

Balanced Organizational Scorecard

Balanced Organizational Scorecard

Administration

Organizational Vision	Organizational Mission	Stallings Way Values	FY 2023-24 Town Council Priorities	Departmental Vision/Mission Statement
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.	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.	<ul style="list-style-type: none">• Integrity• Commitment• Flexibility• Awesome Customer Service• Team Before Self• Continuous Improvement• Competent/Qualified• Supporting Each Other• Everyone Pitches In• Work/Life Balance• Positive Attitude• Collaboration• Dialogue• Have Fun• Trust & Respect• Open to Teach/Learn• Healthy, Positive Environment	<ul style="list-style-type: none">• Downtown Creation• Pursue Sewer Capacity Alternatives• Maximize Positive Development Around Hospital/Light Rail• Encourage Completion of Critical State Intersection Projects• Sustain Core Services	<p><u>Town Manager Mission:</u> The Town Manager's Office provides professional, strategic, responsive, ethical, and respectful leadership under the Council-Manager form of government.</p> <p><u>Town Clerk Mission:</u> To provide a legally mandated, knowledgeable, professional function to the incorporated body and its citizens accurately and timely, while preserving and maintaining the Town's vital records.</p> <p><u>Human Resources Mission:</u> To anticipate, develop and fulfill the human resources needs of Town employees. To provide support to the Town in developing, implementing, and administering a comprehensive human resources program.</p>



Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Serve the Community	Strengthen Citizen Engagement	Enhance public access to information about Town services, meetings, key issues, and opportunities	Broadcast Regular Town Council Meetings	100%	Fiscal Year	Visual/audio recordings are taken at each Council Meeting	ADM	Video all regular meetings stream live to the Town's YouTube Channel.	ALL - All Departments ADM - Administration P/R - Parks & Recreation P/Z - Planning & Zoning
			Publish blog post quarterly	4	Fiscal Year	2	ADM	The Council saw the need for a location to house information about ongoing projects and issues for the Town.	ENG - Engineering P/W - Public Works PD - Police TC - Town Council
			Provide a Monthly Status Update of NCDOT's Old Monroe Road Project	Monthly	6/30/2023	Monthly	ADM	Update as part of monthly staff report	
	Promote Economic Vibrancy	Implement Economic Development Strategic Plan with goal of 80%/20% (res/com) tax base by 2030	Track MOU to work with MUCEDC to encourage/support economic development endeavors	Yes	9/1/2023	MUCEOC Scheduled to come present to Council in June 2024.	ADM	<u>MOU w/ MUCEDC.</u> - Catalog retail/service needs of Town raised by existing manuf. - Recommend new additions to Sub. Com. Center as may be responsive to manuf. - Identify sites for industrial dev. - Plan/coordinate existing industry seminar - Present annual update to TC - Provide Town with ED content for blog	
		Create a Traditional Downtown that Attracts Niche Retail, Local Restaurants, Breweries, and Other Amenities in a Unique Walkable Town Center <small>- FY 23-24 Strategy - Pursue downtown creation through an incremental approach including evaluating sewer capacity, exploring more immediate downtown retail uses on site controlled properties (due to sewer capacity challenges, attracting desired retail (in the long-term) by encouraging/supporting higher density residential in the downtown area, integrating critical streetscape into the downtown area, and determining streetscape phasing.</small>	<small><u>FY 23-24 Action Strategies</u> - Adopt streetscape requirements into SDO by 12/31/23 - Determine by 8/31/23 if Council wants to start installing streetscape improvements/phasing in front of certain Town properties - Evaluate and present cost for converting 325 Stallings Road property into boutique retail shop by 6/30/23 - Hire a consultant to determine if brewery if feasible by 8/31/23 - If feasible, develop brewery marketing plan - If downtown developer requests public participation, considering using DFI for review. - Hold at least 18 events at downtown park. - Sewer Capacity Study - see below.</small>	Complete various items	Various - See Measure	<small><u>FY 23-24 Action Strategies</u> - 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 adopted before 6.30.24 . - Determine by 8/31/23 if Council wants to start installing streetscape improvements/phasing in front of certain Town 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 if feasible by 8/31/23. Complete. - If feasible, develop brewery marketing plan. Broker is marketing property for Town. - If downtown developer requests public participation, considering 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.</small>	TC, ADM		

