

**BEACHWOOD CITY COUNCIL
COMMITTEE OF THE WHOLE MEETING AGENDA
MONDAY, JUNE 3, 2019, 5:30 PM
at BEACHWOOD CITY HALL, CONFERENCE ROOM A,
25325 Fairmount Boulevard, Beachwood, Ohio 44122**

Brian Linick
James Pasch
Justin Berns
Alec Isaacson
Barbara Bellin Janovitz
Eric Synenberg
June E. Taylor

Agenda Items

1. Mayor's Report
2. Executive Session Discussion regarding Pending Litigation
3. Discussion regarding Citizens Finance Review Committee
4. Discussion regarding an Ordinance accepting a certain bid from Ronyak Paving, Inc. for the George Zeiger Drive Resurfacing Project; and declaring this to be an urgent measure
5. Discussion regarding Proposed Intersection Camera Upgrades/Additions
6. Discussion regarding Asphalt Patching Program
7. Discussion regarding Fire Station 2 Budget Adjustment
8. Discussion regarding electrical suppliers for Municipal Buildings
9. Discussion regarding Pool Fees
10. Discussion regarding CRA Housing Appointments
11. Any other matters coming before the Committee of the Whole

#

AN ORDINANCE ENACTING NEW BCO CHAPTER 175, TITLED "CITIZEN FINANCE ADVISORY COMMITTEE", OF THE CODIFIED ORDINANCES OF THE CITY OF BEACHWOOD, OHIO; ESTABLISHING A CITIZEN FINANCE ADVISORY COMMITTEE; AND DECLARING THIS TO BE AN URGENT MEASURE

WHEREAS, the City of Beachwood is a municipal corporation of the State of Ohio; and

WHEREAS, the Codified Ordinances of the City of Beachwood vest the Finance Director, Mayor, and Council with the responsibility for adopting an annual budget, appropriating funds to be used for the administration of City functions, and providing for the investment of City funds consistent with sound business practice; and

WHEREAS, Council desires to create a Citizen Finance Advisory Committee to provide financial advice, expertise, and assistance to the Finance Director, Mayor, and Council to assist in fulfilling their budgeting and financial responsibilities under the Code.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Beachwood, County of Cuyahoga and State of Ohio, that:

Section 1: New BCO Chapter 175, titled, "Citizen Finance Advisory Committee", is hereby enacted to read and provide, in its entirety, as follows:

"175.01 ESTABLISHED; MISSION; MEMBERSHIP; TERM.

There is hereby established a Citizen Finance Advisory Committee ("CFA Committee"). The mission of the CFA Committee shall be to provide effective financial know-how and advice to Council on a continuing and an as-needed basis with the intent to create and sustain excellence in financial governance, reporting and decision making. The Committee shall be composed of seven (7) city residents, a majority of which shall have a background in the area of business leadership, financial management and reporting, and are committed to become involved in a detailed manner with this working CFA Committee. Each Council member shall choose one (1) member of the CFA Committee, who shall serve for a period of three (3) years. Inaugural members will be appointed for a period of one, two and three years with one (1) member appointed for one year, three (3) members appointed for two years and three (3) members appointed for three years. Members of the CFA Committee shall serve voluntarily and with compensation at the rate of \$75.00 per meeting attended. Members of the CFA Committee may be removed at any time in the discretion of Council. Vacancies shall be filled by Council. The Finance Director and Auditor shall be permanent members of the CFA Committee.

175.02 STATEMENT OF FINANCIAL INTEREST; OUTSIDE CONSULTANTS.

No member of the CFA Committee may have a direct business relationship with any organization that is conducting business with the City. All members must sign a Statement of Financial Interest form every 12 months. There is a duty on each committee member to affirmatively notify Council of any political conflict that may arise at any time between the times that the Statements of Financial Interest are due.

The CFA Committee, at its discretion, may consult with outside advisors whose expertise may be sought for any issue under consideration. Any fees shall be approved by Council before they are incurred and all other City purchasing procedures shall be followed.

175.03 FUNCTIONS.

The CFA Committee shall:

- a) Review annually the forecasting assumptions made by the Finance Director, study the financial projections, and, if necessary, examine related documents concerning the City's finances.
- b) Share business and financial best practices from the private and public sector.
- c) Collaborate with the City to identify strategies to communicate the City's financial health to the community.

175.04 MEETINGS; UPDATE TO COUNCIL.

The CFA Committee shall meet on a regular basis, typically quarterly, or as needed to review financial performance and critical financial issues. CFA Committee meetings shall be open to the public and advertised in accordance with Section 105.01 of the Codified Ordinances of the City of Beachwood. The CFA Committee shall maintain detailed minutes of its meetings and action items, which will be posted to the City's website following approval of the minutes by the CFA Committee, in accordance with Section 105.01 of the Codified Ordinances of the City of Beachwood. CFA Committee members should also be available to provide such experience and expertise when requested by the Finance Director and/or Auditor. An update of CFA Committee activities shall be presented to Council quarterly.

175.05 DISSOLUTION.

The CFA Committee may be dissolved by vote of Council when, in the discretion of Council, the CFA Committee is no longer deemed necessary."

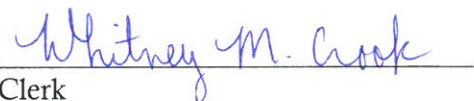
Section 2: Any other Ordinance or parts thereof in conflict herewith be, and the same hereby are, repealed to the extent of the conflict.

Section 3: It is found and determined that all formal actions and deliberations of Council and its committees relating to the passage of this legislation that resulted in formal action were in meetings open to the public where required by Chapter 105 Codified Ordinances of the City.

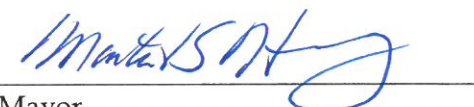
Section 4: This Ordinance is declared to be an urgent measure which is immediately necessary for the public peace, health, safety, or the efficient operation of the City; and for the further reason that it is necessary to appoint members to the Committee as soon as possible; wherefore, this Ordinance shall be in full force and effect immediately upon its passage and approval by the Mayor.

WHEREFORE, this Ordinance shall be in full force and effect from and after the earliest date permitted by law.

Attest: I hereby certify this legislation was duly adopted on the 22nd day of October, 2018 and presented to the Mayor for approval or rejection in accordance with Article III, Section 8 of the Charter on the 23rd day of October, 2018.


Clerk

Approval: I have approved this legislation this 23rd day of October, 2018 and filed it with the Clerk.


Mayor

Mike Burkons

2466 Richmond Road, Beachwood, Ohio 44122 | 216-832-6771 | mburkons@chariteegolf.net

November 15, 2018

Ms. Crook
Clerk of Council
City of Beachwood
25325 Fairmount Blvd, Beachwood, OH 44122

Dear Ms. Crook:

I am excited that Beachwood City Council decided to create a Citizen's Finance Advisory Committee and I appreciate the opportunity to apply for a seat on this committee.

A committee like this with seven seats allows for a mix of individuals that bring different skill sets that complement each other. Beyond managing my own business's finances, I have no formal finance/accounting experiences. However, my involvement and interest since 2013 in regards to how Beachwood operates has led to a deeper and broader understanding of Beachwood's finances than a good percentage of private sector CPAs.

Beachwood is very fortunate to have such a large commercial tax base. In the past, this has allowed the City to avoid making many of the tough choices other cities with less income face regularly. This is starting to change even as our revenue is increasing at a healthy clip. I am not suggesting that the City is in a crisis, but that our financial position will require the Mayor and Council to seek out efficiencies and make many tough decisions in a way that wasn't required in the past.

No better example is that during the 2019 budget process, Council learned that without adding more debt or significantly depleting reserves, an additional \$15.6m is needed to complete all the projects and initiatives on the Mayor and Council's wish list and this doesn't include the costs of adding better lighting on side streets. The reality is that there is only a finite amount of money available which is not enough to do everything we want to do.

This is normal but new to Beachwood which I believe makes this a perfect and important time for a committee like this to be formed. I hope this committee will pose the tough questions that challenge the administration and Council to prioritize and scrutinize all spending (operations and capital projects) so the money we have stretches as far as it can and accomplishes the most important things needed for our community.

Thank you for your consideration.

Sincerely,

Mike Burkons

P.S. I didn't realize I needed a resume until last night. I didn't have one so the one included was one quickly put together from a boiler plate form on Microsoft Word. I apologize if it isn't up to today's normal resume standards.

Mike Burkons
2466 Richmond Road • Beachwood, Ohio 44122
Mburkons@Chariteegolf.net
216.832.6771

Experience/Achievements

Charitee Golf LLC

2004 - Present

Founder and President

Charitee Golf LLC developed and sells a turn key solar powered wireless surveillance solution to golf courses. This solution allows them to offer the value and excitement of Hole-in-One and proximity contests to every golfer, every round they play. Without our product, golf course are limited to offering these contests at outings and special events, due to the need to have a human witness.

Significant Accomplishments Include:

- Developing, testing, perfecting and implementing the technology on extremely limited resources.
- Introduced a new product in a conservative industry that does not embrace innovation quickly or easily.
- Adapted and improved the product to better address the customers' needs.
- Raised money through angel investors and early stage venture capital groups (\$1.8m raised to date).
- Developed all marketing and sales materials.
- Was responsible for selling the product to golf courses.

Bar Management Group, Charlotte, North Carolina

1998-2001

Regional Manager

The Company owned and managed 60+ restaurants, bars, lounges and nightclubs in the United States. During the three years of my employment, the company grew from five stores to over sixty (60). Initially was hired as the manager of a new location in Pittsburgh, PA., which was the most profitable store in the company's history at that time. As the company grew, I was given more responsibilities and rose to become a multi store regional manager.

Education

Cleveland-Marshall College of Law, Cleveland, Ohio
J.D. (2004)

Connecticut College, New London, Connecticut
B.A., Economics, (1998)

- 1994-1998 Varsity Ice Hockey (ECAC East Division)

References Available Upon Request

November 2, 2018

Alexander Cohen
24809 Hawthorne Drive
Beachwood, OH 44122

Ms. Whitney Crook
City of Beachwood Clerk of Council
25325 Fairmount Boulevard
Beachwood, OH 44122

Ms. Crook,

Since receiving my honorable discharge from the U.S. Army in 2011, it has been my goal to transition to a career in business management. Over the years I have served in numerous, fast paced and demanding mid-level operational management positions in both military and civilian settings, and I believe that experience has made me into a well- rounded and versatile team member and leader.

Since 2016, I have worked, as the controller, for Main Sail LLC, an ISO 9001:2015 certified Veteran Owned Small Business IT consulting company that has a large concentration of business in the Department of Defense (DoD). I was brought into Main Sail under a management training program, with the intention that I would gradually attain more knowledge, receive increasing levels of responsibility and eventually become an upper level Manager. To that effect, I have worked closely with my immediate supervisor Main Sail's Chief Financial Officer. My responsibilities at Main Sail include both commercial and governmental accounting, budgeting and forecasting, cash management and internal auditing. Additionally, since May 2018, I have been enrolled in the part-time MBA program at John Carroll University. In terms of experience, I consider myself a junior level financial professional.

I would greatly appreciate your consideration as a volunteer member on the Citizen Finance Advisory Committee and would welcome the opportunity to interview with you. Thank you for your time and I look forward to hearing from you.

Sincerely,



Alexander Cohen
Alex.e.cohen@jmail.com
914-980-4503

ALEXANDER E. COHEN

24809 Hawthorne Drive, Beachwood, OH 44122 · 914-980-4503

Alex.e.cohen@gmail.com

PROFESSIONAL SUMMARY

Self-starter able to comfortably work in high-pressure situations while inspiring organizational cooperation. Resourceful and highly skilled at analyzing and solving problems. At ease working as a member of a team and developing job proficiency and leadership skills. Above all; self-reliant, self-confident, adaptable, flexible and possesses excellent oral and written communication skills. U.S. Army Veteran of Iraq and Afghanistan/Honorable Discharge (8 years – U.S. Army Reserve). TS Clearance.

EDUCATION

John Carroll University, Cleveland, OH

Pursuing Master's Degree in Business Administration (part time/ night school)

Class of 2021

Northeastern University, Boston, MA

Bachelor of Science Degree in Criminal Justice, 2008

GPA: 3.1

United States Army, Fort Huachuca, AZ

Military Intelligence Academy/ Special Agent Course, 2004

EMPLOYMENT HISTORY

Main Sail LLC, Beachwood, OH

2016-Present

Controller/ Accounting and Finance Operations

Maintained business accounting records in accordance with GAP and the Federal Acquisition Regulations (FAR) and administered the employee payroll system.

- Efficiently maintained records of all Accounts Payable / Accounts receivables.
- Determined total costs of employees and consultants utilizing various financial formulas.
- Learned and implemented Government Contract accounting procedures as required under the FAR.
- Worked closely with the Chief Financial Officer to maintain accurate company financial records.
- Developed a new system to store all Accounts Payable records electronically; eliminating the need for document storage.
- Authored new company policies governing telecommuting, property management and Federal Compliance.
- Drafted a marketing plan to expand help desk/IT services to local area customers.
- Served as ISO (Quality Management System) auditor to ensure company could certify to ISO 9001:2015 standard.

McMaster-Carr Supply Company, Aurora, OH

2014-2016

General Warehouse Operations

Processed customer orders to ensure timely, efficient and accurate execution and delivery.

- Accurately facilitated order processing according to company standards.
- Worked closely with management to ensure work quality and output met and exceeded expectations.
- Worked efficiently in a fast paced team environment.

April Printing Company Inc., New York, NY
Production Manager

2011-2013

Processed customer orders to ensure timely, efficient and quality production.

- Organized and executed an efficient project work schedule to complete numerous projects simultaneously.
- Created high efficiency inventory management system and trained other employees to use it.
- Took the initiative to create the first ever company website.
- Brought in new business with outside sales and marketing ideas tailored to specific businesses.
- Received customer orders and interacted with customers to ensure work met specifications.
- Utilized precision printing craft machines to produce specialized printing products.

United States Army, Kabul, Afghanistan

2010-2011

Non-commissioned Officer in charge/Office Manager of Staff level Theatre Intelligence unit (J2X)

Responsible for supervising and coordinating the fast paced, day to day military operations of a unit comprised of over 50 personnel.

- Adjudicated personal and administrative issues for all members of the Unit; including pay, leave, awards, performance evaluations and disciplinary actions etc.
- Served as the unit Special Security Representative; in charge of securing and safeguarding highly classified operational information and intelligence reports in accordance with Department of Defense (DoD) regulations.
- Organized and supervised the 24 hour a day staffing rotations of the detachment to ensure full time operational functions.
- Managed unit item accountability program and inventory control for sensitive items; \$1,500,000 worth of equipment in accordance with DoD regulations, with no losses.
- Created and implemented the first ever unit tactical driving Standard Operating Procedure (SOP) manual and appointed by base commander to teach tactical driving course (qualified over 100 soldiers and civilians in Kabul over a four month period).
- **Awarded Bronze Star Medal for leadership in a combat environment.**

Mantech Inc. For Federal Bureau of Investigation (FBI), Arlington, VA
Intelligence Analyst

2010

Responsible for providing analytical support to Investigative Special Agents on a variety of intelligence related projects.

- Appointed as a project lead for a special program; supervised and delegated work to other analysts.
- Wrote analytical intelligence reports and provided investigative leads to Special Agents at various field offices.
- Received Official Certificate of Achievement from Deputy Director of the FBI.
- *Called up for military deployment to Afghanistan in June 2010, resigned from position.*

L-3 Communications Inc., Mosul, Iraq

2008-2009

Force Protection debriefer/ Analyst

Obtained and disseminated intelligence information concerning security threats against local assets.

- Provided detailed, written reports for dissemination throughout U.S. Department of Defense community.
- Identified security deficiencies in U.S. government programs in Iraq and recommended practical solutions.
- Interviewed local stakeholders to determine which areas needed attention and/or improvement.
- Received Recognition Awards from L3 and U.S. Army.

United States Army, Al Hilla, Iraq

2005-2006

Counterintelligence Special Agent

Supported the full spectrum of U.S. military intelligence support and force protection functions.

- Provided detailed, written reports for dissemination throughout Department of Defense community
- Identified Enemy tactics and techniques and recommended countermeasures.
- Interviewed local nationals to determine if they posed a threat to U.S. Forces.
- Created and Implemented base force protection measures
- **Awarded Army Commendation Medal.**

TECHNICAL SKILLS/CERTIFICATIONS

- Microsoft Office Suite (Word, Excel, Outlook, Access and PowerPoint)
- Certified Notary public, State of Ohio

JILLIAN DELONG

25221 Bridgeton Drive * Beachwood, OH 44122 * 216-509-3514 * jdelong216@gmail.com

November 9, 2018

Dear Ms. Crook:

Please accept my resume in consideration for the Citizen Finance Advisory Committee for the city of Beachwood. I am currently employed with Cuyahoga Community College as the Manager of College Assets & Mail Operations in the Capital & Construction Department at the District Office.

The key strengths that I possess for success include:

- Extensive experience in fiscal responsibility including budget management, reconciliation of more than 120 accounts, forecasting and variance analysis, GASB reporting and compliance.
- Ability to thrive in a demanding environment processing time sensitive data with critical deadlines. Confident and organized with excellent time-management skills.
- Successful collaborator and liaison with both the Academic and Administrative college workforce. Extensive customer service background with a diverse group of both academic personnel, students and community stakeholders.

I am proud to have spent the past eight years working for an institute of higher education that not only has such a positive impact on Northeast Ohio but is nationally-recognized for its excellence in education. You will find me to be well-spoken, energetic and personable with an unflappable sense of optimism. With my diverse background in fiscal management, data analysis and compliance, I am confident I will contribute the same level of performance as a member of the Citizen Finance Advisory Committee.

Thank you for your time and consideration. I look forward to speaking with you soon.

Sincerely,

Jillian DeLong

Qualifications

Accomplished Collaborator: Extensive experience working in partnership with individuals both internal and external to the College including auditors, students, academic leaders, and community stakeholders. Proven ability to research and analyze confidential issues and develop solutions.

Experienced Compliance Administrator: Comprehensive involvement in Governmental Accounting Standards Board (GASB) reporting. Strict adherence and compliance to State-mandated public auditing procedures. Experienced employee educator on Compliance standards as it relates to Tri-C's Standards of Accounting.

Talented Liaison: Wide-ranging background coordinating with a diverse College population of both internal and external individuals. Demonstrated discretion conducting audit reviews, researching information from program managers, students, auditors and administrative personnel. Excellent verbal and written skills.

Professional Experience

Cuyahoga Community College, Cleveland, Ohio

Manager, College Assets & Mail Operations

September 2015 - Present

Senior Accountant/ Analyst

February 2010 – September 2015

- Oversee Projects/Budgets that were established with the passing of the 2017 Capital Bond Issue
- Track the ingress/egress of College equipment from the requisition through retirement of the assets
- Supervise the physical inventory of +10,000 assets
- Administer the College's inventory database
- Management of Account Reconciliation Team and the Mail Operations Team
- Monthly reconciliations of 120+ general ledger accounts and cash accounts
- Preparation of multiple internal and external audit reports, including variance analysis and detail transactions
- Educate and train employees on College Standards of Accounting for their departmental funding
- Maintenance of accurate general ledger balances and reports, creation of expense corrections and journal entries

Case Alumni Association, Cleveland, Ohio

Case Western Reserve University, College of Engineering

Coordinator of Student and Alumni Relations

September 2007 – February 2010

- Organization of multiple alumni receptions country-wide
- Coordination with various CWRU development officers, students and faculty to implement programs and activities
- Calculation and maintenance of budget schedules, generation of allocated expense statements

R. W Beckett Corporation, North Ridgeville, Ohio

Accountant

May 2005 – September 2007

- Maintenance of Fixed Asset System software, implementation of physical inventories
- Management of plant employees time and attendance records
- Daily account receivable evaluation and customer follow-up
- Generation of month-end journal entries and account reconciliations
- Coordinator of Kaizen Events, Lead United Way Representative and event organizer

Integrated Logistics Solutions, Euclid, Ohio

Inventory Accountant

June 2002 – April 2005

- Evaluation and analysis of freight reports and inventory accounts
- Assess inventory rates with expeditors expenses, comparing per unit average costs
- Monthly reconciliation of balance sheet accounts and creation of profit and loss statements
- Calculation of cost adjustments to purchase price variances for correction of over/under statement of cost of goods sold

Education

Cleveland State University, Cleveland, Ohio

Bachelor of Science in Accounting

Dale Carnegie, April 2007

Six Sigma Training (Certification in Lean Mastery), January 2006

Whitney Crook

From: Tatyana S Guzman <t.guzman@csuohio.edu>
Sent: Saturday, November 10, 2018 3:03 PM
To: Whitney Crook
Subject: Beachwood Citizen's Finance Advisory Committee
Attachments: Guzman-Urban-CV.pdf

Dear Ms Crook and members of Beachwood City Council. I am writing to apply for a membership in Beachwood Citizen's Finance Advisory Committee. I have been a resident of Beachwood for over five years now (since we moved to Ohio). I am very much interested in Beachwood finances, I have two kids in Beachwood schools, I am a local homeowner, and I am qualified to serve as a member of the Advisory committee.

I am a faculty member at Cleveland State University (CSU) teaching Budgeting and Government Finance. I got my PhD from Indiana University Bloomington (IU) with majors in Public Finance and Policy Analysis. My research interests are in budgeting, education finance, municipal finance, and tax preferences. I currently chair CSU's "Faculty Senate Budget and Finance Committee" and am a member of the University "Planning and Budget Advisory Committee". I also serve as a treasurer and a head of the "Finance/Foundation Management" committee for Beachwood Schools Foundation.

Please, find attached my CV. Be advised that this is a standard academic Resume, which is longer than traditional CV. Please, let me know if you prefer a shorter version (if yes, I would appreciate if you could indicate what information I should keep).

Thank you in advance for considerations!

