

On April 30, 2022, Ohio Plan led a strategic planning session involving the Mayor, the Chief of Police, two council members, five Mariemont residents and two business owners in the Village. Mariemont’s council requested this work because, in spite of being a “planned community”, Mariemont currently has no master plan on what we should be focusing on over the next 3-5 years.

Moreover, as shown below, from 2016 to 2019, the Village’s spending exceeded its revenue and the deficits were getting larger. Starting in 2020, the Village implemented a combination of spending cuts and revenue increases that have helped to put us on stronger footing. We also received some one-time revenue from the government due to Covid and we sold a paper street and some excess equipment.

<u>All dollars in thousands</u>	<u>2021</u>	<u>2020</u>	<u>2019</u>	<u>2018</u>	<u>2017</u>	<u>2016</u>
Revenue	\$5,744	\$5,581	\$4,834	\$5,049	\$4,370	\$4,220
Expenses	<u>\$5,721</u>	<u>\$4,823</u>	<u>\$5,149</u>	<u>\$5,779</u>	<u>\$4,557</u>	<u>\$4,275</u>
Surplus/(Deficit)	\$23	\$758	(\$315)	(\$730)	(\$187)	(\$55)
<u>Included in Revenue</u>	<u>2021</u>	<u>2020</u>				
Government Covid Funds	\$184	\$220				
Sale of Equipment/Property	\$125	\$50				

Council thought it was important to start working now on developing a master plan that would hopefully enable us to be more proactive in identifying revenue opportunities, developing an infrastructure maintenance plan and to run our Village in a more cost effective manner.

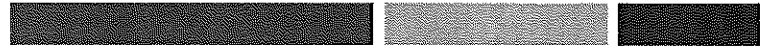
The strategic planning session was the first step, as the group worked to identify different strengths and weaknesses within the Village, and took an initial cut at what some of the focus areas should be for the Village. The Executive Summary of the Strategic Planning session is available on the Village website. The next step will be to develop an integrated and holistic master plan that will encompass the next 3-5 years. Once a first cut of the master plan has been developed, it will also be made available for residents for their thoughts and input.



Village of Mariemont
Executive Summary
Strategic Planning Session Report

OHIO PLAN
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May 2022

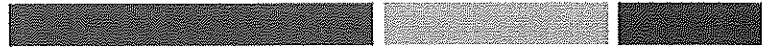


OHIO PLAN MANAGEMENT RESOURCES TEAM

Michael Hinnenkamp, *Executive Director*

Lorna Rose, *Executive Assistant*





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I. INTRODUCTION AND EXECUTIVE SUMMARY

Introduction and Executive Summary

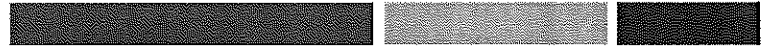
The Village of Mariemont engaged Ohio Plan Management Resources, Inc. (OPMR) to facilitate a 6-Hour Strategic Planning Session for selected Village elected officials and staff, business owners, and residents. The Mayor and Village Council selected the participants of the Planning Session Team and included the following: Mayor Bill Brown, Council Members Rob Bartlett, and Kelly Rankin, Police/Fire Chief Rick Hines. Village Business Owners, Bill DeCamp and Bill Spinnenweber and Village residents, Kathleen Cail, Michael Cain, Mike Kintner, Paul Mace and Julie Northrup.

The Team was selected to represent a cross-section of the Village, with different interests, ideas, backgrounds, knowledge and demographic segments of the community included, as best as possible.

The specific purpose of the Planning Session was to:

- Conduct a self-appraisal of the current state of the Village from both an internal organizational/operational and external economic, environmental, and quality of life standpoint.
- Identify strengths, weaknesses, opportunities, and threats for the Village from the perspective of the existing government structure, leadership, and staffing, financial capacity, services, programs, in addition to the physical, economic, and environmental characteristics and issues of the Village.
- Conduct a Strategic Visioning and Village Mission exercise to define and clarify the Village's short, mid, and long-range goals and objectives.
- Determine and prioritize specific projects, programs, plans and action steps that should be included as part of a more detailed Strategic Plan and implemented to achieve or establish substantial progress towards the Village's Mission and Vision.

