



*A Balanced Scorecard Approach for the Town of Stallings*

*FY 23-24 Annual Report*

# FORWARD STALLINGS

September 19, 2024

## **A Report to Citizens, Council, & Staff – FY 2023-2024**

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 23, 2024. At this meeting, the Manager will officially submit the FY 23-24 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 fourth 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

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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 succeed 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**

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## **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. The Town’s blog post continues to be enhanced and community education on the Occupancy Tax referendum has been added to assist in community involvement with the Town’s government.

Provide a Monthly Status Update of NCDOT’s Old Monroe Road Project – One month was inadvertently missed but was promptly corrected.

Creating a Stallings Town Center - 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 23-24 Action Steps (Updates)

- Adopt streetscape requirements into SDO by 12/31/23. **(Complete)**
- Determine by 8/31/23 if the Council wants to start installing streetscape improvements/phasing in front of certain Town properties. **(Council decided not to start phasing in streetscape on Town property at this time).**
- Evaluate and present cost for converting 325 Stallings Road property into boutique retail shop by 6/30/23. **(Complete).**
- Hire a consultant to determine if brewery if feasible by 8/31/23. **(Complete).**
- If feasible, develop brewery marketing plan. **(Broker is representing Town in ongoing lease discussions with a brewery for 2725 Old Monroe Road).**
- If downtown developer requests public participation, consider using DFI for review. **(Sewer capacity concerns have hindered developer interest in the Town Center area).**
- Hold at least 18 events at downtown park. **(Held 16 events in the park NOT including the Farmers Market and programs).**
- Sewer Capacity Study - see below

Pursue Sewer Capacity Alternatives – The Town engaged with an engineering firm to conduct a sewer capacity analysis. This analysis is underway.

Secure Occupancy Tax – Legislature has passed bill that will allow for referendum for occupancy tax (scheduled for November 2024). An occupancy tax education campaign is underway.

Maintain a 5-Year IT Replacement Schedule/Plan- Computers and equipment are being updated as needed. Staff have laptops available for use in the office, and if need be, remotely.

Enhance Emergency Preparedness – An emergency tabletop exercise was held on 8/17/23.

Improve Staff Relationships Through Team-Building Events – Held 4 events (met goal).

Ensure All Employees are Informed/Have Opportunity for Feedback to Increase Buy-In – This year we held an all hands on deck meeting. This was a challenge to do in the past due to schedules, but we were able to do it.

## **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)?*

Committee Participation - Lack of participation on committees continues. However, to combat that challenge, several committees have been combined and interest seems to have increased slightly. Staff will continue to monitor these efforts.

Recordable Injuries – The Town has had 4 recordable injuries but only 1 missed day of work. The Town sets our recordable injuries goal at “0” every year because we refuse to set a workplace injury goal that is anything less. The Town evaluates each incident to determine how we can avoid it in the future.

Implementing Economic Development Strategic Plan – The Town has partnered with Monroe Union County Economic Development Commission (MUCEDC) for assistance with economic development in Stallings. However, due to not only the lack of sewer in the area but also to the inability to schedule consistent follow-up with MUCEDC, measurable progress has been slow. However, staff is hopeful as a MUCEDC report is slated for the Council at the end of September 2023.

Budget in FY 23-24 Employee Pay Study – Town Council opted to move this to FY 24-25 Budget.

Maintaining a Skilled & Competent Workforce – This is both an accomplishment and a challenge. Overall, the Town did not meet its turnover goal but a closer examination reveals this should not be a concern and we’ve made progress on filling key leadership positions. Even the best organizations will not always meet turnover goals in today’s environment. 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. Also, the Town recently 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 to help build relationships, held an all hands on deck meeting to build buy-in, and met employee recognition goals.

## **OTHER COMMENTS:**

### **September Report:**

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

- An update has been completed by the legal codifying company with any ordinance changes since the last update. These updates have been codified and are reflected on the website.

#### **Bulk Pick-Up**

- **Fall Bulk Pick-Up Week:** Week of November 18. For more information: [Fall Bulk Pick-Up > Events](#)

#### **Fall Shred Day**

- Saturday, November 9

- For more information: [Fall Shred Day > Events](#)

### **Occupancy Tax Referendum**

- Occupancy Tax Referendum education campaign will begin in September.

