



A Balanced Scorecard Approach for the Town of Stallings

FY 21-22 Mid-Year Report



February 4, 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 first opportunity to analyze results and discuss possible changes to strategy will be at the Council's regular board meeting on February 24th. At this meeting, the Manager will officially present the FY 21-22 Mid-Year 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 is 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.

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 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 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
-------------------------------------	---	---	---------------------------------	---



Manage Resources

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



Run the Operations

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



Develop Know-How

Maintain a Skilled & Competent Workforce	Support Development of Citizen Volunteers	Enhance Relations with Other Entities
---	---	---

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 – MID-YEAR 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 – This has been both an accomplishment and a challenge. The Town has continued to broadcast all Town Council meetings with a mix of in-person and virtual formats due to the constantly evolving COVID situation. With virtual meetings, the public can participate remotely. The Town is currently exploring a hybrid option where the meeting is in-person, but individuals can participate remotely in certain situations.

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. **Funds are in the budget and Council is scheduled to discuss a DFI downtown proposal on 2/28/22.**
- Start Farmers Market & Continue Events (P/R). **Achieved (see P/R).**
- 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 is partnering with a consultant to develop several streetscape specifications that can be plugged into the Town's development ordinance as a requirement.**

Maintain a 5-Year IT Replacement Schedule/Plan- Computers and equipment are being updated as needed.

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.

Emergency Preparedness – Staff are in the process of planning a mock emergency training scenario.

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 3 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)?

Pandemic Note – As indicated previously, the COVID pandemic has created many challenges for the Town of Stallings. Our common operational goal has been to continue to provide public services while ensuring the safety of staff and the public.

Citizen Newsletter & Business Highlight – The goal is 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 be outdated by the time it is received by the public. However, the Town plans to continue doing business highlights via social media with information supplied by the mayor and subsequently the economic development committee members.

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, the County's ED entity is reforming itself and it will not provide personnel until that process is completed.

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 previously reported that budget issues and COVID response consumed recent sessions but were open to reconsidering in the future.

Mandatory Safety Training – 45% of staff have completed mandatory safety training. We've had some technical difficulties with our NCLM software, but we are planning on getting everyone up to date by the end of the fiscal year.

Maintaining A Workforce – This is both an accomplishment and a challenge. Due to the pandemic, 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, and then our trainer was in a bad car accident. When our trainer recovers, we will plan on implementing. Holding this training in-person is essential.

OTHER COMMENTS:

ENGINEERING DEPARTMENT – MID-YEAR BALANCED SCORECARD OVERVIEW

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. The significance of this accomplishment is that repairs are completed in a timely manner which provides prompt service to residents, 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 will continue through 6/23.
- 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 Phase 1 of the Town Pavement Management plan. Phase 1 of the process consisted of pavement condition assessment. Phase 2 of the process is about to comment and consists of prioritization and recommended maintenance activities. Phase 2 is expected to be completed within the next month.
- The Engineering Department has been responsive to questions and issues presented by Town residents and have maintained a high level of communication.

CHALLENGES:

- The Town Hall Streetscape design was not completed due to ongoing coordination with NCDOT for permissible streetscape features. 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 implementation may be delayed by the timing of funding for planning projects. The funding application cycle begins in August 2022 and funds, if awarded, won't be available until July 2023.

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 – MID-YEAR 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?

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.
- Completed FY2021 financial statement audit and related Annual Comprehensive Financial Report (ACFR).
- Successful submission of the FY2021 ACFR to GFOA for consideration for the award of excellence in financial reporting.
- Received notification from GFOA that the Town received the Award of Excellence in Financial Reporting for the FY2020 ACFR.

Accounts Payable staff able to complete accounting training classes to enhance overall accounting and customer service skills.

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)?

While training was met by supervised staff, director level training will not take place until the spring.

Challenges continue with the COVID19 epidemic. Virtual working has relieved some of the stress associated with contracting the virus but our department is so small and if only one person contracts the virus, it effects our ability to continue weekly payroll runs and submit financial reporting on a timely basis.

OTHER COMMENTS:

PARKS & REC DEPARTMENT – MID-YEAR 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?

Enhancing Blair Mill Park has been a top priority of the Town for many years. So far this year the Parks and Recreation Department has contracted out landscaping to a professional company to help improve conditions of the grass, as well as scheduled turf remediation for the spring. The traffic islands in the Fairhaven parking lot were revitalized with river rock over the winter to prevent future mulch run-off and improve the aesthetic representation of the park. Council approved the installation of a playground for Blair Mill Park and the required grading work to meet ADA compliance.