		<p>Pursue Sewer Capacity Alternatives Evaluate future sewer capacity needs and any anticipated shortfalls, and then identify any appropriate actions to close the capacity shortfall.</p>	Engage a Engineering Firm to Conduct a Sewer Capacity Analysis	Yes	9/30/2023	Yes	ADM, ENG		
Manage Resources	Maintain Fiscal Strength	Adopt a fiscally responsible annual budget	Adopt a Balanced Budget that does not use unrestricted fund balance or debt for operational expenditures	Yes	Annual	Yes	TC, ADM, FIN		
		Determine if Adding Solid Waste Fee is Appropriate	Provide Analysis on Adding Solid Waste Fee	Yes	6/30/2023	Yes			
		Secure an Occupancy Tax	Occupancy Tax Enacted	Yes	6/30/2024	Occupancy tax passed. Resolution for Referendum scheduled for March Town Council Meeting.	T.C., ADM		Previous FY 19-20 Council Priority
	Develop Long-Term Financial Plans	Ensure Organizational IT Infrastructure/Equipment needs are met	Maintain 5-year IT Replacement Schedule/Plan	Yes	Ongoing	Yes	ADM		Computers and equipment are being updated as needed.
	Deliver Services Efficiently	Create a safe environment for employees/public and control cost	% of workforce that have completed mandatory safety training	100%	Annually	99%	ADM, SAFETY CO., ALL		
			# of OSHA recordable injuries: Town Total: General Government: Police:	# of OSHA recordable injuries: Town Total: 0 General Government: 0 Police: 0	Annually	# of OSHA recordable injuries: Town Total: 2 General Government: 0 Police: 2	ADM, SAFETY CO., ALL		
Run the Operations	Enhance Emergency Preparedness	Ensure Organization-wide Emergency Preparedness	Hold a Large Mock Emergency Training Scenario and Identify Areas for Improvement	Once Every 3 years	Once Every Three Years	Complete. Held 8/17/23.	ADM	Emergency Table Top Exercise held on 08-17-2023 for Town Staff. Next one due 2026	ADM staff worked with County EM to hold Emergency Table Top Exercise. Final report will be presented to Council
	Improve Communication & Collaboration	Improve Inter-Departmental Relationships Through Team-Building Events	Hold Organization-Wide Team Building Event	4	Quarterly	2	HR		
		Ensure All Employees are Informed & Have Opportunity for Feedback to Increase Feeling of Ownership/Buy-In	Hold "All Hands on Deck" Meeting	1	Annually	1	ADM		
		Maintain an educated, dedicated, competent, and productive workforce	Turnover Rate: Non-PD: PD: (*Excludes retirements, Involuntary Separations, & 6 month Probationary Period)	Turnover Rate: <10% Non-PD: <10% PD: <10% (*Excludes retirements, Involuntary Separations, & 6 month Probationary Period)	Annual	Turnover Rate:11.6% Non-PD:18.7% PD:7.4% (*Excludes retirements, Involuntary Separations, & 6 month probationary period separations)	ADM, HR	FYE 23-24 Action Steps - Continue to follow pay policy. - Reengage and complete Performance Evaluation Training - Team-Building Events - Employee Recognitions	

Develop Know-How	Maintain a Skilled & Competent Workforce	Attract Retain High Quality Staff	Present TC with proposal to address immediate market pay disparity for police officers using existing FY 22-23 budget funds	Y	3/27/2023	Y			
			Budget in FY 23-24 Employee Pay Study	Y	FY 23-24	N - Town Council opted to move it to FY 24-25			
		Caught Ya! Employee Recognition Program	# of Employee Recognition Awards	8	Annual	5	HR		

