability and Impact Assessment (VIA)
Understanding the river watershed, ecosystem services, human livelihoods, and the potential for Ecosystem-based Adaptation (EbA) March 2020
- Sudanese Environmentalists Association | Khartoum, Sudan
World Environment Day
“For the Nature” virtual forum – Arabic language June 2020
- Sudan, the Nile, and the Environmental Impact Assessment (EIA)
Understanding Sudan’s EIA process – case study: Merowe Dam. March 2022

INTERNATIONAL CONFERENCES

- International Association for Impact Assessment (IAIA) | Seville, Spain
Paper title: Vulnerability and Impact Assessment in the Eastern Nile Basin
 Session: Disaster, Conflict and Crisis: are impact being identifies? IAIA 21, May 18-21
- International Association for Impact Assessment (IAIA)
 Think Big: A Cleaner, Greener Covid-19 Recovery | Virtual Forum November 4, 2021
Topic title: Achieving sustainable livelihoods in the face of climate change.
Case studies in the Sudan and the Nile will exemplify comparative impact assessment and its implications for sustainability.
- International Association for Impact Assessment (IAIA) | Vancouver, Canada.
Poster title: Hydropower and Nature-based Solutions in the Eastern Nile Basin
Paradigm shift to protect the Nile River from the potential harm of hydropower projects IAIA 22, May 4-7

PHILANTHROPY

- Advisor – North and South Sudanese Association (NSSA) – Ohio State University November 2021 – To date
- Volunteer – Diversity, Equity, and Inclusion (DEI) – Upper Arlington City School Aug 2018 – May 2022

Sumia Mohamed

Ambassador – Ready for 100 Columbus

Sierra Club – Ohio Chapter | Columbus, OH

May 2018 – Aug 2018

Conducted power mapping and community mapping research for the central Ohio area.

Invited to be part of the Columbus city's application for the Bloomberg Climate Challenge Grant, pulling together information about tax abatements for sustainability.

Aided with public campaign administration and events and conducted public outreach, volunteer management, communication with local businesses, data entry, organization, and creating campaign documents.

Founder/Assistant Director.

Aug 2015 – To date

Azza Women and Children Development Org. | Columbus, OH

Sumia Mohamed

April 28, 2024

Community Relations Committee (CRC)
City of Upper Arlington - Ohio

Upon learning about the Community Relations Committee volunteer position, I was eager to contact you with my interest. When reviewing the CRC work focused core areas, I was excited to see how well my community work experiences align with your committee's needs and position requirements. Serving in CRC at this time is more in line with my short-term goals to serve my community, and I feel that I would be an immediate asset to the team.

I am an environmental scientist and practitioner, double Master's degree holder, lecturer at The Ohio State University, project manager, and mother with two sons. Since choosing Upper Arlington as my home eight years ago, I volunteered extensively both in our schools and throughout our local community. As a strong believer in applying all learning to real life experiences, I frequently give back to the community and country that has given much to me. As a member of 3 Parent Teacher Organizations (PTO), I honored our educators by assisting with teacher appreciation events and elevated the uniqueness of all UA students by leading diversity, equity, and inclusion (DEI) programs such as the high school's hUmAn Connection Festival (Celebrating Cultures & Diversity). This inaugural, school wide, day-long event is considered to be the premier DEI event in Upper Arlington Schools and received a Community Relations Commission grant from the City of Upper Arlington.

Working in different locations in the Middle East, Africa, and the U.S. made me a recognized communication and communicative collaboration expert. My previous roles in multinational corporation, professional certificates, and graduate studies have strengthened my critical thinking and leadership capabilities, including attention to detail and accuracy.

I am confident I can be a great addition to the CRC. I have attached my resume to provide a complete account of my qualifications. I look forward to hearing from you at your earliest convenience to discuss further how I can contribute to our community. Thank you for your time and consideration.

Sincerely,



Sumia Mohamed

Laura Oldham

City of Upper Arlington | Generated 5/2/2024 @ 6:31 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Laura Oldham	City Tree Commission	0	Pending
Application Date	4/10/2024			
Expiration Date	4/10/2026			
Board Member	Laura Oldham			
Status	Validated			

Basic Information

Name
Laura Oldham

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Seyla Kramer
Christy Walters
Nidhi Satiani

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
Starburst Media / Return to Sender

Occupation
Digital Marketer / Plant Propagandist

Job Title
Owner at Starburst Media / Owner at Return to Sender

Yes, I am a city employee
No

Professional Licenses
Dealer in Nursery Stock License through the Ohio Department of Agriculture

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No, I have not.

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
Not that I'm aware of!

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Upper Arlington Civic Association Tri-Village Chamber Partnership

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I'd love to give back to Upper Arlington by using what I currently know about trees and their care as a member on the City Tree Commission. My passion is sustainable landscaping, and I'd love the opportunity to learn more from fellow City Tree Commission members as well as to work with UA City Councilmembers.

Check the box next to your area(s) of expertise.
Fundraising, Marketing, Horticulture, Arborists

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?
Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:31 pm



LAURA OLDHAM

Digital Marketer +
Plant Propagandist

ABOUT ME

Passionate small business enthusiast and sustainable artist utilizing decades of marketing and design experience to foster a deep appreciation for nature within others. With almost 15 years of experience working independently as Starburst Media LLC coupled with 11 years of research and implementation of sustainable landscaping strategies, delivering high-quality work on time and understanding the foundational work needed to make the best decisions is second nature.

EXPERTISE

Sustainability Presentations
Digital Marketing
Native Plant Landscaping
Graphic Design
Website Development
Copywriting

COMMUNITY ENGAGEMENT

Upper Arlington
Public Library Sustainability Fair
Westerville Public Library Presentation
934 Fest Seed Paper Demos
Barrington Elementary Presentation
Taught After School Enrichment
at Barrington + Wickliffe
Jones Middle School
Sustainability Club Garden Tour

EDUCATION

Ohio University, 2001 – 2004
Bachelor of Arts in Journalism

WORK EXPERIENCE

Jan 2022– Present
Return to Sender | Owner

Plant Propagandist + Sustainability Educator

- Engage community members via interactive crafts, projects and presentations to demystify sustainability and native plants.
- Volunteer at schools, libraries and with local clubs and organizations to answer questions and make sustainability accessible.
- Upcycle garbage to inspire rethinking our relationship with the planet.

March 2010 – Present
Starburst Media | Owner

Digital Marketing Manager

- Manage and execute all tasks from idea to live website for businesses of all sizes and backgrounds around the country.
- Problem solve alongside nonprofit clients on how to efficiently market themselves.
- Design logos, flyers, infographics, posters and more for events and promotions.

EXHIBITIONS

24/7 Pop Up | Seventh Son + 934 Gallery | 2024

Adam + Steve

- Crafted hundreds of handmade flowers and pollinators out of paper scraps and native plants and hung them with plant-based fishing line to represent the precarious balance of nature and humanity.
- Created a large seed paper maché apple out of only climate change-related headlines and corn starch-based biodegradable glue.

Art in Bloom | Columbus Museum of Art | 2023

Paired with Schokko with Red Hat

- Worked alongside dozens of central Ohio's most talented floral designers to create arrangements to complement our chosen pieces of art.

LAURA OLDHAM



DEAR UPPER ARLINGTON CITY COUNCILMEMBERS,

I've been an Upper Arlington resident for more than 11 years and have loved getting to know the people, places and plants of my adopted community. My husband Doug and I moved to Upper Arlington in 2013 after years of living in tiny Chicago apartments without any outdoor areas or much nearby greenspace. One of my favorite parts of UA has been learning more about the plants and trees throughout the community and understanding why certain species were chosen for specific spots.

Throughout the last 11 years I've dove in headfirst to absorb everything I can about sustainable landscaping and the impacts that the tree choices we make today will have for decades (and beyond) to come. I would love to be appointed to the City of Tree Commission both to share what I currently know and to continue to learn from fellow commission members.

