Linda Allen *Councilmember*

Sharon Carmack *Councilmember*

Brenda Combs Councilmember



Lisa Fedor *Councilmember*

Maryan Harrison *Councilmember*

Rolin Spicer Vice-Mayor

CITY OF SOUTH LEBANON REGULAR MEETING OF CITY COUNCIL AGENDA

SEPTEMBER 19, 2024, at 6:00 P.M.

- 1. Meeting Call to Order
- 2. Roll Call
- 3. Prayer/Pledge of Allegiance
- 4. Guests
- 5. Floor open to the public
- 6. New Business Emergency Resolution 2024-33, accepting amounts and rates as determined by the Warren County Budget Commission for fiscal year 2025

Emergency Ordinance 2024-20, creating the position of Deputy Director of Finance / Tax Administrator and establishing compensation and fund allocation

Motion to Approve Invoices

Approval of Law Director Invoice

Motion to Approve the August Financial Statements

<u>Approval of Meeting Minutes:</u> Regular Meeting – August 15, 2024

- 7. Old Business: Emergency Ordinance 2024-19, Second Reading, accepting the Frank Snyder Park Annexation of 21.5659 acres in Union Township, Warren County, Ohio to the City of South Lebanon
- 8. Communications and reports from City Officials and Committees
 - a. Mayor d. Law Director
 - b. Director of Finance e. Sergeant
 - c. Administrator f. Council Members

9. Executive Session:

10. Adjournment

Members of the public may address the Council during the Open Forum segment of the agenda. Citizens desiring to address the Council must sign the visitor sheet and state their name and address prior to speaking. Comments are limited to three minutes. Large groups are encouraged to select no more than three spokespersons.



City of South Lebanon 10 N. High Street, South Lebanon, Ohio 45065 513-494-2296 fax: 513-494-1656 www.southlebanonohio.org

MEMORANDUM

| To: | Mayor & City Council |
|----------|--|
| CC: | Jerry Haddix, City Administrator Andrew Meier, Law Director |
| From: | Tina Williams, Director of Finance |
| Date: | September 17, 2024 |
| Subject: | Accepting FY25 Tax Rates |

On July 3, 2024, the Council approved Resolution 2024-25 to submit the Fiscal Year 2025 Tax Budget to the County Auditor.

The FY 2025 Tax Budget has been approved by the Warren County Budget Commission and we have received the Official Certificate of Estimated Resources from the County Auditor. The Official Certificate certifies the amount of estimated Property Taxes and Local Government Funds the City is expected to receive next year. The amounts are highlighted on the attached certificate.

The County has estimated a 34% increase in our property tax revenue from \$214,000 (2024) to \$287,000 (2025). The increase is due to our assessed property values increasing by \$58.6 million. Our overall assessed property value is estimated to be \$232,317,359 for tax year 2024, collection year 2025. The prior year assessed value was \$1173,656,670. Of the \$58.6 million increase, \$45.4 million was in residential property values located in Hamilton Township. The property assessed values for both years are attached for comparison.

The County Auditor is estimating the city will receive \$29,059 in Local Government funding in 2025. This is a slight (1.3%) increase over the 2024 amount, \$28,683.

Resolution 2024-33 accepts the amounts and rates as determined by the County Budget Commission and certifies them to the County Auditor. The deadline to certify the rates is October 1, 2024, therefore I have requested the resolution be passed as an emergency.

RESOLUTION 2024-33

EMERGENCY RESOLUTION ACCEPTING THE AMOUNTS AND RATES AS DETERMINED BY THE WARREN COUNTY BUDGET COMMISSION AND AUTHORIZING THE NECESSARY TAX LEVIES AND CERTIFYING THEM TO THE COUNTY AUDITOR, AND DECLARING AN EMERGENCY

The Governing Board of the City of South Lebanon, Warren County, Ohio, met in regular session on the

19th day of September 2024, at the office of South Lebanon Council Chambers with the following members present:

Ms. Linda Allen Ms. Sharon Carmack Ms. Brenda Combs Ms. Lisa Fedor Mr. Maryan Harrison Mr. Rolin Spicer

Mr. / Ms. _____ moved the adoption of the following Resolution:

RESOLVED, Council of the City of South Lebanon, Warren County, Ohio, in accordance with the provisions of law has previously adopted a Tax Budget for the next succeeding fiscal year commencing January 1st, 2025; and

WHEREAS, on August 28,2024, the Budget Commission of Warren County, Ohio, has certified its action thereon to this Council together with an estimate by the County Auditor of the rate of each tax necessary to be levied by this Council, and what part thereof is without, and what part within, the ten mill limitation; and

WHEREAS, immediate action is required to submit said acceptance to the Warren County Auditor by the October 1st, 2024 deadline and such action is necessary in order to preserve the public peace, health, safety or welfare of the City, THEREFORE BE IT RESOLVED, by the Council of South Lebanon, Warren County, Ohio, that the amounts and rates, as determined by the Budget Commission in its certification, be and the same are hereby accepted' and be it further

RESOLVED, that this Resolution is hereby declared to be an emergency measure in accordance with Ohio Rev. Code § 731.30 for the immediate preservation of the public peace, health, safety and general welfare; and, this Resolution shall be in full force and effective immediately upon its passage.