### **2725 Old Monroe Road (John Deere) Property**

- KWC is in current negotiations with the brewery. The Economic Development Committee discussed at its September meeting. It will be reviewing a draft lease in October as well as visiting the potential tenant's other location.

### **Stallings 50<sup>th</sup> Anniversary**

- Staff is moving forward with preparations.

### **Surplus Sales**

- A total of \$19,990.27 have been sold so far in 2024. A total of \$23,244.85 worth of items were sold in 2023.

# ENGINEERING AND PUBLIC WORKS DEPARTMENT – ANNUAL BALANCED SCORECARD

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## 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, all the major storm water repairs have been completed and/or are contracted for repairs. This has been the result of ongoing efforts to maximize funding by performing more projects in-house with the public works department and contracting projects out where necessary. Additionally, the Public Works department has utilized new equipment to perform additional low-priority projects such as ditch clearing and regrades, saving the Town approximately \$3,000 with each low priority project done in-house. Staff is expecting to expand the Public Works department to allow for more larger-scale high-priority projects be performed in-house.
- The Public Works department has completed numerous sidewalk and curb and gutter repair projects. As the public works department becomes more proficient with these projects, they will be able to save time and money by performing larger repair projects. Additionally, Public Works has utilized the new equipment to perform roadway patching projects quickly and efficiently. The Town saves approximately \$2,0000 per roadway patch that is performed in-house.
- 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 has completed the FY 2024 resurfacing contract and has executed a FY 2024 preventative maintenance contract that encompasses crack sealing and microsurfacing that intends to prolong the life of the road while being approximately a fifth of the cost of traditional resurfacing techniques. Staff hopes to continue to utilize and expand traditional resurfacing and preventative maintenance methods that will allow us to stretch the taxpayer dollar further while maintaining the integrity of the Town's roadways.
- The Engineering Department has completed Permit Year 1 requirements of NCDEQ's NPDES MS4 Program. This is a major accomplishment as the Town has been in violation of this permit, and subject to significant fines, in years past. Staff has essentially started from scratch and has worked diligently to ensure the Town's MS4 program is in compliance with the State's requirements, which is important because the Town is subject to random audits by NCDEQ.
- The Engineering Department has completed the Comprehensive Right-of-Way Assessment that inventoried all of the Town's pedestrian infrastructure and analyzed for deficiencies such as cracking/deformations, trip hazards, ADA infractions, etc. With this information, Staff has a plan to rectify all identified deficiencies and track progress in the years to come. Staff's goal is to budget \$50,000, of Powell Bill funds, every Fiscal year to make these repairs, and use the Public Works department and alternative methods to make these repairs in the most efficient and cost-effective manner.
- The Engineering Department has been responsive to questions and issues presented by Town residents and has maintained a high level of communication. This was especially true during the recent months of December and January where significant rains resulted in drainage concerns at multiple locations across Town.
- The Engineering Director completed the professional development necessary to maintain their Professional Engineering License. Additionally, the Associate Engineering passed the Fundamentals of Engineering Exam

and has office become a licensed Engineer In Training (EIT). Achieving the EIT is a major step in becoming a licensed Professional Engineer.

**CHALLENGES:**

- Staff sees many challenges with the Town's Permit Year 2 MS4 requirements. During Permit Year 2, Staff will need to inventory all the Town's storm water infrastructure, inspect all major components of the storm water infrastructure, and analyze an appropriate method to ensure private property owners and HOAs are inspecting their storm water ponds and correcting any issues accordingly. All of this is completely new to the Town so there will be significant learning curves, major coordination with property owners and communities, and a significant budget analysis to determine the most appropriate method for completing these inspections on an annual basis.
- As staff seeks to implement new methods preventative roadway maintenance, there will be significant challenges and learning curves as Staff analyzes alternative maintenance methods and pilots these programs.
- As both the Engineering and Public Works departments seek to increase efficiency and cost-effective maintenance and repair solutions, there will be significant challenges curves and challenges as each department works through learning curves implementing new and alternative methods.

**OTHER COMMENTS:**

The Engineering and Public Works Departments continue to collaborate and diligently meet the needs of the residents and business community regarding repairs, contractor activities, flooding, plan review, and construction coordination. Additionally, the Public Works Department continues to utilize new equipment perform numerous infrastructure repairs and seeks to expand the department to allow for additional capabilities to maintain Town Infrastructure.