During my time in Upper Arlington I've had the opportunity to serve on the Tri-Village Chamber Partnership Board of Directors, including several years as the organization's president. I've also served on the GenWex Advisory Committee, the Wexner Center for the Arts' group that helps engage entrepreneurs, creatives and young professionals. Additionally I've volunteered for dozens of organizations throughout central Ohio to help give back to the community I'm so fortunate to call my family's home.

Thank you for considering me for this open position on the Upper Arlington City Tree Commission. I would be honored to help act as a steward for our land by working alongside other community members and Upper Arlington City Councilmembers to make decisions that will benefit families for decades to come.

Gratefully,

Laura Oldham

Michael Paulus

City of Upper Arlington | Generated 5/2/2024 @ 6:47 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Michael Paulus	Cultural Arts Commission	1	Pending
Application Date	3/21/2024			
Expiration Date	3/21/2026			
Board Member	Michael Paulus			
Status	Validated			

Basic Information

Name
Michael Paulus

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Hedi Munc
Liz George Stump

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
Rocket Mortgage

Occupation
Graphic Design / UX Design

Job Title
Principal Experience Designer

Yes, I am a city employee
No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
no

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
no

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
none

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
My interest in the Cultural Arts Commission is deeply rooted in my lifelong commitment to the arts and my professional background in graphic design. With a Bachelor of Fine Arts from Bowling Green State University (BGSU), focused on Graphic Design, I have spent over two decades honing my skills in visual communication and design. This extensive experience has not only equipped me with a profound understanding of the arts but has also instilled in me a passion for leveraging my skills to support and enhance the arts within the community. Throughout my career, I have had the privilege of serving on the Arts Commission of Greater Toledo, where I played a pivotal role in facilitating art shows and providing digital design and marketing support to bolster the commission's efforts. This experience allowed me to directly contribute to the promotion and support of the arts at a local level, further deepening my commitment to the arts community. Additionally, as a founding member of the AIGA Toledo chapter and a board member, I have been actively

involved in advocating for design and the arts, creating a platform for professional development, and fostering a community of designers and artists. Given my background and experiences, I believe I can bring a unique perspective and set of skills to the Cultural Arts Commission. My expertise in graphic design, digital media, and marketing, combined with my experience in arts administration and community engagement, positions me well to contribute to the commission's goals of promoting the arts and enhancing cultural experiences within the community. In terms of my goals for serving on the Board & Commission, my short-term objective is to leverage my skills and experiences to support ongoing initiatives and contribute to the development of new projects that can further the commission's mission. In the long term, I aim to foster stronger connections between the arts community and the broader public, utilizing digital platforms and innovative marketing strategies to engage a wider audience and enhance the visibility of the arts. In conclusion, my passion for the arts, combined with my professional background in graphic design and my experiences in arts administration and community engagement, make me a strong candidate for the Cultural Arts Commission. I am eager to contribute my skills and expertise to support the commission's mission and to work collaboratively with fellow members to promote and enhance the cultural arts within our community

Check the box next to your area(s) of expertise.

Marketing, Strategic Planning, Fine Art / Graphic Design

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:47 pm

Status

Name sheryl pfeil
Application Date 3/13/2024
Expiration Date 3/13/2026
Board Member sheryl pfeil
Status Validated

Board	Vacancies	Status
Cultural Arts Commission	1	Pending

Basic Information

Name
sheryl pfeil
Date of Birth
List 3 Personal and/or Professional References (at least one required)
Dr. Joanne Lynn (UA resident)

Contact Information

Address

Occupation

Employer
The Ohio State University
Occupation
physician
Job Title
Director, Humanism and the Arts in Medicine program - Ohio State University College of Medicine
Yes, I am a city employee
No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
I was a student participant in the UA Cultural Arts Commission many years ago when I was a student at UAHS. It was my preference for a city government shadowing program for high school students at that time.
Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
no
List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
none

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I am interested in serving on the Cultural Arts Commission because of my dedication to my community and my longstanding interest in the cultural arts and the ways they enrich our lives. I have been a very longtime resident of UA. In my current professional role as the Director of the Humanism and the Arts in Medicine program for the OSU College of Medicine, I work with community partners and others to bring arts activities and opportunities to the students and other members of the health care community. I also lead the Med Arts Board (a group of volunteers and staff). Some of our recent endeavors include partnering with the Columbus Museum of Art for "Art of Analysis" events, our recently concluded annual Art Show (featured on NBC), publication of our annual literary/photo magazine (Ether Arts) and multiple engaged and immersive non-curricular events such as the Professional School Orchestra, On-Call Creations, and most

recently the painting of a mural! I would love to contribute to the UA Cultural Arts Commission. I shadowed this Commission when I was a student at UAHS (our city government shadowing program) and my passion for the cultural arts continues today!

Check the box next to your area(s) of expertise.

Strategic Planning

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:48 pm

Blythe Arielle Price

City of Upper Arlington | Generated 5/2/2024 @ 6:30 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Blythe Arielle Price	City Tree Commission	0	Rejected
Application Date	12/11/2022			
Expiration Date	12/11/2024			
Board Member	Blythe Arielle Price			
Status	Validated			

Basic Information

Name
Blythe Arielle Price

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Nick Gilliland [REDACTED]
Rick Espe [REDACTED]
Jeff Bryan [REDACTED]

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
MKSK

Occupation
Landscape Architect

Job Title
Landscape Architect III

Yes, I am a city employee
No

Professional Licenses
Professional Landscape Architect
#6518, State of California

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
N/A

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
N/A

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Ohio Chapter of the American Society of Landscape Architects
- Executive Board Member

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.

As a licensed landscape architect, my passion lies in designing sustainable, biodiverse landscapes that enhance people’s quality of life. I am interested in joining the Upper Arlington Tree Commission so that I can continue this mission as I give back to my community and help shape the character of my City. I have 8 years of experience working on the design of landscapes across the United States. Prior to purchasing my home in Upper Arlington, I worked as a landscape architect in San Francisco, designing streetscapes, public parks, private residences, and campuses across the West Coast. This has given me exposure to a variety of city codes and standards, a wide range of planting and design knowledge, expertise on reading and creating design and construction drawings, and a fresh perspective that I’d love to bring with me as a member of the Committee. My short term goal as a Committee member is to enhance the sustainability of our urban forest by planting diverse native trees with high wildlife value,

educating our community on the importance of a tree canopy, demonstrating the potential biodiversity value of native landscaping, and encouraging neighborhood street tree planting. In the long term, I'd love to help plan for and preserve the quality of our urban canopy by helping to facilitate a Forestry Master Plan for the city.

Check the box next to your area(s) of expertise.

Professional Expertise

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Generated 5/2/2024 @ 6:30 pm



BLYTHE PRICE

ASLA, PLA

Blythe is a landscape architect with experience working on sustainable public landscapes across the United States. Growing up, Blythe's work as a volunteer restoring Ohio's native oak savannas and summers spent exploring the nation's national parks inspired her to pursue landscape architecture. Her passion lies in designing experiential spaces that foster human connection to the environment while enhancing wildlife biodiversity. Throughout her time at MKSK, she has worked on a variety of projects throughout Ohio, most recently, the design, public engagement, and visioning for West Case Park in Columbus, Ohio.

EDUCATION

- Bachelor of Science in Landscape Architecture, The Ohio State University, 2015

EXPERIENCE

- MKSK, Landscape Architect III, 2021-Present
- Surfacedesign, Inc., Associate, 2017-2020
- Fletcher Studio, Designer, 2015-2017
- NBBJ, Intern, 2013-2014

AFFILIATIONS

- American Society of Landscape Architects, Ohio Chapter, Executive Board
- Professional Landscape Architect #6518, State of California
- The Ohio State University, Guest Critic

AWARDS

- Olmsted National Scholar, Finalist, 2014

SELECTED PROJECTS

MKSK

- West Case Park, Public Engagement and Visioning, Columbus, OH
 - Public Park
- Stubbs Park and Amphitheater, Phase I, Centerville, OH
 - Public Park, Plaza, and Amphitheater
- Quarry Trails, Columbus, OH
 - Public Park
- Ohio History Collection Storage Facility, Columbus, OH

Surfacedesign, Inc.