The facilitation took place on Saturday, April 30th, 2022, from 9:00 am to 3:00 pm and was conducted by Michael Hinnenkamp, Executive Director of the Ohio Plan, Inc. with assistance from Lorna Rose, Executive Assistant and Research Assistant of the Ohio Plan, Inc



Scope of Services and Process

The Planning Session facilitation utilized and engaged the participants in variety of different informational, discussion, brainstorming and prioritization exercises designed to provide both a comprehensive critical review of the Village as well as strategic visioning concepts aimed at ensuring future Village sustainability and vitality.

The process and objectives included the following:

Process/Objectives:

1. Discuss and provide a contextual overview of the history and establishment of the Village of Mariemont and the role it plays today.
2. Review of the current Village structure of government, services, finances, issues, and challenges.
3. Identify strengths, weaknesses, opportunities and threats for the Village, Government Structure, Services, Programs and Staff as well as the external physical characteristics of the Village
4. Identify and define the Village's Mission (Why Statement), Core Values (How Statements) and Actions and Desired Results (What Process)
5. Identify focus areas, categories, and actions that should be included as part of a more detailed Strategic Vision/Master Plan Process and establish next step recommendations and timelines for implementation.



III. MARIEMONT: CURRENT STATE



Mariemont: Current State

The Planning Session Team was asked to analyze the current state of the Village of Mariemont. A list of components that currently make up the Village of Mariemont were presented and participants were asked as a group to rank whether they believed the Village was *below*, *at*, or *above* where they wished to be as a Village. The following chart summarizes the majority opinion in each category with an “x” and by highlighting the category.

Component	Below	At	Above
Attracting Residents*			X
Attract & Retrain Businesses	X		
Providing Services			X
Attract Elected Officials	X		
Attract & Retain Staff **		X	
Local Economy/Diverse	X		
Infrastructure/Roads	X		
Housing - Price/Attract	X		

**Attracting Residents – the consensus was that the Village is a highly desirable community to live in and therefore has an above average ability to attract residents. However, this strong residential marketing ability can act as an impediment to attracting a diverse (age, cultural background, religion, race and economic) demographic which was noted and desired by the Planning Session Team*

***The General Consensus was that the Village of Mariemont needs a Village Manager to not only oversee day-to-day operations of the Village, but to guide a specific plan and achieve the short and long range goals set by it to ensure strong future for the Village. The Police/Fire Chief is currently filling this role in a limited capacity due to his position managing public safety of the community. He has done a great job in this capacity, but a full time Manager with leadership expertise in all municipal operations such as planning, economic development and financial management is needed.*



V. SWOT ANALYSIS AND PRIORITIZATION



SWOT Analysis

A SWOT Analysis process was conducted with the participants. This commonly used process identifies a community’s strengths, weaknesses, opportunities, and threats.

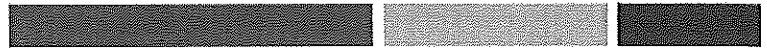
The participants were grouped into two discussion teams and asked to brainstorm Strengths, Weaknesses, Opportunities and Threats from a standpoint of both the “External Physical Village” characteristics and the “Internal Village” or Village of Mariemont government including services, programs, structure, and staff.

The full group of participants then engaged in a prioritization process. The process allowed for each participant to “vote” individually on their top (3) three priorities in each of the SWOT categories. The following represents the aggregated top priorities of the participants in each category.

Internal – Village of Mariemont Government

<p>Strengths</p> <ol style="list-style-type: none"> 1. Police and Fire Service 2. Service Department and Admin Office 3. Town Crier (<i>Newsletter</i>) 	<p>Opportunities</p> <ol style="list-style-type: none"> 1. Shared Services 2. Annexation 3. Getting Right Skills on Right Committees 4. (<i>Hire</i>) Village Administrator 5. Fund Raising Events/ More Events
<p>Weaknesses</p> <ol style="list-style-type: none"> 1. Revenue 2. Lack of Village Manager/CAO 3. Lack of Planned Economic Development 4. Council Gridlock 5. (<i>Cost of</i>) Infrastructure 	<p>Threats</p> <ol style="list-style-type: none"> 1. Declining Employment at Kellogg 2. Industrial Zone Utilization 3. Council Standoffs/Stalemates 4. Shared Services



