



*A Balanced Scorecard Approach for the Town of Stallings*

*FY 23-24 Annual Report*



*February 22, 2024*

### **A Report to Citizens, Council, & Staff – FY 2023-20234**

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 February 26, 2024. At this meeting, the Manager will officially submit the FY 23-24 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

## 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 to 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 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 communication 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

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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?*

#### **Strengthen Citizen Engagement**

The Town has broadcast all regular Town Council Meetings and published a blog post quarterly.

#### **Provide a Monthly Status Update of NCDOT's Old Monroe Road Project**

#### **Implement Economic Development Strategic Plan**

This is both an accomplishment and a challenge. The looming Union County sewer capacity issue means that the MUCEDC (County's ED entity) and the Town have had to reimagine our approach to implementing the ED plan, and have entered into a MOU with MUCEOC scheduled to provide an update to Council on June 2024.

#### **Downtown Creation**

##### FY 23-24 Action Strategies

- Adopt streetscape requirements into SDO by 12/31/23 **Not yet met.** Staff presented in December 2023 and Council questions spurred legal, which requires an ordinance rewrite. Will be brought back to Council and hopefully addressed before 6.30.24.
- Determine by 8/31/23 if Council wants to start installing streetscape improvements/phasing in front of certain properties. **Complete.**
- 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 is feasible by 8/31/23. **Complete.**
- If feasible, develop brewery marketing plan. **The Broker is marketing property for Town.**
- If downtown developer requests public participation, consider using DFI for review. **N/A**
- Hold at least 18 events at downtown park. **Complete.**
- Sewer Capacity Study - **Town has hired an engineering firm and study is ongoing.**

#### **Pursue Sewer Capacity Alternatives**

The Town has hired an engineering firm and analysis is ongoing.

#### **Ensure Organization-Wide Emergency Preparedness**

Held a mock emergency scenario and debrief in August 2023.

#### **Maintain a 5-Year IT Replacement Schedule/Plan**

Computers and equipment are being updated as needed. IT needs are not out of date or lacking at this point in time.

#### **Occupancy Tax**

The general assembly passed, and the Governor signed into law a bill allowing the Town to hold a referendum for an occupancy tax. The Town is scheduled in March to pass a resolution, a necessary step to holding the referendum.

#### **The Stallings Source**

Stallings Source is a blog with quarterly posts with various information for the residents appears to be aiding in providing informational needs to the residents.

**Adopt a Balanced Budget that Does Not Use Unrestricted Fund balance or Debt for Operational Expenditures**

This is both an accomplishment and a challenge. The Town is in a strong financial position with its significant fund balance. However, future forecasting projects significant budget deficits as the cost of services has increased and revenues are not projected to keep pace. The Town Council has approved an extensive process for how to best address this future forecast, hired a facilitator to help, and started much earlier in the budget process.

**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)?*

**Recordable Injuries**

The Town has had 2 recordable injuries within the Police department. The Town sets our recordable injuries goal at "0" every year because we refuse to set a workplace injury goal that is anything less. Whenever there is an injury or a "near-miss" the Town has a process for evaluating the incident to determine what happened and what can be done differently (if anything) to avoid a future injury.

**Maintain a Skilled & Competent Workforce**

This has been both an accomplishment and a challenge. We missed our turnover numbers. Even the best organizations sometimes will not always meet turnover goals in today's environment where the average workers tend to change jobs more often than in the past.

However, there are some positives: the Town has seen excellent retention at the department head leadership level, is conducting stay/exit interviews so management can identify trends and recommend changes if systemic problems arise. Recently, the Town Council approved a pay boost for police officers to address immediate market pay disparity. The Town continues to follow its pay policy, is reengaging and anticipates starting the first round of performance evaluation in FY 24-25, holds team building events, recognizes employees through a variety of methods (Caught Ya! Program, employee of the year, etc.), and held an All-Hands on Meeting.

The Council opted to move the pay study from FY 23-24 to FY 24-25.

**2725 Old Monroe Road (Former John Deere Property) Lease**

Leasing this property with the assistance of the Town's Broker has proved to be challenging due to the sewer shortage in the County. The process of obtaining answers from the County has been slow and aiding in prohibiting the leasing of the building to date. Staff continue to work with the Town's Broker, future tenants, and the County to reach a solution.

**OTHER COMMENTS:****Stallings 50th Anniversary**

Meetings with Parks and Recreation continue to prepare for Stallings 2025 milestone incorporation date. Council will be updated in Spring 2024.