- Expedia Headquarters Campus, Seattle, WA
 - Tech Campus, Native Gardens, Water Feature, Amphitheater
- The Beach at Expedia Group, Seattle, WA
 - Public Waterfront, Bike Trail, Native Habitat
- Auckland International Airport, Terminal Master Plan, Auckland, New Zealand
 - Airport Masterplan
- P2/P8 Public Park, Mission Bay, San Francisco, CA
 - Public Park, Waterfront, Community Gardens
- 950 Market Street, San Francisco, CA
 - Hotel Courtyard and Roofdeck, Multi-family Housing

- Faust Winery, St. Helena, CA
 - Winery

- Primary School, Mountainview, CA
 - Elementary School

Fletcher Studio

- Candlestick Point, San Francisco, CA
 - Multifamily Housing
- Dogpatch Neighborhood Master Plan, San Francisco, CA
 - District Master Plan
- Dogpatch Artwalk, San Francisco, CA
 - Public Alley, Stormwater Mgmt
- Edwina Benner Plaza, Sunnyvale, CA
 - Multifamily Housing, Roof Deck, Courtyard
- 888 Tennessee, San Francisco, CA
 - Multifamily Housing, Streetscape & Public Alley
- Dublin Station, Dublin, CA
 - Multifamily Housing, Streetscape, Roof Deck

December 11, 2022

City of Upper Arlington
3600 Tremont Road
Upper Arlington, OH 43221
Attention: City Tree Commission

City Tree Commission Position

Dear City Tree Commission,

I am writing to express my interest in a position as a member of the Commission. As a licensed landscape architect, my passion lies in designing biodiverse landscapes that enhance a community's quality of life. Trees provide a vast number of crucial community and ecosystem services - helping to enhance neighborhood character, combating climate change, improving environmental quality of life, and providing wildlife habitat. I am proud of the work Upper Arlington has already done to create a thriving urban forest and I would cherish the opportunity to serve and help shape my community as a member of the City Tree Commission.

As a landscape architect with eight years of experience, I have had the opportunity to lead the design, documentation, and construction of numerous projects across the United States. Throughout these projects, I interfaced regularly with the clients, project consultants, and multiple regulatory agencies and stakeholders. I have worked on a variety of project types at a range of scales, from the detailed design of a perennial garden in San Francisco, to the construction documentation and planting design for a 40 acre campus in Seattle, and the master planning for a 50 acre park in the city of Columbus. These experiences have given me a fresh design perspective and invaluable technical, graphic, and collaborative skills that will enable me to excel as a contributing member of the City Tree Commission.

Please do not hesitate to contact me by phone [REDACTED] or email [REDACTED] if you have any questions. Thank you for your time and consideration and I look forward to hearing back from you soon.

Best,
Blythe Price, PLA, ASLA



Landscape Architect, MKSK



Dennis H Miller

City of Upper Arlington | Generated 5/2/2024 @ 6:59 pm by OnBoardGOV - Powered by ClerkBase

Status

Name Dennis H Miller
Application Date 3/19/2024
Expiration Date 3/19/2026
Board Member [Dennis H Miller](#)
Status Validated

Board	Vacancies	Status
Tax Incentive Review Council	1	Pending

Basic Information

Name
Dennis H Miller
Date of Birth
List 3 Personal and/or Professional References (at least one required)
Ryan Miller
Nick Vlasidis

Contact Information

Occupation

Employer
Law Offices of Miller & Miller, P.C.
Occupation
Attorney
Job Title
Attorney/ Partner
Yes, I am a city employee
No
Professional Licenses
Licensed with State Bar of Michigan

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Upper Arlington Senior Association

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I moved to Upper Arlington from Michigan four years ago. I am semi-retired having practiced law for over 40 years. In Michigan, I served as attorney for the Allen Park Downtown Development Authority as well as Allen Park Housing Commission and other municipalities and housing commissions. I served on both of these boards as well, prior to becoming their counsel. I have acquired a great deal of experience in municipal law, real estate law and corporate/ non-profit law. I believe I would be an asset to assist in reviewing tax exempt compliance agreements.

Check the box next to your area(s) of expertise.
Legal, Policy Making, Professional Expertise, Economic Development

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:59 pm

Status

Name JP Ratajczak

Application Date 3/12/2024

Expiration Date 3/12/2026

Board Member JP Ratajczak

Status Validated

Board	Vacancies	Status
City Tree Commission	0	Pending

Basic Information

Name
JP Ratajczak

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Sam Simmons, UA Parks & Forestry Superintendent

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
Nationwide

Occupation
Director

Job Title
Director, Competitive Intelligence

Yes, I am a city employee
No

Professional Licenses
Series 6, 26

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
I have been a member of the UA Tree Commission since 2019

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Locally, I am a coach for the U12G and U10B Oranje Raptors soccer club. I am also the Marketing & Communications Lead for the Council of Competitive Intelligence Fellows, an international group of professionals who have been recognized by their peers for leadership in the discipline of competitive intelligence, and who are steadfast in their support of the advancement of the discipline.

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
Over the 4+ years serving on the UA Tree Commission, I have brought a non-technical perspective to the team, helping translate the goals, mission, and outreach to the everyday UA citizen. Through continuing my marketing and outreach activities with the Commission, I look forward to helping the Commission demonstrate to the community the importance of our urban canopy.

Check the box next to your area(s) of expertise.
Marketing, Strategic Planning

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:31 pm

JP Ratajczak



Veteran Intel Program Builder – Industry Leader & Visionary – Strategic Driver

Builder and consultant of over 100 intelligence programs including over a dozen Fortune 100 organizations. Inducted into Council of Competitive Intelligence Fellows in 2020. Selected by industry peers to lead premier intelligence professional organizations like SCIP and SLA. An acclaimed international speaker on topics like Artificial Intelligence and co-author of multiple intelligence books. Over seven years of experience working in the C-level of a Big Four firm. Documented excellence in scoping, deployment, and ongoing management of intelligence software and systems. Educational background includes formal intelligence training in quantitative and qualitative research and analysis. Proven ability to lead virtual teams. Adept communicator. Tech savvy.

Experience

Nationwide

Director, Competitive Intelligence – April 2019 to Present

Responsible for building, implementing, and leading a competitive intelligence competency across Nationwide's \$16 billion Retirement Solutions (RS) business.

- Proactively briefs the RS President and leadership team on topics of strategic importance ranging from potential acquisition targets to cyber threats to potential executive leadership candidates
- Within first year, developed a tactical intelligence capability that contributed to monthly and quarterly sales records
- Prototyped and launched a predictive, algorithm-driven, on-demand pricing and industry analysis resource, available to forward-facing audiences, which reached clients with \$2.7 billion in assets in under a year
- Launched an intelligence video series, dubbed "visionary" and a "best in class example of innovation" by leading CI experts

Aurora WDC

Director, Intelligence Systems – January 2014 to April 2019

Design, sell, implement, and service intelligence platforms and oversee ongoing operations of the FirstLight product, Aurora WDC's proprietary intelligence software.

- Built and consulted on over 100 intelligence functions at financial services, insurance, and other industry organizations. Required interaction with senior personnel of prospects and clients to build intelligence functions and solve challenging issues. Success resulted in revenue growth of 52% and client base expansion of 85% in the three years after taking over prospecting responsibilities.
- Initiated and led branding strategy for an intelligence product that had been white labeled for nine years. The proprietary software was relaunched as FirstLight™.
- Organically grew a team of 2 into a team of 10 through new client work and consolidating work streams. Was achieved via software implementation standardization and developing a scalable intel monitoring staffing model.
- Served as the head liaison between FirstLight's clients and FirstLight's developers, helping bridge the gap between business and technical requirements



Experience (continued)

Deloitte

CEO Communications Manager – June 2012 to November 2013

Led research efforts to inform the US CEO's briefings, messaging, and talking points and acted as the CEO Comms project manager.