Tatyana

Tatyana Guzman, PhD
Cleveland State University
Assistant Professor in Public Finance and Policy Analysis

Maxine Goodman Levin College of Urban Affairs
2121 Euclid Ave., UR313
Cleveland, OH 44115
(216) 875-9962
t.guzman@csuohio.edu
[Webpage](#)

Tatyana Guzman

Cleveland State University, Maxine Goodman Levin College of Urban Affairs

2121 Euclid Ave., UR313, Cleveland, OH 44115

(216) 875-9962

t.guzman@csuohio.edu

[Website](#)

EDUCATION

INDIANA UNIVERSITY, SCHOOL OF PUBLIC AND ENVIRONMENTAL AFFAIRS, *Bloomington, IN, USA*

PhD, Public Affairs, *May 2013*

Majors: Public Finance and Public Policy Analysis

Minor: Education Policy Studies

Dissertation: *Is there a "Hope" for High School Graduates: the Effect of Federal Income Tax Credits on College Enrollment, Persistence, Graduation, and University Choice*

Dissertation Grant: American Educational Research Association (AERA) - National Science Foundation (NSF), *May 2012 - April 2013*, \$20,000

Dissertation Committee: Dr. Maureen Pirog (chair), Dr. John Mikesell, Dr. Bradley Heim, Dr. Haeil Jung

INDIANA UNIVERSITY, DEPARTMENT OF ECONOMICS, *Bloomington, IN, USA*

Master of Arts, Economics, *February 2007*

CENTRAL MICHIGAN UNIVERSITY, COLLEGE OF BUSINESS ADMINISTRATION, *Mt. Pleasant, MI, USA*

Master of Arts, Economics, *May 2004*

TASHKENT ELECTROTECHNICAL INSTITUTE OF COMMUNICATIONS, *Tashkent, Uzbekistan*

Bachelor of Arts, Management in Telecommunications, *June 1999*

Graduated with honors (similar to Summa Cum Laude)

TASHKENT STATE ECONOMIC UNIVERSITY, *Tashkent, Uzbekistan*

- Introductory Course in Market Economics and Financial Analysis Certificate, JOINT VIENNA INSTITUTE, *Spring 2001*
- Accounting Certificate, INTERNATIONAL BUSINESS SCHOOL, *August 1996 - June 1998*

JOINT VIENNA INSTITUTE (JVI), EBRD, WORLD BANK, BIS, OECD, IMF, AND WTO, *Vienna, Austria*

Applied Economic Policy Course Certificate, *Fall 2001*

ACADEMIC APPOINTMENTS

CLEVELAND STATE UNIVERSITY (CSU), *Cleveland, Ohio*

Assistant Professor, Maxine Goodman Levin College of Urban Affairs, *August 2013 – Present*

UST 633/733: "Budget Policy and Management" course (*Spring 2017 - Present*)

UST 603: "Public Finance and Economics" course (*Fall 2013*)

UST 459: "Budgeting and Policy Analysis" course (*Fall 2015 – Present*)

- Online version of the course is Quality Matters (QM) certified from Summer 2017

UST 405: "Methods of Research and Evaluation" course (*Fall 2013 – Fall 2017*)

INDIANA UNIVERSITY (IUB), *Bloomington, IN, USA*

Instructor-of-Record, School of Public and Environmental Affairs (SPEA), *August 2008 – June, 2013*

SPEA V-372 "Government Finance and Budgets" course (*January, 2010 – June, 2013*)

SPEA K-300 "Statistical Techniques" course (*August 2008 – December 2009*)

INDIANA UNIVERSITY PURDUE UNIVERSITY INDIANAPOLIS (IUPUI), *Indianapolis, IN, USA*

Instructor-of-Record, Department of Economics, *June 2005 – June 2006, and June - August 2007*

E-201 "Introductory Microeconomics" course

E-101 "Survey of Economic Issues and Problems" course

OTHER PROFESSIONAL EXPERIENCE

CLEVELAND STATE UNIVERSITY (CSU), Cleveland, Ohio

Faculty Associate, Center for Economic Development, Maxine Goodman Levin College of Urban Affairs, March 2015 - Present

INDIANA UNIVERSITY (IUB), Bloomington, IN, USA

Visiting Scholar, School of Public and Environmental Affairs (SPEA), January 2014 –Present

Research Assistant, School of Public and Environmental Affairs (SPEA), August 2007 – May 2008

Graduate Assistant, Department of Economics, September 2004 – May 2005, May-June 2006 (3 semesters)

CENTRAL MICHIGAN UNIVERSITY (CMU), Mt. Pleasant, MI

Statistical Analyst, College of Business Administration, May 2003 – August 2004

Graduate Assistant, Department of Economics, January 2002 – May 2003, (3 semesters)

“BUZTON” UZBEK-BRITISH JOINT VENTURE, Tashkent, Uzbekistan

Finance Manager Assistant, Department of Accounting and Finance, February 2000 – March 2001

INSTITUTE OF MACROECONOMIC AND SOCIAL RESEARCH under the Ministry of Macroeconomics and Statistics of the Republic of Uzbekistan, Tashkent, Uzbekistan

Research Fellow (Part-time work), Department of Macroeconomic Analysis and Forecasting, 2000-2001

EUROPEAN INSTITUTE FOR DEVELOPMENT OF ECONOMY AND CULTURE, Tashkent, Uzbekistan

Project Manager (Part-time work), July 1998 – June 1999

PEER-REVIEWED PUBLICATIONS

Guzman, Tatyana (2018). Cost-Benefit and Fiscal Impact Analysis of Ohio Historic Preservation Tax Credit (OHPTC). *Journal of Benefit-Cost Analysis*, 9 (02), 342-373.

Guzman, Tatyana, "Tax-based Aid, College Enrollment, Persistence, and Graduation" *Journal of Education Finance*. *Forthcoming*.

Guzman, Tatyana "Fiscal Conditions of Largest Legacy Cities" (book chapter) in Tighe R and Ryberg-Webster S. eds "The Legacies of Legacy Cities." *Forthcoming*.

Guzman, Tatyana "Capital Budgeting, Infrastructure, and Capital Investment in the Republic of Uzbekistan" in Ermasova N, Yusuf W, and Srithongrungs A. eds. "Capital Management and Budgeting in the Public Sector". *Forthcoming*.

Clark, Benjamin Y., and **Tatyana S. Guzman**. (2017). Does Technologically Enabled Citizen Participation Lead to Budget Adjustments? An Investigation of Boston, MA, and San Francisco, CA. *The American Review of Public Administration*, 47(8), 945-961.

Moldogaziev, Tima T., and **Tatyana Guzman** (2015), "Economic Crises, Economic Structure, and State Credit Quality Through-the-Cycle." *Public Budgeting and Finance*, 35(4): 42-67.

Guzman, Tatyana, Pirog, Maureen A., and Seefeldt, Kristin (2013), "Social Policy: What Have We Learned?" *Policy Studies Journal*, 41: S53–S70. doi: 10.1111/psj.12012

Guzman, Tatyana and Temirlan Moldogaziev (2012), "Which Bonds are More Expensive? The Effects of Bond Issue Purpose and Use on Municipal Costs for Equally Rated Issues" *Public Budgeting and Finance*, 32(3): 79-101.

EDITOR-REVIEWED PUBLICATIONS, REPORTS, AND BOOK CHAPTERS

Lendel, Iryna; Clouse, Candi; Cyran, Ellen; **Guzman, Tatyana**; Piazza, Merissa; Ryberg Webster, Stephanie; Post, Charlie; and Kalynchuk, Kenneth (2015), "Ohio Historic Preservation Tax Credit Economic Impact Study". *Urban Publications*. Paper 1334.

Guzman, Tatyana (June 9, 2014), "Federal Tax Benefits for Education. Do they work?" *Tax Notes* 143(10):1179-1189.

Shibarshova, Lyudmila and **Tatyana Guzman**, (2014), "Distance Education. Comparative Analysis of Several Countries" (in Russian) in *Competitive advantages of Economic Education: Current State and Perspectives. The Collection of Papers from the International Conference*. Plekhanov University Branch.

Anderson, Mary, **Tatyana Guzman**, and Evan Ringquist, (2013), "Evaluating the Effectiveness of Educational Vouchers: A Meta-Analysis" in Ringquist E., ed. *Meta-Analysis for Public Management and Policy*. Wiley: Jossey-Bass.

Guzman, Tatyana and Temirlan Moldogaziev, (Spring 2012), "Structure of the Economy, Financial and Debt Positions, and State Credit Ratings: Panel Study of Michigan and the Great Lakes Region" *Michigan Journal of Public Affairs*. Volume 9.

Guzman, Tatyana, (2009), "State-specific budgeting" *XXII international Plehanov's readings*. Conference proceedings. G.V. Plekhanov Russian Academy of Economics, Moscow, p. 454-456

Guzman, Tatyana, (2004), "Impact of investment in education on economic growth in Uzbekistan" (in Russian). *Iqtisodiyot va ta'lim (Economics and Education)*. Tashkent, Uzbekistan, p. 158-162

Guzman, Tatyana and Lyudmila Shibarshova, (1999), "Creation and improvement of competitive environment in the post and telecommunications sphere of Uzbekistan" (in Russian). *Scientific journal "Vesnik-Svyazi"*. Minsk, Belarus, p. 225-228

Guzman, Tatyana, (1997), "Economic and Ecological Problems & Future of the Aral Sea. Social collection "Civilization. Ecology Man" (in Russian). *Tashkent Electrotechnical Institute of Communications, Center "Ecopolis"*, Tashkent, Uzbekistan, p. 54-56

MANUSCRIPTS UNDER REVIEW

"Cost of Higher Education: For-Profit Universities and Online Learning" (with Maureen Pirog and Haeil Jung) *Revise and resubmit*.

"Smarter City, Smarter Investment? A Study of the Relationship between 311 Systems and Credit Ratings in American Cities" (with Ben Clark). *Revise and resubmit*.

"Crime and Credit: The Empirical Study of How Crime Affects Credit Ratings in Large U.S. Cities." (with Ben Clark) *Under Review*.

"To Choose or Not to Choose: Federal Tax Credits and College Choice Decisions" *Under Review*.

"The Energy-Sector Job-Creation Impact of Intergovernmental Grant Programs Implemented under the American Recovery and Reinvestment Act" (with TaeKyoung Lim and William Bowen) *Under Review*.

"Incentivizing Historic Preservation: State Tax Credits and the Revitalization of Ohio's Communities" (with Stephanie Ryberg-Webster, Iryna Lendel, Marissa Piazza, and Candi Clouse) *Under Review*.

MANUSCRIPTS IN PROGRESS

"Cities' Credit Worthiness. Do Police-Involved Fatalities Matter?" (with Ben Clark)

"Can Budget Transparency Improve City Fiscal Performance?" (with Obed Pasha and Ben Clark)

“Determinants of the Changing Levels of Student Debt” (with Maureen Pirog, Felipe Lozano, and Haeil Jung)

“Kinky Aid and Student Loans: Does Tax-based Aid Affect Students’ Debt?”

CONFERENCE PAPERS AND PRESENTATIONS

“Can Budget Transparency Improve City Fiscal Performance?”

- Association for Budgeting and Financial Management (ABFM) 30th annual conference, *Denver, Colorado, October 4-6, 2016*

“Capital budgeting in Uzbekistan”

- WESTERN SOCIAL SCIENCE ASSOCIATION (WSSA) 59TH ANNUAL CONFERENCE, *San Antonio, Texas, April 4-7, 2018*

“Determinants of the Changing Levels of Student Debt”

- ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT (APPAM) 38TH ANNUAL CONFERENCE, *Washington DC, November 3-5, 2016*

“Criminal Bonds, Or the Influence of Property & Violent Crime on Local Government Bond Ratings”

- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 29TH ANNUAL CONFERENCE, *Washington, DC, September 28-30, 2017*
- WESTERN SOCIAL SCIENCE ASSOCIATION (WSSA) 58TH ANNUAL CONFERENCE, *San Francisco, California, April 12-15, 2017*
- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 28TH ANNUAL CONFERENCE, *Seattle, Washington, October 6-8, 2016*

“Data-driven Decision Making: Evaluating Programs”

- INTERNATIONAL ECONOMIC DEVELOPMENT COUNCIL (IEDC) Conference, *Cleveland, Ohio, September 25-28, 2016*

“Pell Grants and College Matriculation of Students Pursuing Online Education” (with Haeil Jung and Maureen Pirog)

- ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT (APPAM) 37TH ANNUAL CONFERENCE, *Miami, Florida, November 12-14, 2015*
- WESTERN SOCIAL SCIENCE ASSOCIATION (WSSA) 57TH ANNUAL CONFERENCE, *Portland, Oregon, April 8-11, 2015*

“Cost-Benefit Analysis of Ohio Historic Preservation Tax Credit (OHPTC)”

- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 27TH ANNUAL CONFERENCE, *Washington DC, October 1-3, 2015*

“Effects of Local Government Financial Conditions & Bond Ratings on Utilization of Coproduction for Service Provision” (with Ben Clark)

- PUBLIC MANAGEMENT RESEARCH ASSOCIATION (PMRA) BIENNIAL CONFERENCE, *Minneapolis, Minnesota, June 11-13, 2015*
- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 27TH ANNUAL CONFERENCE, *Washington DC, October 1-3, 2015*
- PUBLIC MANAGEMENT RESEARCH ASSOCIATION (PMRA) BIENNIAL CONFERENCE, *Washington DC June 7-10, 2017*

“The Impact of Federal Financial Aid on Tuition Costs of Students Pursuing Online Education” (with Haeil Jung and Maureen Pirog)

- ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT (APPAM) 36TH ANNUAL CONFERENCE, *Albuquerque, New Mexico, November 6-8, 2014*

“Effects of 311- Enabled Coproduction on Local Government Credit Ratings” (with Ben Clark)

- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 26TH ANNUAL CONFERENCE, *Grand Rapids, Michigan, October 2-4, 2014*
- CSU LEVIN COLLEGE BROWNBAG SEMINAR, *Cleveland, Ohio, January 29, 2015*

“Kinky Aid and Student Loans: Does Tax-based Aid Affect Students’ Debt?”

- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 25TH ANNUAL CONFERENCE, *Washington DC, October 3-5, 2013*
- NATIONAL TAX ASSOCIATION 106TH ANNUAL CONFERENCE ON TAXATION, *Tampa Bay, Florida, November 21-23, 2013*

“Structure of the Economy, Debt Position, and Credit Ratings: Panel Study of the U.S. States” (with T. Moldogaziev)

- PUBLIC MANAGEMENT RESEARCH ASSOCIATION (PMRA) BIENNIAL CONFERENCE, *Madison, Wisconsin, June 20-22, 2013*

“To Choose or Not to Choose: Federal Tax Credits and Deductions and College Choice Decisions”, Dissertation chapter

- ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT (APPAM) 34TH ANNUAL CONFERENCE, *Baltimore, Maryland, November 8-10, 2012*
- SOUTHEASTERN CONFERENCE ON PUBLIC ADMINISTRATION (SECOPA) 33RD ANNUAL CONFERENCE, *Coral Springs, Florida, October 3-6, 2012*

“Is there a ‘Hope’ for High School Graduates: the Effect of Federal Tax Credits on College Enrollment”, Dissertation chapter

- ASSOCIATION OF SPEA PHD STUDENTS (ASPS) 11TH ANNUAL CONFERENCE, *Bloomington, Indiana, 2012*. The paper received the first place in the Public Finance Panel with corresponding cash award.
- NATIONAL TAX ASSOCIATION 104TH ANNUAL CONFERENCE ON TAXATION, *New Orleans, Louisiana, November 17-19, 2011*
- ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT (APPAM) 33RD ANNUAL CONFERENCE, *Washington DC, November 3-5, 2011*

“Which Bonds Are More Expensive? The Cost Differentials by Debt Issue Purpose and the Method of Sale: An Empirical Analysis” (with T. Moldogaziev). *Published*.

- ASSOCIATION OF SPEA PHD STUDENTS (ASPS) 11TH ANNUAL CONFERENCE, *Bloomington, Indiana, 2011*. The paper received the first place in the Public Finance Panel with corresponding cash award.
- SOUTHEASTERN CONFERENCE ON PUBLIC ADMINISTRATION (SECOPA) 31ST ANNUAL CONFERENCE, *Wilmington, North Carolina, USA, October 13-16, 2010*
- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 22ND ANNUAL CONFERENCE, *Omaha, Nebraska, USA, 2010*

“Federal Tax Expenditures in Tertiary Education and University Enrollment”

- ASSOCIATION OF SPEA PHD STUDENTS (ASPS) 10TH ANNUAL CONFERENCE, *Bloomington, Indiana, 2010*

“Structure of the Economy, Financial and Debt Positions, and State Credit Ratings: Panel Study of Michigan and the Great Lakes Region” (with T. Moldogaziev). *Published*.

- Association of SPEA PhD students (ASPS) 10th annual conference, *Bloomington, Indiana, 2010*. The paper received the first place in the Public Finance Panel with corresponding cash award.
- ASSOCIATION FOR BUDGETING AND FINANCIAL MANAGEMENT (ABFM) 21ST ANNUAL CONFERENCE, *Washington DC, USA, 2009*

“Poverty among employees: Case of Georgia and Uzbekistan” (with Eka Sabadze)

- JOINT VIENNA INSTITUTE, *Vienna, Austria, 2001*

“Economy Ecological Problems and the Future of the Aral Sea”

- CONFERENCE ON ECOLOGY, *Tashkent, Uzbekistan, 1997*

INVITED PRESENTATIONS AND RELATED ACTIVITIES

Invited Program Discussant:

- APPLIED RESEARCH IN PUBLIC FINANCE: A CONFERENCE IN HONOR OF JOHN MIKESELL, *Bloomington, Indiana, April 27-29, 2017*
- FEDERAL, STATE, AND LOCAL BUDGETS IN JEOPARDY: A CONFERENCE ON AMERICA'S FISCAL FUTURE, *Bloomington, Indiana, April 30- May 2, 2015*

Presenter and Panelist:

- BLACKBOARD BEST PRACTICES USER GROUP FACULTY PANEL, *Cleveland, OH, March 8, 2018*
- THE HALACHIC ORIGINS OF PUBLIC FINANCE, *Cleveland, OH, April 25, 2017*

Presenter:

“Is There “Hope” for High School Graduates: The Effect of Federal Income Tax Preferences on College Enrollment, Persistence, Graduation, and University Choice”

- THE AMERICAN EDUCATIONAL RESEARCH ASSOCIATION (AERA) GRANTS PROGRAM FALL RESEARCH CONFERENCE, *Washington DC, October 10-12, 2013*

“Federal Tax-based Student Aid and College Choice Decisions” (Poster)

- THE AMERICAN EDUCATIONAL RESEARCH ASSOCIATION (AERA) ANNUAL MEETING, *San Francisco, CA, April 27- May 2, 2013*

WORKSHOPS, FROUMS, and SHORT TRAININGS

MUNICIPAL SECURITIES RULEMAKING BOARD (MSRB), *Washington DC*

- Academic forum, *September 7, 2018*
- Workshop, *March 10, 2016*

CENTER FOR eLEARNING AT CLEVELAND STATE UNIVERSITY, *Cleveland, OH*

Faculty Online Teaching and Design Course Certificate, *January-February, 2016*

TASHKENT STATE ECONOMIC UNIVERSITY, *Tashkent, Uzbekistan*

- Introductory Course in Market Economics and Financial Analysis Certificate, JOINT VIENNA INSTITUTE, *Spring 2001*
- Macroeconomics Certificate, “USTOZ” FOUNDATION, *July 1999*

OPEN SOCIETY INSTITUTE, WORLD BANK INSTITUTE (WBI), MINISTRY OF HIGHER EDUCATION, “USTOZ” FOUNDATION, *Tashkent, Uzbekistan*

Distance Learning in Higher Education Course Certificate, *July 2001*

CENTRAL ASIAN TELECOMMUNICATIONS TRAINING CENTER, *Tashkent, Uzbekistan*

Management and Marketing Certificate, *June 2000*

MINISTRY OF FOREIGN AFFAIRS OF ISRAEL/MASHAV, USTOZ FOUNDATION, *Tashkent, Uzbekistan*

Organizational Behavior, Quality and Marketing Management Certificate, *May 1999*

GRANTS

Researcher. Research grant “The Economic Impact of RTIP on U.S. Route 30 in Carroll, Columbiana, and Stark Counties”, *October 2017 – July 2018. \$107,600*

Researcher. Research grant “The Community and Economic Impact of Local Organization (confidential) on the City of Cleveland, Cuyahoga County, and Northeast Ohio”, *January – August 2018. \$148,600*

Researcher. Research grant “Ohio Historic Preservation Tax Credit Economic Impact Study” by the *Development Service Agency of Ohio. May 15, 2015 – August 31, 2015. \$67,340.*

Principal Investigator (PI). Research grant by the AERA (American Educational Research Association) Grants Program, sponsored by the *National Science Foundation. April 14, 2014-April 15, 2015. \$20,000.*

Dissertation grant by the AERA (American Educational Research Association) Grants Program, sponsored by the *National Science Foundation. May 1, 2012-April 30, 2013. \$20,000.*

Grant by Joint Vienna Institute (JVI). *Vienna, Austria, August 2001 - December 2001.* Grant covered training in JVI, accommodations, per diem, and miscellaneous activities (study tours, receptions, etc)

Grant by Joint Vienna Institute (JVI). *Tashkent, Uzbekistan, February 2001 – May 2001.* Grant covered training, meals, and per diem

AWARDS

Levin College Women’s Fund award, *Cleveland, OH, Spring 2018.*

Three best paper cash awards in Public Finance and Economic Policy Panel given by the Association of SPEA PhD students (ASPS), *Bloomington, IN.* Received in 2010, 2011, and 2012

The Chancellor’s List 2005-2006

SCHOLARSHIPS and ASSISTANTSHIPS

Graduate assistantship. *School of Public and Environmental Affairs, Indiana University Bloomington, August 2007 – May 2011*

Graduate assistantship. Department of Economics, Indiana University Bloomington (IUB) and Indiana University Purdue University Indianapolis (IUPUI), *August 2004 – August 2007*

Graduate assistantship. *Department of Economics, Central Michigan University, January 2002 – May 2004*

Distinguished scholarship by the Post and Telecommunication Agency of the Republic of Uzbekistan, *August 1996 – June 1999* (the scholarship was renewed over the period of 6 semesters)

Stipend by Tashkent Electrotechnical Institute of Communications, Tashkent, Uzbekistan. *August 1995 – June 1996*

MEMBERSHIP IN PROFESSIONAL ORGANIZATIONS

Association for Public Policy Analysis and Management (APPAM),
Association for Budgeting and Financial Management (ABFM),
National Tax Association (NTA),
The American Educational Research Association (AERA),
Public Management Research Association (PMRA).