Balanced Organizational Scorecard

Finance

Organizational Vision	Organizational Mission	Stallings Way Values	FY 23-24 Town Council Priorities	Departmental Vision/Mission Statement
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.	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.	<ul style="list-style-type: none">• Integrity• Commitment• Flexibility• Awesome Customer Service• Team Before Self• Continuous Improvement• Competent/Qualified• Supporting Each Other• Everyone Pitches In• Work/Life Balance• Positive Attitude• Collaboration• Dialogue• Have Fun• Trust & Respect• Open to Teach/Learn•Healthy, Positive Environment	<ul style="list-style-type: none">• Downtown Creation• Maximize Positive Development Around Hospital/Light Rail• Develop a More Proactive Communications Strategy• Ensure/Encourage Completion of Critical Intersection Projects	<u>Mission:</u> The mission of the Finance department is to work in partnership with all Town departments providing operational, financial and leadership guidance as well as to provide accurate and timely financial information to the Mayor, Town Council and Town Manager. The department strives for excellence as a steward of the Town's assets and to provide financial transparency to our citizens.



Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Serve the Community	Strengthen Citizen Engagement	Promote financial reporting transparency by using the Town's various communications tools.	Y/N - Conduct a comprehensive review of the financial pages on the Town's website; Update and archive where appropriate.	Y	12/31/2023	Incomplete	FIN	Currently have Interim Finance Officer. Delayed due to staff turnover.	
			Submit 1 financial and budget development related blog post for publication	1	Ongoing	0	FIN		Write a post or blog after key points in the budget development and financial reporting processes.
			Receive a GFOA Certificate of Achievement Award <u>or</u> a Distinguished Budget Award	December 2023	Next 6 months	No	FIN		
	Maintain Fiscal Strength	Maintain system of internal controls that meets and exceeds the standards of generally accepted accounting principles.	# of material weaknesses identified in FY23 Single Audit (High values are bad.)	0	Annually	1	FIN		
			# of significant deficiencies identified in FY23 Single Audit (High values are bad.)	0	Annually	1	FIN		

ALL - All Departments
ADM - Administration
P/R - Parks & Recreation
P/Z - Planning & Zoning
ENG - Engineering
P/W - Public Works
PD - Police
COM - Communications

TC - Town Council

FIN - Finance

Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Manage Resources			ACFR and Single Audit submitted to the Local Government Commission on time.	10/31/23	Annually	No	FIN		
			Council Reserve and General Fund Restricted Fund Balance (% of Budgeted expenditures for following fiscal year)	20%	Annually	Greater than 20%	TC, Admin, FIN		
		Adopt a fiscally responsible annual budget	Adopt a Balanced Budget that does not use unrestricted fund balance or debt proceeds for operational expenditures	Yes	Annually	Yes	TC, ADM, FIN		
	Develop Long-Term Financial Plans	Maintain a five-year financial forecast as a tool to guide in long-range financial planning.	Update the forecast and submit for TM and TC review	11/28/2023	Annually	Yes	FIN		
		Conduct a comprehensive review of financial-related policies and procedures.	Conduct an environmental scan	Baseline	Continuous	No	FIN		
			Update the existing policy and/or write new policy (i.e., Fund Balance, Debt, Cash/Investments, Credit Card)	Baseline	Continuous	No	FIN		
			Write Strategic Operating Procedures (SOPs) for Finance	Baseline	Continuous	No	FIN		
	Excel at Staff & Logistical Support	Provide accurate and timely financial information to internal and external customers to improve decision-making and to promote fiscal responsibility respectively.	Distribute budget to actual reports to Executive-level staff (# of reports distributed)	Weekly	Annually	Yes	FIN		
			Distribute completed Purchase Orders to appropriate staff timely.	Issue within two to three business days of receipt.	Daily	Yes	FIN		
		Provide Responsive & Dependable Services	Respond to public information requests within seven business days.	100%	As needed	100%	FIN		
			Respond to inquires/calls from public within 48 hours.	98%	Weekly	100%	FIN		
		Maintain skilled and competent	Develop strategy to retain employees by	Complete Finance Officer Certification Program through the					

Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Develop Know-How	Maintain skilled and competent workforce	focusing on career development through training	Certification Program through the SOG at Carolina (# of courses passed)	100%	Budget permitting	No	FIN		
	Enhance Relations with Other Entities	Build relationships with other governmental organizations by meeting with or attending organizational financial related functions	Schedule quarterly coffee with other finance officers in the county.	One per quarter	Quarterly	N/A	FIN		