- Directed the design of, led development of, and coordinated weekly updates to CEO's media briefing book, tying together over 70 different sources of information
- Conducted final edits to prep materials before CEO met with US President and top tier media outlets
- Designed a client communications dashboard used by the CEO Comms Director to track eminence, relationships, and subscription information pulled from four disparate systems
- Managed CEO Comms' multi-million dollar budget

Competitive Intelligence Collection Manager – 2006 to 2012

Managed collection of primary information and oversaw proper usage in executive level intelligence deliverables and prepared/delivered the resulting metrics to leadership. Worked on a daily basis with collectors and analysts to create strategic, analytic, forward-looking intelligence deliverables.

- Designed, developed, and implemented a new primary intelligence software tool that received a top rating from Fuld & Company's Intelligence Software Report
- Regularly selected to lead upgrades, implementations, and trainings for operational tools used on a daily basis by hundreds of internal intelligence professionals. One such operational tool update resulted in over 4,200 hours saved in just a year, the equivalent of two FTEs.
- Designed, developed, implemented, and maintained a SharePoint-based Intelligence Library that organized over 1,200 executive-level deliverables. Created accompanying training video to be viewed on demand by the department's 200+ employees.
- Developed 14-step Primary Collection Plan Methodology heavily utilized in project planning
- Trained and managed dozens of overseas resources on intelligence tools, skills, and operations

Crawl for Cancer, Columbus

Founder / Organizer – 2007 to 2012

Created and organized the Columbus Crawl for Cancer (CFC), an annual charity fundraiser meets pub crawl that donates proceeds to local cancer related charities. In the event's first five years, over \$261,000 was donated to cancer related charities and over 19,400 pounds of food was donated to a local food bank. The event grew to involve 19 bars in the Arena District and entertained approximately 20,000 people, making it one of Columbus' premier charity events of its time.

Black & Veatch

Market Research Analyst – 2004 to 2006

Hired to bring competitive intelligence knowledge to supplement a best-in-class market research team for a leading global engineering, consulting, and construction company.

- Designed and created a specialized intelligence portal to track competitors
- Co-led a company-wide task force to choose and implement a \$3 million CRM purchase

Experience (continued)

Mercyhurst University Intelligence Department

Graduate Research Associate – 2002 to 2004

- Developed a department intranet to provide an information hub for 192 students
- Evaluated over a dozen beta-stage intelligence software packages for departmental use
- Maintained the department's computer lab and resources including design, set up, and eventual relocation

Executive Office of the President of the United States

Research Analyst – Summer 2001

Interned in the Law Enforcement and Justice Branch (LEJ), Office of State and Local Affairs, Office of National Drug Control Policy, Executive Office of the President.

- Prepared staff briefings for Congressional Staff meetings and Senate hearings
- Edited and consolidated interagency comments for Congressional Reports

Education

Mercyhurst University – Erie, PA

- Master of Science in Organizational Leadership
- Bachelor of Arts in History – Research/Intelligence Analyst Program (R/IAP), now Department of Intelligence Studies

Major Leadership Roles

- Marketing & Communications Committee Lead, Council of Competitive Intelligence Fellows (2021-Present)
- Past Chair, Chair, Chair Elect, Annual Conference Planner, and Membership Chair of Special Libraries Association (SLA)'s Competitive Intelligence Community (2018 – 2022)
- Co-Chair of Southwest Ohio Strategic and Competitive Intelligence Professionals (SCIP) chapter (2014 – 2016)
- Steering Committee member of local Strategic and Competitive Intelligence Professionals Chapter: Southwest Ohio (2006 – 2014), Kansas City (2004 – 2005), Erie (2000 – 2004)
- SCIP Annual Conference Program Selection Committee (2009, 2010, 2011)
- Mercyhurst University Alumni Board (2011 – 2014)
- Director & Founder of the Race Battling Against Leukemia & Lymphoma (raceBALL)
- Race Around Ohio Leadership Committee (2011 – 2014)
- Pararescue Challenge Planning & Operations Committee (2012 – 2014)

Skills

- Leadership: Upper Arlington Tree Commission (2019-Present), Council of Competitive Intelligence Fellows (2020), Major League Soccer Community MVP, Columbus (2012); Columbus Cancer Clinic Philanthropic Spirit Award (2011); Harvard 8-course Leadership Transitions training program (2012)
- Industry Proficiency: Published as a co-author of The Practical Guide to Competitive Intelligence (2022) and Conference and Tradeshow Intelligence (2007); Presented and moderated at numerous conferences including Intl. Assn. for Intelligence Education (IAFIE), Mercyhurst University Intelligence Conference, SCIP Annual Conference, SLA Annual Conference, and others

Presented and moderated topics ranging from "How To Prepare for 2025's Intelligence Technology" to "Search - The Next Generation - AI, Aggregators, and Beyond" on webinars and at annual conferences for esteemed professional organizations like SCIP, SLA, The Intelligence Collaborative, and Taxonomy Bootcamp

- Tech savvy: In-depth knowledge of intelligence, database, SharePoint and Office software
- Communication: Voted 2005 Toastmaster of the Year for local Kansas City chapter

Ms. Cheryl J Smoot

City of Upper Arlington | Generated 5/2/2024 @ 6:46 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Ms. Cheryl J Smoot	Cultural Arts Commission	1	Pending
Application Date	4/22/2024			
Expiration Date	4/22/2026			
Board Member	Cheryl J Smoot			
Status	Validated			

Basic Information

Name
Ms. Cheryl J Smoot

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Pamela Glasgow - Executive Director, Bexley Education Foundation [REDACTED]
Gretchen Zunic, Director of UA Orchestras - [REDACTED]
Korine Fujiwara, Founder and member of Carpe Diem String Quartet - [REDACTED]

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
No

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Equal UA

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
American Lung Association

Occupation
Fundraiser

Job Title
Nationwide Assistant Vice President, Individual & Planned Giving

Yes, I am a city employee
No

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.

I believe the arts are essential to the human experience and the role of the community in bringing artistic experiences to its citizens cannot be overstated. I would welcome the opportunity to bring my background and experiences to help Upper Arlington continue the excellent artistic programming it already provides and to explore ways we might further develop and strengthen our efforts. I have been a professional fundraiser for the past 37 years. I have had the privilege of working for a wide variety of organizations, including a performing arts organization. My academic background is in music. I am a flutist and a music historian and remain active in the arts community. I have read the 2018 Arts and Culture Master Plan and see many innovative and exciting ideas that were put forth. While I assume the Commission will be re-visiting and re-working this plan in the near future, I was quite

taken by many of the conceptual projects. I am sure the incorporation of the arts into our new Bob Crane Community Center has already been addressed or is in progress. It would be my hope that the visual arts would figure prominently as they were so very important to both of the Cranes, but especially Loann. I would like to see the Commission continue to explore the ways in which we can reach all members of community, respecting cultural, physical and neuro diversities. I would like to explore the concept of individual philanthropy to support the arts in Upper Arlington. I believe my professional background would be helpful in this area.

Check the box next to your area(s) of expertise.

Fundraising, Marketing, Grant Writing, Strategic Planning

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:46 pm

Cheryl J. Smoot



Professional Experience

American Lung Association *2016 – present*

July

Nationwide Assistant Vice President, Individual & Planned Giving

- Lead the planned giving program for the nationwide American Lung Association
- Provide management and strategic direction for all planned giving fundraising, including administration of estate and trust receipts, marketing, donor identification, cultivation and solicitation
- Manage Director of Planned Giving, Nationwide Director of Estate and Trust Administration, and Manager of Estate and Trust Administration
- Create and deploy a robust, multi-channel marketing plan
- Develop and maintain a personal portfolio of donors and prospects
- Responsible for generating 20-25% of all contributed revenue annually
- Serve on the nationwide Diversity, Equity, and Inclusion Council, in addition to other nationwide workgroups
- Accomplishments include increasing membership in the Legacy Society by 40% and solicitation of \$2M planned gift.

