



*A Balanced Scorecard Approach for the Town of Stallings*

*FY 21-22 Annual Report*



*September 22, 2022*

### **A Report to Citizens, Council, & Staff – FY 2021-2022**

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 strategies being used to accomplish objectives and initiative should be 1.) changed, 2.) abandoned, or 3.) maintained (i.e., "stay the course"). The next opportunity to analyze results and discuss possible changes to strategy will be at the Council's regular board meeting on September 26, 2022. At this meeting, the Manager will officially submit the FY 21-22 Year-End 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

## 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?

what (if anything) should be done in response. It is also important to 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.

I am grateful to Council and staff for being willing to try something new. This is our third year, and this has been/will be a continuous learning experience for all of us. However, I am confident that we will be able to use the lessons learned to continuously improve.

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 where 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 desired 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 from 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

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**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

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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 Town-wide 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 respond to the Town-wide 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.



## STRATEGY MAP

### 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

- Create a Stallings Downtown
- Review & Amend Land Use Plans to Better Align w/ Council's Vision
- Economic Development
- Transportation
- Communications
- Enhance Blair Mill Park

### "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

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### 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 – This has been both an accomplishment and a challenge. The Town continued to broadcast all Town Council meetings with a mix of in-person and virtual formats. Notably, the Town. The Town has also begun a Town blog in place of the citizen newsletter. Both of these efforts enhance citizen knowledge and therefore engagement.

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

Creating a Stallings Downtown - The Town continues to work towards creating a downtown with an action strategy that seeks to be both visionary and practical. This goal will take many years to achieve, but the Town has developed a strategy/action plan aimed at laying the foundation for a successful downtown.

#### FY 21-22 Action Steps (Updates)

- Council will recruit community leaders to establish a Downtown Champions Committee. **It is likely premature to do anything here right now and Council has not taken any action.**
- Gain Site Control Over Key Properties. **The Town has purchased 2725 Old Monroe Road and 325 Stallings Road.**
- Partner with DFI for expert guidance/support to proactive investment to spur desired development through a public/private partnership. **Town Council approved contract with DFI and work has begun.**
- Start Farmers Market & Continue Events (P/R). **Achieved.**
- Focus on nuisance violations in downtown core area (P/Z). **CE has focused on downtown area.**
- Complete Streetscape Design (Eng). **NCDOT will not allow the Town to put in on-street parking on Stallings Road, which has caused the Town to change its strategy here. The Town has partnered with a consultant to develop several streetscape specifications that can be plugged into the Town's development ordinance as a requirement. We're waiting for DFI work to be complete to assess how this can be plugged in.**

Maintain a 5-Year IT Replacement Schedule/Plan- Computers and equipment are being updated as needed. With the additional revenue replacement due to the ARPA funds, laptops will be available to all staff for use in the office, and if need be, remotely.

Recordable Injuries – The Town has had 0 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.

Maintaining a Skilled & Competent Workforce – This is both an accomplishment and a challenge. Overall, the Town has met its turnover goal. Even the best organizations will not always meet turnover goals in today's environment where the average worker tends to change jobs more often than in the past which is compounded by the “Great Resignation”. However, the Town should always strive to adopt best practices to ensure that we are able to attract, develop, and retain a competent workforce. The Town has setup stay and exit interviews so management can identify trends and recommend changes if systematic problems arise. Recently, the Town implemented an incentive pay initiative for the police departments based on feedback received and research.

Also, the Town gave out the Marie Garris Award for the employee of the year, officer of the year, and continues to do the “Caught Ya!” employee recognition program. Additionally, the Town was able to hold four teambuilding events thus far.

### **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)?*

Emergency Preparedness – These efforts are anticipated in 2023.

Committee Participation - The pandemic halted all committee meetings. It can be assumed that due to the length of the pandemic shut down, age/health of many committee members, and continued COVID concerns, there is less interest in serving on Town committees. A restructuring of citizen input/volunteerism which is normally provided via committees may need to be considered.

Implementing Economic Development Strategic Plan – The Town has put funds in the budget to contract with the Union County Economic Development entity for a part-time commitment in personnel for implementation of the ED plan. However, this has been delayed as we wait for the County’s ED entity to reorganize itself, which was recently completed. Now we are waiting for the new ED entity to approve moving forward.

