



A Balanced Scorecard Approach for the Town of Stallings

FY 19-20 Annual Report

FORWARD STALLINGS

September 28, 2020

A Report to Citizens, Council, & Staff – FY 2019-2020

The Town's system of linking its vision, mission, Council's top priorities, departmental actions, and performance measures to achieve the desired results is a balanced scorecard system called Forward Stallings. The Town strategy map, scorecards, top departmental priorities, and budgetary information are blended together to better align the Town's time, money, and resources with its top priorities. In essence, this annual report is both a "report card" and a "strategic learning tool" that should be used to help assess how well the Town is doing in pursuing its key objectives. One of the main purposes of the report is to generate discussion, like a post-game analysis, to determine whether particular strategics being used to accomplish objectives and initiative should be 1.) changed, 2.) abandoned, or 3.) maintained (i.e., "stay the course"). The first opportunity to analyze results and discuss possible changes to strategy will be at the Council's regular board meeting on September 28th. At this meeting, the Manager will officially submit the FY 19-20 Annual Report.

The willingness to experiment by using new or innovative ideas is critical to continuously improving operations. At the same time, a learning organization must be able to identify both potential successes and failures early enough to adjust accordingly to changing conditions. This is a major benefit of this system – it provides a reality check, accommodates changes in direction, helps everyone make well informed decisions, and creates accountability by sharing the results (whether good or bad) with the citizens, media, elected officials, and Town employees. In instances where it appears the Town is being successful, the Council, staff and public should still be willing to challenge the status quo and suggest strategies that may allow an even higher standard of service to be delivered. This is the key to avoiding complacency. On the other side of the coin, just because an initiative missed its target does not necessarily mean a change in strategy is needed. As the old saying goes, "the devil is in the details." Hence, asking probing questions to gain an understanding of the many factors affecting outcomes compared to the desired target can help clarify the performance picture and uncover a greater ability to assess what (if anything) should be done in response. It's also important to

ORGANIZATIONAL PERSPECTIVES

Community – Managers must know if the Town is meeting citizen needs. They must determine the answer to the questions: Is the organization delivering the services the community wants?

Financial – Managers must focus on how to meet service needs in an efficient manner. They must answer the question: is the service delivered at a good price?

Internal Business – Manager must focus on those critical operations that enable them to satisfy citizens. Managers must answer the question: Can the organization improve upon a service by changing the way a service is delivered?

Develop Know-How – What skills, tools, and organizational climate do our employees, elected officials, appointed officials, and volunteers need to meet the community's needs while achieving the mission and vision?

remember that departments often set “stretch targets” that are multi-year goals intended to help make a breakthrough by encouraging creative thinking, results-oriented problem solving and/or escaping the comfort zone.

Enclosed please find:

- 1.) Our Balanced Scorecard Policy.
- 2.) Our Strategy Map.
- 3.) Individual Department Reports.
- 4.) Individual Department Scorecards.

Please allow me to express my gratitude to Council and staff for being willing to try something new, as well as the Town of Hillsborough for allowing us to use their system as a model. This is our first report, and without a doubt this was a learning experience for all. However, I am confident that we will be able to use the lessons learned to continuously improve.

Two of the significant lessons learned are 1.) The Town had too many measures; and 2.) The quarterly reporting frequency was too often. Specifically, we found that a quarterly reporting period was often too small of a sample size to bring much insight. As the same time, generating quarterly reports exercised considerable Town resources. To address these two lessons learned moving forward, staff are decreasing the number of measures for FY 20-21 (focusing on quality over quantity) and recommend decreasing reporting frequency to mid-year and end of year.

Please do not hesitate to contact me if you have any questions, suggestions, concerns, or ideas related to this report. Most importantly, we look forward to listening and participating in the discussions that will help us take the next steps in positively impacting Stallings' future.

Sincerely,

Alex Sewell
Town Manager

Rationale, Overview, & Processes

What is the Balanced Scorecard?

A management system that uses a group of measures/goals to help implement an organization's strategy. It is a tool/system for the leaders to use in communicating to employees and the community the outcomes and performance drivers by which the organization will achieve its mission and strategic objectives.