American Lung Association of the Midland States *2011 – June 2016*

May

Vice President of Development

- Chief development officer for a four-state charter of the American Lung Association.
- Provide leadership, management, and strategic direction for the implementation of all fundraising - individual, corporate, foundation, planned and special events.
- During first twelve months, created a reporting structure for the department, developed accountabilities, evaluated and reassigned event portfolios, solicited and obtained first ever national corporate team partner for the ALA which has resulted in \$380K - \$500K annual revenue nationwide.
- Responsible for writing and implementing multi-year Development Strategic Plan.
- Manage the Development Committee of the Midland States Board of Directors and engage them and other members of the Board in fundraising activities.
- Recruit and train all Development staff; Manage Executive Director, Sr. Director of Development and Stewardship Coordinator.
- Implement the first strategic cause campaign for the ALA throughout the Midland States Charter.
- Responsible for maintaining a portfolio of high-level major gift prospects, including individuals, corporations, and foundations.
- Developing a plan to raise individual gifts to support research, specifically lung cancer research.

- Serve on National taskforces and workgroups, especially to create and communicate an awareness and understanding of how individual giving will enhance the mission of the American Lung Association.
- Accomplishments include steady increases in fundraising revenue. In fiscal year 2012, for the first time in the seven year history of the merged organization, special events not only met, but exceeded budgeted goals by \$99,000 or 5.6%. Overall fundraising revenue has increased from a baseline of \$3,142,307 in fiscal year 2011 to \$4,464,208 in fiscal year 2014 (42%) and to an expected \$7.5M in fiscal year 2015 (138%).

American Cancer Society, Ohio Division (Dublin, OH) *September 2007–May 2011*

Senior Director of Major Gifts and Distinguished Events

- Provide leadership, management, and strategic direction for the implementation of a major gifts infrastructure and program for the Ohio Division.
- Provide leadership, management, and strategic direction for the implementation of the distinguished events (gala and golf) infrastructure and program for the Ohio Division.
- Develop and implement key fundraising strategies for a three-year major gifts plan, including planning and executing new capital campaigns, and developing a robust major gift identification, cultivation, stewardship and solicitation pipeline/program within the Ohio Division.
- Responsible for maintaining a portfolio of high-level major gift prospects, including individuals, corporations, and foundations.
- Recruit, train, manage and retain a group of professional major gift staff and one prospect researcher.
- Act as a resource for and collaborate with the Regional Vice Presidents and Directors of Community Development regarding each market's major gift opportunities, building their pipeline of donors, as well as providing stewardship and moves management strategies for their key donors.
- Work with key Society volunteer leaders, both lay and medical, to support and integrate their participation in the major gifts program in the areas of prospect identification, cultivation and proposal creation.
- Manage and direct all Institutional Funding opportunities (foundation grants) for the Ohio Division.
- Create and communicate an awareness and understanding of how distinguished giving will enhance the mission of the American Cancer Society, Ohio Division, both internally and externally.
- Accomplishments include steady increases in major gift and distinguished events results. In fiscal year 2010, all personal solicitation categories exceeded their goals by considerable margins—Individuals by 208%, Corporations by 30%, and Foundations by 24%. Galas increased by 6% over the previous year and Golf was up 19%. Also obtained major gift for funding of pay-if research projects ranging from \$135,000 - \$750,000.

Columbus Symphony Orchestra (Columbus, OH) *November 2005–August 2007*

Director of Development

- Responsible for the development, management, implementation, and evaluation of the overall fundraising program, an average of \$6-7 million annually (60-65% of annual budget).
- Managed staff, board, and other volunteers in planning and executing all annual, sponsorship, capital, endowment, and planned giving programs as well as fundraising events and benefits.
- Developed campaign goals and plans to reach those goals as well as appropriate budgets.
- Served as part of the senior management team to assist the Executive Director in setting and implementing administrative and artistic policies established by the Board.
- Worked closely with the Executive Director and other designated staff in long-range planning.
- Responsible for maintaining a portfolio of high-level major gift prospects, including individuals, corporations, and foundations.
- Served as staff to Board of Trustees with particular responsibility for the Development committee and board members' roles in fundraising.
- Accomplishments include an increase of 7.5% over prior fiscal year; solicitation of a \$500,000+ challenge and a successful match of \$541,000; revamping of direct mail and tele-fundraising programs; establishment of staff accountabilities and goals and development of strategic plan for fundraising.

OhioHealth Foundation (Columbus, OH) *August 2000–October 2005*
(Formerly The Grant/Riverside Methodist Hospitals Foundation)

Vice President, Philanthropy (August 2002–October 2005)

- Served as primary adviser to the President of the Foundation; provided strategy development and direction for the Foundation and Board.
- Responsible for the oversight and growth of the Foundation's multimillion-dollar major gifts program, including all personal solicitations of major gift prospects. Developed innovative strategies to increase levels of performance among four major gifts staff members and prospect research coordinator through direct supervision and evaluation. Major gifts increased by more than 50% in 2003-2004.
- Responsible for maintaining a portfolio of high-level major gift prospects, including individuals, corporations, and foundations.
- Responsible for leading the planned/deferred giving program for the Foundation. Increased membership in planned giving society by 25% during 2002-2003.
- Served as staff to Board of Trustees with responsibility for areas of Board orientation, ongoing development, and appropriate Board Committees.

Vice President, Development (August 2000–August 2002)

- Responsible for all major and capital giving for Grant Medical Center.
- Responsible for revitalizing giving to Grant Medical Center, including re-building physician, emeriti board members, and administration relationships with the Foundation.
- Increased giving to Grant Medical Center by 42% in 2000-2001; another 31% in 2001-2002.

The Ohio State University (Columbus, OH) *October 1994–August 2000*

Director of Development

- Oversaw all development, alumni, and public relations activities for the College of Humanities, one of the largest colleges at the University.
- Responsible for all major gift solicitation in the College of Humanities.
- Successfully raised seven-figure gifts and numerous five- and six-figure gifts.
- Completed \$14.7 million of \$14.5 million Capital Campaign goal.
- Increased gifts coming into the College annually by 75% as compared to 1994.
- Supervised the Coordinator of Alumni Affairs and Public Relations for the College and a clerical assistant.

Methodist Theological School (Delaware, OH)
1994

August 1992–September

Director of Development

- Responsible for all annual fund solicitations on behalf of the School to its alumni, friends, trustees, faculty, staff and church bodies.
- Developed strategic plan, goals and budget for the annual campaign.
- Created all pieces for mail and phone solicitations.
- Developed strategic plans for major donor solicitations in conjunction with the Vice President for Institutional Advancement and the President.
- Solicited gifts up to \$100,000 for endowment purposes.
- Increased Annual Fund by 10% the first year; alumni participation increased from 14% to 31%.

Ohio Northern University (Ada, OH)

December 1989–August 1992

Director of Annual Giving

- Responsible for planning, creating and implementing all solicitations for annual gifts on behalf of the University to its alumni, friends, parents and students.
- Organized annual alumni phonathon and supervised 75 students.
- Directed alumni and student volunteers in raising funds.
- Solicited corporate contributions on behalf of the Ohio Foundation of Independent Colleges.
- Increased annual giving by 19% during first year, 10% the second year; alumni participation increased from 27% to 34% during tenure there.

The Columbus Symphony Orchestra (Columbus, OH) *March 1986–November 1989*

Manager of Telemarketing

- Responsible for planning, organization, and implementation of first in-house telemarketing program.
- Planned campaigns in consultation with the director of development or marketing.

- Managed and motivated phone room staff of twenty callers.
- Proven track record of consistently generating 10-11% of the CSO multi-million dollar budget.

The Ohio State University (Columbus, OH)

September 1979–June 1985

Graduate Teaching Associate

Education

- Doctoral candidate in music history, The Ohio State University, Columbus, Ohio.
- Master of Arts, majoring in music history, The Ohio State University, Columbus, Ohio, 1981.
- Bachelor of Music Education, *cum laude*, Illinois Wesleyan University, Bloomington, Illinois, 1979.

Professional Education

- Certified Fund Raising Executive (CFRE), 1996 to 2017.
- PG Calc Gift Planning Seminar, 2003.
- Association for Healthcare Philanthropy International Conference, 2000, 2002, 2009.
- International Conference of the Association of Fundraising Professionals, 1994, 1996, 1998, 2008.
- Introduction to Planned Giving, Council for the Advancement and Support of Education (CASE), 1993.
- Grantsmanship Workshop, The Grantsmanship Center, March 1993.
- Annual Fund Conference, CASE, October 1990.
- CASE Annual Assembly, June 1990.
- Matching Gifts Conference, CASE, February 1990.