Secure Occupancy Tax – Bill has not advanced in the NC General Assembly.

Mandatory Safety Training – 100% of staff have completed mandatory safety training.

Maintaining A Workforce – This is both an accomplishment and a challenge. The Town has not held any “All hands on deck” meetings”. The performance evaluation system is on hold currently because we are not able to hold in-person supervisory training, our trainer was in a bad car accident, and the Town anticipates bringing in several new department heads in the near future (meaning it is more cost efficient to wait). When our trainer recovers and we bring in the new staff, we will plan on implementing. Holding this training in-person is essential.

### **OTHER COMMENTS:**

#### **September Report:**

##### **Citizen Survey**

- Staff waiting for feedback from Council after presenting on 9/12/22.

##### **ARPA**

- Staff continues to participate in weekly ARPA consortiums presented by the CRC. A mock-audit will be performed in-house by CRC in late October in preparation for a potential Federal audit.

##### **Code of Ordinances Update**

- An update has been sent to the legally codifying company with any ordinance changes since the past update. These updates, once codified, will be reflective on the website.

##### **Surplus Sales**

- As of 09-07-2022, \$7088.11 worth of items have been sold so far in 2022. A total of \$429.00 worth of items were sold in 2021.

**Old Monroe Road NCDOT Project (U-4714)**

- NCDOT advises that their goal is still to let the project in June 2024. However, NCDOT is experiencing some challenges related to right-of-way acquisition and utility relocation. NCDOT will advise us if/when a new schedule is set.

## ENGINEERING DEPARTMENT – YEAR-END BALANCED SCORECARD OVERVIEW

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### ACCOMPLISHMENTS:

- Engineering was engaged in the TCC Meetings. The significance of this accomplishment is participation in regional transportation communication and coordination efforts. This target has been met by the Town's Associate Engineer attending each meeting. This target will continue to be met through the involvement of the Town's Associate Engineer.
- To date, repairs have been completed within two (2) months of purchase orders being issued. This has been the result of an ongoing effort to eliminate the backlog for stormwater management corrective action. The significance of this accomplishment is that repairs are completed in a timely manner which provides prompt service to residents (get's the contractors in and out), addresses potential hazards in a timely fashion, and minimizes the further degradation the area and/or infrastructure impacted by the issue. The Town Associate Engineer promptly coordinates with contractors and the Town Engineer, coordinates a solution, prepares the PO, routes the PO for appropriate Town Staff approvals, coordinates schedule with the contractor, and follows-up to ensure the contractor is responsive and effective. This approach is ongoing and has addressed approximately 36% of the backlog with the major issues in the backlog being tackled first.
- The Town Engineer has completed professional development hours for the NC P.E. license. This is significant as it ensures that the Town Engineer is continually educated on issues and solutions. This was accomplished by the Town Engineer pursuing and completing continuing education courses as required for the P.E.
- The Engineering Department completed the first year of the Pavement Management analysis and project/treatment selection. The next step is the advertisement for bids and commencing the work this fall.
- The Engineering Department has been responsive to questions and issues presented by Town residents and have maintained a high level of communication. This was especially true during the months of July and August where significant rains resulted in drainage issues at multiple locations across Town. The Engineering Department is still addressing issues that have been added to the stormwater backlog as a result of these significant rains.

### CHALLENGES:

- The Town Hall Streetscape design was not completed due to NCDOT denying the Town the ability to institute on street parking on Stallings Road. The Town has developed a draft streetscape plan that it can incorporate into our development ordinance with a parallel timeline of the downtown DFI work. The Town will continue to coordinate with NCDOT to reach a resolution for acceptable streetscape features that accommodates both the regulatory criteria of NCDOT and the vision of the Town for this corridor.
- The Long Range Transportation Plan overhaul has been delayed as the Council has opted on focusing resources on the hospital area first.
- Staffing levels have caused issues meeting some goals. The Town currently has two engineering positions and has had difficulty filling its Town Engineer position due to labor market conditions, and has maintained an interim Town Engineer on a part-time basis. Resulting challenges include completing the sidewalk inventory and evaluation, as the focus this year was on creating a pavement management system and addressing the stormwater backlog. For sidewalk inventory, the Town may need to consider outsourcing the inventory work to make this a reality.
- The Town has inventoried/mapped 80% of our stormwater infrastructure and SCMs. This is significant progress but our goal was 100% so we fell short there.