Rationale and Benefits of the Balanced Scorecard

- *Clarifies and Communicates Organizational Mission.* Translates your vision and strategy into a coherent set of measures, targets and initiatives that can be communicated throughout the organization and community by:
 - 1.) More clearly describing the Town Council's strategy by taking potentially vague policy directives (mission, vision, goals, and objectives) and making them easier to understand by defining them and choosing performance measures to gauge their progress; and
 - 2.) Sharing scorecard results throughout the organization and community gives employees and citizens the opportunity to discuss the assumptions underlying the strategy, learn from unexpected results, and deliberate on future modifications as necessary. Simply understanding an organization's strategy can unlock many organizational capacities, thus allowing employees and citizens, maybe for the first time, to know here the organization is headed and how they can contribute to the journey. The scorecard brings meaning and action to a vague objective like "provide excellence municipal services."
- *Better Data for Policy-Making.* The Balanced Scorecard promotes questions, dialogue, analysis, innovation, experimentation, adaptability, and accountability.
- *Helps Let Us Know if We Are Moving Toward Goal Achievement or Drifting Further Away.*
- *Resource Alignment and Allocation.* 1.) To successfully implement any strategy, it must be understood and acted upon throughout all levels of the organization and ultimately be enacted during departments' day-to-day activities; 2.) Establishing long-term "stretch targets" allows the organization to identify the key steps necessary to achieve its goals; and 3.) Aligns resources (time, effort, and money) so that the initiatives in all departments and levels share a common trait, their linkage to the Town's strategic goals.
- *Strategic Learning* – Any strategy we pursue represents a hypothesis or your best guess of how to achieve success. To prove meaningful, the measures of the scorecards must link

together to tell the story that describes what you are trying to achieve through your strategy.

- *Balance* – Between financial and non-financial indicators; 2.) Between internal and external constituents of the organization; and 3.) Between lag and lead indicators of performance (i.e., what we've done in the past and where we want to go in the future).
- *Increases Likelihood of Accomplishing Key Goals* – By not only helping to keep leadership, management, departments, and employees focused on top priorities, but also by improving communication between all interests thus making it easier to effectively troubleshoot and make logical "changes in course" that result in successfully delivering the type of services the community expects.

Using Strategy & the Balanced Scorecard to Get Results

Any strategy the Town pursues represents a hypothesis or a best guess of how to achieve success. To prove meaningful, the measures on the scorecard must link together the story of, or describe, that strategy. For example, if the Town believes that an investment in employee training will lead to improved quality, it needs to test the hypothesis through the measures appearing on the scorecard. If employee training does increase, but quality actually decreases, then it may not be a valid assumption. Instead, focus could turn to another possible factor, but more importantly, the Town has information in which to act and make decisions.

Strategy to achieve a desire outcome is often a new destination, somewhere the organization has not yet traveled to before. The Balanced Scorecard provides the Town with a method to document and test assumptions inherent in the strategies it adopts. It may take considerable time to gather sufficient data to test such correlations, but simply beginning to question the assumptions underlying the strategy is a major improvement over making decision based purely on financial numbers or subjective information.

A well-designed Balanced Scorecard should describe the Town or department's strategy through the objectives and measures chosen. These measures should link together in a chain or cause-and-effect relationships form the performance drivers in the Develop Employees perspective (Employee Learning and Growth) all the way through Service the Community Perspective. Documenting our strategy through measurement, making the relationships between the measures so specific they can be monitored, managed, and validated. Only then can we begin learning about, and successfully implementing our strategy.

Key Definitions & Components

Vision: Word picture of our desired future.

Mission: Why we exist.

Core Values: What we believe in, guiding principles.

Strategic Priorities: Themes on which the organization will concentrate efforts, dedicate resources, and strive to achieve significant improvements. The focus areas reflect what the current Stallings Town Council believes must be done to succeed.

Perspectives: The four different views that are used to create a “balanced” way of establishing objectives and measurements to assist the organization in accomplishing the vision and strategic priorities. The traditional four perspectives used in corporate strategic planning and program evaluation are 1.) Financial; 2.) Internal Business Process; 3.) Community; and 4.) Innovation, Learning & Growth. While the names and definitions of these perspectives are frequently modified to meet different organization’s specific needs, the original intent of these four traditional perspectives usually remains intact.

Objective: A concise statement describing the specific things the organization must do well in order to execute its strategy. Objectives often begin with action verbs such as “increase,” “reduce,” “improve,” “achieve,” and similar words. Examples: Reduce Crime, Enhance Customer Service, Promote Learning & Growth, Invest in Infrastructure, Deliver Competitive Services, Maintain Fiscal Strength, Maintain a Skilled & Diverse Workforce, Create Unity Between Neighborhoods, Provide Affordable Services, Protect the Environment, Enhance Walkability, etc.

Measure: A standard used to evaluate our community performance against desired results. Reporting and monitoring measures help organizations gauge progress toward effective implementation of strategy. Example: Percentage of water customers with an average pressure of 30 PSI or greater.

Target: The desired result of a measure that communicates the expected level of performance. Example: 98% of customers will have average water pressure of 30 PSI or greater. A “stretch target” is a challenging target that may not be met. It may be a multi-year goal with milestones.

Cascading: The process of developing “aligned” scorecards throughout an organization. Each level of the organization will develop scorecards based on objectives and measures it can influence from the group to which they report. For example, Police Patrol aligns/connects with the Police Department, who aligns/connects with the Town-wide Scorecard by developing their own objectives and measures based on how they influence the Town-wide objectives and measures.

Cause & Effect: The concept of cause and effect separates the Balanced Scorecards from other performance management systems. The measures on the Scorecard should link together in a series of cause-and-effect relationships to tell the organization’s strategic story.