Balanced Organizational Scorecard

Engineering


Organizational Vision	Organizational Mission	Stallings Way Values	FY 2023-24 Town Council Priorities	Departmental Vision/Mission Statement
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.	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.	<ul style="list-style-type: none"> Integrity Commitment Flexibility Awesome Customer Service Team Before Self Continuous Improvement Competent/Qualified Supporting Each Other Everyone Pitches In Work/Life Balance Positive Attitude Collaboration Dialogue Have Fun Trust & Respect Open to Teach/Learn Healthy, Positive Environment 	<ul style="list-style-type: none"> Downtown Creation Pursue Sewer Capacity Alternatives Maximize Positive Development Around Hospital/Light Rail Encourage Completion of Critical State Intersection Projects Sustain Core Services 	Mission: The Engineering Department provides quality, efficient, professional engineering services and technical support to the public and other Town departments. We deliver cost effective and sustainable solutions associated with the implementation of capital improvement, land development and community infrastructure. Fostering an environment of excellence and growth are our core values.



Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Serve the Community	Enhance Recreation, Walkability & Connectivity	Improve Pedestrian Infrastructure	Complete Stallings Sidewalk Inventory	100%	12/31/2023	100%	Eng	Coordinate to determine efficient approach to inventory the existing sidewalk infrastructure and incorporate into Town GIS data.	Ongoing
			Complete Stallings Sidewalk Evaluation for Deficiencies	100%	12/31/2023	Ongoing	Eng	Council has adopted a Sidewalk Maintenance Policy and Staff will determine approach to evaluating and pricing corrective measures for Town sidewalks. After that, Town will need to develop corrective financial plan.	Ongoing
			Begin sidewalk improvement projects with Public works	Yes/No	1/1/2024	Yes	Eng	Work to take on as many sidewalk repair and maintenance projects in utilizing the Public Works department. Look at utilizing alternative methods for repairs and maintenance to reduce costs.	Have initiated sidewalk repairs with public works.
	Maximize/Beautify Areas Surrounding Two Major NCDOT Intersections	Incorporate Beautification Projects at two NCDOT Intersections	Atrium roundabout landscaping completion	100%	6/30/2024	100%	Eng	Coordinate with NCDOT to complete landscaping completion	Completed
			Chestnut & Mathews-Weddington roundabout completion (including design and potential installation contingent on Council direction)	100%	6/30/2024	100%	Eng	Complete design and coordinate with NCDOT for implementation	Completed
	Increase Citizen & Community Safety	Improve Pedestrian Infrastructure (See above)	See above/below.						
		Manage and Complete Storm Water Projects (see below)							
	Invest in Infrastructure	CRTPO Engagement	Participation in TCC Meetings	100%	6/30/2024	100%	Eng	Attend all TCC meetings	
		Sewer Capacity Study	Complete Sewer Capacity Study to determine next steps for downtown creation.	100%	6/30/2024	Ongoing		In accordance with Council's goals established in the 2023 Annual Retreat.	Gave up update to Council on 0/12/2024, and Council agreed to continue the study and additional investigative work
		Maintain Town Roads in a Cost-Efficient Manner	<ul style="list-style-type: none"> Update PCI Index every 3 years Maintain Project Inventory using DRIVE software Develop Project Plan for Pavement Maintenance. Implement Pavement Management Projects, Preventative and Reconstructive 	100%	12/31/2023 & 06/30/2024	Ongoing	Eng	Implement a preventative maintenance pilot program in summer/fall of 2023. Perform an additional resurfacing contract in spring of 2024.	Current resurfacing contract ongoing, and pilot program for micro-surfacing is currently out for bid.
			% of Storm Drainage System Inspected Annually & Cleaned As Needed	20%	6/30/2024	0%	Eng	Determine appropriate inspection methods and inspect 20% annually to remain in compliance with MS4 Permit	Working to implement this as we work through our MS4 permit implementation plan