### OTHER COMMENTS:

The Engineering Department continues to be diligent to meet the needs of the residents and business community regarding repairs, contractor activities, flooding, plan review, and construction coordination.

# FINANCE DEPARTMENT – YEAR-END BALANCED SCORECARD OVERVIEW

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## **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?*

Finance department was able to meet financial reporting targets for FY2022 which include:

- Timely monthly reports to both management, Council and staff as well as online postings to keep our citizens aware of the Town's finances.
- Completion and adoption of the Five Year Financial plan for FY2022
- Received notification from GFOA that the Town received the Award of Excellence in Financial Reporting for the FY2021 Annual Comprehensive Financial Report (ACFR)
- Finance staff provided services related to purchase orders and payables in a timely and accurate manner

Accounts Payable and Finance Officer attending training which included accounting training classes to enhance overall accounting and annual software conference for the accounting software used by the town.

Continued success will be achieved by constant and consist monitoring of the departments targets and goals.

## **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)?*

Monthly reporting by the balanced scorecard goals was challenging. Information from several of our vendors is received later than the established deadline. In the future, the use of estimates will be used to make sure the reports are given to the both Council and staff. This will give them information that is needed to make future financial decisions.

Also, the change to the outsourcing payroll services has created additional work on the finance staff. Biweekly and monthly journal entries are now having to be made since it is not processed within the accounting system. Additional work is also required for reconciliations between retirement and 401K deposits and reporting.

## **OTHER COMMENTS:**



## PARKS & REC DEPARTMENT – FY 21-22 YEAR-END BALANCED SCORECARD OVERVIEW

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### **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?*

Stallings Municipal Park continues to be a staple for our community members. Throughout the past few months, we've hosted our very first Spring into Wonderland Event, live concert series, educational programs with Union County Soil & Water, weekly Farmers Market and other small programming efforts. We have seen a high volume of traffic in the park that we believe is due to our successful summer running the Splash Pad along with our popular events/programs. With this increase of people, we plan to make renovations to Stallings Municipal Park that include new picnic tables for the shelters, updating park equipment, enhancing the bathrooms, new water fountains, and other small projects to increase the overall aesthetic to the park.

June 2022 began the installation of Blair Mill Parks first playground structure. Since the playground has been installed, we have seen an increase in participants enjoying the park with their families. Due to this increase we plan on moving forward with a potential phased project that would consist of playground shade, a permanent shelter structure, bathroom upgrades, as well as a face-lift for the disc golf course.

Construction has begun on the Vickery portion of the Blair Mill Greenway with hopes to be finished by the summer of 2023. This will allow our department to host more program efforts at Blair Mill Park that focus on the importance of the outdoors. We will begin to host programs before the completion of the greenway

### **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)?*

The Department struggles with attaining volunteers, keeping up with re-occurring maintenance issues, and expanding on our programs. Due to the recent shift in management, it has been difficult to adjust while being down a full-time event coordinator. While we have began the process of hiring for the event coordinator position, we believe this will allow our efforts to be put in a multitude of areas that are, at this time, being overlooked. In the future we will focus on recruiting more volunteers through local high schools as well as expanding our current parks committee. In hope that expanding these volunteer opportunities to high school students that may potentially lead to part-time positions in the park. With these new additions it would alleviate the burden that our maintenance team feels and will allow us to reach a new standard at all our facilities.

### **OTHER COMMENTS:**

Ryan Ridgeway received a Caught Ya award, alongside Jake Griffin with Public Works, for their willingness to help a community member in need during a stressful time! We are currently in the interview process for a full-time event coordinator & will begin the search for an additional full-time maintenance staff.

## PLANNING DEPARTMENT – YEAR-END BALANCED SCORECARD OVERVIEW

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### **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 Team continues to excel in providing responsive and dependable services. We create excellent rapport with residents and developers and receive positive comments about how friendly, informative, and efficient we are when helping them.

Like the Downtown, Silverline, ordinance amendments, and Land Use Amendments, many tasks are long-range projects and take years to produce results. Even after many of the items are accomplished, you may not see the benefits immediately, but you can see how beneficial they will be long-term. Planning continues to bring Text and Ordinance amendments to the Council for approval, improving the strength and consistency of our Development Ordinance and Code of Ordinances.