RESOLVED, that there be and is hereby levied on the tax duplicate of said City the rate of each tax necessary to be levied within and without the ten mill limitation as follows:

SCHEDULE A

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

| | | | County | Auditor's |
|---------|-------------------------|------------------------|-----------|---------------|
| | | | | f Tax Rate to |
| | Amount Approved by | Amount to be Derived | | Levied |
| | Budget Commission | from Levies Outside 10 | Inside 10 | Outside 10 |
| FUND | Inside 10 M. Limitation | M. Limitation | M. Limit | M. Limit |
| | Column I | Column II | | IV |
| General | 287,000.00 | | 1.2 / 1.3 | |
| | | | | |
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| TOTAL | \$ 287,000.00 | \$- | 0.00 | 0.00 |

SCHEDULE B LEVIES OUTSIDE 10 MILL LIMITATION, EXCLUSIVE OF DEBT LEVIES

| FUND | Maximum Rate Authorized to Be levied | Co. Auditor's Est. of Yield of Levy (Carry to Schedule A, Column II) |
|------|---|--|
| | | , |
| | | |

and be it further

RESOLVED, that the Clerk of Council be and she is hereby directed to certify a copy of this

Resolution to the Warren County Auditor immediately after its passage.

| Mr. /Ms. | seconded the Resolution and the roll being called |
|----------|---|
| | - |

upon its adoption the vote resulted as follows:

- Ms. Allen, _____
- Ms. Carmack, _____
- Ms. Combs, _____
- Ms. Fedor, _____
- Ms. Harrison, _____
- Mr. Spicer, _____
- Adopted the 19th day of September, 2024

Prepared by and approved as to form:

Law Director, Andrew Meier

Mayor

Clerk of Council of the Governing Board of City of South Lebanon, Warren County, Ohio

OFFICIAL CERTIFICATE OF THE COUNTY BUDGET COMMISSION

The Budget Commission of <u>WARREN COUNTY</u>. Ohio, hereby makes the following Official Certificate of Estimated Resources for the **VILLAGE OF SOUTH LEBANON**, for the fiscal year beginning January 1st, 2025.

| | FUND | Unencumbered Balance Jan. 1st, 2025 | Property Tax | Other Sources | Total |
|-------|----------------------------------|---|--------------|---------------|---------------|
| Gen | eral Fund | 3,677,146.17 | 287,000.00 | 3,878,797.00 | |
| | (Local Government) | | | 29,059.08 | 7,872,002.25 |
| | ial Revenue | | | | |
| 1 | Street | 914,422.52 | XXXX | 375,000.00 | 1,289,422.52 |
| 2 | Shepherd's Crossing Improvements | 4,059.79 | XXXX | 0.00 | 4,059.79 |
| 3 | Permissive Tax | 101,380.77 | XXXX | 45,000.00 | 146,380.77 |
| 4 | Homestead Improvements | 26,421.68 | XXXX | 0.00 | 26,421.68 |
| 7 | Park | 24,617.92 | XXXX | 15,000.00 | 39,617.92 |
| 8 | DUI | 1,625.00 | XXXX | 0.00 | 1,625.00 |
| 9 | Mayor's Court Special Projects | 2,073.93 | XXXX | 2,000.00 | 4,073.93 |
| 10 | TIF Fund / Rivers Crossing | 1,000.00 | XXXX | 1,300,000.00 | 1,301,000.00 |
| 11 | Indigent Alcohol Monitoring | 1,752.65 | XXXX | 0.00 | 1,752.65 |
| 12 | American Rescue Act | 0.00 | XXXX | 0.00 | 0.00 |
| 13 | TIF Fund/Riverside | 1,000.00 | XXXX | 950,000.00 | 951,000.00 |
| 14 | OneOhio Opioid Settlement | 2,076.74 | XXXX | 500.00 | 2,576.74 |
| Ente | rprise Funds | | | | |
| 1 | Water | 2,604,604.92 | XXXX | 1,115,000.00 | 3,719,604.92 |
| 2 | Sewer | 5,171,700.27 | XXXX | 1,513,000.00 | 6,684,700.27 |
| 3 | Sanitation | 337,890.18 | XXXX | 537,000.00 | 874,890.18 |
| 4 | Deposit Trust | 103,878.84 | XXXX | 19,000.00 | 122,878.84 |
| 5 | Utility Maintenance Reserve | 132,024.81 | XXXX | 5,000.00 | 137,024.81 |
| Capi | tal Projects Fund | | | | |
| | Mroow Road Reconstruction | 0.00 | XXXX | 519,244.00 | 519,244.00 |
| Debt | Service | | | | |
| 1 | Municipal Building BANS | 0.00 | XXXX | 0.00 | 0.00 |
| Custo | odial Fund | | | | |
| 1 | Unclaimed Funds | 1,863.89 | XXXX | 1,000.00 | 2,863.89 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | 23,701,140.16 |
| | TOTALS | 13,109,540.08 | 287,000.00 | 10,304,600.08 | 23,701,140.16 |

The Budget Commission further certifies that its action on the foregoing budget and the County Auditor's estimate of the rate of each tax necessary to be levied within and without the 10 mill limitation is set forth on the proper columns of the preceding pages, and the total amount approved for each fund must govern the amount of appropriation from such fund.