Perspectives

The “balanced portion of the Scorecard uses four perspectives to answer critical service delivery questions. This helps provide the balance that organization’s need to successfully plan, implement, measure, and evaluate performance.

Community Perspective:

Serve the Community – What is our mission and vision? What do our citizens want?

Managers must know if the Town is meeting citizen needs. They must determine the answer to the question: Is the organization delivering the services the community wants?

Financial Perspective:

Manage Resources – How we deliver quality services efficiently and remain financially sound while achieving the vision and mission?

Managers must focus on how to meet service needs in an efficient manner. They must answer the question: Is the service delivered at a good price?

Internal Business Perspective:

Run the Operations – What internal processes must we excel at to provide valuable services to the community while achieving the mission and vision?

Managers need to focus on those critical operations that enable them to satisfy citizens. Managers must answer the question: Can the organization improve upon a service by changing the way a service is delivered?

Learning & Growth Perspective:

Develop Know-How – What skills, tools, and organizational climate do our employees, elected officials, and volunteers need to meet the community’s needs while achieving the mission and vision?

An organization’s ability to improve and meet citizen demands ties directly to the employees’ ability to meet those demands. Managers must answer the question: Is the organization providing employees with the training, technology, and proper work environment to enable them to success and continuously improve?

Objectives by Perspective

Serve the Community

What do our citizens want? What must be done to implement the vision and mission?

- **Strengthen Citizen Engagement** – Improve the quality and frequency of communication to enhance public access to information about Town services, meetings, key issues, and emergency situations. Provide a variety of ways for citizens to meaningfully share ideas, concerns, and questions with Town officials.
- **Conserve Cultural & Natural Resources** – Protect the environment, historic assets, and intangible assets such as community and cultural events that help bring Stallings' citizenry together. Ensure that these resources are protected, conserved, celebrated and resilient to changing environmental conditions.
- **Increase Citizen & Community Safety** – Accomplish this by building relationships and problem-solving partnerships with citizens, businesses, and neighborhood watch groups and using best-practice strategies including having police officers and officials accessible and approachable, improving community appearance, addressing nuisances, & approaching community safety across departments will make our community safer.
- **Promote Economic Vibrancy** – While the Town recognizes that there are many factors influencing local economic conditions, the Town seeks to do its part with partners to achieve economic development and support locally owned businesses. The Town recognizes that achieving economic vibrancy also includes creating a sense of place and identity as well as enhancing the quality of life in Stallings as a place to work, live, play, and raise a family.
- **Enhance Recreation, Walkability & Connectivity** – Provide recreation and pedestrian facilities to encourage healthy lifestyles, citizen interaction, and to offer a variety of transportation choices that link Stallings' neighborhoods together in an accessible manner.

Manage Resources

How do we deliver quality services efficiently and remain financially sound while achieving the vision and mission?

- **Maintain Fiscal Strength** – Support fiscal policies, controls, and actions that keep the Town government in a financially strong position, thereby allowing it to respond to unforeseen problems, emergencies, and opportunities, as well as having sufficient reserves for cash flow and credit rating purposes.
- **Develop Long-Term Financial Plans** – Build upon current financial planning instruments to provide a longer-term view of what Stallings' finances and operations may look like in the future. These plans are intended to identify potential challenges, opportunities, and proactive response options.
- **Invest in Infrastructure** – Prioritize funding for infrastructure maintenance to avoid deterioration while

minimizing long-term operational and capital costs. New infrastructure investments help achieve key priorities and optimize the use of current assets.

- **Deliver Services Efficiently** – Ensure citizens are receiving a good value from their investments by delivering cost-efficient services. Maximize the use of public funds through service optimization, innovation, process improvement, competition, and other means.

Run the Operations

What internal processes must we excel at to provide valuable services while achieving the vision and mission?

- **Enhance Emergency Preparedness** – Improving the ability to effectively anticipate and respond to emergency situations, from minor incidents to major disasters, through planning, training, collaboration with public and private agencies, and community education.
- **Improve Communication & Collaboration** – Increase the quality and frequency of communications throughout all areas of the organization to promote problem-solving partnerships within and outside of the organization. Good communication enables the vision to be implemented.
- **Excel at Staff & Logistical Support** – Ensure outstanding internal support is being provided to all departments, employees, elected officials, advisory board members, and volunteers that deliver services or directly serve the community. Use technology, where practical to improve service delivery and save taxpayer dollars.
- **Provide Responsive & Dependable Services** – Provide quality services to citizens in a courteous, responsive, and reliable manner that is effective in achieving desired results. Excel at the technical aspects of delivery.

Develop Know-How

What skills, tools, and organizational climate do our employees, elected officials, and volunteers need to meet the community's needs while achieving the vision and mission?