The Connect Stallings Greenway and Recreation Master Plan was adopted in February of 2019, and so far the Town has accepted one section of constructed trails into its system from the Solis development. This trail connects into the Colonel Francis Beatty regional park and to the Stallings Spine trail that will run the entirety of Stallings when completed. Also under construction is the Atrium portion of the Stallings Spine and connector trail. The Vickery portion of the Blair Mill Greenway bid documentation is under review by consultants and required entities to move forward with that trail portion in this fiscal year utilizing the Town's fee-in-lieu of park land funds.

Partnering with Union County and N.C. Cooperative Extension, Stallings Parks and Recreation launched a weekly Farmer's Market at Stallings Park that served as a satellite of the Monroe Farmer's Market. Each week 8-10 vendors rotated through with farm fresh goods such as meats, fresh bread, fruits and vegetables, local honey, etc. The market also featured occasional craft or flower vendors and live acoustic music once a month. As the Farmer's Market continues into 2022, Stallings Parks and Recreation wants to explore programming opportunities during the market, as well as expanding the number of vendors, activities, and hours of the splash pad to enhance the community experience of the market. Focused customer and vendor feedback was gathered by staff to be used for process improvement for the upcoming market season.

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 continues to struggle with attaining our goals that require in-person meeting of the parks and recreation advisory committee or recruitment and retention of volunteers. During the pandemic, fewer people have been comfortable with volunteering in general, and there has been a shift of focus in our programming and events from mass gatherings to tailored and paced experiences that are spread out over days or hours to reduce crowding and exposure. This also impacted our survey opportunities at Stallings Fest. We originally intended to have the committee help administer the survey, but with that committee not meeting in person for over a year, and a significant reduction in the number of participants, we had to forego that plan altogether. We used budgeted funds to hire additional temporary event staff and did not host the survey. In the future we will implement a digital version of the survey to at least capture some important feedback.

OTHER COMMENTS:

Eunice McSwain, Special Events Coordinator, was selected as the Marie K. Garris Employee of the Year and also received a Caught Ya award for her work with Stallings Fest in October.

PLANNING DEPARTMENT – MID-YEAR 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 Team excels in providing responsive and dependable services. We create excellent rapport with residents and developers, and we receive positive comments about how friendly, informative, and efficient we are when helping them.

Like the Downtown, Silverline, 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 amendments to the Council for approval, improving the strength and consistency of our Development Ordinance.

Development Projects are on the webpage for residents and developers to review, and the mapping has improved from where it was.

Matthew has learned Stallings Planning processes and Ordinances extremely fast, and his expertise kept the Department afloat in the absence of a Director. Matthew completed 334 permits in 2021, averaging around 28 a month. An increase of 68 permits from 2020. Matthew also passed his NCAZO course and test and is now CZO certified.

Code Enforcement has been very successful with cleaning up the Town and mitigation to reduce further blight. Kolleen created positive relationships with property owners and can handle many of the repeat offender's issues efficiently and respect.

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 combination of 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 Score Card, many tasks need to be started from the beginning and reevaluated. You may not see results now, but every task is being worked upon. The main challenge is waiting to see the results of Land Development, which takes years.

Although we have enough members now for the Planning Board and Board of Adjustment, we have recently had a few members resign, and I could see membership and quorum become an issue in the future. We are working on a membership ordinance change to bring to Council and will likely be adopted shortly.

OTHER COMMENTS:

1. Zoning Request/Public Hearings

CZ21.04.01 – 4416 Stevens Mill Road: Approved and awaiting updated site plan for release of permits

RZ 21.08.06: The rezoning from TC to SFR-1 was withdrawn.

CZ21.02.01-STINSON FARMS GAS STATION: Town Council approved on December 6, 2021.

CZ21.09.01 – Bailey Mills Expansion, 3042 and 3038 Matthews Indian Trail Road. CZ-MU-2 to build 23 townhomes will go before Town Council in February 2022.

RZ21.10.01 –Montes Electric, 3845 Matthews-Indian Trail Road. The applicant is seeking a rezoning from MU-2 to CZ-C74 and will go before Council in February.

CZ21.10.02 – Beaty Shop, 1149 Stallings Road. The applicant is seeking a rezoning from SFR-3 the CZ-MU-2 and will go before Council in February 2022.

2. Development Agreements/Plan Review

ARIA AT IDLEWILD (IDLWILD MIXED RESIDENTIAL PLAN)

STATUS: Approved

There is a new owner for the apartment portion of this project. They intend to construct the apartments per ordinance and DA standards, including the 41' allowed building height. Plans have been approved by the Town, they are working through final details and working on acquiring water/sewer approval from the County. Staff have received a letter from the applicant to determine that the height of the buildings have been met. Staff have reviewed this letter with Legal Counsel and determined that it is adequate. The final plans have not been signed off, but there are no major concerns remaining.