EXTRACURRICULAR ACTIVITIES and VOLUNTEERING

School and University Service:

College and university committees’ membership:

- Faculty Senate Budget and Finance Committee, Chair, *Fall 2018 - Present*
- University Planning and Budget Advisory Committee (PBAC), *Fall 2018 - Present*
- Ad hoc committee on faculty engagement with the new presidential administration, *Fall 2017 - Present*

- Graduate College Grade Dispute Committee, *Fall 2017 - Present*
- Blackboard Best Practices User Group, *Spring 2017 – Present*
- PhD Steering Committee, *Fall 2017 - Spring 2018*
- Academic Technology Committee, *Fall 2017 - Spring 2018*
- E-learning Committee, *Fall 2016 – Spring 2018*
- Research Associate (Center for Economic Development) Search Committee, *Fall 2017-Spring 2018*
- LMS (Learning Management System) Committee, *Spring 2016 – Fall 2016*
- Graduation, Convocation, and Assembly Committee, *Fall 2015 – Summer 2017*
- Public Administration/City Management Search Committee, *Fall 2015*

Lead on the new course development:

- UST 636 “Public Budgeting and Finance” (with Stephanie Ryberg-Webster)
- UST 672 “Urban Simulations” (with Megan Hatch)
- UST 683 “Urban Issues in Action”

Reviewer for the 2017 CSU Dissertation Research Award (DRA) Program

Student advising:

PhD Dissertation Committee Member for TaeKyoung Lim. Dissertation title: “Multilevel Governmental Efforts for Energy Efficiency: policy Adoption, Implementation, and Evaluation under the American Recovery and Reinvestment Act”, *Fall 2015 – Fall 2017*

Project Mentor in

- UST 897 “Readings in Urban Studies” for Alissa Glenn, *Spring 2018*
- UST 593 “Special Topics in Urban Studies” for Zach Kramka “City Budget Data Collection and Analysis”, *Fall 2018*
- UST 696 “Individual Research” for Kirby Suntala “City Budget Data Collection and Analysis”, *Spring 2018*
- UST 496 “Urban Research” for Blaney (Trevelle) Harp, “Budget Analysis of the City of East Cleveland”, *Spring 2017*

Project Mentor for Undergraduate Honors’ students

- Kirby Suntala, “Budget Analysis of Cleveland Metropolitan School District”. UST 459 “Public Budgeting”, *Spring 2016*
- Mika Timura, “How Millenials Give in Ohio”. UST 405 “Methods of Research and Evaluation”, *Fall 2015*
- Ryan Meisner, “Demystifying the Earned Income Tax Credit: An Explainer and Review of the Recent Literature”. UST 405 “Methods of Research and Evaluation”, *Spring 2015*

Referee Services:

- Public Administration Review
- Municipal Finance Journal
- Journal of Policy Analysis and Management
- Public Budgeting and Finance
- Urban Affairs Review
- Peer-reviewed book chapters

Guest lecturer at:

- UST 222 “World Population and Society” class (guest lectured at one class), Cleveland, OH, *Spring 2018*
- Urban college capstone project defenses (panel judge), Cleveland State University, Cleveland, OH, *Spring 2016*

- CSU Colloquium series, Finance and Budgeting panel, Cleveland State University, Cleveland, OH, *Fall 2014*
- SPEA-V 361 “Financial Management” class (taught two classes on monetary policy and central banking), Indiana University, Bloomington, IN, *Fall 2010*
- SPEA-V 161 “Urban Problems & Solutions” class (helped to lead several simulations), Indiana University, Bloomington, IN, *Summer 1 2010*
- ECO 616 “Advanced Microeconomic Theory” class (taught one class), Central Michigan University, Mt. Pleasant, MI, *Fall 2002*
- “Microeconomics” class (taught four classes on monopolies and oligopolies), Tashkent Electrotechnical Institute of Communications, Tashkent, Uzbekistan, *Fall 1998*

Invited Research:

- Sales tax forecasts for local government (confidential project), *October 2017*
- Lead Researcher for Cleveland, United Nations Human Settlements Programme, the Global Municipal Database (GMD) Project, *August 2017*

Expert opinion and advice:

- Exchanged e-mails and met with a Captain of Lakewood Police Department, Gary Stone, to help with fiscal analysis of jail operations, *Winter 2018*.
- WCPN reporter (Afi Scruggs). Telephone interview on fiscal impact of renovating Quicken Loans Arena in Cleveland, OH, *Spring 2017*. Featured on the radio news segment on February 14, 2017. Available online at: <http://wcpn.ideastream.org/news/cuyahoga-county-council-hears-proposal-for-modernizing-the-q>
- Reuter’s reporter. Telephone interview on the state of Cleveland finances and the city financial preparedness to host 2016 Republican National Convention, *Summer 2016*
- Greater Ohio Policy Center. Met with Senior Policy Fellow - Jon Honeck to discuss infrastructure (especially water and sewer) finance options in Ohio, *Spring 2016*
- Delta World One. Met with the founder Phil Davis about the financial plan to revive the city of Cleveland, *Spring 2016*
- City of Maple Heights. Telephone conversation with the Mayor Annette Blackwell about potential options to exit the city’s fiscal emergency status, *Spring 2016*
- Ink Plus LLC. Met to talk about co-production, *Fall 2015*

Conference Volunteering:

- Western Social Science Association (WSSA) 60th Annual Conference, *San Antonio, Texas, April 4-7, 2018*
 - “Public Finance and Budgeting” section coordinator
 - “Public Revenues” panel moderator
- Western Social Science Association (WSSA) 59th Annual Conference, *San Francisco, California, April 12-15, 2017*
 - “Local Government Spending” panel moderator
- Association for Public Policy Analysis and Management (APPAM) 38th Annual Conference, *Washington DC, November 3-5, 2016*
 - “The Great Recession and Student Debt” panel organizer
- Association for Public Policy Analysis and Management (APPAM) 37th Annual Conference, *Miami, Florida, November 12-14, 2015*
 - “College Access and Matriculation” panel organizer
- Association for Public Policy Analysis and Management (APPAM) 36th Annual Conference, *Albuquerque, New Mexico, November 6-8, 2014*
 - “College Access and Matriculation” panel organizer
 - “The Effects of Policy Design and Implementation Decisions: Understanding Affordable Housing Policy Outcomes” panel chair

- Association for Public Policy Analysis and Management (APPAM) 34th Annual Conference, Baltimore, MD, *November 8-10, 2012*
 - Student volunteer

Community Volunteering

- Treasurer (3-year term). Beachwood Schools Foundation. Beachwood, Ohio. *Summer 2016 – Present.*
- Head. "Finance/Foundation Management" committee. Beachwood Schools Foundation. Beachwood, Ohio. *Summer 2017 – Present.*
- Member. "Above and Beyond/Long Range Planning" committee. Beachwood Schools Foundation. Beachwood, Ohio. *Summer 2016 – Present.*
- Hilltop Elementary PTO (Parent-Teacher Organization) room parent. Beachwood, Ohio. *Fall 2016 - Present*
- Bryden Elementary and Hilltop Elementary Schools (baking fundraisers, Read Aloud Program, Field Day, Birthday Parties, Monthly Store, Holiday Parties, PTO Garage Sale, Bison Feast+Fest volunteer), Beachwood, OH, *October, 2013 - Present*
- Beachwood Middle School Science Club mentor "Experimental Design" and "Write It Do It" sections, Beachwood, OH, *Fall 2017*
- Beachwood Schools Science and Engineering Fair Club mentor, Beachwood, OH, *Fall 2016*
- Take2 second hand community store (nonprofit organization), Beachwood, OH, *June, 2015 – June, 2016*
- Cleveland State University's American Planning Association (CSU APA) bake sale (made sweets for fundraising sale), Cleveland, OH, *November, 2014 – May, 2014*
- AISH Cleveland, Sunday school (2 hrs a week), Beachwood, OH, *October 2014 – June 2015*
- Bloomington community food pantry "Mother Hubbard's Cupboard" (1.5hrs – 3hrs a week, pantry associate), Bloomington, IN, *February 2011- July 2013*
- 2-year Economics, and 4-year Russian and English languages tutoring experience, Tashkent, Uzbekistan, Mt Pleasant, MI, and Bloomington, IN, *at different times between 1998 and 2007*
- "Sunflower" daycare (childcare and administrative duties – about 10hrs a week), Bloomington, IN, *2005-2006*
- Secretary for the "Hillel" Jewish Student Organization at Central Michigan University, Mt. Pleasant, MI, *2002-2003.*

LANGUAGES

Russian, English, some Uzbek, Ukrainian, and Hebrew

COMPUTER SKILLS

Stata, HLM, Word, Excel, PowerPoint, Visio, some SPSS, Access, and SAS

HOBBIES

Cooking, baking, cake decorating

Swimming

Latin dance

Maggie Keenan
216.346.1232 maggiemkeen@gmail.com

PROFESSIONAL EXPERIENCE

Cuyahoga County

Director, Office of Budget and Management

2015 – present

- Provide decision support to the County Executive and County Council regarding the county's nearly \$2 billion operating and capital budgets
- Manage the development of the biennial operating budget and preparation of regular financial forecasts, as well as for communicating the results to the County's elected officials, agency/department directors, and the public
- Provide recommendations on requests for new funding and to identify opportunities to increase revenue and/or reduce spending
- Participate in negotiations with the County's bargaining units with responsibility for presenting the County's financial status and completing analyses and providing recommendations relative to proposals from both management and labor
- Manage the County's \$1.5 billion debt portfolio, including overseeing new bond issues, establishing debt policies, and ensuring adherence to all related regulations
- Recommend changes to financial policies to ensure accountability, transparency, and efficiency
- Manage 11 staff, including decision-making authority for hiring, workload assignment, and discipline

Shaker Heights Public Library

2015

Fiscal Officer/Business Manager

- Responsible for developing and managing \$5 million annual budget, including overseeing payroll for more than 100 staff, procurement, contracting, and accounting
- Provide financial updates, analyses, and recommendations regarding the allocation of resources to Administration and the Board of Trustees
- Initiated and managed the switch to an electronic time and attendance system
- Supervise Business Office staff

International Criminal Court

Fall 2013

Visiting Professional, Budget and Finance Section

Cuyahoga County

2006 – 2013

Senior Budget Management Analyst

02/08 – 10/13

- Directly responsible for managing agency budgets, including the Courts, the Board of Elections, and the Dept. of Development, totaling more than \$300 million
- Prepared financial forecasts that were consistently within 3% of year-end actuals and was relied on to recommend cost reduction strategies when necessary
- Relied on to present County budget information in response to public records requests, in negotiations with bargaining units, and as requested by directors and Elected Officials

- Nominated by the County Executive and approved by the County Council to represent the County on the Tax Incentive Review Committee (2012 and 2013)
 - Supervised staff analysts
- Health and Human Services Budget Management Analyst* 06/06 – 02/08
- Assisted in agency budget development and forecasting totaling nearly \$200 million

Neighborhood Centers Association

2004 – 2006

Program Director

- Provided oversight of more than 30 academic and social service programs at 20 neighborhood centers and schools totaling more than \$2 million annually; independent evaluations affirmed that programs were successful in improving academic outcomes
- Prepared grant applications and reports to funders, including the Ohio Department of Education, detailing program outcomes and compliance with grant requirements
- Supervised program and support staff

EDUCATION

Cleveland State University

Juris Doctor, Cleveland-Marshall College of Law (anticipated)

Winner, CALI Excellence for the Future Award, Legislation and Regulation

Master of Public Administration, Levin College of Urban Affairs

Bachelor of Arts, Urban Studies, Levin College of Urban Affairs

Bachelor of Arts, Political Science and Psychology, College of Arts and Sciences

COMMUNITY INVOLVEMENT

Lake County Free Clinic (2010 – present)

- Develop annual operating budget of more than \$500,000; prepare budget plan and supporting documents for Board of Trustees' approval; prepare financial forecasts; complete analyses of proposed initiatives and develop reduction strategies as needed
- Secured the three largest grants in the organization's 40-year history; research and write grant applications for program and operating support

Violinist, Cleveland Women's Orchestra (1991 – present)

Free Medical Clinic of Greater Cleveland (2000 – 2004)

- Developed and implemented Patient Assistance Program; this effort was recognized by the Woodruff Foundation with a \$10,000 grant and saved more than \$100,000 in medication costs in its first six months
- Provided supervision to intake volunteers in the mental health department which included reviewing assessments, providing crisis intervention as needed, and making final determination of disposition

Coach, Girls on the Run/Running Club, Campus International School at CSU (2012 – 2016)

Cleveland Bridge Builders, Cleveland Leadership Center (Class of 2011)

PUBLICATIONS

Keenan, Maggie. "CASE STUDY: The Redevelopment of the former Eaton Axle plant, Cleveland, Ohio" *Environmental Practice* Vol. 5, Number 1: March 2003

Whitney Crook

From: David B Ostro <dostro@parker.com>
Sent: Sunday, November 11, 2018 5:58 PM
To: Whitney Crook
Subject: Application for Citizen's Finance Committee

Whitney -

I am advised that City Council is looking to form a Citizen's Finance advisory committee, and that expressions of interest should be submitted to you. This email is being sent on November 11, 2018, in advance of the deadline which I am advised is November 12th.

In lieu of a formal resume, please see below a summary of my background and qualifications for this role:

I am a 61 year resident of Beachwood and a graduate of Beachwood High School (1975). I presently reside on Shakercrest Boulevard where I have lived for the last 34 years.

I am a magna cum laude graduate of Miami University with a BS degree, majoring in Accounting (1979). I also hold an MBA cum laude from CWRU (1992) with a dual major in Banking & Finance and Operations Management. I am a Certified Public Accountant (Inactive status) - 1981.

I was on the Audit staff of Ernst & Young in Cleveland from 1979 to 1984, attaining the level of Supervisor. My clients were primarily SEC filers. I was a Controller for a privately held software company from 1984 to 1986.

Since 1986 I have been employed at Parker Hannifin Corporation all in financial related roles, including SEC financial statement GAAP compliance and financial support for mergers and acquisitions.

Since 1996 to the present I have served in Parker's Treasury department, the last four as Vice President - Treasurer. In my role as Treasurer I am responsible for all global cash management, debt management, foreign currency hedging, share repurchase and other capital deployment planning and execution, and chairing the oversight of over \$6 billion of retirement plan assets. As a part of my role I manage the relationships with the three primary debt rating agencies and the associated ratings related to \$5 billion of public debt. I lead the financing of all capital projects, including acquisitions and capital expenditures.

My past service to the community of Beachwood is highlighted by 14 years as a Member of the Board of Education from 2000 to 2013. I served as its President three times. Throughout this time I was the member of the Board looked to for financial expertise and leadership, including annual budgets and levy initiatives. I represented the School District in front of Moody's debt rating service several times in conjunction with school building projects. I helped lead the School District's attainment of its current AAA debt rating, one of only three school systems so rated in the State of Ohio. Presently I serve as the Chair of the School District's Audit Committee.

My service to the City of Beachwood includes volunteer coaching for the Recreation Department from 1990 to 1997. I was the Leo Weiss Award winner in 1997. Additionally, from 1998 to 2000 I was a member of the Civil Service Commission.

At present I serve as the Board Chair of The Gathering Place, a Not-for-Profit organization serving the members the NE Ohio community who have been touched by cancer. I joined this Board in 2012, serving as its Treasurer from 2014 to 2017 and as its Chairman from 2017 to the present. The organization is headquartered in Beachwood.

It would be my honor and pleasure to lend my experience and skills to the City Council as a member of the Citizen's Finance Committee. I will look forward to learning the Council's decision.

Please send back an email acknowledging the receipt of this application. Thank you.

Sincerely,

David Ostro
2797 Shakercrest Boulevard
Beachwood, Ohio. 44122
216-464-0718

"PLEASE NOTE: The preceding information may be confidential or privileged. It only should be used or disseminated for the purpose of conducting business with Parker. If you are not an intended recipient, please notify the sender by replying to this message and then delete the information from your system. Thank you for your cooperation."

Barbara Bellin Janovitz

From: Marla Petti <pettim@hwfa.com>
Sent: Monday, November 19, 2018 8:48 AM
To: Barbara Bellin Janovitz
Subject: Resume - Citizen's Finance Advisory Committee
Attachments: Resume 11.18.pdf

Hi Barbara! It was nice talking with you this morning. As discussed, please see my attached resume as an indication of my interest in learning more about the new Citizen's Finance Advisory Committee. Thank you for thinking of me!

Marla K. Petti, CPA/PFS, AEP®
Director of Financial Planning Services
HW Financial Advisors
23240 Chagrin Blvd., Suite 880
Cleveland, OH 44122
Office 216.595.6400
Cell 216.509.0747
Fax 216.292.4258

Connect with me on 

pettim@hwfa.com



Celebrating Over 15 Years of Financial Planning Excellence

Advisory services offered through Commonwealth Financial Network® (CFN), a Registered Investment Adviser. Additional advisory services may be offered through HW Financial Advisors, which are separate and unrelated to CFN.

MARLA K. PETTI, CPA/PFS, AEP®

25465 Cardington Drive, Beachwood, OH 44122

216.509.0747 mpetti9@yahoo.com

PROFESSIONAL EXPERIENCE

HW FINANCIAL ADVISORS: 2016 to Present

Director of Financial Planning Services

- Provide comprehensive financial counseling and customized independent, fee-only, wealth management.
- Provide financial planning including retirement planning, education funding, investment allocation, and cash flow planning.
- Assist with estate planning strategies such as will and trust planning, property titling, gifting techniques, use of irrevocable trusts, charitable trusts, family limited partnerships, GRATs, etc.
- Evaluate life, health, and disability policies.
- Analyze benefits including retirement and profit sharing plans, deferred compensation, stock options and insurance plans.

CORNERSTONE FAMILY OFFICE: 2004 to 2016

Principal

- Provided comprehensive tax and financial counseling to wealthy individuals and their families.
- Prepared and reviewed tax returns and provided tax planning for individuals, trusts, estates, and partnerships and provided counsel on a broad range of personal, financial, gift, and income tax matters.
- Recommended and implemented estate planning strategies. Prepared estate summaries and tax calculations.
- Prepared net worth and cash flow analysis.
- Assisted clients in selecting and monitoring their investments, which may include portfolio management, private investments, venture capital, fund of funds, and insurance products.
- Provided an objective analysis to investment opportunities provided by others.
- Assisted clients in the formation, operation, and management of charitable foundations.
- Assumed responsibility for accounting, asset allocation and strategy, reporting, and the making of periodic distributions from trusts.
- Prepared and coordinated executive stock option planning.
- Provided retirement planning.
- Provided supervision and training of staff.
- Offered guidance through life's transitions, orchestrated efficient wealth transfer through generations, and educated future inheritors on the responsibilities of having wealth.
- Provided management and integration of client financial affairs and wealth strategies.

STERLING, A DIVISION OF NATIONAL CITY BANK: 1999 to 2004

Director, Family Office

- Provided tax planning, preparation, and protection strategies for high net worth individuals and their families.
- Prepared projections and analyzed net worth and cash flow statements.
- Provided recommendations to reduce or defer income and estate taxes, enhance investment returns, and increase after tax cash flow.
- Reviewed asset allocation and assisted in investment policy development.
- Prepared insurance review and analysis.
- Provided training and supervision of staff.

STERIS CORPORATION: 1997 to 1999

Senior Tax Accountant

- Assisted in preparing and reviewing all company federal, state, and local income tax filings.
- Provided assistance with federal and state tax estimates, deferred tax accounts, federal accruals, and planning.

HOWARD, WERSHBALE & COMPANY: 1995 to 1997

Tax Department

- Prepared tax returns for individuals, corporations, partnerships, and trusts.
- Provided tax planning and reduction strategies.
- Experienced audits and reviews.

EDUCATION/CREDENTIALS

- Certified Public Accountant – 1996
- Personal Financial Specialist Designation - 2008
- FINRA Series 7, Series 63, and Series 65
- Accredited Estate Planner®
- Bowling Green State University 1993
Bachelor of Science in Business Administration
Major: Accounting

VOLUNTEER EXPERIENCE

- Beachwood Athletic Boosters – Executive Board, Vice President and Secretary
- Beachwood School Audit Committee
- HFLA of Northeast Ohio – Executive Board, Treasurer
- Jewish Federation of Cleveland Audit Committee
- Jewish Federation of Cleveland – Women's Philanthropy Pomegranate Society Co-Chair
- Montefiore Board of Directors

I'm currently working as a Finance Manager with Key Bank in Cleveland, Ohio. In this role, I act as the strategic financial partner for Community Bank areas I support. My primary goal is leading the efforts to improve the overall financial performance. I'm responsible for the Planning, Organizing and Directing of the budgeting process and creating business development plans in order to achieve the budget.

One of my greatest strength is my ability to create and implement processes for scalable functions. This enables my team to be leveraged on more value-added initiatives. Another area I take great pride is my ability to develop a high performing team. Teams that have talents to interact and engage across a matrix organization. I've accomplished this through taking the time to teach my team the necessary skill in order to be successful. I never operate under the assumption that everyone knows everything. The responsibility for teaching and mentoring begins with me. The byproduct of this approach has led to the development of the next generations of financial leadership within my department and beyond.

I am very interested in pursuing an opportunity with the Citizen Finance Advisory Committee. I believe my business leadership experience and financial acumen will make me a valued contributor to the committee.

Matthew D. Sharp, MBA

Matthew D. Sharp

23214 East Baintree Road • Beachwood, OH 44122 • MattSharp5899@gmail.com • (216) 798-8775

SUMMARY OF QUALIFICATION

I am a senior finance professional with more than 20 years of experience as a strategic member of corporate leadership team. I have a strong business background and have developed polished leadership and communication skills throughout my career in various industries.

I bring an enthusiastic team focused approach that has enabled me to drive change. I have a solution-oriented outlook that has let me implement operational efficiencies and maximize my P&L responsibilities. I attack each challenge and see them as possibilities rather than obstacles to success.

- * Budget and planning process
- * Financial analysis / modeling
- * Strategic planning / implementation
- * Project management/planning
- * Mergers & Acquisitions
- * Leadership / employee development

EDUCATION

Ohio University, Athens, Ohio

Bachelor of Business Administration in Accounting, June 1992

Baldwin-Wallace College, Berea, Ohio

Master of Business Administration, December 2011

PROFESSIONAL EXPERIENCE

Key Bank, Cleveland, Ohio

Finance Manager

April 2017 to Present

Key Community Bank Finance Team

- Provide leadership and support to monthly/quarterly analysis of financial results and performance to targets
- Demonstrates managerial courage; developing organizational and professional savvy to influence and challenge leaders, partners, and peers.
- Providing critical thinking ability related to business initiatives & drivers of favorable and unfavorable performance including analysis of new business volumes, draws, and closed activities, pricing trends, economic capital, loan loss allowance, and non interest income and expense drivers.
- Develop proactive ideas, advice, and financial modeling for the following: Deposit and Lending Products, Branch Profitability, and Intangibles
- Act as a primary liaison between product and treasury on topics such as: forecast variances, promotional offers, and initiatives.
- Provide accounting guidance (and/or liaison with Accounting Policy) for treatment and booking of specific revenue and expenses, accruals, reclassifications, etc.
- Provide financial guidance and support the business by conducting financial evaluations of proposed projects and investments, gathering assumptions, making financial projections, and creating business cases that substantiate the rationale for investments
- Advise leaders to make informed decisions that improve business performance based on critical thinking ability beyond current domain expertise or client group.
- Proactively identify opportunities and surface issues and independently propose and implement solutions.
- Maintain and update organizational hierarchy structure (i.e. cost centers, areas, regions) that best reflect the management of business and facilitates reporting
- Partners with Segment Finance Director and Business/Product Leaders, Planning and Performance Management, Treasury, Accounting, and Credit on daily, monthly, and quarterly tasks

Matthew D. Sharp

Professional Experience (Continue)

MetroHealth System, Cleveland, Ohio

Director of Finance

May 2009 to March 2017

Specialty Care and Neuromusculoskeletal Care Service Lines

- Provides financial leadership and strategic financial support through the evaluation of existing and newly planned initiatives.
- Develops and maintains monthly financial, workforce, and statistical analyses. This includes monthly analyses of institutional and administrative functions, special analyses to assist in reviewing fiscal performance, preparing long-range forecasts and financial feasibility analysis of existing and/or proposed services and programs, and interacting with department directors as needed.
- Responsible for executing the annual operating and capital budgeting process, to include detailed volume, revenue and expense projections from core services and proposed new business initiatives. This includes all coordination between Medical Operations and System Administrative Leadership.
- Collaborate with Department Leadership on the development of strategic business, market and operational plans focused on the growth of clinical, academic and financial performance by performing the required cost and volume analysis and environmental assessments for existing and potential markets, developing and maintaining performance benchmarks, data analysis and statistics relative to the department operational and financial performance.
- Evaluates and challenges current practices and methods for reporting and analyzing information, developing and implementing solutions and improving practices.
- Keeping abreast of changes in regulations and guidelines related to physician and technical reimbursement and ensuring that provider staffs are fully educated and up to date with appropriate regulations.
- Establishing cost accounting standards for Departments services in conjunction with financial and medical operations.
- Effectively delegates projects and tasks to appropriate level colleagues and support resources.

National City Bank, Cleveland, Ohio

Senior Financial Analyst, Commercial Banking Finance

May 2008 to May 2009

Financial Analyst, Retail Banking Deposits

January 2005 to April 2007

- Participate in strategic planning process, performing tactical and strategic analysis, through the use of financial modeling capabilities or by other means, such as: Product pricing and profitability, Capital/technology investments, Business line evaluation: growth versus exit strategies, Liability origination strategies, Long-term profitability outlook, Risk mitigation strategies, Deposit/Loan portfolio behavioral analysis.
- Developed financial modeling and analytical tools for the executive leadership decision making process.
- Developed and presented yearly Line of Business budget presentation to senior executive.
- Actively participate in financial planning, forecasting, business analysis and reporting for the business unit and presenting those results to the senior management team.
- Development of financial targets, ensuring that cost savings and revenue enhancements from prior period investments are accounted for in the baseline.

Accenture, LLC, Cleveland, Ohio

January 1998 to December 2004

Manager, Client Financial Management

Financial Management

- Define business performance measures that align with strategy and assess performance relative to these measures.
- Manage financial forecasting processes, manage capital budgeting process including asset acquisition and depreciation, and manage engagement level balance sheet and related accruals.
- Develop new pricing models for new/potential arrangements.

Matthew D. Sharp

Professional Experience (Continue)

Work Management

- Create Financial Management work plan: determine engagement management approach and estimate effort.
- Establish engagement reporting architecture: engagement reporting, reconciliation processes, etc. and ensure adherence to contractual processes.

Contract Management

- Plan/prepare contract: determine pricing approach, model Global Framework (GBDF) and prepare cost estimate.