Professional Activities

Speaker and Presenter

1987–Present

- Association for Healthcare Philanthropy International Educational Conference
- International Special Events Society “Eventworld”
- Association of Fundraising Professionals, Central Ohio Chapter
- American Symphony Orchestra League
- The Ohio State University
- Columbus Urban League
- Ohio Regional Association of Concert and Lecture Enterprises
- The Organization of Ohio Orchestras
- Independent College Advancement Associates

Association of Fundraising Professionals

1989–Present

- Mentor (2016-2017)
- Board Member (1994-1999; 2005–2009)
- Co-Chair, National Philanthropy Day (2007)
- Chair, Fall Conference, Central Ohio Chapter (1999)
- President, Central Ohio Chapter (1997)

Carpe Diem String Quartet

2011-2019

- Grantwriting
- Planning and execution of *A Persian Musical Feast* (2012)
- Board member (2014-2019)

Honors and Recognitions

- Outstanding Fundraising Executive, Association of Fundraising Professionals, Central Ohio, 2002
- Title VI Fellow for Slavic Studies at The Ohio State University, 1985–1986
- Outstanding Graduate Teaching Associate, The Ohio State University School of Music, 1982–1983
- Illinois State Scholar, 1975–1979.

Special Skills

- Trained music historian

Cheryl I. Smoot

April 19, 2024

Upper Arlington City Council
3600 Tremont Road
Columbus, OH 43221

Dear Members of City Council,

Please find attached my application to serve on the Upper Arlington Cultural Arts Commission. I believe my academic training as a music historian and flutist, in combination with my professional and volunteer experience as a fundraiser would be well-suited to serving the community on this commission.

I have lived in Upper Arlington since 1995 with my husband, composer Richard Jordan Smoot, and our family. I have actively volunteered with the Upper Arlington Orchestra Parents Association, including raising funds for the group's trip to China in 2014. We regularly attend and support a wide range of artistic organizations throughout central Ohio.

I was a board member for the internationally recognized Carpe Diem String Quartet for five years; prior to that, I produced "A Persian Musical Feast," a three-day festival recognizing Persian music and culture for the group in 2012. In addition, I worked for the Columbus Symphony Orchestra twice, most recently from 2005-2007.

I believe the arts are essential to the human experience and the role of the community in bringing artistic experiences to its citizens cannot be overstated. I would welcome the opportunity to bring my background and experiences to help Upper Arlington continue the excellent artistic programming it already provides and to explore ways we might further develop and strengthen our efforts.

Thank you for your consideration of my candidacy.

Sincerely,



Cheryl J. Smoot

Brent Theaker

City of Upper Arlington | Generated 5/2/2024 @ 6:35 pm by OnBoardGOV - Powered by ClerkBase

Status

Name Brent Theaker
Application Date 3/6/2024
Expiration Date 3/6/2026
Board Member [Brent Theaker](#)
Status Validated

Board	Vacancies	Status
Community Relations Committee	1	Pending

Basic Information

Name
Brent Theaker
Date of Birth
[REDACTED]
List 3 Personal and/or Professional References (at least one required)
Emma Speight
Steve Schoeny
Jim Lynch

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Yes, I am currently serving on the CRC. I came onboard mid-term replacing an original member.

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Currently serve on the Board for the Upper Arlington Civic Association.

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
In the 18 months serving on the CRC, I believe the group has finally caught its stride and has turned the corner from being a "start-up" group to an impactful evolutionary part of the City of Upper Arlington. There is still more to be done and with the current momentum and knowledge gained, I feel strongly staying in this role for another term to help the future development of the CRC and continue change towards an inclusive and welcoming community. My connections from being involved with the UACA, being a graduate of Leadership UA, plus the skills I have gained over the 19+ years in developing partnerships by being at Kaplan, and raising a child with special needs in our community are all supporting factors to help be successful in this role.

Check the box next to your area(s) of expertise.
Finance and/or budgeting, Fundraising, Marketing, Strategic Planning, Professional Expertise

Contact Information

Address
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Occupation

Employer
Kaplan North America
Occupation
Healthcare Software Sales
Job Title
Sr. Strategic Sales Executive
Yes, I am a city employee
No

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:35 pm

Shannon Tolliver

City of Upper Arlington | Generated 5/2/2024 @ 6:21 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Shannon Tolliver	Board of Zoning & Planning	0	Pending
Application Date	3/7/2024			
Expiration Date	3/7/2026			
Board Member	Shannon Tolliver			
Status	Validated			

Basic Information

Name
Shannon Tolliver

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Jamie Richardson
Anthony Joseph

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
White Castle System

Occupation
Manager

Job Title
Social Responsibility and Environmental Sustainability Manager

Yes, I am a city employee
No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Board of Zoning and Planning member

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
no

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Columbus Humane dog walker and foster care provider

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.

I would like to continue to serve on the Board of Zoning and Planning. I have a Master's in City and Regional Planning and 10 years of transportation planning experience. My education and experience bring an over knowledge of city planning issues to the Board. I stay current on existing trends in city planning and I am passionate about how cities are organized, formed and function within the community and within the greater region. Professionally, I am an environmental sustainability manager and one of my main focuses is reducing waste and improving efficiencies within our operations. I always have that lens when reviewing city development applications along with the city's request to build to LEED standards. I also serve as White Castle's contact and mediator for environmental activist groups. In this role I engage, hear and share various perspectives and goals about a specific issue. Within this process hearing another's perspective and experience is important. This sometimes leads to an understanding and compromise in outcomes and other times it may lead to an understanding but with differing

outcomes. Regardless of the outcome, there is a shared mutual understanding of perspectives and respect within this process. This process pertains to the BZAP process and in my role as existing board chair. As a board we want to hear all perspectives, the city, applicant and citizens. Then we decide based on the zoning code and UDO what the outcome may be while still respecting and hearing each parties perspective and viewpoints. As a board chair you have to be able to hear each sides, keep As a long-term board member I am happy to be at a more objective place with the residential lot split procedures and justifications. It has taken awhile but we learned from each new case and hearings in order to get to where we are now. So I would like to continue to see how current procedures help to preserve our existing lots and be able to make sound concrete decisions on behalf of the city and its citizens. Additionally, a longer-term goal would be to participate and contribute to the Henderson Road planning study. That is an area for potential redevelopment in a thoughtful way. Hopefully this same process can be replicated on SR 33, in corporation with ODOT, in the longer term. Thanks for the consideration for the reappointment to BZAP.

Check the box next to your area(s) of expertise.

City Planning, Landscape Architect, Architect

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:21 pm

SHANNON TOLLIVER



EXPERIENCE

2009-present

Social Responsibility and Environmental Sustainability Manager
White Castle System INC

Develop, implement and manage White Castle's environmental sustainability plan and programs. This includes working and collaborating with various internal departments as well as outside businesses and stakeholder groups.

Perform waste audits on facilities and develop cost effective solutions and options. This includes promoting cost effective waste diversion strategies which may include composting, donation and/or recycling options.

Develop and annually update our environmental SWOT assessment for key stakeholders and Board members.

Identify, prioritize and document life cycle impacts of raw materials and finished goods. Use this information to work on more efficient processes and systems to reduce our products environmental impacts.

Develop programs to educate key stakeholders about White Castle's commitment to sustainable business practices.

Work with supply chain on animal welfare issues and develop longer term strategies to enhance our supply chain options.

Annually report our retail division to the Carbon Disclosure Project.

1998-2007

Transportation Planner II
Knoxville Regional Transportation Planning Organization

Developed, updated, amended and adjusted the over \$790 million federally funded Transportation Improvement Program (TIP) on a regular basis.

Developed Congestion Mitigation and Air Quality Improvement (CMAQ) program and Surface Transportation Program (STP) project selection evaluation criteria and application for local juridical submission. Led project selection committee in evaluating applications and choosing projects for local CMAQ and STP funding.