The Streetscape Design has been completed, with adoption to go with the DFI study timeline.

Development Projects are on the webpage for residents and developers to review, and the mapping has improved from where it was. Planning is updating the website periodically so the residents have the most up-to-date information. It saves a lot of time for people who want information and staff time on inquiries.

The Council adopted a membership change for the Planning Board and Board of Adjustments that will help with quorum issues.

We are fully staffed now with our new employees Ruben Ortiz as the Code Enforcement officer and Patrick Blaszyk as Planning Technician.

### **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 previous Planning Director leaving, the prolonged absence of a Planning Director, and the new Planning Director getting up to speed on many of the tasks mentioned on the Balanced Scorecard, many tasks need to be started from the beginning and reevaluated. Many tasks were delayed due to staff turnover. You may not see results, but every task is being worked upon. The main challenge is waiting to see the results of Land Development, which takes years.

### **OTHER COMMENTS:**

Current Reviews as of September 2022:

- Aria at Idlewild
  - Construction Documents approved 9/7/22
  - Next Steps: Pre-Construction Meeting, Final Plat Review, Bond Review – TBA
- Bailey Mills
  - Under Construction
  - Next Steps: Final Plat Review, Bond Review - TBA

- Bailey Mills Expansion
  - Inactive
  - Next Steps: Construction Document Review - TBA
- Sawmill Run
  - 1<sup>st</sup> Submittal Construction Document Review Complete – not approved
  - Next Steps: Water and Sewer Accessibility Letter, Address Staff Comments for Const Documents - TBA
- Willows at Stallings
  - Construction Documents Approved
  - Next Steps: Final Plat Review, Bond Review – TBA
- Stallings Farms
  - 1<sup>st</sup> Submittal Construction Document Review Complete – not approved
  - Next Steps: Water and Sewer Accessibility Letter, Address Staff Comments for Const Documents – TBA
- Courtyards on Chestnut
  - Under Construction.
  - 1st Final Plat Reviewed, 1<sup>st</sup> Bond Reviewed – not approved
  - Next Steps: Address Staff Comments for Final Plat & Bond - TBA

## Permits

August 2022 Report:

Permit #	Description	Permit Date	Main Status	Total Fees	Total Payments	Parcel Address	Subdivision	Zoning	Parcel #
1614	Basement Renovation	8/31/2022	Approved	\$50.00	\$50.00	2218 CAERNARFON LN #17	Shannamar a	SFR-2	7054721
1613	Brothers Collision and Auto Repair	8/29/2022	Approved	\$50.00	\$50.00	109 Sherin Lane	None	IND	7102160
1612	Replace Existing Rear Deck	8/28/2022	Approved	\$50.00	\$50.00	7007 COPELAND CT #234	Kerry Greens	SFR-3	7129747
1611	New Home Construction	8/26/2022	Approved	\$75.00	\$75.00	1042 Gradison Drive	Courtyards on Lawyers Road	CZ	8321365
1610	New Home Construction	8/26/2022	Approved	\$75.00	\$75.00	1390 Millview Lane	Courtyards on Lawyers Road	CZ	8321304
1609	Interior Plumbing Modification, moving kitchen sink and dishwasher location	8/25/2022	Approved	\$50.00	\$50.00	500 UNION WEST BLVD A #1	Union West Business Park	C-74	07102010R
1608	pool install	8/24/2022	Approved	\$50.00	\$50.00	1108 Yarrow Street	Chestnut	SFR - 1	7141111
1607	Zoning Verification Letter Solis at Chestnut Farm	8/24/2022	Approved	\$50.00	\$50.00	3005 Chestnut Lane	Solis at Chestnut Farm	MU - 2	N/A
1606	10x24 shed	8/22/2022	Approved	\$50.00	\$50.00	701 LAKEWOOD DR	Lakewood Knolls	SFR-3	7129198
1605	EV Charger Installation	8/22/2022	Approved	\$50.00	\$50.00	2945 Matthews Weddington Road	None	CZ	7141005