- **Maintain a Skilled & Competent Workforce** – Create a work environment that allows the Town to hire, develop, and retain a workforce of skilled employees capable of meeting the community's needs. Focus includes career development, succession planning, and improving employee motivation and satisfaction. Hire competent staff who exemplify The Stallings Way.
- **Support Development of Citizen Volunteers** – Identify opportunities for volunteers to develop the technical and leadership skills that enable them to achieve the community's needs and understand the role of the advisory boards in Town government.
- **Enhance Relations with Other Entities** – Build relationships with others involved in the governing process, including governmental organizations, non-profits, and the private sector. Public-private partnerships should be explored as a potential problem-solving tool.

Developing Departmental Strategy

Departmental Balanced Scorecards

A good scorecard will do the following:

- Tell the story of the department's strategy.
- Shows that every objective selected is a linkage in the cause-and-effect relationships that compose the town's strategy.
- Drive performance by using a variety of measures and targets that look at short and long-term results to encourage proactive management.
- Involve the participation of division heads, key staff, and employees throughout the department.
- Is financially viable.
- Positively changes departmental behavior by developing strategic initiatives.

Step #1 – Town-Wide Objectives Selected to Build Scorecard & Map

Departments determine what they can do to support and respond to the town-wide strategy, Balanced Scorecard, and achieve the departmental mission. Departments select the objectives they can meet to help the town board in pursuing the achievement of the Town Council's Strategic Priorities, Vision, and Mission. The objectives selected from each of the four perspective areas are used to create the department's strategy map.

Step #2 – Developing Departmental Initiatives

These are the critical activities the department must pursue to achieve the Town-wide objective and the department's mission.

- Initiatives detail what the department must do to achieve a Townwide objective or achieve the departmental mission.
- Initiatives identify the highest priority activities to show where resources are most needed to achieve the overall departmental strategy.
- Initiatives may apply to all divisions within a department or just one division.
- Initiatives describe how the department will responds to the Townwide objective.
- Initiatives are written so that divisions and employees can determine how they can respond to support the department's effort to achieve the objective and mission.

Step #3 – Developing Measures and Targets

Each departmental initiative does not have to have a measure, but there should be a way to evaluate the achievement of the initiative or whether or not it was accomplished. There are two goals for strategic measures: organizational motivation and strategic learning.

Organizational Motivation – Measures are a very effective tool in improving performance and/or accomplishing goals. A November 2001 article by Edwin Locke in Harvard Business Review titled "Motivation by Goal Setting" cites a survey of more than 500

studies, which indicates that performance increases an average of 16 percent in companies that establish targets. A primary reason for this may be that measures give employees clear direction and guidance as to what they need to accomplish. When employees focus their efforts on achieving key initiatives that are aligned with town-wide objectives and strategic priorities, then there is much greater probability that a well-coordinated effort is made in fulfilling the town's mission and the board's vision. The effort to clearly articulate the town's top priorities to assist employees compliments the old saying that "people do what you inspect, not what you expect."

Strategic Learning – Measures are a way to monitor departments' progress in achieving the town-wide objectives and their initiatives. Any strategy used to achieve initiatives, objectives, or strategic priorities represents a hypothesis of how to succeed. Strategy to achieve a desired outcome or solve a problem is often a new destination, a place that the town has not yet traveled to before. Measures and targets provide a way to test assumptions inherent in the strategies we select to pursue our goals. Documenting our strategy through measurement allows management, employees, elected officials, and the public to monitor, manage, validate, question, and/or deliberate possible adjustments to our strategy. If this can occur, then the Town starts becoming a "learning organization" where being analytical, adaptive, and responsive to the hypotheses we've tested become keystones of the organizational culture that helps the Town successfully implement its strategy.

Components of a Good Measure

- Measures should be specific. Stating the SPD will be the "best" police department or that Administration will "maximize customer satisfaction" are more like vision statements and are difficult to measure.
- Measures should be measurable. There are ways to measure seemingly less tangible goals. Surveys, if properly designed, can be used to measure the perception of service quality, awareness of issues, community satisfaction, etc.
- Does the measure really evaluate the initiative being pursued?
- Is the measure reliable?
- Is the measure easy to understand and explain?
- Are departments using a variety of measures in evaluating their initiatives (workload, results, efficiency, effectiveness, short-term vs. long-term)?
- Does the measure clearly communicate the expected performance?
- It is important to know where you are and where you want to go. Ideally, departments should have a baseline measure for current performance in the form of last year's actual data, best practices or industry standards for comparison. When baselines do not yet exist a TBD (to be determined) is placed in the appropriate area to indicate the department is in the process of getting this data.

Guidelines for Setting Targets

1. Targets should be realistic but challenging enough to motivate greater accomplishments.
2. Departments can be more aggressive when setting multi-year targets.
3. Provide a rational explanation as to why achieving a target is important, especially with stretch targets.
4. When setting a target, department should review the linkage (cause-and-effect relationship) of the “enabling” perspectives to make sure they have the ability to achieve the target, thus the following questions should be asked:

- Do departmental personnel have the skills and tools necessary to get the job done?
- Does the department have sufficient resources/funding?
- Are internal operations adequate?