SAP OTC Super User

- Selected as one of seven resources to lead North America and Canada through Accenture's internal global SAP implementation to train Finance Resources during initial SAP competency system training.
- Responsible for supporting more than 100 SAP end users with the Order to Cash (OTC) process

Menorah Park Center for the Aging, Beachwood, Ohio

August 1992 to December 1997

Stone Gardens Accounting Manager

- Preparation of monthly financial statements, including proper expense accruals and preparing explanation report for budget variances. Responsible for all General Ledger activity and the supervision of accounting team.
- Reviewing financial statements with Menorah Park's Executive Director, Chief Financial Officer and Stone Garden's key administrative staff to explain the current period's change in financial position.
- Assist CFO with the annual budget preparation, including the setting of rate increases and researching the current expense needs with Department Heads.

OTHER EXPERIENCE

Beachwood Schools Foundation Trustee, currently in position of Treasurer and chair of the Finance/Foundation Management Committee. Member from August 2012 – July 2017

- Philanthropic organization whose primary mission is to obtain funds from individuals, families and corporations to provide scholarships to graduating seniors who are continuing their education
- Raise money to enhance programming in the Beachwood School District.

REFERENCES AVAILABLE UPON REQUEST

Whitney Crook

From: Stovsky, Michael D. <MStovsky@beneschlaw.com>
Sent: Wednesday, November 07, 2018 9:05 PM
To: Whitney Crook
Cc: alecisaacson@aol.com
Subject: Citizen's Finance Advisory Committee Opening
Attachments: StovskyBio.PDF

Dear Whitney,

I am writing to submit my name for the Citizen's Finance Advisory Committee. I spoke with Alec Isaacson about the committee and its role and it appears to be a great opportunity to get more fully involved in helping the community which is something I am always looking to do. While I do not have specific background in financial management or reporting, I do consider myself to be a business leader. I'm a partner at the law firm Benesch. We are a 200 lawyer firm and a member of the AmLaw 200. This means that we are among the top 200 firms in the country in terms of revenue and profits. I serve on the Executive Committee of the firm and as such help to manage the operations of a business with revenue in excess of \$120 million and several hundred employees. I also chair the Intellectual Property and Technology group of the firm, one of the 6 business units of the firm with 30 professionals and in excess of \$11,000,000 of revenue annually. In addition, I serve on the board of Providence House and the Beachwood Schools Foundation, and also serve on the Overseas Connections Committee of the Jewish Federation of Cleveland. So, my experience encompasses both private business and public non-profit involvement. My day to day professional life involves the negotiation and completion of complex, high value intellectual property and information technology transactions for some of the largest companies in the region as outside legal counsel. I have been a lawyer in active practice for 27 years and a partner at two of the largest firms in Cleveland during this time. I'm interested in being more actively involved in the community and using my experience and judgment to assist Council in any way I can.

I've attached my resume. Please let me know if there is any other information I can provide.

Best regards,

Mike Stovsky

Chair, Innovations, Information Technology and Intellectual Property Group
Member of Executive Committee

Benesch, Friedlander, Coplan & Aronoff LLP
200 Public Square, Suite 2300
Cleveland, Ohio 44114-2378
Direct: 216.363.4626 | Fax: 216.363.4588 | Mobile: 216.346.4125
mstovsky@beneschlaw.com | www.beneschlaw.com

Chicago | Cleveland | Columbus | Hackensack | New York | Philadelphia | Shanghai | Wilmington
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Licensed to practice in Ohio.

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Michael D. Stovsky

Partner

Chair, Innovations, Information Technology & Intellectual Property (3iP) Practice Group; Executive Committee Member

mstovsky@beneschlaw.com

T:216.363.4626

F:216.363.4588

Assistant Contact

Liz Kohn

ekohn@beneschlaw.com

T:216.363.4666

Cleveland

200 Public Square

Suite 2300

Cleveland, OH 44114-2378

Mike Stovsky is a Partner and Chair of one of Benesch's core practice groups, Innovations, Information Technology & Intellectual Property (3iP). Mike helps companies negotiate, close, and handle complex, high-value, IP and technology transactions and matters including:

- ▶ Systems implementation deals (including multi-site installed and cloud ERP, CRM, VOIP and ECM implementation transactions), eCommerce, development, reseller, professional services, service level, telecom, network services, equipment purchases, support & maintenance, and managed security services;
- ▶ Technology M&A (including IT, financial services, medical devices, health services), joint ventures and technology collaborations, and representation of VCs, PE funds, family offices, and their portfolio companies in capital formations, acquisitions, and divestitures;
- ▶ Inbound and outbound IP, IT and technology procurement, licenses, technology transfers, business process outsourcing (SaaS, IaaS and PaaS), acquisitions, divestitures, and outsourcing transactions (including FFIEC audit compliance), and IP portfolio transfers;
- ▶ Global data security and privacy compliance including the US, Canada and the EU (EU GDPR and ePrivacy, EU/US privacy shield, HIPAA/HITECH, Gramm Leach Bliley, COPPA, FTC Act and Red Flag rule compliance), PCI-DSS, ISO 27001, ITIL, COBIT, and NIST standards, data classification, breach response and mitigation, and policies/procedures;
- ▶ Artificial intelligence, digital signatures, electronic contracting, cryptocurrencies (Bitcoin and Litecoin), blockchain platforms (Ethereum), DApps, and DAOs;
- ▶ IoT, 3D and 4D printing, and additive mfg;
- ▶ Life sciences technology transactions including pharmaceutical, medical devices, and agribusiness development, collaboration, and license deals, and IT and IP deals for major health systems, health product distributors and vendors (including EMR, EHR, RCM, VOIP, and billing implementations);
- ▶ IP due diligence; and
- ▶ Open source software.

EDUCATION

- ▶ University of Pennsylvania Law School, 1991, J.D.
- ▶ Northwestern University, 1986, B.A.

BAR AND COURT ADMISSIONS, LICENSES, CERTIFICATES

- ▶ State of Ohio
- ▶ U.S. Court of Appeals for the Sixth Circuit

- ▶ U.S. District Court for the Northern District of Ohio
- ▶ American Bar Association
- ▶ Cleveland Metropolitan Bar Association

MEMBERSHIPS, ASSOCIATIONS, OTHER ACTIVITIES

- ▶ Former Adjunct Professor, Case Western Reserve University Law School ("Advanced Business Associations: Representing the Internet Start-Up Company" and "Advanced Contracts: Electronic Contracts")
- ▶ Co-Director, Northwestern University Alumni Admissions Council for Cleveland
- ▶ Firm Representative, Intellectual Property Owners Association (IPO)
- ▶ Firm Representative, International Trademark Association (INTA)
- ▶ Firm Representative, American Intellectual Property Law Association
- ▶ Member, Licensing Executives Society
- ▶ Member, Leadership Cleveland (Class of 2010)
- ▶ Member, Planning Committee, National Institute on Representing High Technology Companies; American Bar Association 1998
- ▶ Member, Committee on Law and Commerce in Cyberspace, Business Law Section; American Bar Association
- ▶ Member, Science and Technology Law Section; American Bar Association
- ▶ Fellow, Past Chairman, Technology Committee; Cleveland Metropolitan Bar Association
- ▶ Social Justice Advisory Council, Temple Tifereth Israel
- ▶ Board Member, Providence House
- ▶ Fund Raising Volunteer, United Way 2010 Campaign- Cleveland West Region Cabinet
- ▶ Former Board Member, Cleveland Music School Settlement
- ▶ Former Board Member, IP Advisory Council, University of Akron Law School
- ▶ Volunteer, Cleveland Metropolitan Bar Association 3R's Program (Cleveland City High School Tutor)
- ▶ Youth Sports Coach, Beachwood, Ohio (Baseball and Soccer)
- ▶ Board Member, Beachwood Schools Foundation

RELATED PRACTICES

- ▶ Corporate & Securities
 - ▶ FINTECH and Payments
- ▶ Intellectual Property/3iP Practice Group
 - ▶ Biotechnology
 - ▶ Blockchain & Smart Contracts
 - ▶ Chemical Industry
 - ▶ Copyrights
 - ▶ Data Security & Privacy
 - ▶ E-Commerce
 - ▶ Fair Use
 - ▶ Intellectual Property Litigation
 - ▶ IP & IT Mediation Services
 - ▶ IT Procurement
 - ▶ Medical Devices

- Patents
- Rights of Publicity and Product Endorsement
- Social Media
- Trademarks
- Transactions
- ▶ International
- ▶ Private Equity

RELATED INDUSTRIES

- ▶ Additive Manufacturing-3D Printing
- ▶ Blockchain & Smart Contracts
- ▶ Data Security & Privacy
- ▶ FINTECH and Payments
- ▶ Private Equity

RECOGNITIONS

- ▶ Certified Information Privacy Professional/United States (CIPP/US)
- ▶ AV Rated, Martindale-Hubbell Peer Review
- ▶ Listed, *The Best Lawyers in America*®, Information Technology, 2007-2019 (Copyright 2018 by Woodward/White, Inc., of Aiken, SC)
- ▶ Listed, *Ohio Super Lawyers* (2006)
- ▶ Listed, *CrainTech's Who's Who in Technology* (2002-2006)
- ▶ Recipient, *Crain's Cleveland Business* "40 Under Forty" Award (1999)

RECENT NEWS

August 23, 2018

Peppard and Stovsky quoted in Cleveland Scene | "What the Hell is Blockchain, Anyway? Notes from #Blockland"
Media Mentions | www.clevescene.com

August 15, 2018

U.S. News & World Report - Best Lawyers 2019
Announcements, Press Releases | Best Lawyers

June 18, 2018

Dwellworks Secures Strategic Investment from TZP Capital Partners III, L.P.
Press Releases

November 28, 2017

Benesch client, Cleveland Diagnostics, and Genomic Health Announce Strategic Collaboration to Develop and Commercialize New Prostate Cancer Tests
Media Mentions | PR Newswire

November 2, 2017

Mike Stovsky interviewed during the Information Security Summit 2017
Media Mentions | Information Security Summit 2017

October 3, 2017

Mike Stovsky featured in Crain's Cleveland Roundtable Discussion on Cybersecurity
Announcements, Media Mentions | Crain's Cleveland



August 16, 2017

U.S. News & World Report - Best Lawyers 2018

Announcements, Press Releases | U.S. News & World Report

April 27, 2017

Benesch client, Vantiv, announces agreement to acquire Paymetric

Announcements | Public

February 2, 2017

Benesch serves as co-counsel to buyer in \$267M sale of Key Center

Media Mentions | Cleveland.com

February 2, 2017

5 Firms Steer Columbia-Millennia \$268M Deal And Financing

Media Mentions | Law 360

November 10, 2016

Benesch client, Vantiv, acquires Moneris Solutions, Inc. from Moneris Solutions Corporation for \$425,000,000. | "Vantiv Announces Agreement to Acquire Moneris Solutions USA"

Media Mentions, Announcements | PR Newswire

October 5, 2016

Mike Stovsky gives cybersecurity tips in Crain's Cleveland | "The how and why of selling cybersecurity to the boardroom"

Media Mentions | Crain's Cleveland

August 15, 2016

U.S. News & World Report - Best Lawyers 2017

Announcements, Press Releases | U.S. News & World Report - Best Lawyers 2017

May 2, 2016

Benesch's 2nd Annual 3D Printing Seminar (A Summary Report)

Announcements, Media Mentions | 3dprint.com

December 23, 2015

Mike Stovsky interviewed in this week's Crain's Cleveland on Cyber Security trends

Media Mentions | Crain's Cleveland

October 26, 2015

Crain's Cleveland recognizes Jeff Wild and Mike Stovsky as two of the top 100 Most Connected People in Northeast Ohio

Announcements | Crain's Cleveland Business

August 19, 2015

U.S. News & World Report – Best Lawyers 2016

Announcements, Press Releases

February 18, 2015

Mike Stovsky quoted in Crain's Cleveland article, "12 Cloud Computing Trends and Tips for 2015".

Media Mentions | Crain's Cleveland

October 16, 2014

Watch Benesch Attorney Michael D. Stovsky at the Crain's Cleveland "Ideas At Dawn 2014: Cybersecurity Seminar"

Media Mentions | Crain's Cleveland

August 20, 2014

48 Benesch Attorneys Named Best Lawyers in America

Announcements

August 15, 2013
46 Benesch Attorneys Named Best Lawyers in America
Press Releases

August 2, 2013
Legal Profession Being Pulled Online By Tech Clients
Media Mentions

June 20th, 2013
3iP Practice Group Names New Vice-Chairs and Practice Area Leads
Announcements

June 17, 2013
BlueBridge Networks Makes \$6 Million Investment and Plans to Double Staff
Media Mentions

June 12, 2013
Benesch Sponsors Crain's Cleveland "The Cloud"; Benesch Partner Michael Stovsky a Panelist
Announcements

February 13, 2013
Benesch Hires Leading IP Partner Michael D. Stovsky
Press Releases

SELECTED EXPERIENCE

Corporate & Securities

- ▶ Represented Vantiv, a leading provider of payment processing services and related technology solutions, in its acquisition of Moneris Solutions USA.
Mergers, Acquisitions, Board Counseling & Divestitures | FINTECH and Payments
- ▶ Represented Vantiv in its acquisition of Moneris Solutions, Inc. from Moneris Solutions Corporation for \$425 million.

Intellectual Property/3iP Practice Group

- ▶ Handled transactions on behalf of clients with national and international hardware, software, systems and medical device/life sciences companies.
- ▶ Provided advice and counsel regarding global data security and compliance for a publicly traded, international manufacturing company.
- ▶ Provided data breach disclosure compliance services to a significant, Ohio based non-profit entity with respect to a data breach event involving customer data on customers residing in the State of Ohio.
- ▶ Provided document retention and destruction policy guidance and advice and prepared comprehensive document retention and data security policies for a major, international sports marketing firm.
- ▶ Provided document retention and destruction policy guidance and advice and prepared comprehensive document retention and data security policies for a national real estate development company.
- ▶ Provided document retention and destruction policy guidance and advice and prepared comprehensive document retention and data security policies for a publicly traded international manufacturing company.
- ▶ Represented the home health division of this major national health products distributor in several complex, high value information technology implementation transactions involving transformative systems with major national and international vendors. Vendors included Cognizant and Deloitte. Representation resulted in the successful negotiation, documentation and completion of transformative information systems integration transactions involving the company's enterprise operations.
- ▶ Represents a growing computer network monitoring business in connection with its managed services agreements and

corporate strategy.

- ▶ Served as outside consultant to State Senator Eric Fingerhut with respect to the formulation of the Ohio Digital Signature Act – an amendment to the Uniform Commercial Code in Ohio to expressly permit digital signatures, including the formulation of the initial proposal for digital signature legislation for the State of Ohio, the preparation of materials for use in the drafting of a digital signature bill, aiding the Senator to develop broad-based bipartisan support for the measure, and participation in the legislative process.
- ▶ Served as outside counsel to a Cleveland-based electrical parts distribution company in connection with a major ERP software license transaction with a major international software vendor.
- ▶ Served as outside counsel to a Cleveland-based VoIP service provider in connection with a major ERP software license transaction.
- ▶ Served as outside counsel to a consortium of major international software developers in connection with the analysis of intellectual property and business aspects of software patent portfolios, and the acquisition of software patent portfolios
- ▶ Served as outside counsel to a developer of magnetic resonance imaging equipment in connection with intellectual property commercialization and protection issues, and corporate and securities matters, including aspects of \$15 million venture capital finance transition.
- ▶ Served as outside counsel to a developer of surgical instruments and spinal implants in connection with business issues, financings, sales of product lines and intellectual property and technology contracts and issues.
- ▶ Served as outside counsel to a major Ohio-based hospital system in connection with information systems, software license agreements and related technology issues, including a system-wide, multi-state VoIP implementation with major national and international equipment and service vendors.
- ▶ Served as outside counsel to a national manufacturer of greeting cards and novelty items in connection with intellectual property and technology contracts and issues.
- ▶ Served as outside counsel to a national real estate investment trust in connection with a major ERP software license and integration transaction with a major international software vendor.
- ▶ Served as outside counsel to a provider of logistics planning services to small and middle market companies in connection with general corporate intellectual property and technology matters.
- ▶ Served as outside counsel to a provider of onsite and online health care screening programs and related content and services in connection with general corporate intellectual property and technology matters.
- ▶ Served as outside counsel to an international adhesives manufacturer in connection with the resolution of a dispute with a national ERP software vendor, the resolution of intellectual property issues in a significant international outsourcing transaction, the negotiation of a major multi-site ERP software license transaction with a major national software vendor, and with intellectual property and technology matters.
- ▶ Served as outside counsel to an international polymer and diversified products conglomerate in connection with intellectual property matters and technology contracts and issues, including data security and privacy and information technology services outsourcing.
- ▶ Served as outside counsel to national condominium and apartment developers and owners in connection with satellite and cable television, broadband Internet access and VoIP services implementation agreements

Transactions

- ▶ Served as lead outside counsel to a major international polymer manufacturer in connection with a multimillion dollar business process outsourcing transaction with Sterling Commerce to provide and implement SaaS and IaaS.
- ▶ Served as lead outside counsel to a major international steel products company in connection with mobile application licensing on all major platforms (Amazon, Google and Apple).

- ▶ Served as lead outside counsel to a major international tire and diversified products manufacturer in connection with a multimillion dollar business process outsourcing transaction with Salesforce.com to provide and implement SaaS.
- ▶ Served as lead outside counsel to a major, international tire and diversified products company in connection with a \$180 million technology services transaction with Verizon for the provision of all network services in the western hemisphere.
- ▶ Served as lead outside counsel to a major, international, publicly traded manufacturer in connection with a large scale IaaS implementation transaction with Amazon Web Services.
- ▶ Served as lead outside counsel to a major, international, publicly traded manufacturer in connection with a multimillion dollar business process outsourcing transaction with SuccessFactors to provide IaaS for the storage of worldwide employee data.

RECENT ARTICLES AND PRESENTATIONS

October 8, 2018

Ohio's New Blockchain Legislation | Unpacking the law's economic upside for region, state.

Recent Articles and Presentations | Crain's Cleveland Business

June 21, 2018

Supreme Court Says States Have the Right to Require Online Retailers to Collect Sales Tax

Client Bulletins

May 31, 2018

Supply Chain, Blockchain, Data Security and 3D Printing | Michael D. Stovsky and Sean T. Peppard

Speaking Engagement | Benesch's 4th Annual 3D Printing Conference

March 20, 2018

Leveraging the Power of Blockchain - Insights from a Business Law Firm's Perspective

Recent Articles and Presentations | Crain's Cleveland Business

November 21, 2017

Ohio Proposes Act to Incentivize Consumer Data Security

Client Bulletins

October 31, 2017

Privacy and Cybersecurity – A View from the Trenches

Speaking Engagement | Benesch Information Security Summit

October 27, 2017

Crowe Horwath/ADP/Benesch: The General Data Protection Regulation Roundtable

Speaking Engagement

October 5, 2017

Reducing Risk with Cloud Computing

Speaking Engagement | 2017 Northeast Ohio RIMS Regional Conference

September 12, 2017

Data Breach Exposing 143 Million Americans' Personal Information Hits Equifax

Client Bulletins

August 9, 2017

Latest Developments in Cybersecurity Regulations

Speaking Engagement | Grant Thornton - New GDPR Cyber Regulations

July 18, 2017

Patent and Privacy Law: Updates Impacting Transportation and Logistics

Speaking Engagement | American Trucking Association General Counsel's Forum

June 20, 2017

Cyber Security for Corporate Boards

Speaking Engagement | Cohen & Co.

June 8, 2017

Latest Developments in Information Security Law – No Rest for the Weary

Speaking Engagement | Information Systems Security Association

June 2, 2017

Keeping your Data Safe: Cybersecurity for the Small Manufacturer

Speaking Engagement | MAGNET

April 27, 2017

Privacy and Data Security – a View from the Trenches

Speaking Engagement | Cleveland State University Cybersecurity and Privacy Protection Conference

April 13, 2017

Legal and Industry 3D Panel

Speaking Engagement | Benesch 3D Printing Seminar

April 13, 2017

Cyber Security Protection: What To Do When Your Private Information Becomes Public

Speaking Engagement | Benefit's Resource Group Cyber Security Seminar

March 23, 2017

Panel Discussion Regarding LinkedIn Value

Speaking Engagement | John Carroll University Lombardo Student Center

March 23, 2017

Tech Panel Discussion

Speaking Engagement | Cleveland Tech Awards Luncheon

February 3, 2017

EU Data Protection Law Subjects U.S.-Based Companies to Potentially Substantial Penalties

Client Bulletins

January 26, 2017

3D Printing Quarterly Report | Q4 2016

Client Bulletins, Recent Articles and Presentations

October 28, 2016

Ramifications for US Companies of Changes in Data Security and Privacy Law in the European Union

Speaking Engagement | ASMGi 2016 Information Security Summit

October 27, 2016

My Benesch My Team - North American Dental Group

My Benesch My Team: Client Feature Ads

October 27, 2016

Cybersecurity and Privacy Protection Forum

Speaking Engagement | Crain's Cleveland Business Data Security and Privacy Forum

October 19, 2016

3D Printing - A Fast Moving Market | 3D Printing Quarterly Report Q3 - 2016

Recent Articles and Presentations

October 5, 2016

Cybersecurity: Defense In-Depth

Speaking Engagement | Crain's Cleveland Business – CRAIN360

June 30, 2016

3D Printing - A Fast Moving Market | 3D Printing Quarterly Report Q2 - 2016

Client Bulletins, Recent Articles and Presentations

June 24, 2016

The Defend Trade Secrets Act of 2016

Client Bulletins

April 28, 2016

Legal Aspects of Data Security and Privacy – The Value of Effective Network Surveillance and Monitoring

Speaking Engagement | Binary Defense: Cyber Threat: Real Time Risks, Real Time Solutions

February 2, 2016

Negotiators Reach Agreement on Replacement EU-U.S. Safe Harbor

Client Bulletins

December 16, 2015

European Union Agrees on Data Protection Reform

Recent Articles and Presentations

October 6, 2015

EU – US Safe Harbor Ruled Invalid

Client Bulletins

September 28, 2015

If Not Now, When? Mandatory Data Security and Privacy Compliance for Corporate Directors and Managers

Speaking Engagement

June 11, 2015

"Talking SMAC" (Social, Mobile, Analytics, Cloud)

Speaking Engagement

June 10, 2015

"Talking SMAC" (Social, Mobile, Analytics, Cloud)

Speaking Engagement

May 14, 2015

Records Retention in the Transportation and Logistics Industries; Best Practices for Industry Participants and their Counsel

Speaking Engagement

May 07, 2015

Benesch's 29th Annual Labor & Employment Conference

Firm Events | Cleveland, Ohio

March 26, 2015

Micro Systems Management presents: Who is listening to your data?