Manage Resources	Maintain and Manage Storm Water Infrastructure	% of Town Streets Swept Annually	100%	6/30/2024	0%	Eng	Perform Street Sweeping twice a year	Working to implement this as we work through our MS4 permit implementation plan	
		Review and Update Stormwater Revenue Analysis	100%	6/30/2024	Ongoing	Eng	Verify accuracy of all owned parcels (residential vs commercial with impervious area)		
		Inventory of Stormwater Infrastructure & SCMs	100%	6/30/2024	Ongoing	Eng	Obtain all GIS storm water data and compile into one GIS file.	Working to implement this as we work through our MS4 permit implementation plan	
		Formulate Action Plan for MS4 Permit Compliance & Complete Year 1 Items.	Yes	6/30/2024	Ongoing	Eng	Analyze SWMP to determine appropriate action items to remain in compliance with the MS4 permit.	Working to implement this as we work through our MS4 permit implementation plan	
	Deliver Services Efficiently	Reduce Infrastructure Repair Costs by Utilizing Public Works Dept.	Perform storm water, sidewalk, asphalt repairs with Public Works	Yes	6/30/2024	Yes	PW	Perform as many of these repairs in-house	
		Ensure Contractor and Consultant Costs Competitive	SW and Trans. Projects over 20k will be required to have at least 3 separate bids	Yes	6/30/2024	Yes	Eng	Abide by bid policy to ensure bids are competitive and pricing is accurate	Bid out a larger-scale storm water repair project that included 6 projects. Approved on 02/12/2024
Utilize alternative sidewalk, storm water, and roadway repair methods		Analyze cost savings as a percentage of original expenditures. Goal is to be cheaper and faster.	Yes. Provide alternative repair methods.	6/30/2024	Ongoing	Eng	Analyze ways to reduce costs for typical infrastructure repairs.	Will have this information as a result of the sidewalk study	
Run the Operations	Provide Responsible and Dependable Services	If contracted, complete storm water repairs within one-month of P.O execution	Percentage of projects completed within 1 month of PO execution	75%	6/30/2024	100%	Eng	Ensure we're scheduling and completing projects efficiently.	
		If contracted, complete sidewalk repairs within one-month of P.O execution.	Percentage of projects completed within 1 month of PO execution	75%	6/30/2024	100%	Eng	Ensure we're scheduling and completing projects efficiently.	
		Public Works: Excluding obtaining materials, perform smaller maintenance tasks within one-week of being notified (sign replacements, small pot hole patching, catch basin cleaning, etc...)	Percentage of projects completed within 1 week of notification	75%	6/30/2024	100%	Eng	Ensure we're scheduling and completing projects efficiently.	
	Excel at Staff & Logistical Support	Creating a standard services contract for engineering/public works projects to expedite projects	Y/N	Yes	12/30/2023 & 06/30/2024	Yes	Eng	Coordinate with finance and legal to determine when SSAs are needed and strategize how to make the process more efficient	
Develop Know-How	Maintain a Skilled & Competent Workforce	Improve Employee Skillset & Allow Employees to Grow	% of Engineers with Minimum of 15 Professional Development Hours	100%	6/30/2024	0%	Eng	Take appropriate classes for PDHs in accordance with NCBELS	Completed for 2024 renewal have not started for 2025 renewal
		Continuing Education	% of Department Attendance At a Minimum Of 3 Continuing Education Classes and/or additional certifications	100%	6/30/2024	0%	Eng	Staff to take additional education classes.	
		Public works to expand skills with equipment to expand project abilities.	Number of new equipment skills and/or project types.	5	6/30/2024	3	PW	PW to continue to learn new equipment, operations, and skills to maximize the amount of projects we're able to	
	Enhance Relations with Other Entities	Continue to coordinate with surrounding municipalities and jurisdictions to enhance each area of the balance scorecard (where applicable)	Yes/No	Yes	6/30/2024	Yes	Eng&PW	As we continue to expand skillsets and responsibilities, continue to work/coordinate with surrounding municipalities to help Staff learn and grow.	

