

March 2019

Members of the 2019 Citizen Financial Review Task Force:

We wish to extend our sincere gratitude to you for your willingness to participate on the 2019 Citizen Financial Review Task Force. Fulfilling your role as a volunteer task force member is a commitment of time, energy and expertise that will benefit all in our community, and it is greatly appreciated.

This effort comes five years after the work of the 2014 Task Force, which was created to consider and make recommendations on how the City should best address significant, long-term reductions to its revenue stream while also securing the necessary funding to implement an aggressive 10-Year Capital Improvement Program. The work of the 2019 Task Force will occur within the context of a much brighter financial picture, thanks to the successful implementation of many of the recommendations from the 2014 Task Force—including the voter approved increase of the City’s income tax rate to 2.5%—and a robust economy. That’s not to say that your work is any less critical in nature, as we work to preserve the City’s strong financial standing over the long term, while providing the best possible municipal services to our residents in a cost effective and responsive manner.

As you ready to begin your work, this 2019 Citizen Financial Review Task Force Member Workbook provides you with extensive information on the City’s financial policies, history and future projections, an overview of how Upper Arlington compares with other regional and Ohio cities, and much more. If you believe information is missing or as questions arise through the work of the Task Force, please share your thoughts with Task Force Chair, Ann Gabriel, and she will coordinate the fulfillment of such requests with Staff.

Again, we thank you for agreeing to serve as a member of the 2019 Citizen Financial Review Task Force. We are confident that your work over the coming weeks will serve to guide City Council and the Administration in the months and years ahead.

Sincerely,

Kip Greenhill
President
Upper Arlington City Council

Dan Ralley
Acting City Manager

Brent Lewis
Finance Director

RECORD OF RESOLUTIONS
CITY OF UPPER ARLINGTON
STATE OF OHIO

RESOLUTION NO. 2-2019

2019 CITIZEN FINANCIAL REVIEW TASK FORCE

WHEREAS, in 2013, the City of Upper Arlington faced significant, long-term reductions in its revenue stream that were negatively impacting operating revenues and funds for capital improvements; and

WHEREAS, despite taking a series of progressive steps to address this shortfall, projections indicated an impending structural deficit that would severely compromise the City's ability to maintain core municipal services and to perform necessary infrastructure improvements; and

WHEREAS, in an effort to address and correct this negative forecast, Upper Arlington City Council appointed the 2014 Citizen Financial Review Task Force to perform a detailed study of the City's finances and to develop recommendations that would keep the City on a strong financial footing and enable it to fully meet its obligations to the community; and

WHEREAS, that task force issued a report containing 15 recommendations, the most notable of which resulted in the passage of Issue 23 in November of 2014 – a .5% increase in the City's income tax rate to be solely devoted to capital improvements; and

WHEREAS, that task force also recommended a follow up review some number of years after the initial report, in order to measure the effectiveness of steps taken to implement the recommendations of the 2014 report and determine if additional recommendations should be established and pursued by the City; and

WHEREAS, the following residents have been appointed to undertake this review as members of the 2019 Citizen Financial Review Task Force: Jamie Crane, Ann Gabriel, Colin Gawel, Greg Guy, Ukeme Awakessien Jeter, Tim Keen, Matthew J. Kirby, Matthew Rule, Kaz Unalan; and

WHEREAS, Upper Arlington City Council has issued the following charge to the 2019 Citizen Financial Review Task Force:

1. Review the report of the 2014 Task Force
2. Determine the extent to which recommendations have

been implemented; evaluate whether desired outcomes were achieved for each implemented recommendation, or if not, determine if each recommendation is still valid at this time

3. Undertake a high-level review of the City's current financial status and overall outlook
4. Explore further privatization and/or collaboration opportunities
5. Undertake a high level assessment of existing service levels to verify alignment with community needs and/or expectations
6. Assess the status of capital investments made to date and the outlook/plans for the next 10-year Capital Improvement Program
7. Examine and recommend specific program areas where a fuller review may be necessary
8. Report findings and make recommendations for City Council to consider; and

WHEREAS, the work before the Upper Arlington Citizen Financial Review Task Force is extremely important for the City and its citizens; and

WHEREAS, the members of City Council and the City Administration are extremely appreciative of the Task Force members' willingness to serve their community in this significant endeavor;

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

SECTION 1. That the Upper Arlington City Council does hereby issue the 2019 Citizen Financial Review Task Force (CFRTF) with the above stated charge which is hereby incorporated and made part of this section.