Speaking Engagement

February 5, 2015

Anthem, Inc. Breach

Client Bulletins

February 4, 2015

SEC Releases Bulletins on Cybersecurity
Client Bulletins

January 16, 2015

Information Security and Risk Management: A Growing Challenge
Recent Articles and Presentations | Northern Ohio HIMSS Chapter Meeting

January 16, 2015

Information Security and Risk Management: A Growing Challenge
Speaking Engagement

November 21, 2014

The Knowledge Group: Emerging Issues for E-Commerce Businesses: Updates and Developments in 2015
Recent Articles and Presentations

November 21, 2014

The Knowledge Group: Emerging Issues for E-Commerce Businesses: Updates and Developments in 2015
Speaking Engagement

November 12, 2014

Young ACG Cleveland: Privacy and Information Security Law Overview
Recent Articles and Presentations

November 12, 2014

Young ACG Cleveland: Privacy and Information Security Law Overview
Speaking Engagement

October 30-31, 2014

Information Security Summit 2014
Recent Articles and Presentations

October 26, 2014

Developing, Building, and Sustaining an Innovative Culture
Speaking Engagement

October 16, 2014

Cyber Security: Protecting Against Liability Risk In Any Business Environment
Speaking Engagement

October 16, 2014

Cybersecurity: Protecting against Liability Risk in Any Business Environment
Recent Articles and Presentations | Benesch, Crain's Cleveland and Grant Thornton – Ideas at Dawn Series

September 29, 2014

I Am Benesch | Michael D. Stovsky
Advertisements

September 18, 2014

The Growing Cyber Security Challenge – Are Middle Market Companies More Vulnerable or Less?
Recent Articles and Presentations | Benesch and KPMG Middle Market Roundtable Series

September 18, 2014

Quarterly Middle Market Roundtable Series
Firm Events | Cleveland, Ohio

April 2014

China Business Update: China's Evolving Legal Landscape for Trade Secret Protection
Client Bulletins

April 7, 2014

Benesch B-Cast 08: Benesch's 3iP Group and Data Security & Privacy Team
B-Casts | Benesch B-Casts

April 7th, 2014

B-TV: Benesch's 3iP Group and Data Security & Privacy Team
B-Casts | Benesch B-Casts

January 29, 2014

Cybersecurity and Legal Compliance
Recent Articles and Presentations | Cuyahoga Community College - Third Party Data Security Considerations Cybersecurity Breakfast Series

January 29, 2014

Cybersecurity and Legal Compliance
Speaking Engagement

September 18, 2013

Amplify Speaker Series: Cloud Computing
Speaking Engagement

May 16, 2013

Cyber Security: Past, Present and Future
Firm Events | Cleveland, Ohio

October 16, 2014

Cybersecurity: Protecting against Liability Risk in Any Business Environment
Speaking Engagement

Whitney Crook

From: Karen Tindel <ktindel@sbcglobal.net>
Sent: Wednesday, November 14, 2018 10:02 PM
To: Whitney Crook
Subject: Citizen finance advisory committee
Attachments: Tindel resume January 2018 (5).docx

Greetings,

I wish to be considered as a member of the Beachwood Citizen Finance Committee. As you may know I hold an MBA from Cleveland State University and have spent the last 25 years in Healthcare finance and Administration demonstrating a solid background as a leader responsible for non profit financial management, budgets, marketing and revenue streams.

Over the past few years I have become more involved with the city of Beachwood and I look forward to the opportunity to learn more about the city's finances. I would like to be involved in as many committees as possible so that I can truly learn and appreciate how our city functions.

Sincerely,

Karen Tindel

Karen Roth Tindel

25460 Halburton Rd.
Beachwood, OH 44122
H: 216-292-7516
C: 216-548-6027
ktindel@sbcglobal.net

Administrative / Office Management, MBA professional well versed in office operations, procedures, protocols and practices in a healthcare and /or professional services environment. Well-honed problem solving, communications and interpersonal skills, working effectively with both internal and external customers. Flexible and adoptable with astute planning and project implementation skills. Recognized by managers and colleagues as a strong, positive leader and sharp strategic thinker who works effectively with cross functional teams.

Key skills include:

• Budget Preparation / Oversight	• Communication Written / Verbal
• Event Planning / Implementation	• Office Space Planning / Landscaping
• Performance Management	• Cost Containment/Maximize Reimbursement
• Staff Coaching / Training / Mentoring	• Vendor Oversight / Procurement
• Project Planning / Implementation	• Software Applications – Oracle, Lawson, Epic, All Scripts, Athena, HBO/SMS, Microsoft office suite
• Strategic planning	

PROFESSIONAL EXPERIENCE

Jewish Family Service Association

2016 – Present

Director of Revenue Cycle Management

Provide strategic leadership and day to day management of the revenue cycle department for a nonprofit agency which provides services for home care, medical and behavioral health clinical services, and aging adult services, residential and day programs. These responsibilities include intake and financial clearance, billing, cash posting, collections, and analysis.

The Director of Revenue Cycle works collaboratively with executive members to focus on developing and growing the department in addition to managing the Accounts Receivable staff, leading and motivating the team.

University Hospitals/Case Medical Center

2013 - 2016

Practice Administrator, Department of Surgery

Responsible for financial management of several surgery divisions. This includes budgets, revenue, expenses, strategic initiatives, cost containment measures, patient experience, access initiatives, staffing and recruiting. Divisions within my scope of responsibility included - Colorectal Surgery, General Surgery, Trauma, Bariatrics, Abdominal Solid Organ Transplant, Breast and Oncological Surgery, Cosmetic Plastic Surgery, Reconstructive Plastic Surgery and Pediatric Plastic Surgery.

Cleveland Clinic Foundation, Cleveland, OH

1997 – 2012

Program Administrator,

Primary Care Women's Health, Medicine Institute

2010 –2012

Report to and provide administrative and strategic support for Program Director.

Representative accomplishments include:

- Plan and execute physician Continuing Medical Education (CME) courses, including vendor exhibit fundraising, speakers, budgets, needs assessment, marketing, and oversee work on day of event.

- Participate and plan agenda for quarterly steering committee meetings to support and ensure that department leadership is focused on determining the strategic and tactical goals of the department.
- Plan monthly marketing meeting targeted to educate doctors and increase referral rates to providers, especially from physicians outside of CCF.
- Oversee participation at Heath Fairs including marketing materials, recruit and train volunteers, and provide support on day of event.

Department Administrator, Infectious Disease, Medicine Institute
2005 –2012

Perform day-to-day operations of outpatient clinic on main campus, inpatient hospital consult service, and academic physician training fellowship program. Report to Department Chairman and Institute leadership with 18 direct reports, 24 physicians, and 7 fellows (physicians in sub specialty training program). Assumed additional duties of PCWH in 2010.

Representative accomplishments include:

- Work with Medicine Institute Finance Director to prepare annual budget, analyze physician and support team productivity, revenue volumes, and manage expenses.
- Collaborate with Chairman on annual strategic planning, volume and staff forecasting projections.
- Determine space requirements and oversee design and facilities remodeling projects to support current and future departmental growth.
- Manage appointment scheduling call center, responsible for abandonment rates, speed of answer, customer service, patient experience, ease of scheduling.
- Collaborate with Fellowship Program Director to provide administrative leadership to Infectious Disease Training Program.
- Oversee Individual development plans for all direct reports by use of e-learning, on-site training and college coursework.
- Led work force in service training for a variety of roll outs and implementations of system upgrades.
- Held department and organizational memberships in the following:
Copat team of excellence; Patient Experience Team; United Way Chairperson for Medicine Institute; Gallop Engagement Survey Coach.

Divisional Reimbursement Manager, Division of Surgery
2002 – 2005

Served as liaison for clinical area Administrators, Reimbursement Specialists, and Professional Fee Coders on issues related to billing, coding, denials, electronic claims, CASS, and ORIS charge entry systems.

- Oversaw division compliance program and monitored and evaluated quarterly reporting to assure compliance standards were met.
- Served on Research Billing workgroup, Medcom focus group, and ORIS user group working effectively and well with cross functional teams.
- Managed OR billing and direct managerial responsibility of Division of Surgery Coders. Hired, coordinated staff training, payroll, and annual reviews.
- Became Certified Medical Coder in March, 2003.

Supervisor, Patient Financial Services, Division of Operations
1997 – 2002

Served as Supervisor of MMO / Anthem, BC hospital billing.

- Oversaw the functions of staff associated with billing and collecting MMO / Blue Cross revenue.
- Provided training, employee performance appraisals; developed policy and procedures for unit.
- Performed extensive problem solving, and monitored productivity, QA line staff functions. Worked with outside vendors and participated in provider meetings.
- Prepared payroll, staff scheduling, and financial analysis of Payer trends.
- Learned and effectively utilized various software and mainframe applications such as: Word, Excel, PowerPoint, Outlook, Kronos, HBO, SMS, and EPIC.

Mt. Sinai Medical Center, Cleveland, OH
1990 – 1997
Supervisor

Supervised line staff directly in the day-to-day functions of the Patient Accounts area. Also supervised Medicare billing, Medicaid, Blue Cross, and BWC, customer service and credit collections.

- Trained and developed staff, including performance evaluations, recruitment, enforcement of policy and procedures; scheduled staff, payroll reports, and coordinated overtime for projects.

EDUCATION

Master of Business Administration (MBA) Cleveland State University, Cleveland, OH
Areas of concentration: Accounting, Management, Finance, Marketing, Organizational Development, Economics, Human Resource Management, Team Development, and Strategic Planning

Bachelor of Arts (BA) Criminal Justice, Kent State University, Kent, OH

PROFESSIONAL AFFILIATIONS

- Greater Cleveland Congregations (participant) 2015 - present
- President, Friends of Beachwood Orchestras, 2009 – 2012
- Board Member, Friends of Shaker Square, 1995 – 1998
- Board Member, Fairwood Community Association, 1993 – 1998

November 12, 2018

J. Brandon Walsh

23205 Fernwood Dr.

Beachwood, OH 44122

216-287-4333

jbrandonwalsh81@gmail.com

Dear Whitney Crook,

I'm excited to apply for the Citizen Finance Advisory Committee as it seems like a way I can contribute to this community in a meaningful way. In my day job, I analyze a wide variety of companies in a wide variety of industries so I have a diverse base of business experience. I also have personal experience with being a landlord which may also be of use to the Committee.

A little about me... I'm not originally from Ohio, but have lived in the Cleveland area since 2003 and in Beachwood specifically since 2013. I have kids at Bryden and Hilltop and I try to stay up to date on local and regional issues (political or otherwise).

Thank you for taking the time to consider my qualifications and I look forward to hearing from you.

Sincerely,

Brandon Walsh

J. Brandon Walsh

23205 Fernwood Drive
Beachwood, OH 44122
(216) 287-4333
jbrandonwalsh81@gmail.com

CAREER PROFILE

- ◆ Strong background in commercial credit relationships with emphasis on balance sheet and income statement analysis, projecting covenant compliance/cash flow, and managing risk.
- ◆ Experienced with review and analysis of personal and business tax returns and personal financial statements
- ◆ Focused and efficient in performing all work assigned and prioritizing/multi-tasking to ensure timely completion.

WORK EXPERIENCE

KEYBANK Cleveland, OH 8/07 – Present

Senior Underwriter, KeyBank Business Capital. Analyze all aspects of a prospective client for Asset Based Lending relationships between \$5.0MM and \$75.0MM. Prepare underwriting documents summarizing financial performance, projected availability, strengths/weaknesses, etc. for review and approval by the ABL Credit Officer. Identify risks and potential mitigants through review of the company's financial statements and operations, discussions with management, on-site visits, industry/competition analysis, etc. Also responsible for compliance verification of prospective ABL clients.

KEYBANK Cleveland, OH 8/07 – Present

Credit Analyst/Credit Analyst II, KeyBank Dealer Services. Prepare annual credit reviews of commercial clients in order to determine creditworthiness. Monitor portfolio for signs of deterioration and address accordingly. Additional duties include daily reporting of NSF accounts within Key Auto Finance and the compilation and preparation of the quarterly KAF Portfolio Review as well as maintenance of the covenant exception report.

KEYBANK Cleveland, OH 4/05 – 8/07

Floor Plan Auditor, KeyBank Dealer Services. Perform inventory audits of automotive, marine, and RV dealers in order to assess compliance with floor plan limits. Efficiently gather information and reconcile all units on floor plan with regard to location, sale information, etc. Communicate abnormal audit results to manager.

MBNA AMERICA Beachwood, OH 12/03 – 4/05

Customer Satisfaction Account Manager. Utilize business and product knowledge to efficiently and accurately assist customers with account inquiries. Using effective listening skills, analyze account information to identify potential risk and appropriate value-adding opportunities.

OTHER EXPERIENCE

OWNER/MANAGER - DUPLEX Cleveland Heights, OH 6/2004 – Present

Manages all aspects of profitable ownership, including the tenant selection process, the setting and collecting of monthly rent payments, ensuring maintenance and repairs are completed in a timely fashion, and all interactions with city housing department officials.

OWNER/MANAGER - SFH Cleveland Heights, OH 6/2013 – Present

EDUCATION

INDIANA UNIVERSITY Bloomington, IN, B.S., Finance, May 2003.

CITY OF BEACHWOOD

INTER-OFFICE COMMUNICATION

TO: Martin Horwitz, Mayor
FROM: Chris Arrietta, Public Works Director
DATE: 5/30/2019
SUBJECT: Discussion regarding an Ordinance accepting a certain bid from Ronyak Paving, Inc. for the George Zeiger Drive Resurfacing Project; and declaring this to be an urgent measure

Mayor,

With your approval, I would like to place the George Zeiger Resurfacing Project on the agenda for June 3rd. Ronyak Paving Inc. was the low bidder at \$897,350.00.

AN ORDINANCE ACCEPTING A CERTAIN BID FROM RONYAK PAVING, INC. FOR THE GEORGE ZEIGER DRIVE RESURFACING PROJECT; AND DECLARING THIS TO BE AN URGENT MEASURE

WHEREAS, four (4) bids were received by the Clerk on May 22, 2019, for the George Zeiger Drive Resurfacing Project, pursuant to an advertisement for competitive bidding as required by law; and

WHEREAS, the bid of Ronyak Paving, Inc., in an amount not to exceed Eight Hundred Ninety-Seven Thousand, Three Hundred Fifty Dollars and No/Cents (\$897,350.00), was the lowest and best bid received; and

WHEREAS, the Public Works Director and City Engineer recommend that Council accept the bid of Ronyak Paving, Inc.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Beachwood, County of Cuyahoga, and State of Ohio, that:

Section 1: Based upon the recommendation of the Public Works Director and the City Engineer, the bid of Ronyak Paving, Inc. is found to be the lowest and best bid received for the George Zeiger Drive Resurfacing Project, in an amount not to exceed Eight Hundred Ninety-Seven Thousand, Three Hundred Fifty Dollars and No/Cents (\$897,350.00).

Section 2: The Mayor is authorized to enter into a contract on behalf of the City of Beachwood, Ohio with said Company.

Section 3: It is found and determined that all formal actions and deliberations of Council and its committees, relating to the passage of this legislation that resulted in formal action, were in meetings open to the public where required by Chapter 105 of the Codified Ordinances of the City.

Section 4: This Ordinance is hereby declared an urgent measure which is immediately necessary for the preservation of the public peace, health, safety or efficient operation of the City, and for the further reason that the work may begin as soon as possible; wherefore, this Ordinance shall be in full force and effect immediately upon its passage and approval by the Mayor.

WHEREFORE, this Ordinance shall be in full force and effect from and after the earliest date permitted by law.

Attest: I hereby certify this legislation was duly adopted on the 3rd day of June, 2019, and presented to the Mayor for approval or rejection in accordance with Article III, Section 8 of the Charter on the 4th day of June, 2019.

Clerk

Approval: I have approved this legislation this 4th day of June, 2019 and filed it with the Clerk.

Mayor



5595 Transportation Boulevard, Suite 100
Cleveland, Ohio 44125

Phone 216.518.5544
www.gpdgroup.com

Honorable Martin S. Horwitz
Mayor
City of Beachwood
25325 Fairmount Boulevard
Beachwood, Ohio 44122

May 23, 2019
2019119.05

RE: George Zeiger Drive Resurfacing

Dear Mayor Horwitz:

Bids were opened on May 22, 2019 for the above referenced project. Four (4) bids were received and they are listed below:

<u>Bidder Name</u>	<u>Bid Amount</u>
Ronyak Paving Inc.	\$897,350.00
Carron Asphalt Paving Inc.	\$922,356.90
Barbicas Construction Co. Inc.	\$950,660.36
Crossroads Asphalt Recycling Inc.	\$985,839.00

The engineer's original estimate for this project was \$700,000 based upon a scope of repair and resurfacing only, with minor base pavement repairs. That scope was modified to include the removal and replacement of the majority of the concrete median islands at the north end of the project from Cedar Road going South. We have also included irrigation into the median islands for future landscaping by Mall owner. In addition, the amount of base pavement repairs was increased upon recommendation from the Service Dept. The revised Engineer's Estimate, prior to bidding was \$850,000.

The project is specified to be completed within 45 working days of notice to proceed.

The work embraced by this contract generally consists of, but is not limited to the following:

1. Repair and resurfacing of George Zeiger Drive from Richmond Road to Cedar Road.
2. Removal and replacement of the existing concrete median island on George Zeiger Drive at the south side of the intersection with Cedar Road. The median island size is being reduced (and therefore full depth

pavement must be installed) and a provision is being made for box-outs within the center of the island for future plantings.

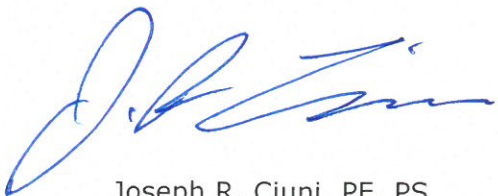
3. Installation of irrigation sleeves at the reconfigured concrete median islands.

The low bid was submitted by Ronyak Paving, Inc. ids 5.5% over the Engineer's estimate. We believe the asphalt prices are higher than expected. Ronyak is a reputable contractor who has successfully completed many similar projects for the City of Beachwood in the past. We are very familiar and comfortable with the quality of their work. As such, we recommend awarding the project to Ronyak Paving, Inc. as the lowest and best bid received.

We hereby recommend the City enter into a contract with Ronyak Paving, Inc.

Returned herewith is a tabulation of all bids received and the actual bidding documents.

Sincerely,
GPD Group

A handwritten signature in blue ink, appearing to read 'J. Ciuni', with a stylized flourish at the end.

Joseph R. Ciuni, PE, PS
City Engineer

Cc: Chris Arrietta, Service Director
File 2019119.05

**City of Beachwood
BID OPENING**

DAY / DATE: May 22, 2019 TIME: 1:00 P.M. LOCATION HELD: Beachwood Law Dept. Conference Room

BIDDERS FOR (ITEM OR PROJECT): George Zeiger Drive Resurfacing Project 2019

PERSON OPENING BIDS: Whitney M. Crook, Clerk of Council

<u>BIDDER NAME</u>	<u>BID BOND</u> (Properly Executed & Signed)	<u>NON-COLLUSION</u> <u>AFFIDAVIT</u> (Properly Executed)	<u>BID AMOUNT</u>
Rangak Paving, Inc	✓	✓	\$ 900 897,350.00
Casson Asphalt Paving, Inc.	✓	✓	\$ 922,356.90
Crossroad Asphalt Recycling, Inc.	✓	✓	\$ 985,839.00
Barbicus Const.	✓	✓	\$ 950,660.36
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

**CITY OF BEACHWOOD
FINANCE DEPARTMENT
INTER-OFFICE COMMUNICATION**

TO: Martin S. Horwitz, Mayor and Alec Isaacson, Finance Chair
FROM: Larry Heiser, Finance Director *LAH*
DATE: May 29, 2019
SUBJECT: Large area concrete patching

The proposed 2019 Capital Budget included \$200,000 for large area patching. These monies were not included in the 2019 approved Capital Budget. After conversations with Chris Arrietta, Service Director, there are areas in the City of Beachwood needing repair. Therefore, this is a request to increase the 2019 appropriations in the Capital Improvements Fund (441) by \$200,000 in order to move forward with the repairs. The City anticipates utilizing the unit pricing from the Tri-mor contract to complete the work.

Please let me know if you have any questions.

**CITY OF BEACHWOOD
FINANCE DEPARTMENT
INTER-OFFICE COMMUNICATION**

TO: Larry Heiser, Finance Director *LHH*
FROM: Michelle Kaplan, Assistant Finance Director *MK*
RE: 2019 Revised Appropriations
DATE: April 15, 2019

I am requesting the following appropriation adjustments be placed on the May 6, 2019 Council agenda.

Fire – Due to four retirements that were not budgeted for, leave settlements need to be increased by \$125,000. Additionally, the utility costs for the new fire station were under-estimated. Since we don't have a full year of utility expenditures yet, I am estimating on the high side and requesting an increase of \$75,000.

Recreation Camp – For 2019, a camp nurse was included in the budget. However, it was included in the professional services line item, not as an employee. It has since been determined that we would hire the nurse as an employee, therefore the \$13,700 that is budgeted in the professional services category needs to be budgeted in salaries and wages. No increase to the total budget.