Balanced Organizational Scorecard			Parks & Recreation						
Organizational Vision	Organizational Mission	Stallings Way Values	FY 2023-24 Town Council Priorities			Departmental Vision/Mission Statement			
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Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
	Enhance Recreation, Walkability & Connectivity	Begin a Park Bench/Memorial Tree Initiative Program	# of Benches Sponsored per Year ; # of Trees Dedicated per year	2	7/1/2024	Currently no program in place ; however, researching how other towns do "Bench" dedication programs	PR	Touching base with other municipalities that have a bench program and the procedures moving forward	
		Construct Blair Mill Greenway Vickery Segment & Privette Park Playground Installation	Finish BM Greenway Construction (Y/N) Privette Playground Installed (Y/N)	Y	4/1/2024	Privette Playground installed end of January 2023. Greenway still in progress	PR	Greenway is planned to be cleaned Mid-March & we will proceed with planning a Grand Opening/Ribbon Cutting Accordingly.	
		Anticipate the needs of the changing community and structure programs & facilities accordingly.	Receive Community Committees Input on 2024/25 Events	Y	10/1/2024	Working with Event Coordinator to discuss ways to engage with Community Committee	PR	Plan to meet with Community Committee to discuss options for future events.	
	Improve Communication & Collaboration	Expand the level of public information and involvement in parks and recreation.	Create cohesive advertising at ALL parks and recreation facilities across town.	Install Banners on each light pole in Stallings Municipal Park	6/30/2024	Working with maintenance department to get correct sizing for Banners		Finalize banner kit size, rent a lift for install & then proceed to design banners by quarter	
				1 Informational board at each Parks & Recreation Facility/Greenway around Town	12/1/2024	Y - Eagle Scout Built one Kiosk at Privette Park N - Blair Mill Park	PR/ Eagle Scout	Install an informationl Kiosk at Blair	
	Provide Responsive and Dependable Services	Create dependable hours around Shelter Rentals, Splash Pad, Parks, & tennis courts to ease public confusion.	Create Operational Hours for each park & entity in it (Ex. Splash Pad, Shelters, Tennis Courts) that coincide with daily park operations.	Operational Schedule in place for each park and service	6/1/2024	Y - Second Consecutive Summer with Same Splash Pad Operations, Same Shelter Rental Hours. N - NO "Set hours" for Tennis Courts	PR	Research other municipalities Tennis Court Rental Fees/scheduling	
	Provide Responsive and Dependable Services	Implement Playground Safety Program	Create Playground safety audits and inspection sheets for every playground	1 Audit Form & 1 Safety Inspection form per playground	Dec. 2024	Y - Complete	PR	Staff Routinely inspects playgrounds currently.	





Run the Operations	Provide Responsive and Dependable Services	Strive to improve existing facilities while seeking opportunities for future development.	Create an Standard Operations Manual for the Stallings Parks and Recreation Department	Cohesive Operations Manual that covers park operations, maintenance, routine inspections, rules/guidelines, etc.	Phase 1 - 12/31/23	N - Currently have Mission Statement, Goals & Vision ; however, no start for groundwork of Manual Operations.	PR /Police	Phase 1.5 Break up Operational Plan into Sections of Park Operations - Work with Parks Department to decide on Key Themes	
			Create an "Mural" Program for the town to enhance the Arts.	1 Mural per park	7/1/2024	Found Local CLT artist - Working on Budget & design.	PR	Move forward with meeting with Parks and Historical Committee to come up with design elements for the Mural.	
			Create a short & long-term plan for each recreation site.	1 short term & 1 long term plan per Park/Greenway	1 Short Term per park - 12/31/23 1 Long Term per park - 6/30/24	Y - Short Term Plan N - Long Term Plan	PR	Work with Senior Maintenance Technician to create a list of long-term projects after all the Short-Term projects get addressed	
Develop Know-How	Maintained a Skilled & Competent Workforce	Train/Hire competent staff who exemplify the Stallings way.	Implement specific training plan for each job description	Y	Annually	Get all maintenance Staff up-to date on CPSI Certifications Attend NCRPA Conference in December	PR	CPR/AED Schedules for Feb. 15th - ALL parks staff (including part time) required. 4 Staff members received CPSI , 3 received CPO & 3 received CPRP	
	Support Development of Citizen Volunteers	Recruit & retain strong volunteer group from various organizations.	Work with schools to make students aware of volunteer opportunities & reward long-term service.	4 Volunteers from 3 different schools	Annually	N - Currently work with one school exclusively.	PR	Plans to reach out to local organizations outside of schools for volunteers Change goal to more volunteers in general	
	Enhance Relationships with other entities	Seek out sponsorships with local agencies	Work with local businesses to sponsor our annual Stallings Fest	10 Sponsors	9/1/2024	Y - Currently have 8 Sponsorships bringing in \$5,500			
		Improve inter-agency cooperation with neighboring communities.	Connect with Local Recreation Departments quarterly to discuss event schedules, strategic marketing, etc.	Meet with Indian Trail, Waxhaw, Monroe, Matthews, Marshville Recreation Coordinators & Establish a "Events Meeting"	Quarterly	N - Have not made it a priority to reach out to other Municipalities	PR	Planning to reach out to other municipalities soon to establish a feasible date/time.	