Aug. 28, 2024

Budget Commission

| WARREN COUNTY | ESTIMATED PROPER | TY TAX INCOME FO | OR SOUTH LEBANON | | ATION | | |
|---------------------------------|------------------|------------------|----------------------------|----------|--------------|-----|-------------------------|
| 2024 TENTATIVE TAX YEAR | | | | EST | IMATED TAXES | CER | TIFICATION @ |
| VALUES | | EFF RATE | | | LEVIED | | 97% |
| | | | | | | | |
| AGRICULTURAL | | | | | | | |
| 544.00 31 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 0.71 | \$ | 0.69 |
| 263,872.00 34 HAM TWP-LMLSD | GENERAL | 0.00130 | dist 34, 47 | \$ | 343.03 | \$ | 332.74 |
| 401,744.00 68 UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 482.09 | \$ | 467.63 |
| 0.00 69 UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | - | \$ | - |
| 666,160.00 | | | | | | | |
| RESIDENTIAL | | | | | | | |
| 107,519,990.70 31 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 139,775.99 | \$ | 135,582.71 |
| 60,318,650.00 34 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 dist 34, 47 | \$ \$ | 78,414.25 | | 76,061.82 |
| | - | | | | | | |
| 50,878,244.70 68 UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 61,053.89 | | 59,222.28 |
| 533,565.10 69 UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | 640.28 | \$ | 621.07 |
| 219,250,450.50 | | | | | | | |
| COMMERCIAL/INDUSTRIAL | | | | | | | |
| 3,123,695.40 31 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 4,060.80 | \$ | 3,938.98 |
| 260,295.00 34 HAM TWP-LMLSD | GENERAL | 0.00130 | dist 34, 47 | \$ | 338.38 | \$ | 328.23 |
| 5,997,918.30 68 UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 7,197.50 | \$ | 6,981.58 |
| 0.00 69 UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | - | \$ | - |
| 9,381,908.70 | | | | | | | |
| PUBLIC UTILITY PERSONAL | | | | | | | |
| 159,470.00 31 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 207.31 | Ś | 201.09 |
| 0.00 34 HAM TWP-LMLSD | GENERAL | 0.00130 | dist 34, 47 | \$ | | Ś | |
| 2,859,370.00 68 UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 3,431.24 | \$ | 3,328.31 |
| 0.00 69 UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | | Ś | |
| 3,018,840.00 | CLITERAL | | | Ŷ | | Ŷ | |
| | | | | | | | |
| | | | | | | | |
| | GENERAL | | | \$ | 144,044.81 | | 139,723.47 |
| | GENERAL | | | \$ | 79,095.66 | | 76,722.79 |
| | GENERAL | | | \$ | 72,164.73 | | 69,999.79 |
| | GENERAL | | | \$ | 640.28 | | 621.07 |
| GRAND TOTALS | TOTALS | | | \$ | 295,945.48 | \$ | <mark>287,067.12</mark> |
| <mark>232,317,359.20</mark> | | | | | | | |

| WARREN COUNTY | | ESTIMATED PROPER | TY TAX INCOME FO | OR SOUTH LEBANO | N CORPOR | ATION | | FISCAL YR 2024 |
|-----------------------------------|------------------|------------------|------------------|-----------------|----------|-----------------------|--|----------------|
| 2023 TENTATIVE TAX YEAR VALUES | | | EFF RATE | | ESTI | MATED TAXES LEVIED | CERTIFICATION @ 97% | |
| AGRICULTURAL | | | | | | | | |
| 19,780.00 | 31 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 25.71 | \$ 24.94 | |
| | 34 HAM TWP-LMLSD | | 0.00130 | dist 34, 47 | \$ | 186.33 | | |
| | 68 UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 287.75 | | |
| | 69 UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | - | \$ - | |
| 402,900.00 | | | | | | | Ŷ | |
| RESIDENTIAL | | | | | | | | |
| 76,376,070.00 | 31 HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 81 | \$ | 99,288.89 | \$ 96,310.22 | |
| | 34 HAM TWP-LMLSD | GENERAL | 0.00130 | dist 34, 47 | \$ | 59,893.89 | and the second state of th | |
| | 68 UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 47,614.54 | and the second | |
| 420,130.00 | 69 UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | 504.16 | | |
| 162,547,200.00 | | | | | | | • | |
| COMMERCIAL/INDUSTRIAL | | | | | | | | |
| 2,822,750.00 | HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 3,669.58 | \$ 3,559.49 | |
| 214,870.00 | HAM TWP-LMLSD | GENERAL | 0.00130 | dist 34, 47 | \$ | 279.33 | | |
| 5,039,030.00 | UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 6,046.84 | \$ 5,865.43 | |
| 0.00 | UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | (- | \$ - | |
| 8,076,650.00 | | | | | | | | |
| UBLIC UTILITY PERSONAL | | | | | | | | |
| 140,620.00 | HAM TWP-KINGS | GENERAL | 0.00130 | dist 25, 31 | \$ | 182.81 | \$ 177.32 | |
| 0.00 | HAM TWP-LMLSD | GENERAL | 0.00130 | dist 34, 47 | \$ | - | \$ - | |
| 2,489,300.00 | UNION-KINGS | GENERAL | 0.00120 | dist 68 | \$ | 2,987.16 | \$ 2,897.55 | |
| | UNION-LEB | GENERAL | 0.00120 | dist 69 | \$ | - | \$ - | |
| 2,629,920.00 | | | | | | | | |
| | | | | | | | | |
| | | GENERAL | | | \$ | 103,166.99 | \$ 100,071.98 | |
| | | GENERAL | | | \$ | 60,359.55 | | |
| | | GENERAL | | | \$ | 56,936.28 | | |
| | | GENERAL | | | \$ | 504.16 | \$ 489.03 | |
| RAND TOTALS | | TOTALS | | | \$ | 220,966.97 | \$ 214,337.96 | |
| 173,656,670.00 | | | | | | | | |



City of South Lebanon 10 N. High Street, South Lebanon, Ohio 45065 513-494-2296 fax: 513-494-1656 www.southlebanonohio.org

MEMORANDUM

| То: | Mayor & City Council |
|----------|--|
| CC: | Jerry Haddix, City Administrator Andrew Meier, Law Director |
| From: | Tina Williams, Director of Finance |
| Date: | September 17, 2024 |
| Subject: | Deputy Director of Finance – Tax Administrator |

On September 16, the Personnel Committee met and is recommending the addition of a Deputy Director of Finance / Tax Administrator position for the Finance Department to replace the former Tax Administrator position.

Additional job requirements and responsibilities have been added to the new position in comparison to the previous Tax Administrator position. The new position will require a Bachelor's degree in Accounting, Finance, or a related field and a minimum of three (3) years of experience in municipal tax collections with at least one (1) year in a supervisory role. The position will have a more supervisory role within the department and if necessary, may act as the Director of Finance in my absence.

Based on the requirements, the new position would qualify as Pay Grade level 6 on the City's pay scale and would be a non-classified, salaried position.