City of Beachwood Electricity Contracting Results

15-Apr-19



Price to Compare ----->					NOPEC G960 Gov Aggregation		Freepoint Energy Solutions	
					Current PTC		New PTC	
					Weighted Average Price	Estimated Costs	Fixed Price	Estimated Costs¹
Account Svc Address	Customer Number	City	Est. Term kWh's	Term (Month's)				
23101 Fairmont Blvd	08005799455001410798	Beachwood	130	13	\$ 0.05600	\$ 7	\$ 0.04908	\$ 6
23355 Mercantile Rd	08005799451750091422	Beachwood	115,093	13	\$ 0.05376	\$ 6,188	\$ 0.04908	\$ 5,649
23355 Mercantile Rd	08005799455000372689	Beachwood	23,233	13	\$ 0.05376	\$ 1,249	\$ 0.04908	\$ 1,140
23550 Commerce Park OAL	08007645505000041846	Beachwood	2,119	13	\$ 0.05600	\$ 119	\$ 0.04908	\$ 104
23550 Commerce Park #2	08005799454000016723	Beachwood	16,343	13	\$ 0.05376	\$ 879	\$ 0.04908	\$ 802
23550 Commerce Park	08005799451590093462	Beachwood	57,633	13	\$ 0.05376	\$ 3,099	\$ 0.04908	\$ 2,829
23550 Commerce Park	08005799451270094042	Beachwood	34,893	13	\$ 0.05376	\$ 1,876	\$ 0.04908	\$ 1,713
23550 Commerce Park FT-PU	08005799451760093468	Beachwood	115,632	13	\$ 0.05376	\$ 6,217	\$ 0.04908	\$ 5,675
23550 Commerce Park	08005799451570093467	Beachwood	122,893	13	\$ 0.05376	\$ 6,607	\$ 0.04908	\$ 6,032
23550 Commerce Park RR-PU	08005799451750093465	Beachwood	68,345	13	\$ 0.05376	\$ 3,674	\$ 0.04908	\$ 3,354
23550 Mercantile Rd #4	08041204531340091570	Beachwood	100,360	13	\$ 0.05376	\$ 5,396	\$ 0.04908	\$ 4,926
23355 Mercantile Rd FL 1	08005799454000014852	Beachwood	355,593	13	\$ 0.05376	\$ 19,118	\$ 0.04908	\$ 17,453
24625 Shaker Blvd	08007645505000106670	Beachwood	14,676	13	\$ 0.05376	\$ 789	\$ 0.04908	\$ 720
25325 Fairmount Blvd	08007645505000073367	Beachwood	558,740	13	\$ 0.05376	\$ 30,040	\$ 0.04908	\$ 27,423
Biscayne Blvd TENNIS	08007645504000007042	Beachwood	53,689	13	\$ 0.05376	\$ 2,886	\$ 0.04908	\$ 2,635
25501 Shaker Blvd PARK	08007645505000122790	Beachwood	828	13	\$ 0.05376	\$ 44	\$ 0.04908	\$ 41
2655 Richmond Rd	08007645504000004807	Beachwood	312,823	13	\$ 0.05376	\$ 16,818	\$ 0.04908	\$ 15,353
24625 Shaker Blvd	08007645505001268568	Beachwood	18,594	13	\$ 0.05376	\$ 1,000	\$ 0.04908	\$ 913
25125 Fairmount Blvd	08011197764000021802	Beachwood	0	13	\$ -	\$ -	\$ -	\$ -
2700 Richmond Rd STREET	08007645501240000018	Beachwood	0	13	\$ 0.0313	\$ -	\$ -	\$ -
25425 Fairmount Blvd	08005799451830000850	Beachwood	0	13	\$ 0.0480	\$ -	\$ -	\$ -
TOTALS					\$0.05377	\$ 106,005	\$ 0.04908	\$ 96,767
Estimated Term Change by Switching					-8.7%		-\$9,238	
23101 Fairmont Blvd	08005799455001410798	Beachwood	250	25	\$ 0.05600	\$ 14	\$ 0.04718	\$ 12
23355 Mercantile Rd	08005799451750091422	Beachwood	221,333	25	\$ 0.05376	\$ 11,900	\$ 0.04718	\$ 10,443
23355 Mercantile Rd	08005799455000372689	Beachwood	44,679	25	\$ 0.05376	\$ 2,402	\$ 0.04718	\$ 2,108
23550 Commerce Park OAL	08007645505000041846	Beachwood	4,075	25	\$ 0.05600	\$ 228	\$ 0.04718	\$ 192
23550 Commerce Park #2	08005799454000016723	Beachwood	31,429	25	\$ 0.05376	\$ 1,690	\$ 0.04718	\$ 1,483
23550 Commerce Park	08005799451590093462	Beachwood	110,833	25	\$ 0.05376	\$ 5,959	\$ 0.04718	\$ 5,229
23550 Commerce Park	08005799451270094042	Beachwood	67,102	25	\$ 0.05376	\$ 3,608	\$ 0.04718	\$ 3,166
23550 Commerce Park FT-PU	08005799451760093468	Beachwood	222,369	25	\$ 0.05376	\$ 11,955	\$ 0.04718	\$ 10,491
23550 Commerce Park	08005799451570093467	Beachwood	236,333	25	\$ 0.05376	\$ 12,706	\$ 0.04718	\$ 11,150
23550 Commerce Park RR-PU	08005799451750093465	Beachwood	131,433	25	\$ 0.05376	\$ 7,066	\$ 0.04718	\$ 6,201
23550 Mercantile Rd #4	08041204531340091570	Beachwood	193,000	25	\$ 0.05376	\$ 10,376	\$ 0.04718	\$ 9,106
23355 Mercantile Rd FL 1	08005799454000014852	Beachwood	683,833	25	\$ 0.05376	\$ 36,765	\$ 0.04718	\$ 32,263
24625 Shaker Blvd	08007645505000106670	Beachwood	28,223	25	\$ 0.05376	\$ 1,517	\$ 0.04718	\$ 1,332
25325 Fairmount Blvd	08007645505000073367	Beachwood	1,074,500	25	\$ 0.05376	\$ 57,768	\$ 0.04718	\$ 50,695
Biscayne Blvd TENNIS	08007645504000007042	Beachwood	103,248	25	\$ 0.05376	\$ 5,551	\$ 0.04718	\$ 4,871
25501 Shaker Blvd PARK	08007645505000122790	Beachwood	1,592	25	\$ 0.05376	\$ 86	\$ 0.04718	\$ 75
2655 Richmond Rd	08007645504000004807	Beachwood	601,583	25	\$ 0.05376	\$ 32,343	\$ 0.04718	\$ 28,383
24625 Shaker Blvd	08007645505001268568	Beachwood	35,758	25	\$ 0.05376	\$ 1,922	\$ 0.04718	\$ 1,687
25125 Fairmount Blvd	08011197764000021802	Beachwood	0	25	\$ -	\$ -	\$ -	\$ -
2700 Richmond Rd STREET	08007645501240000018	Beachwood	0	25	\$ 0.0313	\$ -	\$ -	\$ -
25425 Fairmount Blvd	08005799451830000850	Beachwood	0	25	\$ 0.0480	\$ -	\$ -	\$ -
TOTALS					\$0.05377	\$ 203,856	\$ 0.04718	\$ 178,887
Estimated Term Change by Switching					-12.2%		-\$24,970	
23101 Fairmont Blvd	08005799455001410798	Beachwood	360	36	\$ 0.05600	\$ 20	\$ 0.04834	\$ 17
23355 Mercantile Rd	08005799451750091422	Beachwood	318,720	36	\$ 0.05376	\$ 17,135	\$ 0.04834	\$ 15,407
23355 Mercantile Rd	08005799455000372689	Beachwood	64,338	36	\$ 0.05376	\$ 3,459	\$ 0.04834	\$ 3,110
23550 Commerce Park OAL	08007645505000041846	Beachwood	5,868	36	\$ 0.05600	\$ 329	\$ 0.04834	\$ 284
23550 Commerce Park #2	08005799454000016723	Beachwood	45,258	36	\$ 0.05376	\$ 2,433	\$ 0.04834	\$ 2,188
23550 Commerce Park	08005799451590093462	Beachwood	159,600	36	\$ 0.05376	\$ 8,581	\$ 0.04834	\$ 7,715
23550 Commerce Park	08005799451270094042	Beachwood	96,627	36	\$ 0.05376	\$ 5,195	\$ 0.04834	\$ 4,671
23550 Commerce Park FT-PU	08005799451760093468	Beachwood	320,211	36	\$ 0.05376	\$ 17,216	\$ 0.04834	\$ 15,479
23550 Commerce Park	08005799451570093467	Beachwood	340,320	36	\$ 0.05376	\$ 18,297	\$ 0.04834	\$ 16,451
23550 Commerce Park RR-PU	08005799451750093465	Beachwood	189,264	36	\$ 0.05376	\$ 10,175	\$ 0.04834	\$ 9,149
23550 Mercantile Rd #4	08041204531340091570	Beachwood	277,920	36	\$ 0.05376	\$ 14,942	\$ 0.04834	\$ 13,435
23355 Mercantile Rd FL 1	08005799454000014852	Beachwood	984,720	36	\$ 0.05376	\$ 52,942	\$ 0.04834	\$ 47,601
24625 Shaker Blvd	08007645505000106670	Beachwood	40,641	36	\$ 0.05376	\$ 2,185	\$ 0.04834	\$ 1,965
25325 Fairmount Blvd	08007645505000073367	Beachwood	1,547,280	36	\$ 0.05376	\$ 83,186	\$ 0.04834	\$ 74,796
Biscayne Blvd TENNIS	08007645504000007042	Beachwood	148,677	36	\$ 0.05376	\$ 7,993	\$ 0.04834	\$ 7,187
25501 Shaker Blvd PARK	08007645505000122790	Beachwood	2,292	36	\$ 0.05376	\$ 123	\$ 0.04834	\$ 111
2655 Richmond Rd	08007645504000004807	Beachwood	866,280	36	\$ 0.05376	\$ 46,574	\$ 0.04834	\$ 41,876
24625 Shaker Blvd	08007645505001268568	Beachwood	51,492	36	\$ 0.05376	\$ 2,768	\$ 0.04834	\$ 2,489
25125 Fairmount Blvd	08011197764000021802	Beachwood	0	36	\$ -	\$ -	\$ -	\$ -
2700 Richmond Rd STREET	08007645501240000018	Beachwood	0	36	\$ 0.0313	\$ -	\$ -	\$ -
25425 Fairmount Blvd	08005799451830000850	Beachwood	0	36	\$ 0.0480	\$ -	\$ -	\$ -
TOTALS					\$0.05377	\$ 293,553	\$ 0.04834	\$ 263,930
Estimated Term Change by Switching					-10.1%		-\$29,623	

¹New contract price to begin with the meter reads in May-2019

CITY OF BEACHWOOD
FINANCE DEPARTMENT
INTER-OFFICE COMMUNICATION

TO: Mayor Martin S. Horwitz
FROM: Larry A. Heiser, Finance Director *LAH*
RE: GEM Energy – Electric Pricing
DATE: April 15, 2019

Mayor –

Over the past few months I have been contacted by several companies regarding our electric supplier. We are currently are a NOPEC city and the concern was that we might not receive a grant from NOPEC if we switched suppliers. However, the grant monies are based on revenues which are generated by the residents who are NOPEC customers. Diane has previously reviewed the contract with GEM and they have modified the contract per her request. This morning I received updated pricing which is attached. If you are in agreement with changing our electrical supplier, I would like to contact Alec to either have this put on the agenda or have it be part of a Finance Committee meeting.

Please let me know if you have any questions.

Thank You.

From: [Karen Carmen](#)
To: [Whitney Crook](#)
Subject: FW: Grandparent Rate Request
Date: Thursday, May 30, 2019 10:33:42 AM

Whitney,
Will this be okay?

LMK
K

From: Karen Carmen
Sent: Wednesday, May 22, 2019 3:34 PM
To: 'Barbara Bellin Janovitz'
Cc: Martin S. Horwitz
Subject: Grandparent Rate Request

Hello Barbara,
On Monday night, two residents requested a Grandparent rate for the BFAC.

A possible suggestion would be to offer Beachwood Grandparents the opportunity to bring their non-resident grandchildren and receive the resident day rate of \$6 (vs \$10 day rate for Non-Residents.)

With this change, each grandchild would be a \$4.00 savings.
EX. 2 NR grandchildren would be \$12 vs \$20 (now)

BFAC pricing is a council decision. LMK how you want to proceed and if this is going anywhere this season. I have met with the Mayor and he was supportive of this proposal.

TY
Karen

AN ORDINANCE IMPLEMENTING SECTIONS 3735.65 THROUGH 3735.70 OF THE OHIO REVISED CODE, ESTABLISHING AND DESCRIBING THE BOUNDARIES OF THE COMMERCE PARK COMMUNITY REINVESTMENT AREA IN THE CITY OF BEACHWOOD, OHIO, DESIGNATING A HOUSING OFFICER TO ADMINISTER THE PROGRAM, AND CREATING A COMMUNITY REINVESTMENT HOUSING COUNCIL AND A TAX INCENTIVE REVIEW COUNCIL

WHEREAS, the council of the City Beachwood (hereinafter "Council") desires to pursue all reasonable and legitimate incentive measures to assist and encourage development in specific areas of the City of Beachwood that have not enjoyed reinvestment from remodeling or new construction; and

WHEREAS, a survey of housing, a copy of which is on file in the office of the Clerk of City Council as required by Ohio Revised Code (ORC) Section 3735.66, has been prepared for the area to be included in the proposed Community Reinvestment Area; and

WHEREAS, the maintenance of existing and construction of new structures in such area would serve to encourage economic stability, maintain real property values, and generate new employment opportunities; and

WHEREAS, the remodeling of existing structures or the construction of new structures in this Community Reinvestment Area constitutes a public purpose for which real property exemptions may be granted.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Beachwood, County of Cuyahoga, and State of Ohio that:

Section 1: The area designated as the "Commerce Park Community Reinvestment Area" constitutes an area in which housing facilities or structures of historical significance are located, and in which new construction or repair of existing facilities has been discouraged:

Section 2: Pursuant to ORC Section 3735.66, Commerce Park Community Reinvestment Area is hereby established as that area described and depicted in attached Exhibit A to this ordinance. Only residential, commercial and/or industrial properties consistent with the applicable zoning regulations within the designated Community Reinvestment Area will be eligible for exemptions under this Program.

Section 3: All properties identified in Exhibit A as being within the designated Community Reinvestment Area are eligible for this incentive. This proposal is a public/private partnership intended to promote and expand conforming uses in the designated area. As part of the project, the City of Beachwood intends to undertake supporting public improvements in the designated area.

Section 4: Within the Community Reinvestment Area, the percentage of the tax exemption on the increase in the assessed valuation resulting from improvements to commercial and industrial real property and the term of those exemptions shall be negotiated on a case-by-case basis in advance of construction or remodeling occurring according to the rules outlined in the ORC Section 3735.67. The results of the negotiation as approved by this Council will be set forth in writing in a Community Reinvestment Area Agreement as outlined in ORC Section 3735.671. For residential property, a tax exemption on the increase in the assessed valuation resulting from the improvements as described in ORC Section 3735.67 shall be granted upon application by the property owner and certification thereof by the designated Housing Officer for the following periods.

Ten (10) years for the remodeling of every residential dwelling unit containing not more than two housing units with a minimum investment of Twenty Five Thousand Dollars and No/Cents (\$25,000.00), and with such exemption being fifty percent (50%) for each of the ten (10) years.

Ten (10) years, for the construction of dwellings containing not more than two (2) housing units with such exemption being fifty percent (50%) for each of the ten (10) years.

Up to, and including, ten (10) years, and up to, and including, fifty percent (50%) for the remodeling of existing commercial and industrial facilities, with a minimum investment of Fifty Thousand Dollars and No/Cents (\$50,000.00) for commercial and One Hundred Thousand Dollars and No/Cents (\$100,000.00) for industrial with the term and percentage of which shall be negotiated on a case-by-case basis in advance of remodeling occurring.

Up to, and including, ten (10) years, and up to, and including, fifty percent (50%) for the construction of new commercial or industrial facilities, the term and percentage of which shall be negotiated on a case-by-case basis in advance of construction occurring.

For the purposes of the above described Community Reinvestment Area, structures exclusively used for residential purposes and composed of two (2) and fewer units shall be classified as residential structures.

If remodeling qualifies for an exemption, during the period of the exemption, the exempted percentage of the dollar amount of the increase in market value of the structure shall be exempt from real property taxation. If new construction qualifies for an exemption, during the period of the exemption the exempted percentage of the structure shall not be considered to be an improvement on the land on which it is located for the purpose of real property taxation.

Section 5: All commercial and industrial projects are required to comply with the state application fee requirements of ORC Section 3735.672 (C) and the local annual monitoring fee of one percent of the amount of taxes exempted under the agreement - a minimum of \$500 up to a maximum of \$2500 annually unless waived.

Section 6: To administer and implement the provisions of this Ordinance, Tom Moore, Assistant Building Commissioner is designated as the Housing Officer as described in Sections 3735.65 through 3735.70.

Section 7: A “Community Reinvestment Area Housing Council” shall be created, consisting of two members appointed by the Mayor, two members appointed by the Council, and one member appointed by the Planning and Zoning Commission. The majority of the members shall then appoint two additional members who shall be residents within the area. Terms of the members of the Council shall be for three years. An unexpired term resulting from a vacancy in the Council shall be filled in the same manner as the initial appointment was made. The Community Reinvestment Area Council shall make an annual inspection of the properties within the district for which an exemption has been granted under Section 3735.67 of the ORC. The Council shall also hear appeals under Section 3735.70 of the ORC.

A Tax Incentive Review Council has been established pursuant to ORC Section 5709.85 to review annually the compliance of all agreements involving the granting of exemptions for commercial or industrial real property improvements under Section 3735.671, of the ORC and make written recommendations to the Council as to continuing, modifying or terminating said agreement based upon the performance of the agreement.

Section 8: City Council reserves the right to re-evaluate the designation of the Commerce Park Community Reinvestment Area after December 31, 2019, at which time the Council may direct the Housing Officer not to accept any new applications for exemptions as described in Section 3735.67 of the ORC.

Section 9: The Council hereby finds and determines that all formal actions relative to the passage of this Ordinance were taken in an open meeting of this Council, that all deliberations of this Council and of its committees, if any, which resulted in formal action were taken in meetings open to the public, in full compliance with the applicable legal requirements, including Section 121.22 of the ORC.

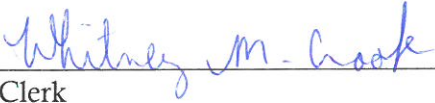
Section 10: This ordinance shall take effect and be in force from and after the earliest period allowed by law and upon confirmation by the Director of the Ohio Development Services Agency of the findings in this Ordinance.

Section 11: The Mayor is hereby directed and authorized to petition the Director of the Ohio Development Services Agency to confirm the findings contained within this Ordinance.

WHEREFORE, this Ordinance shall be in full force and effect from and after the earliest period permitted by law.

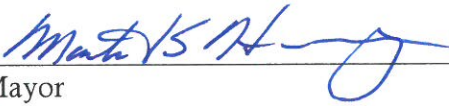
Attest:

I hereby certify this legislation was duly adopted on the 2nd day of April, 2018, and presented to the Mayor for approval or rejection in accordance with Article III, Section 8 of the Charter on the 3rd day of April, 2018.


Clerk

Approval:

I have approved this legislation this 3rd day of April, 2018, and filed it with the Clerk.


Mayor

Placed on First Reading and Referred to a Public Hearing: February 5, 2018

Held on Pending: February 20, 2018

Placed on Second Reading: March 19, 2018

Placed on Third and Final Reading: April 2, 2018

CITY OF *Beachwood*
INTEROFFICE MEMORANDUM

TO: Martin S. Horwitz, Mayor
Brian Linick, President of Council
Eric Synenberg, Economic Development Committee Chair

FROM: William Griswold, Building Commissioner *WG*
Keri Zipay, Business Retention Specialist

DATE: January 23, 2016

SUBJECT: Community Reinvestment Area (CRA) Establishment

Following our discussion with the Economic Development Committee and members of Council, we are respectfully requesting to be placed on the Council agenda on February 5, 2018 for approval of the creation of a Community Reinvestment Area (Commerce Park). Guidelines for the program will be formulated and presented to City Council for their review prior to any applicant's participation in the CRA.

All CRA applicants will pay required fees (to be determined) and receive approval from City Council.

Attached is a copy of the CRA application, as well as, an example of a points-based job creation incentive grant application form, which could be effectively translated for use with the CRA program. This example application and valuation system was developed by Mrs. Zipay as part of research conducted to examine other local and state incentive offerings, and has been attached for your review.

Enc.

cc: Larry Heiser, Finance Director
Hope Jones, Law Director
Tina Turick, Assistant Administrative Officer

APPROVED BY MAYOR FOR
NEXT COUNCIL AGENDA.

SIGNATURE

DATE

Martin S. Horwitz
1-23-18

Job Creation Incentive Study

The application, as it exists, requests the following information for review:

1. Current full and part-time employment at the proposed project site
2. Current full and part-time employment in the City of Beachwood
3. Hiring plans for the next 3 years
4. Estimated pay roll for new employees in the next 3 years

Award guidelines:

New Payroll by end of Year 3:

\$1-3M – 3 years – 30%
\$3-6M – 4 years – 35%
\$6-8M – 4 years – 40%
\$8M+ – 5 years – 50%

Proposal:

Some municipalities (such as Kent, OH and the region of Niagara Gateway) have adopted a points-based grant application form to make more well-informed decisions and achieve designated community goals.

Consider revising the Job Creation Incentive application, to a points-based application. Review the next page to see one example of what this could look like.

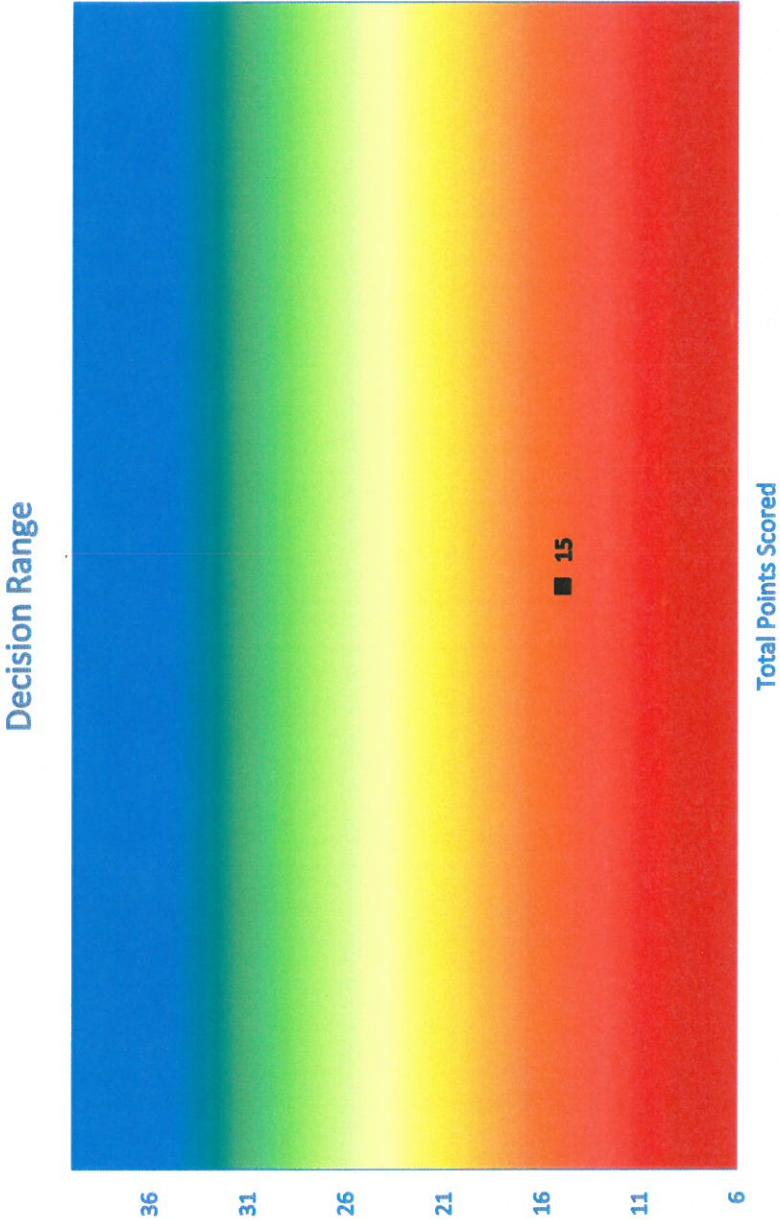
Example of a points- based application format:

1. Current facility location: ☐ Outside of United States - 5 ☐ In OH, outside of Cuyahoga County – 3 ☐ In Beachwood - 1
☐ In US, outside of Ohio - 4 ☐ In Cuyahoga County, but outside of Beachwood – 2
2. Parent company location: ☐ Outside of United States - 5 ☐ In OH, outside of Cuyahoga County – 3 ☐ In Beachwood - 1
☐ In US, outside of Ohio - 4 ☐ In Cuyahoga County, but outside of Beachwood – 2
3. Current number of employees: ☐ 30-50 (1 point) ☐ 51-75 (2 points) ☐ 76-100 (3 points) ☐ Over 100 (4 points)
4. Number of employees to be added by Year 3: ☐ 1-5 (1 point) ☐ 6-10 (2 points) ☐ 11-15 (3 points) ☐ 16 or more (4 points)
5. Average salary of non-executive level employees: ☐ \$0-24,999 (1 point) ☐ \$25,000-49,999 (2 points) ☐ \$50,000-99,999 (3 points)
☐ \$100,000+ (4 points)
6. Level of planned capital investment: ☐ \$0-249,999 (1 point) ☐ \$250,000-499,999 (2 points) ☐ \$500,000-999,999 (3 points)
☐ \$1,000,000+ (4 points)
7. Locating inside the Commerce Park CRA? ☐ Yes (1 point) ☐ No (0 points)
8. Industry: ☐ Medical, BioMed, IT (5 points) ☐ Professional Services (4 points) ☐ Wholesale, Manufacturing (3 points)
☐ Other (0 points)

9. LEED certification or installation of renewable energy materials? ☐ Yes (3 points) ☐ No (0 points)

10. Locating within a mixed-use development? ☐ Yes (3 points) ☐ No (0 points)

Results Chart Sample:



Point range: 6=lowest, 38=highest

Staff report (including industry research) would be provided based upon the total points scored.

**PURSUANT TO OHIO REVISED CODE SECTIONS 3735.65 ET SEQ., APPLICANTS SHALL PROVIDE
THE FOLLOWING INFORMATION: (Completion of ALL questions is required)**

1. Name of proposed Community Reinvestment Area (CRA): Commerce Park
2. Applicant:
a. Name ² : City of Beachwood
b. Address: 25325 Fairmount Blvd. Beachwood, OH 44122
c. County (if municipal applicant): Cuyahoga
d. Chief Executive of Applicant: Mayor Martin Horwitz
3. Designated Housing Officer ³ :
a. Name/Title: Tom Moore/Housing Inspector
b. Organization: City of Beachwood
c. Address: 25325 Fairmount Blvd. Beachwood, OH 44122
d. Email ⁴ : tom.moore@beachwoodohio.com
e. Telephone Number: 216-292-1916
f. Fax Number 216-292-1917
4. Total population of the municipality or township applicant: 11,953
5. Total population for the proposed CRA: 186
6. Total number of residences in the proposed CRA: 86

7. If the applicant has any other active CRAs, attach a listing of each CRA including the name, date of creation, and date of any and all amendments. Additionally, attach a map of the applicant's jurisdiction showing all active CRAs. If the proposed CRA will combine multiple pre-existing CRAs, will excise territory out of an existing CRA, or will otherwise cause an existing CRA to cease to exist, provide the name, date of creation, and date of any and all amendments of such CRA(s).