**Surplus Sales**

No items have been sold so far in 2024. A total of \$23,244.85 worth of items were sold in 2023.

**American Rescue Plan**

The staff continues to receive favorable audit reviews from the NCLM on its ARPA reporting and project allocations. These audits are crucial tools to help ensure compliance.

# ENGINEERING DEPARTMENT – MID-YEAR BALANCED SCORECARD OVERVIEW

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## ACCOMPLISHMENTS:

- Engineering was engaged in the TCC Meetings. The significance of this accomplishment is participation in regional transportation communication and coordination efforts. This target has been met by the Town's Associate Engineer attending each meeting. This target will continue to be met through the involvement of the Town's Associate Engineer.
- To date, 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 (PWD) and contracting projects out where necessary. The significance of this accomplishment is that repairs are completed in a timelier manner, and the Town has saved approximately \$25,000 by performing projects with the PWD. This also provides prompt service to residents and addresses potential hazards in a timely fashion and minimizes the further degradation of the area and/or infrastructure impacted by the issue. The Town Engineer, Associate Engineer, and Public Works Supervisor promptly coordinate projects and determine if each project can be performed in-house or if contractors are needed. Staff are expecting to purchase additional equipment that will allow more, larger-scale, projects to be performed by the PWD, and will continue to maximize fiscal and project efficiency.
- The PWD has completed numerous sidewalk and curb and gutter repair projects, reducing costs by approximately half compared to contracting these repairs. As the PWD becomes more proficient with these projects, they will be able to save time and money by performing larger repair projects.
- Staff were able to coordinate with NCDOT and install plantings within the roundabout at the intersection of Chestnut and Matthews-Weddington Road. This intersection serves as a gateway to Stallings and was not being sufficiently maintained. This landscaping provides a cleaner, more aesthetic, gateway into Stallings at one of our major intersections.
- 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 2023 Resurfacing contract and has begun the FY 2024 resurfacing contract. Additionally, to date, staff currently has a preventative maintenance contract out for bid. Implementing preventative maintenance in conjunction with reconstructive provides a more cost-effective method for maintaining roadways and prolonging the life of Town roads.
- The Engineering Department and PWD have been responsive to questions and issues presented by Town residents and have 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.

## CHALLENGES:

- To date, there is an ongoing comprehensive right-of-way assessment that seeks to inventory all the Town's pedestrian infrastructure and analyze for deficiencies such as cracking/deformations, trip hazards, ADA infractions, etc. With this information, Staff will be able to formulate an efficient action plan to rectify all identified deficiencies and track progress in the years to come. The challenge will be determining cost effective and appropriate solutions to remediate these deficiencies.
- Staff are currently working with a consultant to perform a self-audit of the Town's MS4 program and permit issued by the North Carolina Department of Environmental Quality (NCDEQ). Upon completion of this self-audit, Staff seeks to implement take action to ensure the Town is in compliance with the MS4 permit's year one requirements and formulate an action plan to meet the permit's remaining years' requirements. This is a State requirement, and the Town is subject to audits from the State to ensure compliance. The Town is

essentially starting from scratch on MS4 permit compliance, and it will be an annual challenge to ensure we're efficiently and effectively meeting our permit requirements while sufficiently coordinating with the residents and business of the Town as community cooperation is a major piece to permit compliance.

- As staff seeks to implement new methods for reconstructive and 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 Department and PWD seek to increase efficiency and cost-effective maintenance and repair solutions, there will be significant challenges as each department works through learning curves implementing new and alternative methods.

**OTHER COMMENTS:**

The Engineering and PWD 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 PWD continues to provide effective maintenance on the building and grounds.

## FINANCE DEPARTMENT – MID-YEAR 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?*

Former finance officer Marsha Gross has come in and helped the Town complete its audit and submit to the LGC.

### **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 challenges created a number of cascading issues including a delayed audit completion and financial statement submission to the LGC. Other deadlines for reporting were missed due to the importance of completing the financial statement audit. The Town has secured the services of a new highly qualified finance officer who can continue the high standards we have for our fiscal management.