Stretch Targets – These are usually long-term or multi-year goals. At most, departments should set one to two stretch targets per year. These are reserved for those initiatives critical in making a particular breakthrough. Stretch targets can be especially useful to help a department break form its comfort zone or traditional way of running operations so as to spark creative thinking and results-oriented problem-solving. Every department should have at least one stretch target.

Vision for Stallings

To provide an inviting and safe community with a commitment to excellence where families and businesses can thrive as we embrace our future while preserving our past.



Mission of Town Government

To serve the residents and businesses of the Stallings community by providing excellent municipal services while upholding the public interest by maintaining a sound financial position and active stewardship of public assets and resources.



Serve the Community

Strengthen Citizen Engagement	Conserve Cultural & Natural Resources	Increase Citizen & Community Safety	Promote Economic Vibrancy	Enhance Recreation, Walkability & Connectivity
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Manage Resources

Maintain Fiscal Strength	Develop Long-Term Financial Plans	Invest in Infrastructure	Deliver Services Efficiently
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Run the Operations

Enhance Emergency Preparedness	Improve Communication & Collaboration	Excel at Staff & Logistical Support	Provide Responsive & Dependable Services
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Develop Know-How

Maintain a Skilled & Competent Workforce	Support Development of Citizen Volunteers	Enhance Relations with Other Entities
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Town Council Strategic Priorities

- Fiscal Responsibility
- Plan Implementation (Land Use and Parks & Rec/Greenway)
- Improve Transportation Network
- Economic Development
- Public Engagement

“The Stallings Way” Core Values

- Integrity
- Commitment
- Flexibility
- Awesome Customer Service
- Team Before Self
- Continuous Improvement
- Qualified/Competent
- Supporting Each Other
- Everyone Pitches In
- Work/Life Balance
- Positive Attitude
- Collaboration
- Dialogue
- Have Fun
- Trust & Respect
- Open to Teach/Learn
- Healthy, Positive Environment

ADMINISTRATION DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

What targets did your department meet and/or exceed? What is the significance of meeting these targets? How did the department meet/exceed these targets? What will be done to ensure continued success?

Strengthening Citizen Engagement – In the short-term, the Town had some technical difficulties with its pre-pandemic A/V system for broadcasting Town Council meetings. However, this A/V system was just an inexpensive placeholder until the New Town Hall opened which has an enhanced A/V system. This new system should allow the Town to successfully broadcast regular Council meetings with clear audio and video. During the pandemic, the Town has continued to broadcast Council meetings via the ZOOM virtual platform. Whether it be virtual meetings or in-person meetings, the Town should be able to broadcast all regular Town Council meetings moving forward.

Adopting a Fiscally Responsible annual budget – This has been completed – fiscal responsibility is a Council priority. The Town will continue to monitor its fiscal situation regularly and work towards maintaining public funds in a fiscally responsible manner.

Sharing Departmental Accomplishments - The Town achieved this goal and will continue to do so.

Developing a Balanced Scorecard – The Town successfully implemented a balanced scorecard tool to help the Town implement strategy, enhance internal and external communication, provide better data for policy making, and help achieve mission/goals. Management will ensure that the overall system is maintained.

Improve Inter-Departmental Relationships Through Team-Building – The Town has met its goal. The pandemic has created a challenge with this goal moving forward.

Develop and Present a Parade Feasibility Study – Staff met with Mayor Dunn and held 5 developmental staff meetings. Study was presented to Council at the 6/10/19 Council Meeting. Council opted not to hold a Christmas parade in 2019 but rather to enhance the 2019 Christmas event.

Employee Recognition Program – The Town exceeded the goal here for number of employee recognition awards given. With the pandemic,

Hold a Citizen Academy – Council took the lead on holding a citizen academy with staff taking a support role designed to increase citizen participation in Town government.

CHALLENGES:

Which targets did your department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?

Citizen Newsletter – The goal was to publish this 4 times per year. The newsletter was published in Spring, Summer, and Fall 2019, and also the Winter of 2020. However, Spring 2020 and subsequent newsletters have been delayed due to the pandemic. The rationale being that because information has changed so rapidly with the pandemic and there is a lag time between finalization of newsletter content and receipt by the public, the newsletter could provide wrong information if sent.

“All Hands-on Deck” Meeting – The Town was not able to hold 2 meetings due to the pandemic. Once we are able to safely meet in-person, we can continue these meetings.

Secure Occupancy Tax – Bill has not advanced in the NC General Assembly yet. State elected officials reported pre-pandemic that this item would be brought up again during the short session. However, state elected officials report that COVID response consumed the most recent short-session, but they would consider revisiting it in the future.