Label this as "Attachment A."

8. Attach a copy of the housing survey⁵ documenting the finding that the area designated as the CRA "...is one in which housing facilities or structures of historical significance are located and new housing construction and repair of existing facilities or structures are discouraged." The survey must provide both a statement of general conditions of the area as well as specific locations and conditions fulfilling the standard set forth within ORC § 3735.65(B). Housing surveys often include supplemental information such as pictures or local building department records that support the findings.

Label this as "Attachment B."

9. Attach a certified copy of the local legislative authorization, which may be either an ordinance or resolution that authorizes the creation of this CRA⁶. The proper authority must certify each ordinance/resolution. **Label this as "Attachment C."**

10. Attach evidence that the local legislation was published in a newspaper of general circulation once a week for two consecutive weeks immediately following its adoption per ORC Section 3735.66. **Label this as "Attachment D."**

1. This form should be used for both the creation of new CRAs as well as the amendment of pre-existing CRAs.
2. Only municipal corporations or counties, acting on behalf of townships, may enact Community Reinvestment Areas. See ORC § 3735.66.
3. The CRA Housing Officer is responsible for the local administration of the program. The CRA Housing Officer typically is, but is not required to be, an employee of the enacting political subdivision.
4. The Ohio Development Services Agency uses email to distribute important annual report information and bulletins.
5. A Housing Survey is required pursuant to ORC § 3735.66. A sample housing survey can be found on the Ohio Development Services Agency's CRA page at: http://development.ohio.gov/files/bs/SHS_youngstown.pdf
6. This resolution or ordinance should be from the applicant. Boards of Township Trustees frequently do pass resolutions of support when its county enacts a CRA on their behalf, but such resolution or ordinances of support are not required.

11. Attach a map(s) of the proposed CRA which clearly outlines:
 - a. The boundary of the local legislative authority⁷ **Label this as "Attachment E-1";**
 - b. The boundary of the proposed CRA **Label this as "Attachment E-2";**
 - c. The current zoning map⁸ **Label this as "Attachment E-3";**
 - d. Existing major industries (only required if the CRA is permitted to consider industrial/commercial projects) **Label this as "Attachment E-4";**
 - e. Vacant land available for development **Label this as "Attachment E-5";** and
 - f. The boundary of all school districts affected by the CRA **Label this as "Attachment E-6."**
12. Attach a written description of the proposed CRA boundary (not a legal description). Examples should include street boundaries or parcel numbers. The description must conform to the information on the map of the proposed CRA depicting the boundary. **Label this as "Attachment F"**
13. School District/Board of Education Participation:
 - a. Identify each Board of Education with jurisdiction within the area designated as the proposed CRA. **Label this as "Attachment G."**
 - b. Attach evidence that each Board of Education listed in Attachment G has been informed of the CRA program requirements as well as their rights to: 1) notice of exemptions; 2) review/approval authority for commercial/industrial agreements; 3) meeting requests; and 4) income tax sharing. (The Ohio Development Services Agency suggests a certified letter to the President of the Board of Education.) **Label this as "Attachment H-1."**
 - c. Proposed CRAs within municipalities that levy a municipal income tax should consider developing a procedure in conjunction with the Board of Education(s) to allow for income tax sharing on projects. Attach a copy of the procedure, if one exists. This requirement applies only to city, local, or exempted village school districts and not to joint vocational school districts⁹. **Label this as "Attachment H-2."**
 - d. Outline involvement of Board of Education in the CRA program and any negotiated revenue sharing agreements with the applicant. (Optional – Board of Education Resolution) – **Label this as "Attachment H-3."**
14. Attach a list of contact people including the name, title, address, and phone numbers for the following¹⁰:
 - a. The county auditor;
 - b. The township clerk and trustees for each participating township;
 - c. All county commissioners (for county-designated areas);
 - d. The city/village, mayor/CEO, or administrator for each participating municipality;
 - e. The superintendent, or other authorized official, of each school district listed in requirement 13a of this petition;
 - f. The state representative(s) for the territory covered by the proposed CRA; and
 - g. The state senator(s) for the territory covered by the proposed CRA. **Label this as "Attachment I."**

This petition is authorized to be submitted to the Ohio Development Services Agency. All information contained herein is accurate to the best of my knowledge.

 Signature Municipal/CEO President
 of the Board of County Commissioners

 Date:

Ohio Development Services Agency
 (800) 848-1300
www.development.ohio.gov

7. If a county is the applicant, this map should only be of the affected township.
 8. Participating jurisdictions are required to supply an updated zoning map when zoning changes occur on parcels within the CRA. See ORC §3735.66 (5th ¶I).
 9. For more information about Joint Vocational School District rights, please see Ohio Attorney General's Opinion 2000-030. This is available at: <http://www.ohioattorneygeneral.gov/getattachment/06fab61d-49dd-4a65-b5d1-1a1c9459a3a9/2000-030.aspx>
 10. If the Ohio Development Services Agency confirms the findings for the proposed CRA, the original confirmation of findings will be sent to the CRA Housing Officer. Each of the people listed in Attachment I (if applicable) will receive notification as well.

Beachwood - Commerce Park Community Reinvestment Area

City of Beachwood Housing Study (Attachment B)

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Proposed CRA

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Housing Survey (Attachment B)

Prepared by the City of Beachwood Economic Development & Building Departments

Introduction:

The City of Beachwood, Ohio presents the area known locally as “Commerce Park” located within Census Tract 1311.02 that is comprised of residential, commercial, office, warehousing, and light industrial uses, as a viable candidate to establish a new (and Beachwood’s first) Community Reinvestment Area. Most of the structures in the area are at least 50-60 years old and have not seen significant investment since their original construction. In the areas surrounding Commerce Park, Beachwood is flourishing. The time is right to build off of this momentum and utilize available tools to spur new development in the Commerce Park area.

History of Beachwood, Ohio:

Much of Beachwood was originally part of the “Warrensville” settlement of the Western Reserve in the 1800’s. The Village of Beachwood was originally established with a vote of just 47 residents in 1905, and reached official “city” status in 1960 when the population reached over 5,000 residents. The origins of the village were very much influenced by the Van Sweringen brothers, who developed nearby Shaker Heights. In fact, because of the Van Sweringen’s plans to develop larger more exclusive parcels, much of Beachwood’s residential areas were not developed until the 1940s and 50s after the Van Sweringen’s land was sold off and the company filed for bankruptcy. Like many surrounding communities, Beachwood was very much still a farming village until the 1940s.

Beachwood has a long history of a “business-friendly” reputation; dating back to the 1920s many businesses chose to locate with the village due to the low tax rate. Today over 2,500 businesses call Beachwood home, including several large corporations such as Eaton Corporation, DDR Corporation, Cleveland Clinic satellite offices, BASF, and Tremco.

In the mid-1950s the Village of Beachwood requested the County’s Planning Commission to assist in planning for Beachwood’s future, as many developers had approached the Village with various plans for commercial and retail developments. The County advised specifically that the south side of Chagrin Blvd. (between Green and Richmond Roads) be devoted to the location of office buildings and the north side be devoted to a shopping plaza, apartments, and additional office buildings. The County also advised the development of Commerce Park, which is the target area for the establishment of a Community Reinvestment Area. In 1959, Commerce Park was originally planned as a 200-acre industrial park and was zoned for light manufacturing and warehousing.

The residential section of our proposed Community Reinvestment Area was also developed in the mid-1950s as an 86 parcel residential development known at that time as the “PAR Development.” The homes are situated on two streets – Concord Drive and Beacon Drive. The parcels average approximately .40 acres each.

Opportunity for development on vacant land in Beachwood is minimal. Any parcels of vacant land are held by longtime property owners that have historically not been opted to sell. New construction or redevelopment tends to be confined mainly to areas where existing structures are present.

Commerce Park Road, Mercantile Road, and Highpoint Road comprise the commercial section of the proposed Community Reinvestment Area. When initially constructed in the 1950s, warehousing and light industrial were the two main uses at that time. With that in mind, the structures sprawl across each parcel at a very low density with just a single floor of constructed space. In recent decades, Beachwood has evolved into an epicenter for technology, finance, medicine, law, and real estate development. The single floor uses for warehousing and light industrial are all but obsolete in Beachwood's current business climate and have become a major limitation for potential tenants.

Future Plans:

In 2015, the City of Beachwood adopted a new Master Plan. Throughout the plan many goals were identified, including the diversification of housing options, offering tax abatements for residential improvements, reimagining Richmond Road as a multi-family corridor, and removing barriers to the adaptive reuse of older buildings.

The Master Plan specifically identified the establishment of a Community Reinvestment Area as an Economic Development tool to link incentives to the City's identified goals.

Location:

Beachwood is located eleven miles east of downtown Cleveland in Cuyahoga County. The City encompasses 5.2 square miles and is conveniently situated just west of I-271.

Demographics:

The population of Beachwood was initially very slow to grow, and in fact as recently as 1936 just 237 residents were reported. In 1960 the Village's population reached over 6,000 and with that Beachwood became a City. The population reached its peak in 2000 at 12,186 residents. As of the 2010 Census, the population was 11,953, which was a decrease of 2% from 2000. The City's population is expected to dip again with a projected population of 11,707 for 2016. This is a projected 2% decline from 2010 and a 4% decrease from 2000.

The City of Beachwood is aging, with 30% of our population at ages 65 years and older. This is quite high as compared to Cuyahoga County with just 15% of residents being 65 years and older.

The number of households has declined slightly from 2000 to 2013 with a 3% decrease of 5,074 to 4,932.

While Beachwood's ethnicity is mainly Caucasian (80%), comparisons from 2013 to 2009 show that diversity is increasing with the population of a number of other races growing - including black, Asian, Hispanic, and other cultural backgrounds.

Unemployment in Beachwood is 2.4% in 2015, as compared to 3.0% in 2009.

Historic Buildings:

With the majority of Beachwood's homes and non-residential structures being built in the mid-20th century, Beachwood has just one area that has been designated as an Historic District. The Elizabeth Blossom residential subdivision and athletic building known as "The Hangar" are located in a small neighborhood near the intersection of Cedar and Richmond Roads. The homes and "The Hangar" were constructed during the 1920s and 1930s.

Much of the remainder of Beachwood's homes and non-residential structures were built throughout the 1950s-60s making them at least 50 years old, including the targeted area for the proposed Community Reinvestment Area.

Beachwood Existing Housing Characteristics:

According to the 2010 Census, Beachwood has a total of 5,483 housing units, of which 5,064 (or 93%) are occupied. Of the occupied housing units, 3,271 (57%) are owner occupied. Owner-occupied housing is down 3% from 2000, renter-occupied housing is up to 35% from 33%, and vacant residences increased from 7% to 8%. Beachwood's housing stock consists mainly of two types – single family detached, which comprises 53% of the housing stock, while residential structures consisting of at least ten or more units account for 40%. The majority of Beachwood's housing stock is older, with 31% of residential structures built between 1940 and 1959, and 33% built between 1960 and 1979.

	2000	2010	% of Units 2000	% of Units 2010
Total Dwelling Units	5,458	5,483		
<i>Owner-occupied</i>	3,271	3,152	60%	57%
<i>Renter occupied</i>	1,813	1,912	33%	35%
Vacant Dwelling Structures	374	419	7%	8%
Units in Structure				
<i>Single-family detached</i>	2886		53%	
<i>Single-family attached</i>	348		6%	
<i>Two-family</i>	0		0%	
<i>3-4 Units</i>	17		0%	
<i>5-9 Units</i>	18		0%	
<i>10-19 Units</i>	188		3%	
<i>20+ Units</i>	1995		37%	

Sources: US Census/NEO Cando

Property Values and Investments:

Median residential sale prices throughout the City of Beachwood have increased 12% from an average sale price of \$250,000 in 2007 to \$280,000 in 2017. However, sales on the two streets within our proposed CRA (Beacon and Concord) decreased in average value by 12% from \$181,366 in 2007 to \$158,093 in 2017. The number of building permits pulled on individual properties in this area (86 residences) was seven in 2015, ten in 2016, and ten in 2017. The value of building permits is well below the amount spent in the remainder of the city. For the past three years (2015-2017), the average permit value for this area is \$6,000, while the rest of the city averages more than six times that amount at \$41,000.

The number of commercial building permits pulled in this area (85 structures) in 2015 was ten, seven in 2016, and nine in 2017. The average permit value in the proposed CRA is \$82,000. Throughout the rest of the city, the average permit value is more than four times that amount at \$385,000.

The City of Beachwood inspects commercial properties each year, and residential properties every four years. In 2014 the Concord-Beacon residential area was inspected. There were a total of 197 failed inspections in 2014, and 49 (25%) were located on either Concord or Beacon Drive. From 2015-2017 there were a total of 243 failed commercial property inspections. Of those, 83 (or 34%) were located in the proposed CRA.

Zoning:

There are five different zoning districts within the proposed Community Reinvestment Area:

U1A1 – This district is currently zoned for single-family detached housing and includes parcels on both Concord and Beacon Roads as well as a large space of vacant land adjacent to the residential development.

U3C – Planned Multi-family Residential District is for high density residential uses - Located at the intersection of Chagrin Blvd. and Green Road – this parcel is the only one in the proposed CRA that has seen recent investment with the construction of the Vue apartment complex in 2015.

U5 – Public and institutional – This district is reserved for education, cultural, religious and government uses. The U5 parcel within the proposed CRA houses a water tower that is owned by the City of Cleveland.

U7A – General Office – Multi-story office structures lining almost the entirety of the south side of Chagrin Blvd. between Green and Richmond Roads.

U8 – Storage and Manufacturing – houses mainly one-story warehouse structures

Major Industries:

Beachwood is home to several major corporate and private entity offices such as DDR, Austin Powder, Eaton Corp., and the Jewish Federation of Cleveland. Within the proposed CRA there are two mid-sized companies; Tremco, a supplier of sealant and weatherproofing construction applications, and BASF, a producer of chemicals. Both companies have been present at these sites for decades. Aside from these there are no other major industries in the CRA because the existing commercial structures are obsolete for today's business needs and the needs of the industries that Beachwood strives to attract. The proposed CRA is the future home of a compounding pharmacy, Lee Silsby, which has plans for renovations to an existing building that would benefit from the establishment of this proposed CRA.

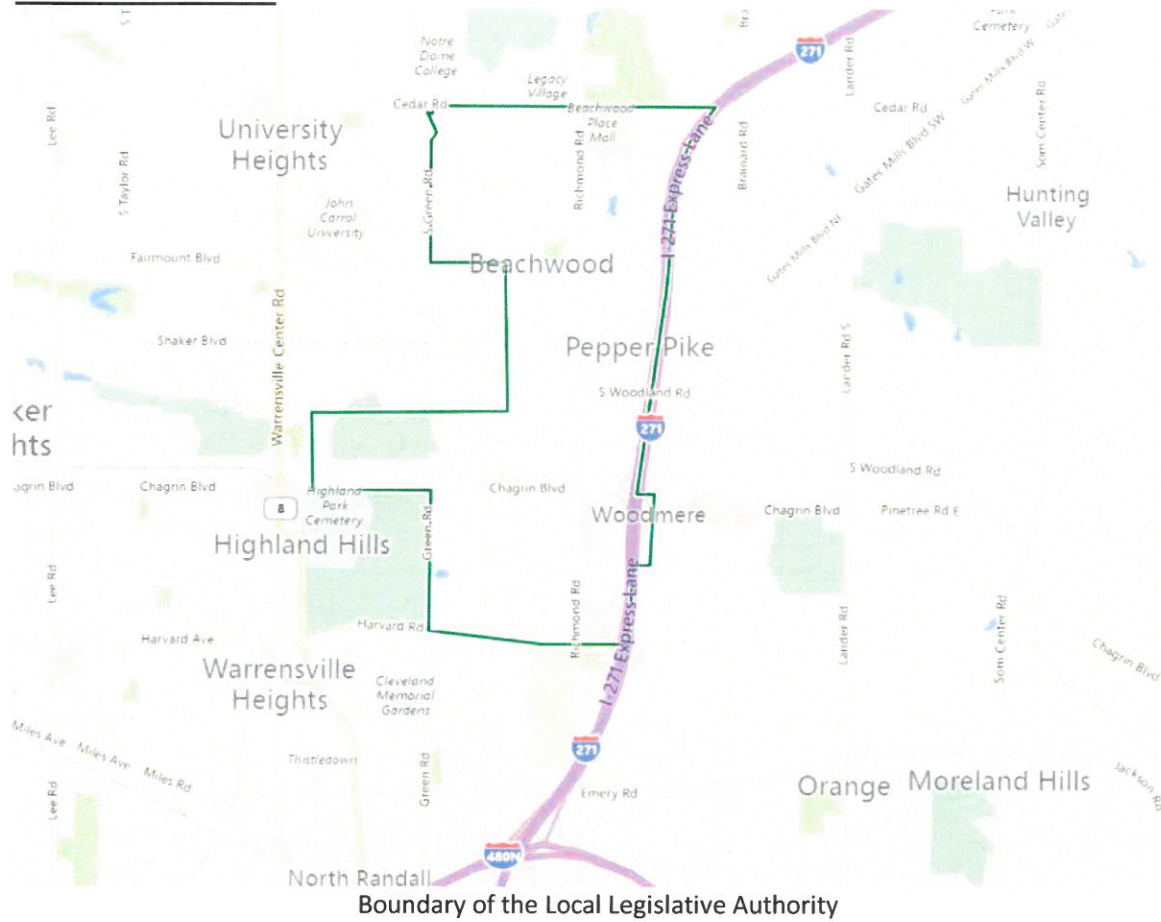
Vacant Land:

There is a minimal amount of vacant land available for development throughout Beachwood, and many of the parcels that are vacant are owned by larger entities like the Cleveland Clinic and the Jewish Community Center. There is one large parcel of land (parcel 742-27-012) in the proposed CRA that is located between the residential section and the commercial section. At the north side of the parcel fronting Chagrin Blvd. is a structure that is home to the First Catholic Slovak Ladies Association. That is the only structure on the parcel and the entire parcel is over 32 acres. As the parcel is zoned residential, if the land were to be sold, it would be an ideal opportunity to diversify the city's housing stock, which was an identified goal in the 2015 Master Plan, or to rezone the area and create a mixed-use development with both residential and commercial uses.

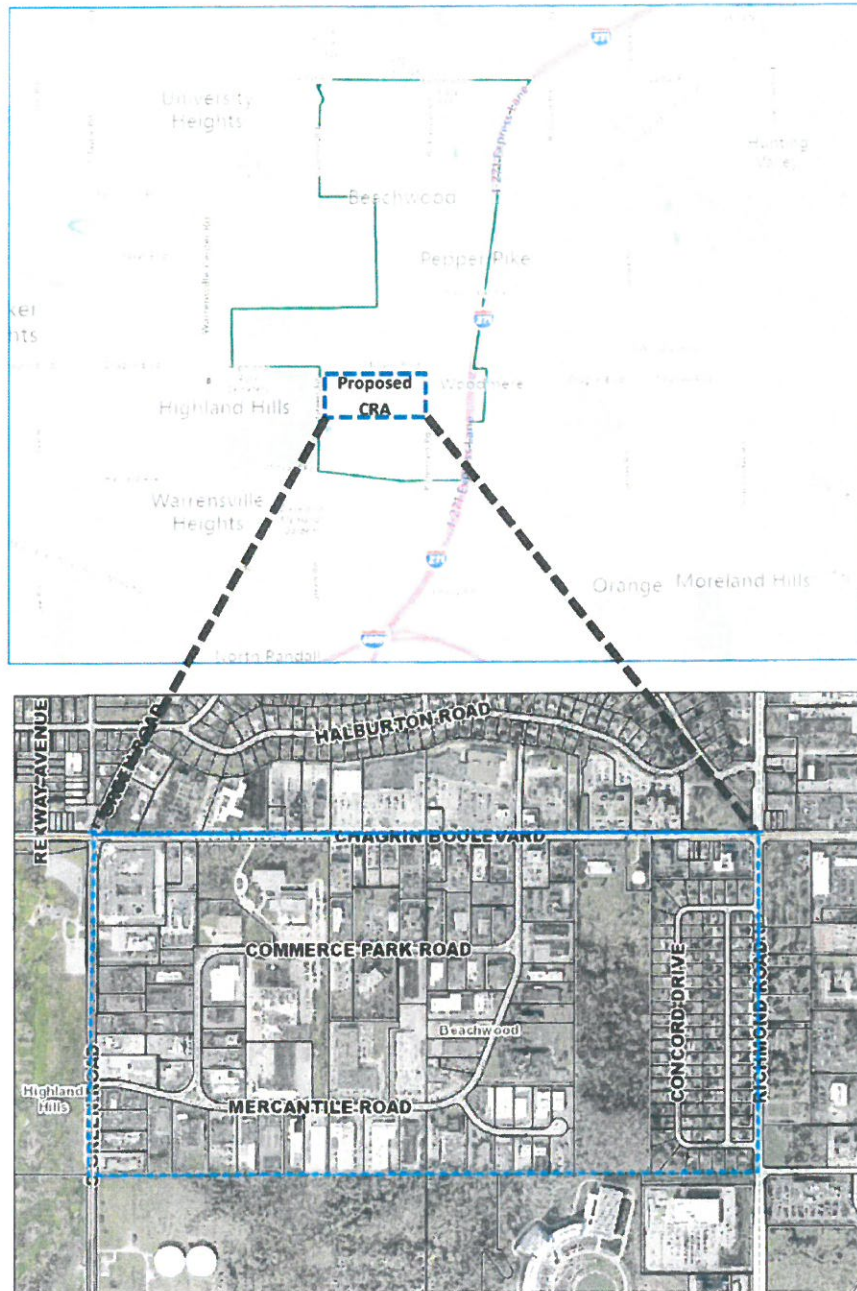
Conclusion:

While development takes place around Commerce Park in the City of Beachwood, development within Commerce Park and the Beacon/Concord residential area has stagnated since its initial conception decades ago. Adding the benefits of an established Community Reinvestment Area to the city's toolkit will allow Beachwood to assist building owners and developers in creating a business climate that works for today's industry needs. It will also allow homeowners in the residential section to make needed investments and increase their property values. Because of the 12% decrease in residential property values over the past decade (as compared to the 12% increase in the rest of the city), the high concentration of failed inspections in both the residential (25%) and commercial (34%) areas and the low average building permit value (\$6,000) as compared to the rest of the city (\$41,000), the City of Beachwood finds that the proposed CRA meets the criteria for a Community Reinvestment Area as defined by the Ohio Revised Code Sections 3735.65-70.