### **OTHER COMMENTS:**



# PARKS & REC DEPARTMENT – MID-YEAR 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 Stallings Parks and Recreation Department has truly been able to complete a wide variety of projects within the past few months. Thanks to all of our staff who have been working during our “slow” season to get things going for the community in the Spring/Summer. I wanted to highlight just a few of the things that our department is proud of :

1. **Stallings Greenway Construction:** We are proud to announce that we are on track to finalize the construction of the Stallings Greenway. The project has been a significant focus for our department, and thanks to the dedicated efforts of our team and collaboration with contractors, we have made substantial progress. The completion of this greenway will provide the community with a safe and scenic pathway for recreational activities, enhancing the overall quality of life in Stallings.
2. **Stallings Fest Sponsorship Funds:** Our annual Stallings Fest has garnered significant support from the community, with almost \$5,000 in sponsorship funds secured thus far. These funds will contribute greatly to the success of the event, allowing us to offer a wide range of activities and entertainment for residents of all ages to enjoy.
3. **New Playground Build and Safety Inspections:** We are excited to announce the upcoming completion of the new playground build at Stallings Municipal Park. This playground has been designed to be accessible for individuals with a wide range of abilities, ensuring inclusivity within our community. Additionally, our maintenance team has been conducting routine safety inspections of all playground equipment, prioritizing the safety of our park visitors.
4. **Cohesive Hours for Splash Pad and Shelter Rentals:** To streamline operations and improve user experience, we have established cohesive hours for the Splash Pad and Shelter Rentals across all town parks. This initiative aims to provide consistency and clarity for residents seeking to utilize these amenities for gatherings and events.
5. **Updates to Park Bathroom Facilities and Staff Training:** We have undertaken significant updates to enhance the functionality and cleanliness of all town park bathroom facilities. Additionally, our staff members have undergone comprehensive training programs to ensure they are equipped with the knowledge and skills necessary to deliver exceptional service to our community.
6. **Professional Certifications and Development Opportunities:** Our department takes pride in maintaining a highly skilled and certified team. Our staff holds a variety of certifications, including Pesticides License, Certified Pool Operator, Certified Playground Safety Inspector, and Certified Parks and Recreation Professionals. Furthermore, we recently had the opportunity to send our Senior

Maintenance Technician to the National Maintenance Management School—a two-year program that will provide invaluable insights and expertise in effectively managing and maintaining our park operations.

In conclusion, the Stallings Parks and Recreation Department remains committed to enhancing the quality of life for residents through the provision of exceptional recreational facilities and programs. We look forward to continuing our efforts to serve the community and achieve our goals for the remainder of the year.

### **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)?*

1. **Park Bench/Tree Initiative Program:** Unfortunately, we regret to inform you that we did not meet our goals for the Park Bench/Tree Initiative Program as anticipated. Despite our efforts to implement this program, unforeseen challenges arose, including budget constraints and logistical issues with running the parks irrigation system to promote the best lifespan for the trees. We recognize the importance of this initiative in enhancing our parks and will continue to explore alternative strategies to pursue it in the future.
2. **Community Feedback Collection at Events:** Due to staffing limitations, we encountered difficulties in collecting community feedback at events. Our team's capacity was stretched thin, and we were unable to allocate sufficient resources to gather data effectively. As a result, we lack valuable insights that could inform our decision-making processes and improve the delivery of recreational services. We acknowledge the importance of community engagement and will prioritize the allocation of resources to address this issue moving forward. We believe interacting with the Community Committee, Historical Committee & even the town planning committee – we may be able to gain more valuable and dependable information from town citizens.
3. **Informational Kiosk at Blair Mill Park:** While progress has been made, we are still in the process of installing an informational kiosk at Blair Mill Park. Delays have occurred due to re-routing the disc golf course at Blair Mill & we want all the signs information to be accurate upon implementation.
4. **Standard Operation Manual:** Despite concerted efforts, our standard operation manual is still incomplete. We encountered setbacks in this endeavor, primarily stemming from the need to rebuild the manual from scratch to ensure accuracy and comprehensiveness. This process has been time-consuming, and we appreciate your patience as we work towards finalizing the manual to streamline our departmental operations.
5. **Volunteer Recruitment Challenges:** We have faced difficulties in recruiting volunteers from multiple organizations to support our programs and events. However, we are incredibly fortunate to have forged a strong partnership with Union Academy, which has consistently provided a substantial portion of our volunteer base, accounting for at least 90% of our volunteers. While we continue to explore opportunities to diversify our volunteer pool, we are immensely grateful for the ongoing support from Union Academy and remain committed to fostering positive relationships with community partners.