Recordable Injuries – The Town sets our recordable injuries goal at “0” every year because we refuse to set a workplace injury goal that is anything less. We had 2 recordable injuries this year for 2019. Whenever there is an injury our safety committee reviews to determine if this accident could have been avoidable and, if so, what future changes might be needed to avoid such an incident in the future.

Hold “All Hands-on Deck” Meeting – The Town has not held one yet and COVID-19 pandemic led to cancellation.

Respond Within 1 Business Day from Citizen Inquiry – Administration missed this goal on two occasions but has not had a miss since. Will continue to strive to acknowledge citizen inquiries as soon as possible and respond as soon as staff can investigate request.

OTHER COMMENTS:

The Balanced Scorecard has been a positive learning experience for all. Like anything new, we have identified some ways we could improve and will continue to strive towards our goals.

ENGINEERING DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

What targets did your department meet and/or exceed? What is the significance of meeting these targets? How did the department meet/exceed these targets? What will be done to ensure continued success?

Met Target:

Select design firm and execute contract for Phase I implementation of the Greenway Master Plan.

- Destination by Design selected as the primary consultant by a staff selection committee. Contract executed for the Phase I scope of work. Will work with the consultant to ensure quality deliverables are developed.

5% sidewalk panels deficiencies identified and reduced a year.

- Fairhaven and Morningside Meadows subdivisions severe sidewalk issues were identified and repaired (6% of inventory). Callonwood subdivision severe sidewalk issues have been identified. Will continue to identify potential safety hazards and repair accordingly.

100% of roads >40 on the pavement condition index.

- This initiative completed with the fall 2019 resurfacing contract. Roads in this contract are rated from 35-40. PCI values updated post completion of this contract.

100% of Town streets sweep annually.

- Street sweeping completed the week of Aug 10th, 2020.

100% of engineers with minimum of 15 Professional Development Hours for licensure maintenance.

- Town Engineer attended ASCE Conference Oct 10-13, 2019 in Miami, FL. Earned 15 PDHs from attending technical seminars on various topics pertaining to civil engineering. Will continue to attend future conferences and/or online webinars.

100% of department attendance at a minimum of 3 continuing education classes.

- Town Engineer attended ASCE Conference Oct 10-13, 2019 in Miami, FL. Earned 15 PDHs from attending technical seminars on various topics pertaining to civil engineering. Will continue to attend future conferences
- Associate Engineering is currently engaged in a Fundamentals of Engineering study course to prepare for the FE exam. Six hours a week of course work with study problems for each section covered. Once FE exam is successfully passed, will investigate study courses for the PE exam.

Resurfacing contracts line items costs compared to similar sized communities are with 10%.

- Cost per square yard of roadway resurfacing was equivalent to the FY18-19 Indian Trail resurfacing contract.
- Same contractors bid on the Stallings and Indian Trail contracts. Indian Trail had 2.75 times more roadway area in that contract. Better individual line item pricing due to economy of scale but the overall contract cost per square yard of roadway was the same. This ensures that the Town is acquiring competitive bids for this scope of work.

Complete stormwater repairs within two months of purchase order execution (80% target).

- Completed 96% of stormwater repair projects within two months of contract execution. Associate engineer will continue to work with contractors to promptly repair prioritized stormwater repair projects.

CHALLENGES:

Which targets did your department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?

20% of storm drainage infrastructure proactively cleaned annually.

- Town has estimates to do this work. Separated street sweeping from the vacuum excavation contracts. Covid-19 slowed the process of acquiring quotes.

1 business day from citizen inquiry to respond/acknowledge.

- Did not meet target. Twin Pines lesson learned. Engage property owners during the process to ensure transparency. Set aside time during the workday to respond accordingly.

FINANCE DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

What targets did your department meet and/or exceed? What is the significance of meeting these targets? How did the department meet/exceed these targets? What will be done to ensure continued success?

Targets that were met were the following:

- strengthen citizen engagement by providing monthly financial reports on the website
- maintain financial strength with the completion of the FY2019 audit and CAFR
- receiving the GFOA Award of Financial Excellence for the FY2019 CAFR
- maintaining a 30% council reserve in restricted fund balance with fiscally responsible guidance to the Town Manager and Council with strategic funding and purchasing solutions
- running the operations with the timely issuance of purchase orders
- production of timely financial statements to the town manager and directors so they can stay within budget and make financial decisions for their departments
- maintain skilled and competent workforce with accounting training
- dependable services by providing timely responses for public information requests

These items were met, and in some cases exceeded, by constant oversight and review of financial reports and communication to department heads, town manager and council. This approach of constant monitoring and reporting will be used to in FY2021 to ensure continued financial success.

CHALLENGES:

Which targets did your department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?

With the impact of the COVID virus, the department had challenges which related to attending meetings and functions that would build relationships with other governmental organizations. This will be remedied with the use of virtual meetings which have become very common since the outbreak.

The virus also impacted training and development which for the next fiscal year we will look for more virtual training opportunities.