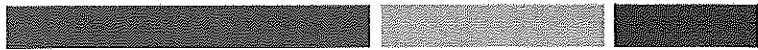


External – Physical Environment/Characteristics/Amenities and Organizations

<p>Strengths</p> <ol style="list-style-type: none"> 1. Walkability 2. Unique History & Architecture 3. Square Amenities 4. Schools 5. Parks 	<p>Opportunities</p> <ol style="list-style-type: none"> 1. Industrial Area 2. Commercial Development (Retail/Food) 3. Historic District
<p>Weaknesses</p> <ol style="list-style-type: none"> 1. Declining Quality of Rental Properties 2. Lack of Diverse Residential Population 3. Lack of Tax Base from Industrial District 4. Lack of Financial Condition Awareness of Residents 5. Condition of Infrastructure 	<p>Threats</p> <ol style="list-style-type: none"> 1. <i>(Continuing)</i> Declining Infrastructure 2. <i>(Village is)</i> Landlocked. 3. Business Competition Neighboring Comm. 4. Decline of Rental Properties Quality 5. Lack of <i>(Resident)</i>Diversity



VII. MISSION (WHY) AND CORE VALUE (HOW) STATEMENTS



Mariemont - Why and How Statements

A discussion and presentation video by Simon Sinek regarding the Power of Why and the Golden Circle was shown to assist the Planning Team with articulating the Why Statement (Vision for the Village) and their How Statement (Core Values for the Village). Why and How are two parts of three that make up the “Golden Circle.” The purpose of these two statements is further defined and explained below:

Why Statement (Vision)

The group brainstormed words and phrases that convey the Village’s “Why?” Specifically, the group was asked to identify and brainstorm the “To... So that...” aspects of the Village’s “Why.”

Why Statement Exercise

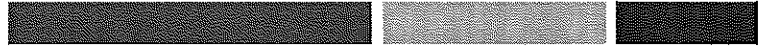
To:	So That:
<ul style="list-style-type: none"> • Lead • Plan • Coordinate • Provide • Preserve 	<ul style="list-style-type: none"> • High Quality of Life is Ensured • Strong Sense of Community is Maintained • Community Remains Friendly and Walkable • History and Founding Vision is Preserved • A Diverse Residential Base is Attracted

Based on the Brainstorming Exercises conducted by the group regarding the Village’s Why Statement, the OPMR Team recommends the following:

Village of Mariemont -- Why Statement:

To provide a clear vision for the future that preserves Mariemont’s founding principles So That businesses prosper, and a high quality of life is ensured for a diverse residential base





How Statements (Core Values) Exercise:

The group brainstormed words and phrases that convey the Village's guiding principles and core values. These words articulate How the Village achieves the above Why/Vision Statement.

- ❖ Sense of Community
- ❖ Engagement
- ❖ Walkable
- ❖ Safe – Friendly and Interactive Safety Services
- ❖ Give Back – Participating
- ❖ Caring for Those in Need
- ❖ Extended Family
- ❖ Inclusive
- ❖ Business Friendly and Involvement in the Community

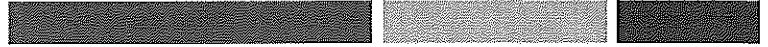
Based on the Brainstorming Exercises conducted by the group regarding the Village's How (Core Values) Statement, the OPMR Team recommends the following:

Village of Mariemont - How Statement

Our residents, business owners and employees are our extended family...

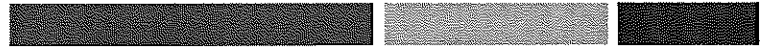
- ❖ We are engaged in planning for our future and care for those in our community to ensure they have a safe, inclusive, and prosperous place to call home and conduct business.





VIII. 2022 ACTION STEPS & PRIORITIES





Action Steps and Priorities

The final component of the day focused on establishing the “What” or “next step” priority actions that form the basis and categories for the development of a detailed Strategic Plan for the Village.