The complete job description and pay grade point factoring sheet are attached.

If you have any questions or need additional information, please contact me.

CITY OF SOUTH LEBANON, OHIO ORDINANCE NO. 2024-20

AN ORDINANCE CREATING THE POSITION OF DEPUTY DIRECTOR OF FINANCE / TAX ADMINISTRATOR IN THE FINANCE DEPARTMENT, ESTABLISHING COMPENSATION, AND DESIGNATING COMPENSATION, AND DECLARING AN EMERGENCY

WHEREAS, the City staff has reviewed the current tax positions within the Finance Department and is recommending the creation of a new position within the department; and,

WHEREAS, the City Personnel Committee met on September 16, 2024, and have recommended creating the Deputy Director of Finance / Tax Administrator position as attached; and,

WHEREAS, on April 28,2023, the Civil Service Commission for the City of South Lebanon adopted the Rules and Regulations of the Commission; and

WHEREAS, per Section 5.02 (12) of the Civil Service Rules and Regulations, Council may designate a position as unclassified and therefore not subject to the Civil Service Rules and Regulations; and

WHEREAS, the City Personnel Committee are recommending the Deputy Director of Finance / Tax Administrator position be designated as unclassified: and

WHEREAS, allocation of pay shall be established for all City positions and reflective of an employees' job description and duties and responsibilities; and

WHEREAS, immediate action is required to advertise for and fill this position as soon as possible, and such action is necessary in order to preserve the public peace, health, safety or welfare of the City.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of South Lebanon, at least two-thirds of all members elected thereto concurring:

<u>Section 1</u>. That the unclassified position of Deputy Director of Finance / Tax Administrator in the Finance Department is hereby created.

Section 2. That the compensation pay range for said position shall be equal to Pay Grade 6 as set forth in the City of South Lebanon Compensation Plan.

Section 3. That compensation for said position shall be designated solely from the General Fund.

<u>Section 4</u>. The recitals contained in the Whereas clauses set forth above are incorporated by reference herein.

<u>Section 5.</u> All formal actions of the City Council regarding this Ordinance were adopted in an open meeting of City Council in compliance with all legal requirements, including, but not limited to, Section 121.22 of the Ohio Revised Code.

<u>Section 6</u>. This Ordinance is hereby declared to be an emergency measure in accordance with Section 731.30 of the Ohio Revise Code for the immediate preservation of the public peace, health, safety, and general welfare; and this Ordinance shall be in full force and effective immediately upon its passage.

Adopted this _____ day of _____, 2024.

Linda S. Burke, Mayor

Attest: _____ Petrina D. Williams, Director of Finance/Clerk

| Rules Suspended: | _(if applicable) |
|--------------------|------------------|
| First Reading: | _ |
| Second Reading: | _ |
| Vote: Yeas Nays | |
| Effective Date: | _ |

Prepared by and approved as to form:

Andrew P. Meier Law Director City of South Lebanon, Ohio

CITY OF SOUTH LEBANON

An Equal Opportunity Employer

POSITION DESCRIPTION

| Position Title: | Deputy Director of Finance / Tax Administrator | | | | | | | |
|---------------------------|---|------------------------|---------------------|--|--|--|--|--|
| Employment Status: | Full-time | Dept./Division: | Finance / Tax | | | | | |
| FSLA Status: | Exempt | Reports To: | Director of Finance | | | | | |
| Pay Grade: | Level 6 | Classification: | Unclassified | | | | | |

GENERAL DESCRIPTION:

Under the direction of the Director of Finance, the Deputy Director of Finance / Tax Administrator exercises initiative, independence, and mature judgement in administering activities associated with collecting the City's local earnings tax, including supervision of staff. The position requires a high level of detail and accuracy, leadership in strategic planning, strong interpersonal skills, solid written and oral communication skills, and the ability to work well with the public and other staff. The position may act as Director of Finance in their absence.

MINIMUM QUALIFICATIONS FOR EMPLOYMENT: An example of acceptable qualifications:

Bachelor's degree from an accredited college or university with major course work in Accounting, Finance, or Business Administration, or a related field, and a minimum of three (3) years of experience in municipal income tax collections, with knowledge of Ohio municipal tax laws and regulations, of which at least one (1) year in a supervisory role; or any combination of education, training, and/or experience which provides the desired knowledge, skills, and abilities to perform the essential functions of this position.

LICENSURE OR CERTIFICATION REQUIREMENTS:

Must have the ability to be bonded and possess and maintain a valid State of Ohio driver's license. Must remain insurable under the City's vehicle insurance plan.

EQUIPMENT OPERATED: The following are examples only and are not intended to be all inclusive: Personal computer, computer software (MITS - Municipal Income Tax Software, Microsoft Office, and other applicable computer software), printer, copier, fax machine, postage machine, calculator, scanner, shredder, telephone, mobile phone, and other commonly used standard modern business office equipment.

INHERENTLY HAZARDOUS OR PHYSICALLY DEMANDING WORKING CONDITIONS:

Employee has exposure to chemical compounds found in an office environment (e.g., toner, correction fluid, etc.); may be required to lift, carry, push, or pull heavy objects; may be exposed to hostile or upset members of the general public; this is considered sedentary work and the employee must demonstrate the ability to perform the physical demands required of the position in accordance with the U.S. Department of Labor's physical demands strength ratings.

In cases of emergency, unpredictable situations, and/or department needs, may be required to lift, push, pull, and/or carry objects heavier than D.O.L. strength ratings recommend.