Presented status reports, amendments and adjustments pertaining to the TIP, CMAQ and STP projects during the monthly Technical Committee and quarterly Executive Board meetings.

Annually calculated and reported ozone and particulate matter emissions for obligated CMAQ projects in the CMAQ Annual Report.

EDUCATION

1996-1998	Masters in City and Regional Planning The Ohio State University, Columbus Ohio Received a two-year assistantship with full tuition waiver. Two-year City of Dublin, Ohio intern
1992-1996	Bachelor of Arts Wittenberg University, Springfield, Ohio Business Administration and Geography double major Tau Pi Phi Business Honorary

BOARD EXPERIENCE

2012-present	Upper Arlington Board of Zoning and Planning (Board Chair 2023-present)
2022-present	COTA Board of Trustees (Chair of External Relations Committee 2023-Present)
2017-2023	OSU Knowlton Alumni Board member (Secretary 2020-2023)
2012-2017	COSI Community Board
2012-2015	Sustainable Ohio Board

MEMBERSHIPS

National Restaurant Association- Sustainability Executive Study Group Steering Committee Member
Food Waste Reduction Alliance representative
Foodservice Packaging Institute representative
International Society of Sustainability Professionals-Sustainability Associate (SA) credential (2011-2014)
American Institute of Certified Planners Accreditation (2001-2008)

SHANNON TOLLIVER

Dear Upper Arlington City Council Members,

I would like to be reappointed to the Board of Zoning and Planning (BZAP) for another term. I am grateful to have served on this board since 2012. When I first served on the board, I was thankful for the opportunity to serve my hometown community after moving back to UA. During this time I professionally transitioned away from a public employee into private business. Although I love my current career, I will always have a passion for serving a community and city planning. I enjoy watching cities develop, improving mobility options for everyone, and bettering communities through physical design and infrastructure. I have thoroughly enjoyed keeping my hands and mind involved in city planning through my board participation and this past year I also served as board chair. Becoming the chair was an honor and while it was a steep learning curve I have enjoyed facilitating and directing the meetings.

I am also on the COTA Board of Trustees as a City of Upper Arlington appointee. I have enjoyed serving on this board as well and I am excited to see how LinkUs impacts Upper Arlington in offering additional mobility options and helping to connect us to the greater region.

My education, experience and passion for city planning as well as my environmental sustainability experience bring a unique perspective to the board. In the past 10 years the board has dealt with a lot of changes and developments, such as Land Ave, Kingsdale, 33/Fishinger redevelopments, and conflicts over residential lot splits and redevelopment. It is nice to see the board at a good spot regarding those improvements and I am excited to see what future developments occur for the city. Thanks for the opportunity to be considered for the BZAP.

Sincerely,



Shannon Tolliver

Mr. John M. Yesso

City of Upper Arlington | Generated 5/2/2024 @ 6:50 pm by OnBoardGOV - Powered by ClerkBase

Status		Board	Vacancies	Status
Name	Mr. John M. Yesso	Library Board of Trustees	0	Pending
Application Date	4/24/2024			
Expiration Date	4/24/2026			
Board Member	John M. Yesso			
Status	Validated			

Basic Information

Name
Mr. John M. Yesso

Date of Birth
[REDACTED]

List 3 Personal and/or Professional References (at least one required)
Gloria Heydlauff, Susan J. Stocker (retired Dean Of KSU @ Ashtabula

Contact Information

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Occupation

Employer
Retired

Occupation
Retired Industrial and Systems Engineer

Job Title
Retired from Kent State University @ Ashtabula

Yes, I am a city employee
No

Have you ever been a member of any City Board & Commission, or employed by the City of Upper Arlington? If so, describe.
Yes, currently on the library board

Are you related to any person employed by the City of Upper Arlington, either by blood or marriage? If so, state relation.
No

List present membership in any community service or civic association, if any. If a student, then list school activities, membership in clubs, etc.
Conneaut Ohio city planning commission, Civic Development Corporation of Ashtabula County, Partnership for Education in Ashtabula County, United Way of Ashtabula County, Past President of the Society for Engineering Management Systems

Please explain your interest in this Board & Commission. Then describe your skills, talents, or experiences, and how the Board & Commission would benefit from them. If an incumbent, why do you wish to continue serving? List short- and long-term goals you have, and describe your special skills, talents, interests, training or experience that you bring to the Board & Commission.
I have been a consultant in performance improvement for nonprofit and profit organizations. My expertise is in helping and training organizations improve the quality of their performance. I want to continue on the board since during my presidency the current strategic plan was created and I'd like to help ensure the plan continues to be implemented as designed and to make appropriate changes as the needs of the community change. Also, as we embark on our Master Facilities Plan, my operations experiences will be helpful in successfully completing the plan.

Check the box next to your area(s) of expertise.
Policy Making, Strategic Planning, Professional Expertise, Economic Development

Do you affirm that all answers and statements in this document are true and complete to the best of your knowledge and belief?

Yes

Are you a registered voter?

Yes

Generated 5/2/2024 @ 6:50 pm

PERFORMANCE IMPROVEMENT • STRATEGIC MANAGEMENT

An experienced industrial engineer with proven ability to develop organizational strategic direction, implement improvement systems and manage projects resulting in higher performance. Effective listening skills with the ability to establish trust and strong working relationships with all levels of the organization from line staff to senior executives to create high performance work teams. Excellent analytical, systems integration and problem-solving skills complemented by strong group facilitation skills.

PROFESSIONAL EXPERIENCE

Integrated Improvement Systems, Columbus, Ohio

1990 to Present

Principal Consultant

A management consulting firm dedicated to assisting private and public sector organizations in the areas of strategic planning and management, quality and performance improvement, group facilitation and problem solving, and performance measurement. Some clients include:

- United Way of Ashtabula County, strategic planning
- Conneaut Ohio City Council, strategic planning (Pro Bono)
- Conneaut Area City Schools Board of Education, strategic planning (Pro Bono)
- U.S. Navy, total quality management
- Miller Brewing, total quality management
- Ohio Department of Development Small Business Development Centers, Baldrige Self-Assessment for Small Businesses

Kent State University – Ashtabula, Ashtabula, Ohio

2004 to 2012

Administrator

Held various administrative positions including 1) *outreach program manager* as a liaison to the business community brokering consulting and training contracts for ISO 9000, Lean/Six Sigma and strategic management; 2) *interim assistant dean* responsible for faculty hiring and scheduling of classes; 3) *senior special assistant to the dean* leading the campus strategic management process, accreditation reporting and the Office of Corporate and Community Services.

Adjunct Instructor

Serve as an adjunct instructor in College of Business Administration, Department of Management and Information Systems teaching courses in leadership, individual and team behavior, and operations management. Have served as a contract administrator assisting with developing, marketing and delivering training programs for local organizations.

Ohio Department of Development, Columbus, Ohio

2003 to 2004

Chief Strategic Management

Responsible for leading the design and implementation of a strategic management process that includes the department strategic plan (vision, mission, values and strategic goals), program division and office operating plans, and a balanced scorecard based performance measurement system at all levels.

- Established and led the implementation of the department's strategic management.
- Developed the department's mission and long-term goals.
- Facilitated the development of division goals and measures.

Ohio Office of Quality Services, Columbus, Ohio**1999 to 2003*****Deputy Director***

Led an internal consulting office that assisted the Governor's Office and state departments in implementing the Quality Service through Partnership initiative by providing quality management, process improvement, facilitation, and training consulting services to department directors and their leadership team. The success of the state's quality initiative has resulted in savings of over \$340 million.

- Served as a technical consultant for multiple state departments implementing a Balanced Scorecard based performance measurement system.
- Lead the development of a Baldrige based organizational assessment for government agencies.
- Co-leader of Pathways to Excellence, the state of Ohio's quarterly quality event that shares best practices, trains people in new tools and recognizes accomplishments.
- Have trained state workers at all levels in process and quality improvement, performance measurement and leadership skills.
- Co-facilitated a Governor's One Day Statewide Education Summit consisting of education, business and civic leaders.
- Co-developer and presenter of a one-day senior leadership seminar on total quality management for department directors and their management team.
- Developed and facilitated strategic planning retreats for several department directors and their senior management team to develop the department's goals and improvement objectives for future services.