These priorities were categorized into action groups as follows:

- Internal Village Government - Structure, Operations and Services
- Internal Village Government - Building and Grounds
- Internal Village Government - Programs and Policies
- External Village - Programs and Policies
- External Village Quality of Life

The participants were again grouped into two smaller teams for brainstorming purposes and established a list of action steps and priorities regarding **Village Government Internal Structure, Operations and Services, Building and Grounds and Program and Policies Actions Steps.**

The full group of participants then engaged in the prioritization process used previously during the day in other components of the Planning Session. The process allowed for each participant to “vote” individually on their top (3) three priorities in each of the Action Step categories. The following represents the aggregated top priorities by rank of the Planning Team, in each category.

Village Government -Structure, Operations and Services Action Step Priorities

1. Explore CAO/Village Administrator Position
2. Create Economic Development Plan
3. Explore School Tax Abatements for Businesses
4. Educate/Communicate Revenue Information to Residents
5. Explore Statutory v. Charter Form/Structure of Government





Village Government -Internal Building and Grounds Action Step Priorities

1. Explore Revenue Options from South 80
2. Lamp Posts and Fire Hydrants
3. Street and Sidewalk Maintenance

Village Government -Internal Policy and Program Action Step Priorities

1. Explore Pool and Tennis Court Membership to School District Residents
2. Update and Evenly Apply All Codes – Zoning, Building and Architectural Review Board
3. Explore Shared Services (Except Police and Fire)
4. Maximize Centennial to Raise Funds for Parks

External Village - Quality of Life Action Step Priorities

1. Improve Partnership Between Schools, Business Community, and Village Government
2. South 80 Master Plan/Utilization
3. Dale Park Trails Maintenance

External Village Policy and Program Action Step Priorities

1. Proactive Plan for Better Development of Industrial Zone
2. Inspection Program for Rental Properties
3. Economic Development Incentives to Attract Business



**IX. PROFESSIONAL ANALYSIS,
RECOMMENDATIONS AND NEXT STEPS**



Professional Analysis

As one of the few planned communities in the region and United States, the Village of Mariemont is a rare, unique, and special community. Founded by Philanthropist Mary Emery and Incorporated in 1941, the Village has a rich history and legacy regarding its original vision and founding principles. It was recognized on the National Register of Historic Places in 1979 and was awarded National Historic Landmark Status in 2007. The Village has an Historic District and Town Center distinguished by its English Tudor architectural character and tree lined boulevards, streets, and public spaces.

As important as its rich history, is the fact that the Village has most of the critical physical attributes and desired quality of life components that nearly every local government or neighborhood strives for. Mariemont's public and private amenities are walkable from all parts of the Village and the Village is served by an excellent School District. Village parks and recreational facilities, including tennis courts and a community pool, are conveniently located, and interspersed throughout the fabric of the community. The Village has an outstanding variety of shops, restaurants and even an historic hotel in the Village Town Square. In addition, the Village also has an industrial district in its southwestern quadrant that is both physically and visually isolated from the remaining areas of the Village with decent access to the regional interstate system. All the above factors make Mariemont a highly desirable place to live, with high property values and strong marketing capacity.

However, there are several serious issues, challenges and threats facing the Village, most of which are not widely known or recognized by many of the Village's 3,490 residents and some community and business leaders.

The lack of a clear path forward and of a full-time professional appointed leader to provide clear day-to-day direction and expertise, declining income tax revenues coupled with aging infrastructure and rising capital improvement and public service delivery cost are among the most urgent issues. While these issues, challenges and threats are not necessarily unique or different than those that confront many local governments, they are less recognized and have not been proactively addressed in Mariemont, because on the surface, things appear to be functioning as usual and the Village is as strong as ever, operating with its present structure of government.





In short, the Village has been resting on its laurels and past successes. Ironically, a community known and founded with a specific vision and guiding principles, has been remiss to update this vision to ensure present day and future goals and objectives can be attained and the Village’s legacy preserved for future generations. To a certain extent, the Village’s strong attributes and market desirability function as a ‘double edged” sword. It hinders Village residents, leaders, and staff from having the sense of urgency to address and make difficult decisions that may be unpopular politically in the short-term. The Village may also lack the understanding and expertise needed to proactively plan and recognize how changing social, cultural and economic conditions are and will impact the short- and long-range sustainability and vitality of the Village.