CITY OF SOUTH LEBANON

An Equal Opportunity Employer

POSITION DESCRIPTION

Position Title: Deputy Director of Finance / Tax Administrator Page 2 of 3

JOB DESCRIPTION AND WORKER CHARACTERISTICS: JOB DUTIES in order of importance

ESSENTIAL FUNCTIONS OF THE POSITION: For purposes of 42 USC 12101:

- Assists the Director of Finance with supervising and administering finance operations with an emphasis on the tax collection aspect of the City's finances.
- Administers city-wide collection of revenues while ensuring all collections are properly recorded and balanced.
- Plans, organizes and directs all activities of the Tax Department, including the review and evaluation of personnel. Develops policies and procedures for the Tax Department.
- Responds to the needs of resident and business taxpayers via phone, letter, and personal interview. Answers routine inquiries concerning the City's tax ordinance and prepares local tax returns for residents. Investigates and resolves taxpayer problems and complaints. Fosters positive community relations by providing exceptional customer service.
- Audits and maintains files for resident and business taxpayers; reviews tax returns for accuracy and compliance with the City's tax ordinance; calculates penalties and interest when appropriate; prepares and issues taxpayer correspondence; posts final returns to resident and business taxpayer accounts; and approves all refunds.
- Prepares monthly reports and other financial information for the Finance Department.
- Gathers data from various sources in search of new accounts, delinquent accounts, and discontinued accounts.
- Investigates, identifies, and initiates collection proceedings of delinquent income tax accounts, both business and residential. Represents on behalf of the City in legal proceedings related to prosecution of delinquent taxpayer accounts.
- Continually reviews customer service options to provide streamlined collection alternatives.
- Attends Board of Tax Review meetings and represents the City in tax cases.
- Performs special projects and analysis as assigned.

OTHER DUTIES AND RESPONSIBILITIES:

• Attends various meetings, trainings, and seminars, as appropriate.

CITY OF SOUTH LEBANON

An Equal Opportunity Employer

POSITION DESCRIPTION

Position Title: Deputy Director of Finance / Tax Administrator

Page 3 of 3

- Demonstrates regular and predictable attendance.
- Meets all job safety requirements and all OSHA safety standards that pertain to essential functions.
- Performs other related duties as assigned.

MINIMUM ACCEPTABLE CHARACTERISTICS: (*indicates developed after employment)

Knowledge of: *City and department goals and objectives; *City and department policies and procedures; *City tax ordinance and tax software (MITS – Municipal Income Tax Solutions); modern office practices and procedures; computer-related software (e.g., Microsoft Word, Excel and Outlook); general business practices, basic accounting; bookkeeping; tax payments or collections; general finance; workplace safety practices and procedures; records management; English grammar and spelling.

Skill in: Computer operation; adding machine or calculator operation; use of modern office equipment; motor vehicle operation.

Ability to: Interpret a variety of instructions in written, oral, picture, or schedule form; understand, interpret, and apply laws, rules, or regulations to specific situations; read, copy, and records figures accurately; add, subtract, multiply, and divide whole numbers; calculate fractions, decimals, and percentages; copy records precisely without error; complete routine forms; prepare routine correspondence; compile and prepare reports; respond to routine inquiries from public and/or officials; communicate effectively; maintain records according to established procedures; handle sensitive inquiries from and contacts with officials and general public; develop and maintain effective working relationships; resolve complaints; travel to and gain access to work site.

POSITIONS DIRECTLY SUPERVISED:

None.

This position description in no manner states or implies that these are the only duties and responsibilities to be performed by the position incumbent. My (employee) signature below signifies that I have reviewed my position description, and that I understand the contents of the position description. I agree to abide by the requirements set forth. I understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these activities.

(Approval of Appointing Authority or Designee)

(Date)

(Employee Signature)

(Date)