SECTION 2. The CFRTF is to report back to Council in June 2019 with recommendations, assessments, and findings. If additional time is needed, it can be authorized at this time.

SECTION 3. Council hereby appoints the following members:

- Jamie Crane (President of Council)
- Ann Gabriel (Council Member Casper)
- Colin Gawel (President of Council – At-Large Member)
- Greg Guy (Council Member Ralph)
- Ukeme Awakessien Jeter (President of Council – At-Large Member)
- Tim Keen (Council Member Lynch)
- Matthew J. Kirby (Council Member Hoyle)
- Matthew Rule (Vice President King)
- Kaz Unalan (Council Member Close)

SECTION 4. President of Council shall appoint the Chair of the CFRTF prior to the first meeting and the City Clerk shall provide notice to City Council of the appointment.

SECTION 5. In the event of a resignation by a CFRTF Member, the Council Member who nominated the said CFRTF Member is authorized to appoint a replacement, if deemed necessary.

SECTION 6. That this resolution shall take effect at the earliest date allowable by law.

2019 Citizen Financial Review Task Force Contact List

TASK FORCE MEMBERS

Name	Email
Ann Gabriel, Chair	Agabriel002@columbus.rr.com
Jamie Crane	jcrane5559@aol.com
Colin Gawel	Colingawel@gmail.com
Greg Guy	gguy@airforceone.com
Ukeme Awakessien Jeter	uajeter@gmail.com
Tim Keen	tskeen21@aol.com
Matthew J. Kirby	mjk@hamiltoncapital.com
Matthew Rule	mrule@nationalchurchresidences.org
Kaz Unalan	Kunalan@gbq.com

CITY ADMINISTRATION

Name	Title	Phone	Email
Dan Ralley	Acting City Manager	614-583-5043	dralley@uaoh.net
Brent Lewis	Finance Director	614-583-5288	blewis@uaoh.net
Jonathan Lindow	Assistant Finance Director	614-583-5284	jlindow@uaoh.net
Jackie Thiel	Public Service Director	614-583-5351	jthiel@uaoh.net
	City Engineer		
Emma Speight	Community Affairs Director	614-583-5045	espeight@uaoh.net
Ashley Ellrod	City Clerk	614-583-5033	aellrod@uaoh.net

2019 Citizen Financial Review Task Force Meeting Schedule & Timeline

KEY DATES

Detail	Date
Start of Citizen Financial Review Task Force	April 4, 2019
*Report/Update to City Council	June 3 or 15 Conference Session
*First Reading/Public Hearing	June 10 or 24 City Council Meeting
*Second Reading/Public Hearing/Council Action	June 24 or July 8 City Council Meeting
Council on Summer Recess	July 15-August 12
Council Meetings Resume	August 19 Council Conference Session
First Budget Discussion	November 4 Special City Council Meeting
Second Budget Discussion	November 18 Council Conference Session
Third Budget Discussion	December 2 Council Conference Session
Vote on Budget	December 9 City Council Meeting

** Should the Task Force determine that more time is necessary for it to complete its work, the Chair may request an extension at the June 3 or 15 Report/Update to Council.*

MEETING SCHEDULE

- All meetings will be held on Thursday mornings, beginning at 8:15 am
- All meetings will be held in the Lower Level Meeting Room at the Municipal Services Center, 3600 Tremont Road
- Some meetings may be cancelled if deemed unnecessary by the Chair

Dates

April 4	April 18	April 25		
May 2	May 9	May 16	May 23	May 30
*June 6	*June 13			

** Placeholder meeting dates in the event additional time is needed to conclude the work of the Task Force.*