In conclusion, while we have encountered challenges in meeting certain goals and initiatives, the Stallings Parks and Recreation Department remains dedicated to serving the community and enhancing recreational opportunities for residents. We will continue to address the issues proactively and strive towards achieving our objectives in the second half of the year.

## PLANNING DEPARTMENT – MID-YEAR 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?*

#### 1. Sustained High Customer Satisfaction:

- We have maintained consistent, favorable feedback from developers and the public regarding responsiveness, dependability, friendliness, informativeness, and efficiency during the permitting and plan review process.
- High customer satisfaction translates to smoother projects, positive promotion, and increased investment in Stallings. This fosters a welcoming environment for development and contributes to the Town's economic growth.
- How achieved:
  - Proactive communication and timely responses to inquiries.
  - Streamlined processes and user-friendly resources.
  - Knowledgeable and helpful Staff provides clear information and guidance.
- Continued success:
  - Ongoing staff training and development to maintain excellent customer service skills.
  - Regularly review and improve processes and resources.

#### 2. Downtown Streetscape Plan Adopted:

- Target met: Successfully adopted the Downtown Streetscape plan.
- Significance: This plan aligns with Council goals and paves the way for creating a vibrant, walkable town center featuring niche retail, local restaurants, breweries, and other amenities. This attracts residents and visitors, boosting the local economy and enhancing the community's character.
- Continued success:
  - Secure funding for the implementation of the plan.
  - Collaborate with stakeholders and developers to bring the vision to life.
  - Track progress and measure the plan's impact on economic development, community vibrancy, and resident satisfaction.

### 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)?*

#### 1: Staff Turnover and Capacity

- Several initiatives from the Balanced Scorecard Report were missed due to staff vacancies in Planner 1 and Code Enforcement Officer positions.
- Reduced capacity for in-house development of new land use categories and TOD standards.
- Difficulty attracting and retaining qualified Staff for demanding positions, especially with limited advancement opportunities in entry-level roles.
- Strategies:
  - Partner with CRTPO Grant to leverage consultant expertise for land use and TOD projects.
  - Consider outsourcing specific tasks.

#### 2: Planning Board & Board of Adjustment Membership

- Lack of public interest in serving on a board with limited decision-making power.
- Strategies:
  - Highlight the valuable role of board members in shaping the community's future.

- Consider revising the board structure or responsibilities to increase its appeal to potential members.

### 3: Streetscape Fee-in-Lieu Implementation Delay

- Integrating streetscape improvements into the fee-in-lieu program encountered legal and Council pushback.
- Securing funding to implement streetscape standards for Town owned property. Will need Council direction to install streetscape in front of Town Hall and adjacent property.
- Convincing developers to install streetscape – creates more interest in Conditional Zoning to avoid installing greenway/streetscape

### 4: Interactive Mapping Costs

- Budgetary constraints forced a reduction in the scope of the interactive mapping projects.

## POLICE DEPARTMENT – MID-YEAR BALANCED SCORECARD OVERVIEW ACCOMPLISHMENTS:

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*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-** event calendar has been created and events will begin this month.
- **Host two community events to educate citizens on fraud awareness and financial safety. Increase clearance rate on fraud-related crimes by 3%-**Department is coordinating with NCSECU to provide fraud pamphlets and training programs. Working with a local neighborhood to host fraud awareness.
- **Completion of the 5-step process of CALEA accreditation-**Continuing on the process of gathering proofs. The virtual assessment is in March and the Final assessment is slated for April.
- **Create a Technology Strategic Plan-**Committee has completed its meetings, and the report is in the process of being written. Completion is expected in early Summer 2024.
- **Increase firearms proficiency by 5%-**over 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 have been given materials to review to help understand what a mission statement should be.

### 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)?*

- **Increase impaired driving enforcement by 5%. Conduct 10 traffic safety awareness campaigns (PSA's/bike rodeo/car seat installs/traffic checkpoints/youth driving clinics).** There has been a significant increase in impaired driving arrests, but very limited focus on education and community outreach. Arrests are part of the job, but educating the community to not drive impaired is a key component of traffic enforcement.
- **Create 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.
- **Create and staff a community volunteer program/increase methods of obtaining citizen feedback/ update PD website-**Melissa 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. There is some internal pushback on using volunteers. Additionally, a lot of time has been spent by all administrative staff to complete our CALEA accreditation. We have been able to update permits on our website and have found a solution to simplify our community satisfaction survey and get that information out to the public more efficiently.

### OTHER COMMENTS

The SPD is on schedule to meet our goals set. 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.