OTHER COMMENTS:

The finance department has efficiently provided service to the staff, town manager, council and our citizens in a time which has been challenging given the current environment. We have been able to pay our vendors and have worked to provide timely and accurate information. This next year will also be challenging but we will continue to strive to meet our goals and expectations.

PARKS & REC DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

What targets did your department meet and/or exceed? What is the significance of meeting these targets? How did the department meet/exceed these targets? What will be done to ensure continued success?

- **Strengthen Citizen Engagement/Marketing:** New greenway/master plan website completed, 100% response rate and 15-minute response time to social media inquiries maintained throughout the year, shared staff accomplishments
- **Increase Citizen & Community Safety:** Parking issues were resolved for large special events by partnering with CPCC to utilize their parking facilities and shuttle services to bring people safely to Stallings Park and alleviating traffic congestion in downtown Stallings.
- **Enhance Recreation, Walkability & Connectivity:** Discussions with Mecklenburg County led to a concept approval for a connection from Stallings Greenways into Colonel Francis Beatty Park. Once the trail is constructed, an MOU/IGA will be established.
- **Enhance Emergency Preparedness:** Special Event Contingency Plan was formed and adopted by the Safety Committee and Parks and Recreation Advisory Committee, and Emergency Action Plans created for most likely scenarios to impact parks and recreation activities.
- **Maintain a Skilled & Competent Workforce:** Training opportunities for staff were increased by 20%, and Parks and Recreation staff members were nominated for and received numerous Caught Ya! awards throughout the year.
- **Enhance Relations with Other Entities:** Staff successfully established connections throughout the community to bring in volunteers, sponsorships, and public/private partnerships.

CHALLENGES:

Which targets did your department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?

- **Provide safe and equitable access to recreation amenities and facilities** – largely development driven, many of the necessary components to begin working on a Safe Routes to Parks framework were premature to work on in this year. This goal will be more appropriate once the recreation network throughout Town expands in the future.
- **Meet ADA standards for accessible parks & programs** – The scheduled webinars for this initiative were postponed to spring, and then indefinitely due to COVID-19.
- **Develop a life-cycle replacement plan for all capital assets (P/R, P/W include facility assets)** – While the minor property inventory was completed, capital asset inventory and replacement plan have been delayed due to ongoing construction and assets being stored in many different locations temporarily.
- **Establish cost recovery goals for all recreation programs** – Staff opted to defer this initiative due to 1) lack of programming space and 2) COVID-19 impacts on programming.
- **Develop a core group of volunteers** – The challenge here is due to being out of touch with our volunteer base due to COVID.

OTHER COMMENTS:

Parks and Recreation staff truly embraced the community and used creativity, innovation, and flexibility to provide programs and outreach to the community when COVID-19 impacted our ability to host events. This led to us fast-tracking our initiative to restore community programming. Some of the key initiatives were:

- Easter Bunny Drive-By: Two Trucks & one Van went out through local neighborhoods with the Easter Bunny!
- Pen Pal Program: Stallings Residents were given the opportunity to register for our first ever Pen Pal Program. This program allows staff members to write to 3-4 families per/week.
- Senior Spotlight: This program involves highlighting local high school and college seniors in our area. We will be putting yard signs, goodie bags, & letters together to deliver to local students in Stallings. This program is open to Stallings Residents to sign-up via. Facebook.
- Stay Smiling Stallings: 21 new activities were posted for families to do at home via. our Facebook Page. These included homemade play dough, sidewalk chalk, science experiments, & even printable sheets for kids!

PLANNING DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

What targets did your department meet and/or exceed? What is the significance of meeting these targets? How did the department meet/exceed these targets? What will be done to ensure continued success?

The Planning Department successfully worked to efficiently provide planning expertise to elected officials and provide the community with customer service in a timely and effective manner.

Staff worked towards making changes to ordinances and plans to bring the documents into line with elected official's goals for the Town.

Meeting these targets help to promote council objectives.

CHALLENGES:

Which targets did your department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?

Training goals were not met. Partially due to covid-19, but also due to workload.

A goal for 20-21 is to work towards managing projects and staffing resources in a way that makes time for training.

Training opportunities and delegating projects will encourage staff members and help to effectively perform their job duties.

OTHER COMMENTS:

19-20 presented challenges to the department that allowed for an opportunity to re-evaluate staff resources and provide for a clear way forward. 20-21 will focus on evaluating the departments "Big Picture" and focus goals that will assist council in accomplishing their established goals for the Town.

POLICE DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

What targets did your department meet and/or exceed? What is the significance of meeting these targets? How did the department meet/exceed these targets? What will be done to ensure continued success?

Targets met include traffic crash reduction rate, CID case closure rate and use of social media usage.