The owner has received a letter from Union County Public Works indicating that they will not receive a letter of sewer accessibility until at least early 2022.

BAILEY MILLS (FORMER STALLINGS TOWNHOMES)

STATUS: Approved and Permitted
Under construction.

First submittal Final Plat review comments submitted to the developer on 11/17/2021. Awaiting updated Final Plat.

ATRIUM HEALTH

STATUS: Approved and Permitted.

Zoning Compliance inspections for the two medical buildings have been released. Bond work is still incomplete.

STALLINGS ELEMENTARY SINGLE-FAMILY TND

STATUS: Approved.

No plans have been submitted for permitting.

WILLOWS AT STALLINGS

STATUS: Approved.

Plans were submitted on 11/12/2020 for permitting. Working through ROW and timing of offsite improvements.

Plans showing revisions requested per the first round of comments have been submitted and have been reviewed by Planning and Engineering. The developer is reviewing the final comments.

STALLINGS FARM

STATUS: APPROVED

Plans for permitting have not been submitted.

STONE CREEK (FORMER UNION PARK TOWNES)

STATUS: DA and plans approved.

Under Construction.

New plats, to show correct setbacks, will need to be approved for each phase. Will not hold them back from receiving permits.
Phase 1 resubmittal was approved 11/18/2021.

STINSON FARMS

STATUS: Approved

Code Enforcement

PERIOD: 4th Quarter (Oct-Dec) 2021

TYPES OF VIOLATIONS	OPENED THIS PERIOD	CLOSED THIS PERIOD
PUBLIC NUISANCES	36	27
ABANDONED JUNKED AND NUISANCE VEHICLES	3	1
MINIMUM HOUSING STANDARDS	0	1
STALLINGS DEVELOPMENT ORDINANCE	27	21
NON-RESIDENTIAL BUILDINGS & STRUCTURES	2	0
TRAFFIC	5	5
NOISE	0	0
OPEN BURN	3	4
HAZARD TREE	0	0
AT LARGE/NUISANCE DOG/CAT or other animal	2	3

POLICE DEPARTMENT – MID-YEAR 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?

One of the SPD's goals was to increase our social media presence. Since the start of the fiscal year, we have increased our Facebook followers by over 300 people. We have began posting more information and attempting to let the community know about issues going on in the community. For example, we have utilized Facebook to assist in locating a woman with dementia along with posting photos of suspects involved in crimes, in efforts to get the community's help in identifying those involved in crime. We also created some crime prevention and informational videos to help reduce incidents of crime. As we continue through the year, we will add other social media platforms to increase our reach within the community and the area.

Another goal that is making strides is the implementation of the Traffic Education Safety Team. This team's charge is to focus on community education and enforcement to increase safety of pedestrians, bicyclists, and the motoring public. Officers have been dedicated to this team and are working to formulate ongoing plans to effectively meet the goals set forth.

CALEA accreditation is a 3-year process, and the SPD is 7 months into the program. Currently, we are in the self-assessment phase, where we review and amend policy to be within the CALEA standards.

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)?

Although the SPD is still working on two goals in particular, we see that these might be challenging to complete. The goal of implementing a reserve officer program will be challenging. Currently, the SPD is struggling to fill full time officer vacancies. As of this writing, we have three vacant positions with only two applicants. Filling a reserve officer program requires the same candidates for new officers, only experienced. The SPD will still need to equip and train reserve officers. We are still exploring options to staff reserve officers.

The other goal that will create a challenge is the implementation of the teen distracted driving program. Our TEST team has taken on this goal and will be working on options. The SPD had one driving instructor and that officer retired. We have the option to ask them to come back to teach the class, but that would be a temporary fix. We are exploring our options to achieve this goal.

OTHER COMMENTS: The SPD continues to work towards accomplishing all goals in a manner that will allow the Department to thrive and continually serve the community to the best of our ability.

PUBLIC WORKS – MID-YEAR BALANCED SCORECARD OVERVIEW

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 energy. We will look at replacements that are larger with a good SEER value.

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.

% 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. We have now contracted out with Iworq to create a workorder system. We have started the process, but other projects have delayed this.

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.

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:

% of work orders reported through website from citizens – We have selected a workorder software system in Iworq. We have faced challenges in getting it setup due to time from other projects that took priority.

Training Meetings to Improve Employee Skillset/Knowledge – Currently we are still facing challenges with training due to the COVID pandemic.

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.