Attachment E-1



Attachment E-2



Boundary of Proposed CRA

CITY OF Beachwood

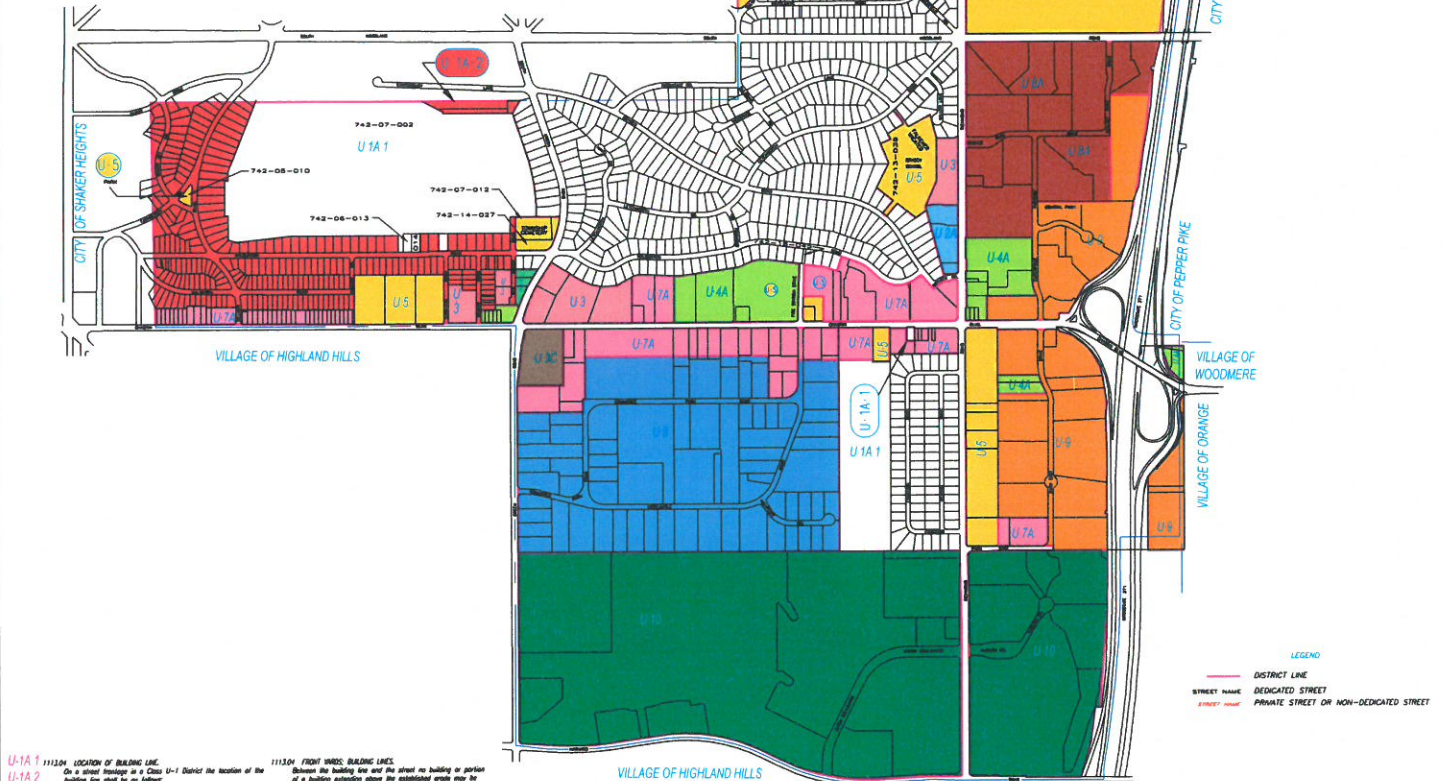
MERLE S. GORDEN, MAYOR

ZONING MAP

SHOWING ALL AMENDMENTS TO AND INCLUDING ORDINANCE
NO. 2002-15, ADOPTED BY THE COUNCIL OF THE CITY OF
BEACHWOOD, OHIO
APPROVED BY THE PLANNING COMMISSION OF THE CITY OF
BEACHWOOD, OHIO
MAP UPDATE: OCTOBER 28, 2004.

MAP REVISED AUGUST 2015

CODE USE / AREA	DISTRICT	MINIMUM LOT AREA SQ. FT.	STREET FRONTAGE FT.	MINIMUM BUILDING AREA SQ. FT.	MINIMUM BUILDING HEIGHT FEET	PARKING
U1A1	SINGLE FAMILY	10,000	35	3,500	35	
U1A2	SINGLE FAMILY	10,000	35	3,500	35	
U2	SINGLE FAMILY	10,000	35	3,500	35	
U2A	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U3	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U3A	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U3B	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U4A	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U4B	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U5	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7A	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7B	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7C	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7D	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7E	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7F	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7G	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7H	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7I	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7J	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7K	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7L	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7M	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7N	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7O	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7P	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7Q	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7R	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7S	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7T	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7U	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7V	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7W	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7X	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7Y	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	
U7Z	ATTACHED SINGLE FAMILY	10,000	35	3,500	35	

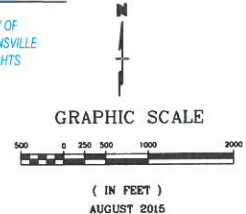


U1A1
U1A2

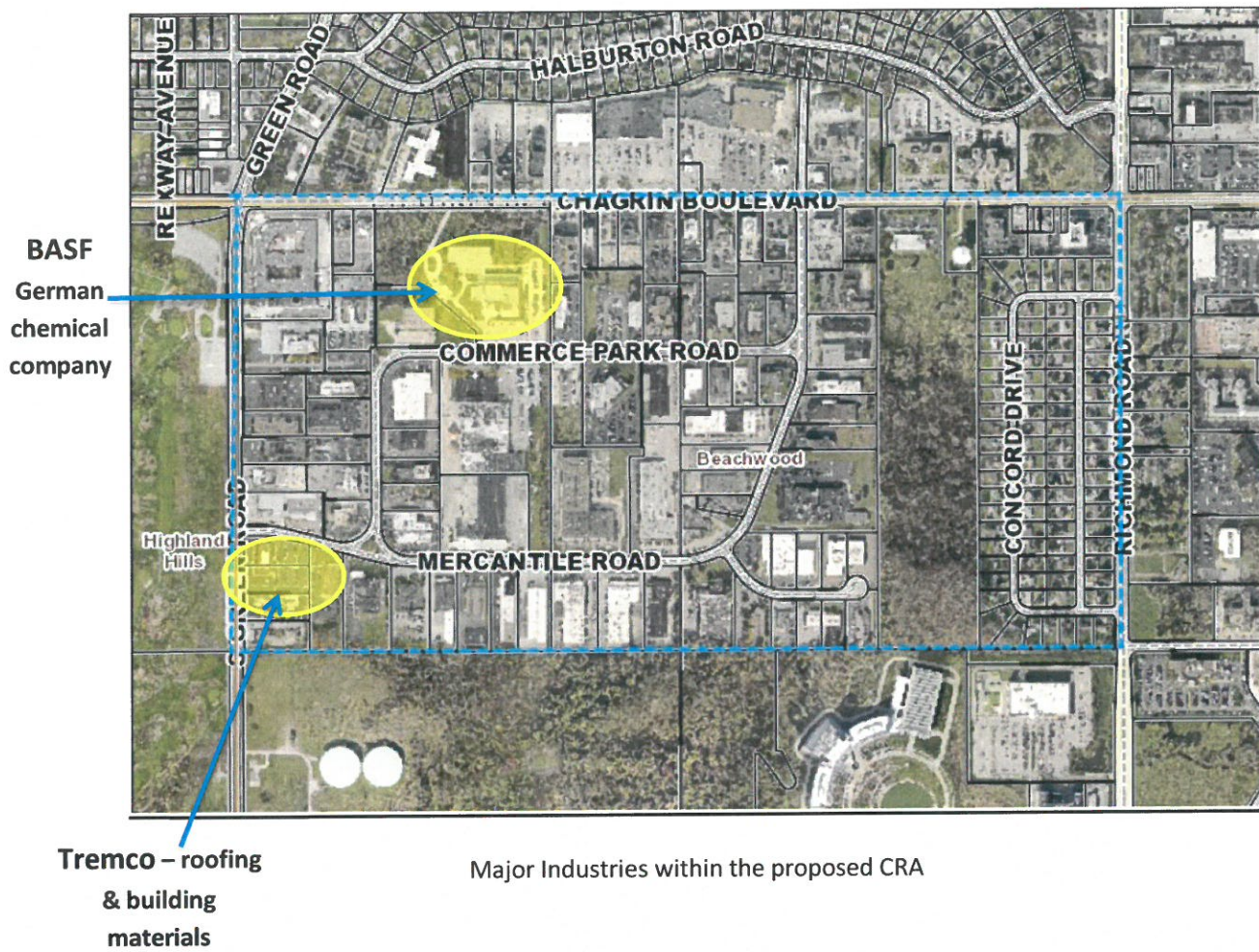
1113.04. FRONT YARD, BUILDING LINES.
On a street building is a Class U-1 District the location of the building line shall be as follows:
(a) On a street building other than the side line of a corner lot, the distance of the building line back from the street right-of-way line shall be twenty percent (20%) of the average depth of the lot or thirty-five (35) feet, whichever is greater.
(b) In a Class U-1 District along the side line of a corner lot, the distance of the building line back from the street right-of-way line shall be twenty percent (20%) of the average width of such lot or thirty-five (35) feet, whichever is greater.

U10

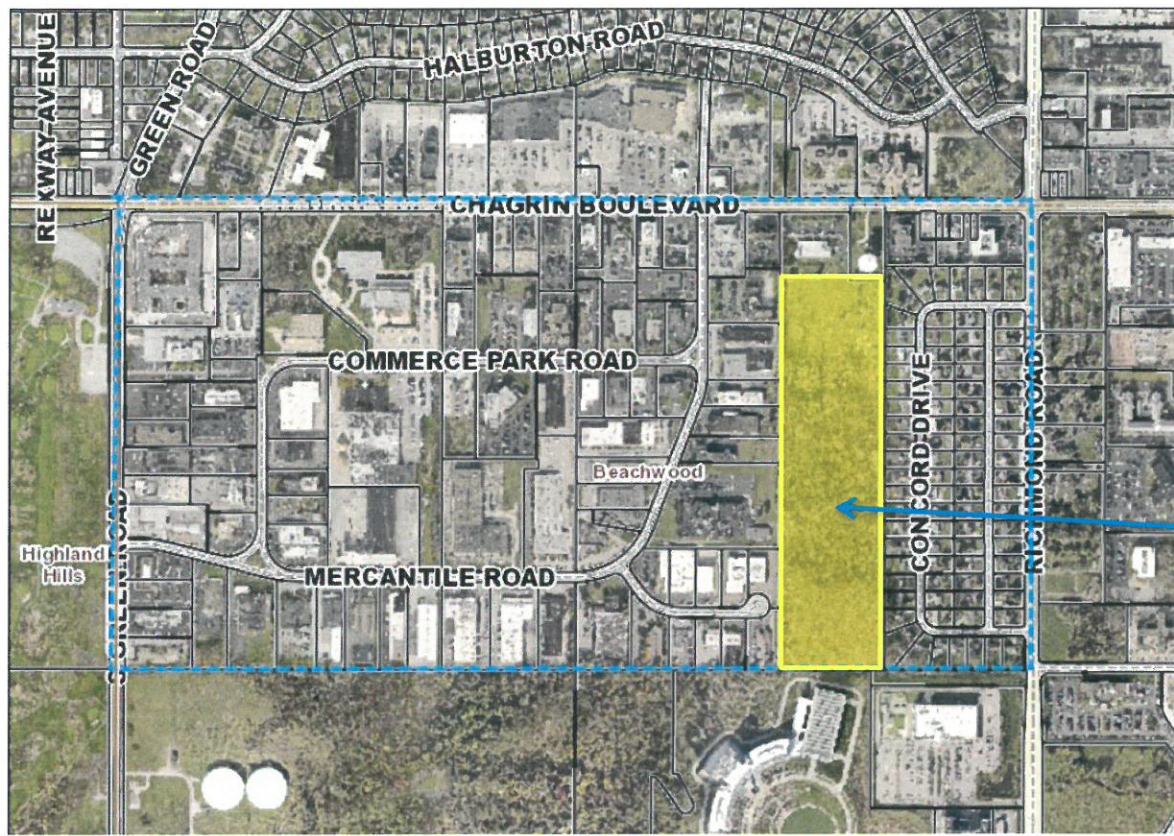
Permitted uses in this U-10 District shall include the following, with the exception of those in this chapter or interpreted by ordinance:
(1) Class P-1 (One-Family House).
(2) Class P-2 (Two-Family Building).
(3) Class P-3 (Three-Family Building).
(4) Class P-4 (Four-Family Building).
(5) Class P-5 (Five-Family Building).
(6) Class P-6 (Six-Family Building).
(7) Class P-7 (Seven-Family Building).
(8) Class P-8 (Eight-Family Building).
(9) Class P-9 (Nine-Family Building).
(10) Class P-10 (Ten-Family Building).
(11) Class P-11 (Eleven-Family Building).
(12) Class P-12 (Twelve-Family Building).
(13) Class P-13 (Thirteen-Family Building).
(14) Class P-14 (Fourteen-Family Building).
(15) Class P-15 (Fifteen-Family Building).
(16) Class P-16 (Sixteen-Family Building).
(17) Class P-17 (Seventeen-Family Building).
(18) Class P-18 (Eighteen-Family Building).
(19) Class P-19 (Nineteen-Family Building).
(20) Class P-20 (Twenty-Family Building).
(21) Class P-21 (Twenty-One-Family Building).
(22) Class P-22 (Twenty-Two-Family Building).
(23) Class P-23 (Twenty-Three-Family Building).
(24) Class P-24 (Twenty-Four-Family Building).
(25) Class P-25 (Twenty-Five-Family Building).
(26) Class P-26 (Twenty-Six-Family Building).
(27) Class P-27 (Twenty-Seven-Family Building).
(28) Class P-28 (Twenty-Eight-Family Building).
(29) Class P-29 (Twenty-Nine-Family Building).
(30) Class P-30 (Thirty-Family Building).
(31) Class P-31 (Thirty-One-Family Building).
(32) Class P-32 (Thirty-Two-Family Building).
(33) Class P-33 (Thirty-Three-Family Building).
(34) Class P-34 (Thirty-Four-Family Building).
(35) Class P-35 (Thirty-Five-Family Building).
(36) Class P-36 (Thirty-Six-Family Building).
(37) Class P-37 (Thirty-Seven-Family Building).
(38) Class P-38 (Thirty-Eight-Family Building).
(39) Class P-39 (Thirty-Nine-Family Building).
(40) Class P-40 (Forty-Family Building).
(41) Class P-41 (Forty-One-Family Building).
(42) Class P-42 (Forty-Two-Family Building).
(43) Class P-43 (Forty-Three-Family Building).
(44) Class P-44 (Forty-Four-Family Building).
(45) Class P-45 (Forty-Five-Family Building).
(46) Class P-46 (Forty-Six-Family Building).
(47) Class P-47 (Forty-Seven-Family Building).
(48) Class P-48 (Forty-Eight-Family Building).
(49) Class P-49 (Forty-Nine-Family Building).
(50) Class P-50 (Fifty-Family Building).
(51) Class P-51 (Fifty-One-Family Building).
(52) Class P-52 (Fifty-Two-Family Building).
(53) Class P-53 (Fifty-Three-Family Building).
(54) Class P-54 (Fifty-Four-Family Building).
(55) Class P-55 (Fifty-Five-Family Building).
(56) Class P-56 (Fifty-Six-Family Building).
(57) Class P-57 (Fifty-Seven-Family Building).
(58) Class P-58 (Fifty-Eight-Family Building).
(59) Class P-59 (Fifty-Nine-Family Building).
(60) Class P-60 (Sixty-Family Building).
(61) Class P-61 (Sixty-One-Family Building).
(62) Class P-62 (Sixty-Two-Family Building).
(63) Class P-63 (Sixty-Three-Family Building).
(64) Class P-64 (Sixty-Four-Family Building).
(65) Class P-65 (Sixty-Five-Family Building).
(66) Class P-66 (Sixty-Six-Family Building).
(67) Class P-67 (Sixty-Seven-Family Building).
(68) Class P-68 (Sixty-Eight-Family Building).
(69) Class P-69 (Sixty-Nine-Family Building).
(70) Class P-70 (Seventy-Family Building).
(71) Class P-71 (Seventy-One-Family Building).
(72) Class P-72 (Seventy-Two-Family Building).
(73) Class P-73 (Seventy-Three-Family Building).
(74) Class P-74 (Seventy-Four-Family Building).
(75) Class P-75 (Seventy-Five-Family Building).
(76) Class P-76 (Seventy-Six-Family Building).
(77) Class P-77 (Seventy-Seven-Family Building).
(78) Class P-78 (Seventy-Eight-Family Building).
(79) Class P-79 (Seventy-Nine-Family Building).
(80) Class P-80 (Eighty-Family Building).
(81) Class P-81 (Eighty-One-Family Building).
(82) Class P-82 (Eighty-Two-Family Building).
(83) Class P-83 (Eighty-Three-Family Building).
(84) Class P-84 (Eighty-Four-Family Building).
(85) Class P-85 (Eighty-Five-Family Building).
(86) Class P-86 (Eighty-Six-Family Building).
(87) Class P-87 (Eighty-Seven-Family Building).
(88) Class P-88 (Eighty-Eight-Family Building).
(89) Class P-89 (Eighty-Nine-Family Building).
(90) Class P-90 (Ninety-Family Building).
(91) Class P-91 (Ninety-One-Family Building).
(92) Class P-92 (Ninety-Two-Family Building).
(93) Class P-93 (Ninety-Three-Family Building).
(94) Class P-94 (Ninety-Four-Family Building).
(95) Class P-95 (Ninety-Five-Family Building).
(96) Class P-96 (Ninety-Six-Family Building).
(97) Class P-97 (Ninety-Seven-Family Building).
(98) Class P-98 (Ninety-Eight-Family Building).
(99) Class P-99 (Ninety-Nine-Family Building).
(100) Class P-100 (One Hundred-Family Building).



Attachment E-4



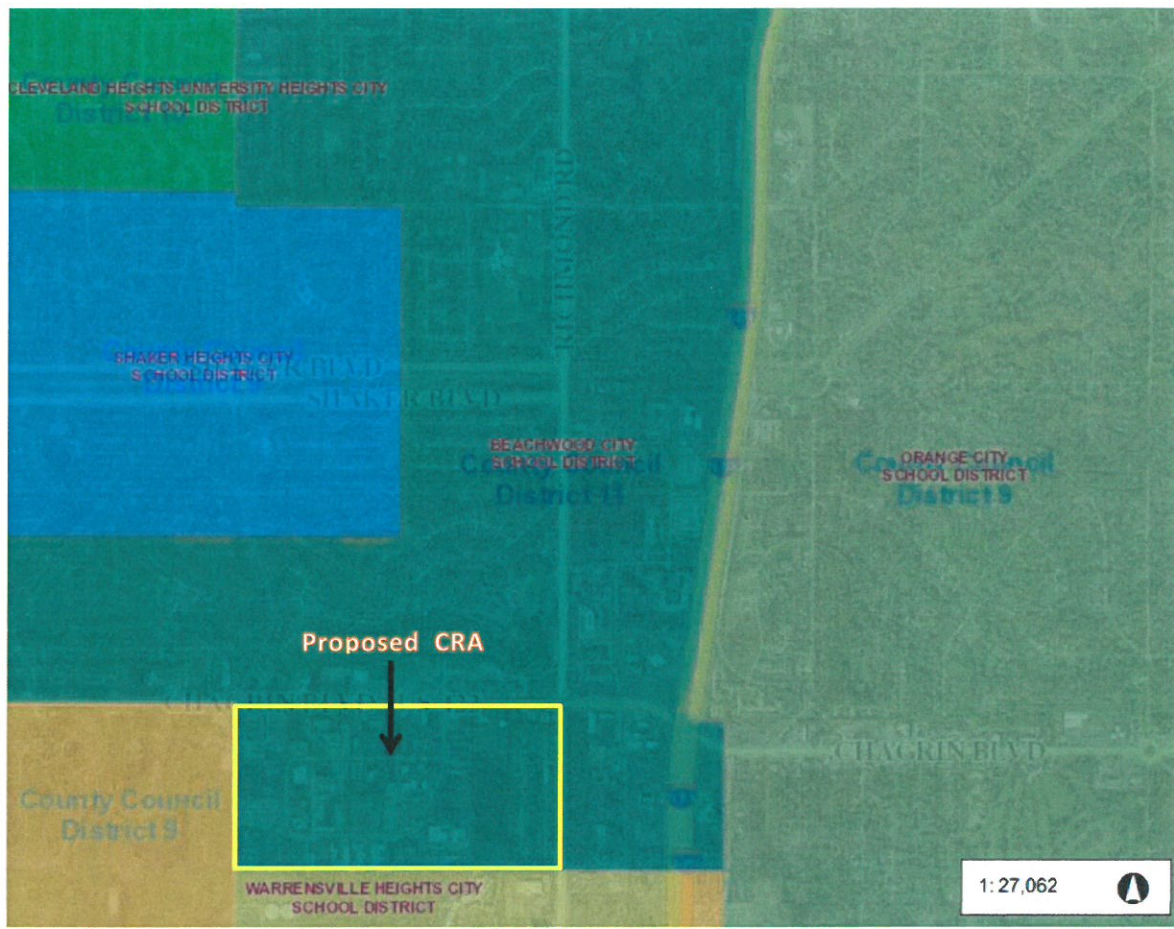
Attachment E-5



Approx 30
acres
owned by
the First
Ladies
Slovak
Assoc.

Vacant Land within the proposed CRA

Attachment E-6



School District Boundary Map

Attachment F

The proposed Community Reinvestment Area for the City of Beachwood is bounded by Chagrin Boulevard at the north, Richmond Road at the east, South Green Road at the west, and to the south – parcels located on the south side of Mercantile and Highpoint Roads, parcel 74226054, and parcels at the southern end of Concord Drive.

Attachment G

Beachwood City School District is the only school district present within the proposed CRA, as depicted in Attachment E-6.

Attachment H-1 (Evidence of School Board notification)

Unless an agreement were to be reached that would exceed a 50%, 10-year exemption, no notification is necessary at this time.

Attachment H-2 (School board for income tax sharing)

No procedure has been implemented or is planned to be implemented.

Attachment H-3 (outline of involvement with School Board)

Unless an agreement were to be reached that would exceed a 50%, 10-year exemption, the involvement of the Beachwood City School district is not necessary at this time.

Contact Information (Attachment I)

a) County Auditor:

Lisa Rocco, Director of Operations
Cuyahoga County
2079 East 9th Street
Cleveland, OH 44115
216-443-5730

b) Township Clerk:

Whitney Crook, Clerk of Council
City of Beachwood
25325 Fairmount Boulevard
Beachwood, OH 44122
216-595-5493

c) County Commissioner:

Armond Budish, County Executive
Cuyahoga County
2079 East 9th Street
Cleveland, OH 44115
216-443-7178

d) City of Beachwood Mayor:

Mayor Martin Horwitz
City of Beachwood
25325 Fairmount Boulevard
Beachwood, OH 44122
216-292-1901

e) Beachwood City Schools Superintendent

Robert Hardis
Beachwood City Schools
24601 Fairmount Boulevard
Beachwood, OH 44122
216-464-2600

f) State Representative

Kent Smith, Representative District 8
77 South High St.
Columbus, OH 43215
614-466-5441

Contact Information (Attachment I continued)

g) State Senator

Kenny Yuko, District 25
1 Capitol Square, 3rd Floor
Columbus, OH 43215
614-466-4583











12/07/2016





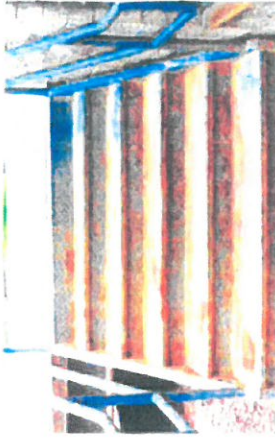
View From: 112 24-008 24110 Chapter Blvd - Peaslee Building Co.



View From: 112 24-008 24110 Chapter Blvd - Peaslee Building Co.



View From: 112 24-008 24110 Chapter Blvd - Peaslee Building Co.



View From: 112 24-008 24110 Chapter Blvd - Peaslee Building Co.



View From: 112 24-008 24110 Chapter Blvd - Peaslee Building Co.



View From: 112 24-008 24110 Chapter Blvd - Peaslee Building Co.



Google Maps



Imagery ©2017 Google, Map data ©2017 Google 20 ft