# 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?*

Maintaining Fiscal Strength – This has been both an accomplishment and a challenge. The accomplishment portion relates to the 20% fund balance threshold. The Town regularly maintains an unrestricted General Fund balance exceeding this amount. Failure to meet this target is not in the foreseeable future; although, modifications to the specific metric are forthcoming.

Developing Long-Term Financial Plans – This is another objective that includes both an accomplishment and challenge. A comprehensive review of financial-related policies and procedures has been completed and a list compiled, but neither updates to existing policies or creating new ones has taken place during this fiscal year. This remains an objective with different target completion dates for individual policies, creating more attainable goals.

Exceling at Staff & Logistical Support – A weekly budget to actual report is distributed to executive level staff consistently, promoting transparency and the ability to make informed decisions.

## **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)?*

Staffing issues created a number of challenges during the fiscal year. Former Finance Officer, Marsha Gross, returned part-time as Interim Finance Officer and a new full-time Finance Officer started in April. Staff is confident this will create a shift in future balanced scorecard results.

Strengthening Citizen Engagement – The Finance website has not yet been reviewed and updated, nor did the Town receive either award from the Government Finance Officers Association (GFOA). These do remain targets going forward though.

Maintaining Fiscal Strength – The Town completed only financial statements, rather than an Annual Comprehensive Financial Report (ACFR), that were submitted to the Local Government Commission (LGC) late. The audit completed during this fiscal year for the year ended June 30, 2023 did include both a material weakness and significant deficiency. The aforementioned challenges are a direct result of staffing issues that have been remedied.

Due to the approaching depletion of federal funding received from the American Rescue Plan Act (ARPA) of 2021, a stimulus bill passed by the United States government to provide relief from the COVID-19 pandemic, the FY 24-25 budget adopted during this fiscal year included an appropriation of General Fund balance totaling \$460,400. Utilizing fund balance to cover ongoing operating expenditures is not sustainable long-term; therefore, creation and adoption of a fund balance policy is a short-term goal that needs to be achieved prior to the development of the annual budget.

Developing Long-Term Financial Plans – Due to staffing issues, no revisions or new policies were completed during this fiscal year. Standard Operating Procedures (SOP) have not yet been written either. Both remain goals for the future.



Providing Responsive & Dependable Services – While public information requests are always responded to, it is not consistently done within the seven-business day target. Compiling the data for these requests can be quite cumbersome and time-consuming due to current reporting capabilities, processes and procedures. Limited Finance staff exacerbates this challenge, prolonging the time required to complete these requests.

**OTHER COMMENTS:**

Maintaining a Skilled & Competent Workforce – While this remains a goal, the specific performance measure has changed since the preparation of the initiatives for this balanced scorecard. Completion of the North Carolina Government Finance Officers Association (NCGFOA) program and achievement of the corresponding certification are no longer necessary. The new Finance Officer hired this year came to the Town already certified. The revised metric for the FY24-25 balanced scorecard includes maintaining certification that is accomplished through continuing education.

# PARKS & REC DEPARTMENT –YEAR-END BALANCED SCORECARD OVERVIEW 23-24

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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?*

As the Parks and Recreation Director, I'm thrilled to report that our department has met and even exceeded several key targets this year.

### **Targets Met:**

1. **Construct Blair Mill Greenway Vickery Segment & Privette Park Playground Installation:** These exciting additions have increased access to recreational spaces for families and individuals, promoting both health and wellness in our community.
2. **Anticipate the needs of our changing community:** We proactively engaged with our community committee to structure programs and facilities based on real-time feedback. This has ensured that our offerings remain relevant and inclusive.
3. **Establish dependable hours for Shelter Rentals, Splash Pad, Parks, & Tennis Courts:** By setting clear and consistent hours, we've alleviated public confusion and streamlined the experience for residents.
4. **Implement a Playground Safety Program:** We've introduced safety standards that will ensure that our playgrounds are not only fun but secure environments for all children.
5. **Seek out sponsorships with local agencies:** Our collaboration with local businesses has led to increased funding and support for various programs, strengthening our community ties.

**Significance of Meeting These Targets:** Meeting these targets has improved our park facilities and events/programs, making them more user-friendly and engaging for a broader range of community members. The playground installation and greenway expansion are key milestones in increasing accessibility and family engagement. Structured hours and safety measures enhance visitor experiences, while partnerships with local agencies ensure long-term sustainability.