1604	Showcase Dance Centre	8/22/2022	Approved	\$50.00	\$50.00	7800 STEVENS MILL RD	None	MU - 2	7054715
1603	Upfit in shopping center	8/19/2022	Approved	\$50.00	\$50.00	7800 Stevens Mill Rd	None	MU - 2	N/A
1602	12x20 Unconditioned Sunroom on Existing Deck	8/18/2022	Approved	\$50.00	\$50.00	3012 CHALET LN	Vickery	SFR - 1	7075343
1601	Replace aging fence around property	8/18/2022	Approved	\$50.00	\$50.00	2111 COATSDALE LN #237	Kerry Greens	SFR - 3	7129692
1600	back yard fencing	8/17/2022	Approved	\$50.00	\$50.00	222 SAMUEL ST	Olde Blairs Mill	SFR - 1	7075393
1599	In Ground Swimming Pool	8/16/2022	Approved	\$50.00	\$50.00	222 SAMUEL ST	Olde Blairs Mill	SFR - 1	7075393
1598	Fabricated Aluminum, Non-Illuminated Sign Cabinet Cabinet Size: 6"d x 36"h x 86"w Graphics: Double Face, FCO Acrylic Logo Graphics Base: Faux Stone, LedgeStone DP2455 Almond Taupe Mount: Two internal aluminum posts, direct burial into concrete footings	8/16/2022	Approved	\$50.00	\$50.00	MATTHEWS WEDDINGTON RD	Chestnut	MU - 2	06087001E
1597	New Home Construction	8/15/2022	Approved	\$75.00	\$75.00	1373 Millview Lane	Courtyards on Lawyers Road	CZ	08321345
1596	New Home Construction	8/15/2022	Approved	\$75.00	\$75.00	1402 Millview Lane	Courtyards on Lawyers Road	CZ	8321303
1595	New Home Construction	8/15/2022	Approved	\$75.00	\$75.00	6023 Pleasant Run Drive	Courtyards on Lawyers Road	CZ	8321300
1594	New Home Construction	8/15/2022	Approved	\$75.00	\$75.00	6011 Pleasant Run Drive	Courtyards on Lawyers Road	CZ	8321297
1593	post and beam patio covering 28 feet across and 12 feet out into backyard, rafters attached to ledger attached to house , metal roof	8/11/2022	Approved	\$50.00	\$50.00	5009 HAVEN LODGE RD	Fairhaven	MFT	7078011
1592	Zoning Verification Letter	8/9/2022	Approved	\$50.00	\$50.00	3400 SMITH FARM RD	None	IND	07129338G
1591	Re-doing current sign on property	8/8/2022	Approved	\$50.00	\$50.00	3701 Pleasant Plains Rd	Pleasant Plains	TC	7129307
1590	To install a 28'x14' inground concrete pool	8/5/2022	Approved	\$50.00	\$50.00	926 Moose Trail	Southstone	CZ	7033307
1589	Covered Patio in Backyard	8/4/2022	Approved	\$50.00	\$50.00	808 Southstone Dr	Southstone	CZ	7033298
1587	8x10 storage shed in Stonewood	8/3/2022	Approved	\$50.00	\$50.00	1118 SLATE RIDGE RD #64	Stonewood	SFR-3	7132487
1585	landscape Supply / Material yardGrandfathered Use22.4-1 Discontinuation of Nonconforming Uses. A nonconforming use is	8/2/2022	Approved	\$50.00	\$50.00	3701 Pleasant Plains Rd	Pleasant Plains	TC	7129307

	allowed to continue unless the use is discontinued for any reason for a period of seven hundred and thirty (730+) or more consecutive days, and there are no substantial good faith efforts to re-establish the use during this period.								
			Total # of Permits: 29	\$1,550.00	\$1,550.00				