| CITY OF SOUTH LEBANON POINT FACTORING 2024 | | Education | | Experience | Supervision Exercised | | Personal Contacts | | Responsibility for Assets | | Independence of Work/Discretion | | Responsibility for Policies and Procedures | | Work Environment / Health and Safety | | Responsibility for | Accurate Kecords / Reports | Consequence of | Errors | otal Points | Scale Level | |
|---|--------|---------------|--------------|---------------|--------------------------|---------------|-------------------|---------------|------------------------------|---------------|------------------------------------|---------------|--|---------------|--|--------|--------------------|-------------------------------|----------------|---------------|----------------|-------------|---|
| Position | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Degree | Points | Total P | Pay Sc | |
| City Administrator | 4 | 116 | 4 | 75 | 6 | 125 | 4 | 75 | 4 | 75 | 4 | 150 | 6 | 150 | 1 | 8 | 3 | 100 | 4 | 116 | 990 | 9 | |
| Director of Finance | 4 | 116 | 4 | 75 | 4 | 69 | 4 | 75 | 4 | 75 | 4 | 150 | 6 | 150 | 1 | 8 | 3 | 100 | 5 | 150 | 968 | 9 | |
| Asst. City Administrator | 4 | 116 | 3 | 52 | 5 | 87 | 3 | 52 | 3 | 53 | 3 | 105 | 5 | 102 | 1 | 8 | 3 | 100 | 4 | 116 | 791 | 7 | * |
| Public Works Director | 4 | 116 | 4 | 75 | 4 | 69 | 3 | 52 | 2 | 30 | 3 | 105 | 5 | 102 | 2 | 41 | 3 | 100 | 4 | 116 | 806 | 7 | |
| Lead Operator | 3 | 82 | 4 | 75 | 3 | 40 | 3 | 52 | 3 | 53 | 2 | 60 | 2 | 34 | 3 | 75 | 2 | 55 | 2 | 49 | 575 | 5 | |
| Asst. Fiscal Officer | 3 | 82 | 2 | 30 | 2 | 12 | 2 | 30 | 4 | 75 | 2 | 60 | 3 | 57 | 1 | 8 | 3 | 100 | 3 | 82 | 536 | 4 | - |
| Deputy Director of Finance / Tax Admin. | 4 | 116 | 3 | 52 | 2 | 12 | 3 | 52 | 3 | 53 | 3 | 105 | 4 | 79 | 1 | 8 | 3 | 100 | 3 | 82 | 659 | 6 | |
| Tax Administrator | 3 | 82 | 2 | 30 | 2 | 12 | 2 | 30 | 4 | 75 | 2 | 60 | 3 | 57 | 1 | 8 | 3 | 100 | 3 | 82 | 536 | 4 | - |
| Foreman | 2 | 49 | 4 | 75 | 3 | 40 | 1 | 8 | 3 | 53 | 2 | 60 | 2 | 34 | 3 | 75 | 1 | 10 | 2 | 49 | 453 | 4 | |
| Water Operator | 3 | 82 | 4 | 75 | 2 | 12 | 1 | 8 | 1 | 8 | 2 | 60 | 2 | 34 | 3 | 75 | 2 | 55 | 2 | 49 | 458 | 4 | |
| Wastewater Operator | 2 | 49 | 4 | 75 | 2 | 12 | 1 | 8 | 1 | 8 | 2 | 60 | 2 | 34 | 3 | 75 | 2 | 55 | 2 | 49 | 425 | 3 | |
| Court Clerk | 2 | 49 | 2 | 30 | 1 | 0 | 2 | 30 | 2 | 30 | 2 | 60 | 2 | 34 | 1 | 8 | 2 | 55 | 3 | 82 | 378 | 3 | |
| Tax Clerk | 2 | 49 | 2 | 30 | 1 | 0 | 2 | 30 | 3 | 53 | 2 | 60 | 2 | 34 | 1 | 8 | 2 | 55 | 2 | 49 | 368 | 3 | |
| Utilities Clerk | 2 | 49 | 2 | 30 | 1 | 0 | 2 | 30 | 3 | 53 | 2 | 60 | 2 | 34 | 1 | 8 | 2 | 55 | 2 | 49 | 368 | 3 | |
| Senior Maintenance Worker | 2 | 49 | 3 | 52 | 1 | 0 | 1 | 8 | 2 | 30 | 2 | 60 | 2 | 34 | 3 | 75 | 1 | 10 | 2 | 49 | 367 | 3 | |
| Maintenance Worker | 2 | 49 | 2 | 30 | 1 | 0 | 1 | 8 | 2 | 30 | 1 | 15 | 1 | 12 | 3 | 75 | 1 | 10 | 2 | 49 | 278 | 2 | |
| Groundskeeper | 2 | 49 | 1 | 8 | 1 | 0 | 1 | 8 | 2 | 30 | 1 | 15 | 1 | 12 | 3 | 75 | 1 | 10 | 1 | 15 | 222 | 2 | 1 |
| Part-Time Laborer | 1 | 15 | 1 | 8 | 1 | 0 | 1 | 8 | 2 | 30 | 1 | 15 | 1 | 12 | 3 | 75 | 1 | 10 | 1 | 15 | 188 | 1 | 1 |

* Will need to revise requirements prior to filling the position.

OLD BUSINESS



City of South Lebanon 10 N. High Street, South Lebanon, Ohio 45065 513-494-2296 fax: 513-494-1656 www.southlebanonohio.org

MEMORANDUM

To: Mayor & City Council

From: Jerry Haddix, City Administrator

Date: September 3, 2024

Subject: Frank Annexation Ordinance

Attached is an ordinance for the Frank Annexation of 21.5659 acres in Union Township. The County Commissioners approved the annexation on July 2, 2024, and the Commissioners Clerk delivered the record of the proceedings to the City Finance Director on July 3, 2024. Per ORC 709.04, after sixty (60) days from the date of the delivery, the City Council can officially accept the annexation. It is presented as a first reading, but as emergency ordinance after the 2nd reading to expedite the property owner to receive the "Inside the City" water rate and to complete the annexation process.

Let me know if you have any questions or need additional information.

CITY OF SOUTH LEBANON, OHIO ORDINANCE NO. 2024-19

AN ORDINANCE ACCEPTING THE ANNEXATION OF 21.5659 ± ACRES IN UNION TOWNSHIP, WARREN COUNTY, OHIO TO THE CITY OF SOUTH LEBANON, OHIO AND DECLARING AN EMERGENCY

WHEREAS, a petition for annexation of approximately $21.5659\pm$ acres in Union Township, Warren County to the City of South Lebanon described in attached Exhibit A and shown on the map or plat attached as Exhibit B was filed with the Warren County Commissioners on June 5, 2024. The petition followed the expedited type 2 annexation process provided for in Ohio Revised Code Section 709.023; and,

WHEREAS, the petition was signed by all owners of real estate in the unincorporated territory of the township proposed for annexation; and,

WHEREAS, by resolution adopted on July 2, 2024, the Board of County Commissioners of Warren County, Ohio approved the annexation of $21.5659\pm$ acres in Union Township to the City of South Lebanon, Ohio; and,

WHEREAS, the clerk of the Warren County Board of County Commissioners had a certified copy of the record of the annexation proceedings, including all resolutions of the Board held in connection with the $21.5659\pm$ acre annexation, delivered to the Director of Finance on July 3, 2024; and

WHEREAS, more than sixty (60) days from the date of delivery of the record of the annexation proceedings to the City has elapsed in accordance with provisions of Section 709.04 of the Ohio Revised Code and the Director of Finance has now laid the resolution of the Warren County Commissioners granting the annexation and the annexation papers before Council at this next regular scheduled meeting to accept or reject the petition for annexation; and

WHEREAS, it is the desire of the owners, and in the interest of the City, that all municipal ordinances and powers be immediately effective in the annexed territory, that City services be immediately available to the territory and that territory immediately be within the City so that the City can begin providing services and for the preservation of the peace, health, safety and welfare of the annexation territory, the City and its residents.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of South Lebanon, at least two-thirds of all members elected thereto concurring:

<u>Section 1</u>. The annexation of $21.56595\pm$ acres described in Exhibit A and shown on the map or plat labeled Exhibit B previously approved by the Warren County Board of County Commissioners by Resolution on July 2, 2024, be and is hereby accepted by the City.