Ohio Environmental Protection Agency, Columbus, Ohio**1993 to 1999*****Agency Quality Coordinator***

Managed, coordinated, and facilitated the agency's Strategic Management Process, Total Quality Management Initiative (Quality Service through Partnership), and non-technical training. Ohio EPA is a 1,300-person agency with five district offices throughout the state and a central office in Columbus. Managed a staff of three with a budget of \$350,000.

- Led the design and implementation of the state's Quality Service through Partnership (QStP) Initiative in the Ohio EPA through the development of an infrastructure of a statewide steering committee and coordination teams in each location to support the process statewide.
- Program manager for the implementation of the EPA's leadership development program **DEAL**, Developing Excellent Agency Leaders. The 13-month program combines classroom instruction in twelve leadership competencies with a capstone team project.
- Trained instructors, organized the basic QStP training, and co-instructed some of the classes for all 1,300 people in the agency.
- Implemented a facilitator training class and trained 140 facilitators to assist the process improvement teams.
- Facilitated and served as the consultant to a senior management team who developed the agency's Strategic Management Process which integrated the processes used by the various program divisions and district offices into a single process to set the agency's plan for the future.
- Developed and implemented a professional development program for all agency employees. The program identifies individual development and agency-wide training needs, so that the \$100,000 annual training budget can be allocated to the high-priority needs.
- Served as a consultant for several department heads to design and run planning and team-building retreats. Facilitated many of these retreats.
- Co-developed and taught a class on performance measurement basics offered to all state employees.

The Performance Center, Virginia Tech University, Blacksburg, Virginia
External Associate

1990 to 1995

- Designed and facilitated a five-day retreat for twenty grocery store warehouse managers for a large Canadian grocery store chain resulting in their commitment to become change agents so the company could maintain its leadership role in an environment of increasing competition.
- Implemented a strategic performance improvement process for a high technology/high-risk unit of the armed forces targeting quality and productivity improvements. The program entailed plan design, deployment strategies, training module design and delivery, group exercises, and ongoing review.
- Supported the implementation of Total Quality Management in a Navy shipbuilding command that included authoring and delivering a Total Quality Leadership class, providing just-in-time training on the Total Quality Management tools for process action teams and facilitating process action teams.
- Performed training needs analysis to assess the requirements for performance improvement team resulting in hands-on training in flowcharting and small group dynamics.
- Developed and trained 250 production workers in the concepts and applications of Total Quality Management.

Community Mutual Insurance Company, Cincinnati, Ohio
Internal Management Consultant

1980 to 1992

Developed a comprehensive planning process to refocus the role of the MIS division in the organization and to improve the delivery of its services. The process implemented included a vision and mission statement, a division-wide strategic planning process, goal identification, and tactical performance plans that resulted in a realignment of resources and saved the organization \$8 million.

- Designed, developed and implemented the MIS's Total Quality Management process encompassing management commitment, implementation strategy, training, communications, measurements, and process action teams.
- Recommended a regional facilities plan that consolidated 60 locations into 20. Analyzed cost, service, and market issues to relocate the facilities where they would best serve the market demands. In addition, formulated a staffing model to determine the appropriate skills mix and number of employees to process the claims for the five business divisions in these locations.
- Achieved a \$1.5 million savings by converting claims receipts from hard copy to electronic media. Responsible for total project management involving coordination with hospitals, software vendors, and claims processing units.

The Ohio State University, Columbus, Ohio
Systems Analyst

1976 to 1980

- Project leader for the design and development of an integrated automated personnel and payroll system and perform system improvement studies for the existing system.
- Directed the faculty activity reporting process for collecting and analyzing information reported to the Ohio Board of Regents.
- Provided internal consulting to Office of Personnel Services management for operational and process improvements.

OTHER EXPERIENCE

The Ohio State University, Department of Industrial and Systems Engineering, Columbus, Ohio

- Adjunct Instructor 1976 to 1978
- Graduate Teaching Associate 1974 to 1976

EDUCATION • PROFESSIONAL DEVELOPMENT

Quality Seminars:

Leadership Skills For a High-Performance Workplace, Ohio Office of Quality Services
W. Edwards Deming 4-Day Seminar: Quality, Productivity, and Competitive Position
3M Facilitator Training Program

The Ohio State University, Columbus, Ohio

B.S. and M.S., Industrial and Systems Engineering

PROFESSIONAL AFFILIATIONS

Alpha Pi Mu, National Industrial Engineering Honorary

American Society for Quality

Institute of Industrial Engineers

Elected an Institute Fellow, 2004

President, Society on Engineering Management Systems, 2002 - 2004

Past National Director for Honors and Awards

Past National Director for Chapter Development

Past President of the Columbus Chapter and board member

Ohio Award for Excellence

Member of Operational Council, 2000-2005

Selected as a senior examiner for 1999-2000, Examiner 2001-2002, Team Leader 2003-2004

CIVIC AND VOLUNTEER AFFILIATIONS

Member of the Upper Arlington Public Board of Trustees, 2013 to present

Past Member of Conneaut City Planning Commission

Past Member of the Board of Trustees for the Civic Development Corporation of Ashtabula County

Past Member of the Board of Trustees of the United Way of Ashtabula County

Past Member of the Board of Trustees for the Partnership for Education in Ashtabula County

Past Member of the Ashtabula County Convention and Visitors Bureau Board of Trustees

Graduate of the 2005 class of LEADERShip Ashtabula County and facilitated their midyear retreats

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2004 to 2012

Administrator

Held various administrative positions including 1) *outreach program manager* as a liaison to the business community brokering consulting and training contracts for ISO 9000, Lean/Six Sigma and strategic management; 2) *interim assistant dean* responsible for faculty hiring and scheduling of classes; 3) *senior special assistant to the dean* leading the campus strategic management process, accreditation reporting and the Office of Corporate and Community Services.

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Ohio Office of Quality Services, Columbus, Ohio**1999 to 2003*****Deputy Director***

Led an internal consulting office that assisted the Governor's Office and state departments in implementing the Quality Service through Partnership initiative by providing quality management, process improvement, facilitation, and training consulting services to department directors and their leadership team. The success of the state's quality initiative has resulted in savings of over \$340 million.

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W. Edwards Deming 4-Day Seminar: Quality, Productivity, and Competitive Position
3M Facilitator Training Program

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B.S. and M.S., Industrial and Systems Engineering

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Institute of Industrial Engineers

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Past President of the Columbus Chapter and board member

Ohio Award for Excellence

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Past Member of the Board of Trustees for the Civic Development Corporation of Ashtabula County

Past Member of the Board of Trustees of the United Way of Ashtabula County

Past Member of the Board of Trustees for the Partnership for Education in Ashtabula County

Past Member of the Ashtabula County Convention and Visitors Bureau Board of Trustees

Graduate of the 2005 class of LEADERShip Ashtabula County and facilitated their midyear retreats

NOTICE TO LEGISLATIVE
AUTHORITY

OHIO DIVISION OF LIQUOR CONTROL
6606 TUSSING ROAD, P.O. BOX 4005
REYNOLDSBURG, OHIO 43068-9005
(614)644-2360 FAX(614)644-3166

TO

8621154		N		STORE OPS 2140 LLC & PATIO 2140 TREMONT CTR RD UPPR ARLINGTON OH 43221
PERMIT NUMBER		TYPE		
ISSUE DATE				
06 05 2024				
FILING DATE				
D5				
PERMIT CLASSES				
25	242	B	E19087	
TAX DISTRICT		RECEIPT NO.		

FROM 06/07/2024

PERMIT NUMBER		TYPE	
ISSUE DATE			
FILING DATE			
PERMIT CLASSES			
TAX DISTRICT		RECEIPT NO.	



MAILED 06/07/2024

RESPONSES MUST BE POSTMARKED NO LATER THAN. 07/08/2024

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 N 8621154

(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