### **How We Met/Exceeded These Targets:**

- We collaborated closely with our community through surveys and meetings to ensure we were addressing their needs.
- We created clear communication channels to keep the public informed about operating hours and rental procedures.
- Our focus on safety has been driven by comprehensive staff training and regular equipment inspections.
- Finally, building partnerships with local sponsors allowed us to secure additional resources and expand our reach.

**Ensuring Continued Success:** Moving forward, we will maintain an open dialogue with our community through regular engagement. We will continue improving our facilities and programs based on feedback, ensuring that our parks remain vibrant and well-utilized spaces. Furthermore, we will work on expanding sponsorship opportunities to fund future projects, ensuring that our department continues to thrive and serve our evolving community needs.

## **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)?*

As the Parks and Recreation Director, I acknowledge that while we have met many important goals this year, there are several key targets we did not meet. These include:

### **Unmet Targets:**

1. Park Bench/Memorial Tree Initiative Program
2. Create a Standard Operations Manual for the Parks and Recreation Department
3. Develop a Mural Program to enhance public art
4. Create short- and long-term plans for each recreation site
5. Implement a specific training plan for each job description
6. Increase volunteer engagement with schools and reward long-term service
7. Connect with local recreation departments quarterly to discuss event schedules and marketing

### **Challenges Faced:**

- **Resource Allocation:** Many of these initiatives, such as the Park Bench/Memorial Tree Program and the Mural Program, were delayed due to the need to prioritize larger infrastructure projects, like the Blair Mill Greenway and Privette Park Playground.
- **Staff Bandwidth:** Creating a comprehensive Standard Operations Manual and detailed site-specific recreation plan requires significant input from staff, who have been fully engaged in maintaining existing programs and managing high-priority projects.
- **Volunteer Outreach:** While we had initial conversations with local schools, we were unable to reach a broader audience of volunteers.
- **Coordination with Other Departments:** Scheduling quarterly meetings with local recreation departments has proven more challenging than anticipated due to conflicting schedules and resource limitations.

### **Adjustments in Strategy Going Forward:**

1. **Prioritizing and Phasing Projects:** We will break these larger initiatives into more manageable phases, ensuring that key elements—like the Standard Operations Manual and short-term site plans—can be completed while balancing ongoing project demands.
2. **Revised Outreach and Volunteer Strategy:** To reach a broader audience, we will develop a dedicated volunteer recruitment campaign aimed at local schools, utilizing social media and in-person visits. We'll also offer incentives for long-term service to boost retention.
3. **Enhancing Cross-Department Communication:** To ensure we don't miss out on valuable opportunities for collaboration, we will set specific dates for quarterly meetings with local recreation departments well in advance and use virtual platforms to improve attendance.
4. **Staff Training and Development:** A renewed focus will be placed on implementing job-specific training plans by carving out dedicated time for staff to complete these programs. This will ensure that our team is equipped to meet both short- and long-term departmental goals.

These adjustments will allow us to regroup and make steady progress on these important initiatives. Going forward, we're committed to aligning resources, fostering community partnerships, and fine-tuning our strategy to ensure these targets are met.

**OTHER COMMENTS**

Overall – the Parks Department continues to thrive by hosting multiple events geared towards a wide audience, efforts are ongoing to improve current facilities & parks staff works strong as a team towards common goals and initiatives.

## 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 exceed expectations, consistently receiving positive feedback from developers and the public. Our reputation for responsiveness, dependable services, and exceptional customer service is well-earned. Each team member has invested in their professional growth through ongoing education, enhancing their skills and abilities to deliver outstanding results.

### **Creating a Vibrant Downtown: A Vision in Progress**

While realizing our vision of a Traditional Downtown with Niche Retail, Local Restaurants, Breweries, and a Walkable Town Center requires time and investment, we are making significant strides. The Downtown Streetscape Plan, now adopted, is the foundation to create a thriving and attractive destination.

### **Innovative Tools for Effective Planning**

We have demonstrated our commitment to efficiency and cost-effectiveness by developing an interactive Zoning map. This valuable tool streamlines processes and saves resources, ensuring that our planning efforts are both effective and sustainable.