<u>Section 2</u>. The Director of Finance is hereby directed to make three copies containing the petition, the map or plat accompanying the petition, a transcript of the proceedings of the Board of County Commissioners, and resolutions and ordinances in relation to the annexation, including this Ordinance. The Director of Finance shall then deliver one certified copy to the Warren County Recorder for recording it in the Recorder's official records. The other two copies shall be certified by the Director of Finance and forwarded to the Ohio Secretary of State and the Warren County Auditor. The Director of Finance shall pay any associated fees and costs and to take any other action required by statute.

<u>Section 3.</u> The Director of Finance is further directed to notify the Warren County Board of Elections of the changes in the boundaries of the City in writing which shall include a certified copy of this Ordinance with its attached exhibits, including the legal description and annexation plat, within thirty (30) days of the adoption of this Ordinance.

<u>Section 4</u>. The recitals contained in the Whereas clauses set forth above are incorporated by reference herein.

<u>Section 5.</u> All formal actions of City Council regarding this Ordinance were adopted in an open meeting of City Council in compliance with all legal requirements, including, but not limited to, Section 121.22 of the Ohio Revised Code.

Adopted this _____ day of _____, 2024.

Linda S. Burke, Mayor

Attest: _____ Petrina D. Williams, Director of Finance/Clerk

Ordinance 2024-19 Page 3

| Rules Suspended: | (if applicable) |
|-------------------|---------------------|
| First Reading: | _ |
| Second Reading: | _ |
| Vote:Yeas Nays | |
| Effective Date: | |

Prepared by and approved as to form:

Andrew P. Meier Law Director City of South Lebanon, Ohio

By: _____ Date: _____

DESCRIPTION FOR:

VILLAGE of SOUTH LEBANON ANNEXATION

LOCATION:

"FRANK SNYDER PARK AREA" 21.5659 Acres

Situate in Section 31, Town 5 East, Range 3 North, Union Township, Warren County, Ohio, and being 17.4259 acres of the 27.4190 acre premises conveyed to Board of Park Commissioners of the Warren County, Ohio Park District by deed recorded in Document Number 2021-039922 (all records of the Warren County, Ohio Recorder's Office) and 4.14 acres of the 4.37 acre premises conveyed to Charles D. Frank and Amy L. Snyder by deed recorded in Official Record 5623, Page 655 also being more particularly described as follows:

COMMENCING at the northeast corner of Lot 26 of Amburgy Subdivision as recorded in Plat Book 3, Page 26;

Thence, North 27°16′05″ East, 36.55 feet and South 12°09′44″ East, 198.18 feet to a northwesterly corner of aforesaid 27.4190 acre tract and west corner of a 16.1932 acre tract of land conveyed to John Kevin Spicer by deed recorded in Official Record 2211, Page 781;

Thence along the common lines of said 27.4190 acre and 16.1932 acre tracts, the following nine (9) courses and distances:

- 1.) South 58°16′04″ East, 211.58 feet;
- 2.) South 51°21'45" East, 136.80 feet;
- 3.) South 33°10'25" East, 80.70 feet;
- 4.) South 77°18'01" East, 88.02 feet;
- 5.) North 70°27'48" East, 39.78 feet;
- 6.) North 53°55′50″ East, 121.19 feet;
- 7.) North 68°11'28" East, 56.18 feet;
- 8.) South 89°31'07" East, 173.11 feet;
- 9.) South 69°42'07" East, 91.93 feet to the existing corporation line of the City of South Lebanon and **POINT OF BEGINNING** for this description;

Thence, from said **POINT OF BEGINNING**, continuing along common lines of said tracts, South 69°42'07" East, 116.06 feet and North 31°26'51" East, 475.25 feet to a south line of a 24.446 acre tract of land



conveyed to MHP Holdings- Little Miami Estates, Ltd. by deed recorded in Official Record 3520, Page 295 and said existing corporation line;

Thence, along the lines of said 24.446 acre tract and existing corporation line, the following five (5) courses and distances:

- 1.) South 54°28'00" East, 168.00 feet;
- 2.) North 02°46′10″ East, 111.00 feet;
- 3.) South 77°39'30" East, 383.46 feet;
- 4.) North 04°27′00" East, 9.17 chains (605.22 feet);
- 5.) North 31°06′00″ East, 210.38 feet to the 30′ south right-of-way line of Mason-Morrow-Millgrove Road;

Thence, along the 30' south right-of-way line of said Mason-Morrow-Millgrove Road, the following three (3) courses and distances:

- 1.) South 33°40′00″ East, 265.38 feet;
- 2.) South 45°50'17" East, 56.86 feet;
- 3.) Along an arc deflecting to the left, having a central angle of 15°05′54″, a radius of 203.16 feet and a length of 53.54 feet. The chord of said arc bears South 53°23′13″ East, 53.38 feet to a west line of a 5.922 acre tract of land conveyed to Little Miami, Inc. by deed recorded in Official Record 3754, Page 465;

Thence, along the west line of said 5.922 acre tract, South 33°40'00" East, 122.85 feet to the low water mark of the Little Miami River;

Thence, with the meanders of said Little Miami River, the following three (3) courses and distances:

- 1.) South 64°11′00″ West, 2.88 chains (190.08 feet);
- 2.) South 38°44'00" West, 2.25 chains (148.50 feet);
- 3.) South 12°29'00" West, 3.47 chains (229.02 feet) to a point on a west bank of said river;

Thence, along said Little Miami River, South 06°12′00″ West, 176.88 feet to the north corner of a 1.2288 acre tract of land conveyed to William A. Barnhart and Kathleen T. Barnhart by deed recorded in Official Record 4923, Page 366;

Thence, with the northwest line of said 1.2288 acre tract, South 33°33'19" West, 869.06 feet to a point on a northwest bank of said Little Miami River;

Thence, along lines of said Little Miami River, the following three (3) courses and distances:



- 1.) South 70°04'00" West, 265.00 feet;
- 2.) North 89°14′00″ West, 259.38 feet;
- 3.) North 67°48'00" West, 56.55 feet to the aforesaid existing corporation line of the City of South Lebanon;

Thence, along said existing corporation line, North 03°18'13" East, 702.32 feet to the point of beginning.