### Code Enforcement

August Monthly Report - Code Enforcement				
Case Date	Description	Found By	Status	Address
8/1/2022	PN -TGW	Ride Around	Closed	5700 CHRETIEN POINT DR
8/1/2022	PN -TGW	Ride Around	Closed	326 INDIAN LAKE DR
8/1/2022	PN -TGW	Ride Around	Closed	3015 PINE POINTE ST
8/1/2022	PN -TGW	Ride Around	Closed	223 LAKEWOOD DR
8/1/2022	PN - Tree Debris	Complaint	Closed	4411 DERBYSHIRE LN
8/2/2022	PN - TGW	Ride Around	Closed	604 PEPPER ANN LN
8/2/2022	PN - TGW	Complaint	Closed	4000 PURPLE VALE DR
8/2/2022	PN - TGW/ Junk vehicle	Ride Around	Closed	4064 Mellon Rd
8/2/2022	PN - TGW	Ride Around	Closed	329 MEADOWBROOK DR
8/3/2022	SDO - Care stored on public street	Complaint	Closed	2712 BENT OAK DR
8/5/2022	PN - Tree debris & Junk Vehicles	Ride Around	Closed	8303 Mill Grove Rd
8/5/2022	PN -TGW	Complaint	Closed	1629 SECREST SHORT CUT RD
8/5/2022	PN -TGW	Ride Around	Closed	6801 Morrison Blvd, Ste 400
8/8/2022	PN - Mulch Pile	Ride Around	Open	3024 MILL STREAM CT
8/9/2022	PN -TGW	Ride Around	Closed	6802 STONEY RIDGE RD
8/9/2022	PN - Junk Vehicles	Complaint	Open	6901 STONEY RIDGE RD
8/9/2022	MHS - Excessive Moisture in bathroom	Complaint	Closed	1511 LOVE RD
8/10/2022	PN - TGW	Ride Around	Closed	1205 MOUNTAIN LAUREL CT
8/10/2022	PN - Trash and Debris	Ride Around	Open	PO BOX 219
8/11/2022	PN - Tree limb and bush in RoW.	Complaint	Closed	16415 DEEPWOOD PL
8/12/2022	PN -TGW	Ride Around	Closed	4226 LAWRENCE DANIEL DR

8/12/2022	PN -TGW	Ride Around	Closed	4000 LAWRENCE DANIEL DR
8/12/2022	PN - TGW	Ride Around	Closed	1575 HAWTHORNE DR
8/12/2022	PN - TGW	Ride Around	Closed	4007 AMEN CT
8/15/2022	PN - TGW	Ride Around	Closed	6133 COLCHESTER LN
8/15/2022	PN - TGW	Ride Around	Closed	2049 WESTMINSTER LN
8/15/2022	Traffic - Unregistered/expired tags Vehicles in RoW	Ride Around	Open	4023 LAWRENCE DANIEL DR
8/16/2022	Auto - Junk Vehicles in yard	Complaint	Closed	511 MEADOWBROOK DR
8/16/2022	Traffic - Vehicle parked in RoW	Complaint	Closed	1850 PARKWAY PLACE #900
8/18/2022	SDO - Cut trees in tree save area	Complaint	Open	611 MACRAES CT
8/18/2022	SDO - Cut trees in buffer/tree save	Complaint	Open	0
8/23/2022	SDO - Removal of Buffer	Complaint	Open	0
8/25/2022	Traffic - Expired registration parked in streets	Ride Around	Open	5001 HAVEN LODGE RD
8/26/2022	PN - TGW	Ride Around	Open	3036 HELMSTETLER RD
8/29/2022	SDO - Tree cutting without permit	Complaint	Open	FOUR EAST EXECUTIVE PARK
8/30/2022	PN - TGW	Ride Around	Open	711 WHITE OAK LN
8/30/2022	PN - TGW	Ride Around	Open	818 WHITE OAK LN
8/30/2022	PN - Construction Debris	Ride Around	Open	8426 HUNLEY RIDGE RD

Violations	
Public Nuisance	28
J/A/N Vehicles	1
SDO	5
Traffic	3
Open Burn	0
Hazard	0
Noise	0
MHS	1
<b>Total Opened</b>	<b>38</b>

July Cases	
Open	13
Closed	25
<b>Total</b>	<b>38</b>

# POLICE DEPARTMENT – FY 21-22 YEAR-END BALANCED SCORECARD OVERVIEW

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## 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?*