Recommendations:

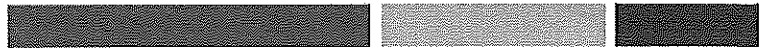
The issues outlined above were accurately and thoroughly identified by the Planning Team during the Planning Session. The Planning Team also articulated and prioritized appropriate general actions steps and areas that need to be explored in more detail.

These now need to be addressed in a formal, structured process either through the development of a Comprehensive Strategic Action Plan that includes all the issues raised or as individual component studies for each topic.

The recommendation here is to move forward with the former option of a Comprehensive Strategic Action Plan that includes all the issues and actions identified by the Planning Team. This offers the best approach to ensure the proper timing and coordination of issues.

It is likely that multiple Village input groups for certain topic areas would be selected to work with Village leaders and professional experts chosen to lead the project, but the key is a central committee/consultant to ensure overall coordination, scheduling, and commitment towards the effort.





The following are the recommended component areas of focus that should be included in the Strategic Vision and Action Plan for the Village

Structure of Government:

- ❖ Explore Changing the Village Structure of Government from Statutory to Charter with a Council-Manager Form of Government
- ❖ This involves a process established by statute (ORC) and generally involves a nearly two-year long process

Leadership:

- ❖ Explore Creating a Chief Administrative Officer – Village Manager Position to serve as the appointed leader for day-day operations of the Village and all employees
- ❖ While this action can be implemented sooner, it ties heavily on the Structure of Government Component and the Village would be more successful timing the two together
- ❖ A Professional Public Sector Recruitment Firm is recommended to assist in this process

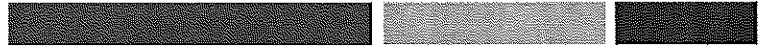
Fiscal Planning

- ❖ Develop 5 Year Budgets – Including Revenue and Expenditure Projections for All Village Departments, Operational Functions, Capital Improvements and Equipment and Fleet Replacement Needs
- ❖ Develop Short, Mid and Long-Range Tax and Revenue Generation Options
- ❖ Pursue Applicable Local, State and Federal Grant Opportunities

Land Use/Economic Development/Revenue Enhancement

- ❖ Create a Village Land Use Plan
- ❖ Create an Economic Development Plan for the Industrial District and Town Square Business District to Enhance Earning and Property Tax Revenues
- ❖ Explore all Economic and Tax Incentive Options Available through Ohio Law
- ❖ Engage a Public Sector Economic Development Professional or Consultant





Infrastructure

- ❖ Develop a 10 and 20-Year Street, Sidewalk and Drainage Improvement Plan
- ❖ Submit OPWC Grant Funding Applications Annually

Regulatory

- ❖ Create a Rental Inspection Program
- ❖ Update and Strengthen Village Zoning, Building and Architectural Review Board Codes and Ensure Consistent Enforcement and Applicability

Partnership

- ❖ Create a Village, School, and Business Community Committee to Provide Informational Updates and Explore Partnership Opportunities

South 80

- ❖ Develop a Master Plan for Utilization and Opportunities

Outreach and Marketing

- ❖ Develop an Outreach and Marketing Plan to Demonstrate Community Inclusiveness and Attract a More Diverse Residential Base

Community Events

- ❖ Partner, Collaborate and Support Community Groups and the Business Community to ensure a wide variety of public community events are conducted throughout the year



Next Steps:

The following next steps are recommended so that the ideas and priorities generated by the Planning Session and provided recommendations in this report result in actionable outcomes:

- ❖ *Provide a Presentation to the Full Village Council regarding the Planning Session Report*
- ❖ *Communicate the Report to Mariemont Residents and the Business Community*
 - *Explain the process to them*
 - *Engage them and ask for feedback – Public Hearing*
 - *Discuss Next Steps*
- ❖ *Formally adopt a Vision Statement, Core Value Statement for the Village*
- ❖ *Determine who is responsible for (Council, Staff, Other) to leading the effort to prepare the Detailed Comprehensive Strategic Plan for the Village*
- ❖ *Prepare and schedule a timeline for action on the Initiating the Planning Process*
- ❖ *Engage a Professional Consultant or Consultants to Assist in the Development of the Detailed Comprehensive Strategic Plan for the Village or Core Components*