Containing 21.5659 +/- acres of land.

Subject to all legal highways, easements and restrictions of record.

The above description is the result of plat titled Plat of Annexation City of South Lebanon "Frank Snyder Park Area" prepared by McGill Smith Punshon, Inc. under the direction of Richard D. Nichols, P.S. No. 7929, dated the 5th of July 2023.

Bearings are based on subject property deeds of record (all records of the Warren county, Ohio Recorder's Office).

Annex does not include 0.230 acres that lay within the existing 30' south public right-of-way of Mason-Morrow-Millgrove Road (r/w varies) and part of parcel 13-31-200-004 conveyed to Charles D. Frank and Amy L. Snyder in Official Record 5623, Page 655.

The above description was prepared from existing deeds, plats and surveys of record, and is not the result of a field survey.

| Prepared by: | McGill Smith Punshon, Inc. |
|--------------|----------------------------|
| Date: | 05 JUL 2023 |
| MSP No.: | 06308.30 |

06308303-LEG-ANX-00



McGill Smith Punshon, Inc.3700 Park 42 Drive, Suite 190BCincinnati, Ohio 45241513.759.0004Fax 513.563.7099www.mspdesign.com



3 of 3

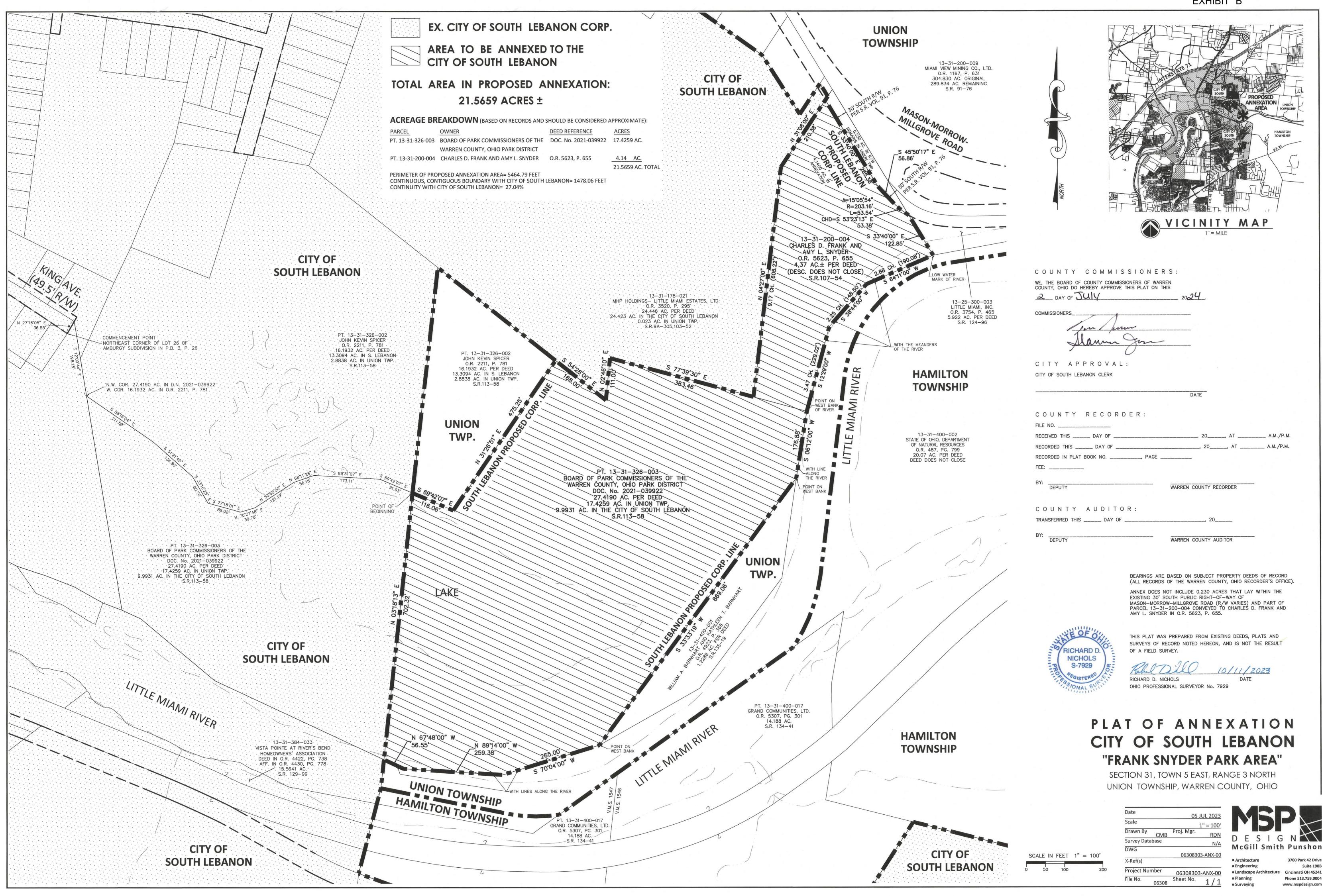


EXHIBIT "B"

| 1 | IL | T | 0 | N | | |
|---|----|---|---|---|---|--|
| | N | S | Η | | 0 | |

3700 Park 42 Drive Suite 190B Cincinnati OH 45241 Phone 513.759.0004