- **Expansion of social media footprint**-The department has increased its use of Facebook, using both serious and humorous postings to gain attention from the community, while also getting important information distributed to the public. Over the course of the year, the SPD has gained approximately 600 followers. The SPD recently created an Instagram and Twitter account. All of these platforms can be linked so information can be shared to one platform and carried over to another.
- **Creation of Traffic Education Safety Team**-The TEST team has been in the works for the past year. Over this time, the SPD has seen a 50% increase in impaired arrests, for the same time frame in 2020. Officers on the team have been certified as Child Safety Seat installers and have participated in multiple child safety seat installation programs and traffic checkpoints. TEST team members also conducted a survey of traffic accident locations to determine if there were quick fixes that would assist in accident reductions, such as foliage trimming and updated road signs. Members of this team also made videos that were posted online to encourage responsible drinking and driving and driver's safety on Town roads. One of the other goals of the TEST team was to host two distracted driving programs. Although this goal will not be met this year, the program is in the process of being developed. TEST team leadership has partnered with Scott Clark Toyota to host this program and will be implemented in late 2022.
- **CALEA accreditation**-The SPD has been diligently working on this three-year process. We just completed our first full year of the self-assessment phase. All policies have been re-worked to fit within the CALEA framework. The SPD has two more years to prepare for the on-site assessment.

## 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)?*

- **Create and staff a reserve police officer program**-The SPD spent a large amount of time filling police officer vacancies, throughout the year. Filling those vacancies took priority. We have two candidates who are interested in becoming reserve officers and we will continue working towards filling reserve officer spots into the next year.
- **Create and fund staff development plan**-The Department created a workgroup to look into and develop a plan for both an incentive program and a staff development plan. The group presented an incentive program that would reward officers for significant training accomplishments that best benefited the department and Town. The incentive program was approved by the Town Council. The same workgroup also began working on the staff development plan. Due to the extremely turbulent nature of our current economy, the group determined that it would be worth suspending the development of this plan until things stabilize.

## OTHER COMMENTS:



- The ongoing COVID pandemic has still hindered some progress, but all department members continue to participate in accomplishing our goals. As we can see the pandemic has/is coming to an end department members, community groups, and businesses have begun to take steps to move forward. The Stallings Police Department continues striving to accomplish all of our goals while meeting the standards of our mission to “provide an exemplary level of service” to those who work, live, and travel through Stallings.

# PUBLIC WORKS – YEAR-END BALANCED SCORECARD OVERVIEW

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## **ACCOMPLISHMENTS:**

**Be a good steward of natural resources** – This is an ongoing process to show energy consumption for the town and ways to reduce the cost. In the beginning we did find 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. Our focus now is the HVAC units at Town Hall. With all the construction and remodeling done here these units cannot keep up and in most cases are running at 125% capacity. Not only does this burn out the unit it draws a great deal of energy. We will look at replacements that are larger with a good SEER value. Council approved in the FY23 budget using ARPA funds to replace all HVAC units at Town Hall. This will greatly reduce energy consumption and cost associated with installing units with a greater SEER value. We are holding off to the Fall to begin this project as it will be a large undertaking, but this should be completed before we go into Summer 2023.

**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. We also come across potholes that have no defined edges, or they are too close to the road shoulder and in these cases, we are unable to patch. Before the end of FY23 Public Works is going to investigate alternative cold patches that offer more durability and can be used year-round.

**% Of work orders reported through website from citizens** – With the iWorq workorder system in place we are getting approximately 85% of all citizen workorder requests through the system.

**Produce list of training initiatives and send to the Safety Committee** - Advise safety committee on relevant trainings for building safety. Public Works and Parks and Recreation took part in a flagger safety course for directing traffic in the roadway.

**% 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. We do sometimes receive calls related to another department, and these are sent to the correct department same day so that there is no delay in citizen getting contacted. Having the iWorq system has greatly improved this as most residents are now using the system to put in workorders.

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

## **CHALLENGES:**

Some staff continue to just email or want to text about workorders. I continue sending reminders on where to log in new workorders and will continue to do so until it just becomes second nature to enter workorders this way. We still face some issues with training. We can do more training now, but most of it online and sometimes this can be challenging and some of the context gets lost or is hard to understand. Lastly, we continue to face a challenge with developing a life cycle replacement plan. This is something we are starting from scratch and its just been difficult to know where to begin and how to format into a document. This is something we will continue to pursue and find a way to accomplish.

**OTHER COMMENTS:**

Public Works shares a goal with Parks and Recreation for the enhancement of Blair Mill Park. As part of this we were able to setup landscape maintenance to be managed by Smith Grounds as part of our other contracts with them. We have also been able to enhance the grounds at Blair Mill Park with aerating and turf remediation. Playground was installed at Blair Mill Park. Smith Grounds did the excavating for level ground and then playground was installed.