The 19-20 goal for traffic crash reduction was 20%. The department's overall crash reduction rate achieved was 8.5%, while the reduction of personal injury accidents was reduced by almost 13%. Although the percentage was not met I still consider this a success. Any reduction of traffic accidents is still potentially saving lives of the motoring public that travel through Stallings. This traffic crash reduction goal will continue into the next year but it has been reduced to put the goal within an achievable range. The initial 20% reduction goal was predicated on the creation of a fulltime traffic unit. Based on staffing and departmental needs this unit was never created, nor is there any plans on creating the unit.

The department is using social media to share departmental achievements. Sgt. Mathews promotion was placed on Facebook along with several items posted to thank the Stallings community for the outpouring of support shown during the recent, national civil unrest. We will continue to use social media as a platform to help us connect with our community.

Criminal Investigations Unit ended the year with a case closure rate of 33%. This national case closure rate was 31%. This goal was not achieved but did meet the national average. In the past years, the intent has been to have patrol follow up on their cases as much as possible and close them on the patrol level, particularly simple cases. CID has been taking on more complex and involved cases, which make a case closure more difficult.

CHALLENGES:

Which targets did your department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?

Targets not met include employee retention rates and NC League of Municipalities Law Enforcement Risk review.

The police department did not meet the goal of having fewer than 10% vacancies. The department has experienced two retirements, one injury, and some other issues that resulted in officers' resignations. We have hired three new officer and still have two vacancies that are in the process of being filled. It is our hope that a new hiring protocol will help select successful candidates along with creating new ancillary opportunities within the department that should lead to better officer retention.

In 2019 the department's old policy manual was submitted to the NCLM. The risk review process was not completed as the process was not followed. In 2020 the department launched a new policy manual and we will revisit the risk review process once the new manual has been active, allowing all officers to the opportunity to review and process new policies. All supervisors have already completed the pre-requisite NCLM online training to prepare for the risk review onsite.

OTHER COMMENTS:

Although the set goal was not met for CID case clearance and accident reduction, I still feel those categories are measured successes. These goals are still in our next BSC but have been adjusted to make the goals attainable and realistic. The department is having the conversations with all staff to make sure they are aware of the departmental goals. The department command staff has already sat down and discussed goals for 20-21 and staff is prepared for parts of the goals to be assigned to begin working on.

PUBLIC WORKS –YEAR-END BALANCED SCORECARD OVERVIEW

ACCOMPLISHMENTS:

Be a good steward of natural resources – This is an ongoing process to identify energy consumption for the town and ways to reduce the cost. In the beginning we did identify installing LED lights throughout town hall would significantly lower our energy consumption as well as what we were paying each month. In doing this we have a greener footprint and it has lowered maintenance cost with no replacement of bulbs or ballast.

Repair small potholes within 3 business days of request – In just about every instance we have been able to accomplish this. There are occasions where weather prevents this, and in the winter months when it is too cold.

% of work orders reported through website from citizens – This measure is partially complete. We have a way to report streetlight outage, and you can report a concern. Still working on an actual work order. I would say we reached our mark of around 35%. I rarely receive a streetlight outage request now that it can be reported directly on our website by a citizen whereas I would receive 1 to 2 request every couple of months. We also get 1 to 2 request per month reported through the “report a concern”.

Produce list of training initiatives and submit to the Safety Committee - Advise safety committee on relevant trainings for building safety. Asked safety committee to do an updated training on fire extinguishers. I consistently work with Ashley Platts our safety coordinator on relevant and on-going safety issues. This has been especially relevant in the wake of COVID-19 for cleaning, sanitizing, and employee PPE.

% of responses to citizen inquiries within 1 business day - Citizens calling in or emailing are contacted within a 1 business day turn around allowing us to have a more positive experience with the citizen. This year there were some instances where we were not able to accomplish this due to COVID-19. Everyone inquiry was responded to in less than 5 days though.

Inspect All Town Neighborhoods - Doing these neighborhood inspections has not only allowed us to identify potholes, street sign issues, etc., but it has also allowed us to identify storm water issues as well as code enforcement issues. In doing these inspections we can identify and correct issues before residents see it and it becomes a major issue.

CHALLENGES:

% of work orders reported through website from citizens – Looking at different workorder system to identify what would work best for our citizens to report issues through the website. We will then need to communicate to the town that this workorder is in place and this is the best way to report a concern.

Training Meetings to Improve Employee Skillset/Knowledge – Currently we do training or skillset improvement just by walking the employee through the process while in the field on a skillset that they are less familiar with. Our safety coordinator provides refreshers and new trainings to completed online and for now this is sufficient. We were looking at going to some trainings, but in the wake of COVID-19 most of these were cancelled.

% of neighborhoods who have citizens volunteer – As a result of COVID-19 I felt it was best to abandon this goal for now.

OTHER COMMENTS:

This year presented several challenges with the unfortunate pandemic COVID-19. I think we faced this challenge well and continue to navigate all the challenges that seem to change daily. Even with the challenges I feel like the BSC gave us a good

guide (a map and compass so to speak) to follow for the year. I look forward to perfecting the BSC and seeing where our map takes us in FY20-21.