### **Driving Economic Growth: Leveraging Transportation Infrastructure**

The Planning Team's successful acquisition of the CRTPO Transportation Grant for the Silver Line Plan Integration project underscores our dedication to maximizing positive development around the Hospital/Light Rail corridor. This grant, valued at up to \$100,000, will fund three key initiatives:

1. **Integrating the Silver Line into the Comprehensive Land Use Plan:** By incorporating timelines, benefits, studies, and educational resources, we are aligning our planning efforts with the project's goals.
2. **Reimagining the Monroe Expressway Small Area Plan:** We are creating a new plan that includes renderings and specifications for a Silver Line Station and Atrium Hospital, further enhancing the area's development potential.
3. **Incorporating a Transportation Oriented Development Overlay:** This overlay will promote preservation and development techniques along the proposed Silver Line alignment, ensuring that the project's benefits are maximized.

These initiatives demonstrate our ongoing commitment to creating a sustainable, vibrant, and economically prosperous community. By building upon our successes and embracing innovative approaches, we are poised to continue delivering exceptional results for Stallings.

**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 Planning Department is actively addressing a portfolio of legacy projects adopted prior to the arrival of the current staff. A primary challenge lies in the extended timeline required for land development to yield tangible results. Sewer capacity remains a challenge in creating a desire for redevelopment in the Town Center area.

Maintaining a high-quality Planning staff has been a priority. We are dedicated to supporting and training our employees, ensuring that their development is not hindered by external factors. While the planning technician/planner 1 position serves as an entry-level role, it has contributed to staff turnover. Additionally, the code enforcement position can be demanding due to public expectations.

Recruiting and retaining qualified members for the Planning Board and Board of Adjustment remains an ongoing challenge. Despite our efforts to promote these volunteer roles, many individuals are hesitant to join due to the advisory nature of the boards.

# 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?*

- **Host quarterly coffee w/a cop; bi-monthly lunch w/ a cop at Stallings Elementary; host a fishing derby w/ NC Wildlife for kids-** We hosted 2 coffee w/ a cop programs. One on each side of town. We changed lunch w/ a cop to recess with a cop at the request of Stallings Elementary. Our first fishing derby was a success and we maxed out our participant number of 20 kids.
- **Host two community events to educate citizens on fraud awareness and financial safety. Increase clearance rate on fraud-related crimes by 3%-**Department hosted two fraud awareness events. CID also had 64 fraud-related crimes assigned to the unit. CID cleared 14% of all fraud cases, which was an increase of 4% over last year's clearance.
- **Completion of the 5-step process of CALEA accreditation-**SPD had a successful onsite assessment. We went in front of the commission for our hearing in July and were granted accreditation status on July 27.
- **Create a Technology Strategic Plan-**Committee has completed its meetings, and the report has been finalized. We have begun implementing pieces of the plan as funding needs are met.
- **Increase firearms proficiency by 5%-**over a two-year period we saw firearms scores improve 5.3% overall
- **Review and update existing mission statement and core values-** We have gathered department volunteers to sit on the committee to review the mission statement. Committee members finalized the new mission statement and core values. In June this was presented to the whole department.
- **Increase impaired driving enforcement by 5%. Conduct 10 traffic safety awareness campaigns (PSAs/bike rodeo/car seat installs/traffic checkpoints/youth driving clinics).** There has been a significant increase in impaired driving arrests but there was a very limited focus on education and community outreach. During the last half of the year patrol has participated in 5 child restraint seat installation clinics; 37 checkpoints; handed out safety information at the 2023 National Night Out event; participated in the Parks and Rec Bike Rodeo and held one distracted driving campaign with Matthews PD.  
  
126% increase in DWI arrest from 2022-23 to 2023-24.
- **Create and staff a community volunteer program/increase methods of obtaining citizen feedback/ update PD website** Carnes has been designated as the volunteer coordinator and has done quite a bit of research on the issue and has met with surrounding agencies. The Department has made multiple efforts to get volunteer applicants. As of this writing, we have had one person apply to volunteer. We have been able to update solicitation and sound amplification permits on our website and have added our community satisfaction survey on our business cards as a QR code found a solution to simplify and get that information out to the public more efficiently.

### **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 a bicycle patrol unit and motor unit utilizing sustainable initiatives-** We have identified some officers who are interested in bike patrol. Staffing and field training have hindered progress on this goal.

### **Other comments**

We continue to work through staffing shortages and training of new officers to continue providing a high level of service to our community. Overall, all department members have participated in the work done so far to accomplish our goals.