Balanced Organizational Scorecard

Planning and Zoning

Organizational Vision	Organizational Mission	Stallings Way Values	FY 2023-24 Town Council Priorities	Department Mission Statement
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Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Serve the Community	Enhance Economic Vibrancy	Create a Traditional Downtown that Attracts Niche Retail, Local Restaurants, Breweries, and Other Amenities in a Unique Walkable Town Center.	Council approval of the Streetscape Plan and implementation into the SDO.	Y/N	12/31/2023	(1/2 Complete) The Council Adopted the Streetscape Plan in 2023. The Council will hear the text amendment to implement streetscape into the ordinance in March 2024.	P/Z	Bring back the Streetscape plan to Council (Late Summer/early Fall).	Requires direction from Council.
			Help determine if Council wants to consider investing in streetscape improvements in front of certain Town properties and, if so, the phasing of such investments.	Y/N	8/31/2023	8/14/23 – The Council opted to hold off making immediate streetscape investments in front of Town Hall and town-owned properties.	Admin w/ P/Z support	Request Council feedback about proceeding with streetscape investments.	Requires direction from Council.
			Attract and support desired downtown retail, encourage and support higher density residential in the Town Center area during land use planning and zoning decisions.	Y/N	12/31/2023	Ongoing (Needs to be revised to make it measurable) - DFI study advised current low residential density is a challenge for attracting specialty (non-chain/boutique) retail. DFI recommended encouraging higher density residential to support retail.	P/Z	Revisit Future Land Use and Small Area Plan for the Downtown area.	Requires insight from Council.
			If the Town receives a significant development plan within the downtown area from a private developer that requests public participation, consider contracting with DFI for a 3rd Party review of the development plan.	TBD	TBD	Ongoing (Needs to be revised to make measurable. No significant developments have come forward in the Downtown area)- DFI has advised that higher density residential and retail facing Stallings Road can help meet downtown goals and help serve as a catalyst to support desired retail on Town controlled properties.	P/Z	Collaborate with DFI if we receive such proposal.	
		Maximize Positive Development Around Hospital/Light Rail (Economic Development).	Incorporate limited TOD standards into Development Ordinance to support Silver Line Light Rail into Stallings.	100%	8/31/2023 per Council priorities.	CRTPO grant to fund full overhaul with the consultant. The consultant presented at the council in January 2024. Plan to have a kickoff meeting in late Feb or early March 2024.	CATS & P/Z	Staff to implement their recommendation into TOD Standards.	Requires direction from Council.
			Station area SAP/DO/CLUP updates to incorporate light rail and Atrium.	100%	9/30/2024 per Council priorities.	On target - CRTPO grant awarded. Alter based on Atrium and planned light rail corridor/station with a consultant.	P/Z	Coordinate with consultant and CRTPO throughout the year for updates to SAP/DO/CLUP.	
Manage Resources	Excel in Customer Service	Provide excellent customer service for permits and procedures.	% of Plan review (Const. Doc, Final Plans, Etc.) to be reviewed within 30 business days for the Planning Dept.	100%	Annual	On target - Create 30 business day review process.	Engineering & P/Z	Maintain the Development Projects list with the timeline.	We strive to increase customer service response times.
			Conduct monthly review of the information on the Planning pages of the website and update if necessary.	100%	Annual	Development Project information needs work, but all other pages are sufficient.	P/Z	Review each page ongoing. Make the landing page for planning from the original site.	We hope to remove comments from the public that think the site is hard to navigate.
		Website and Mapping updates to improve service and communications.	Develop Interactive Mapping website for public use	100%	12/31/2023	(Needs revision) Interactive mapping costs more money than initially anticipated and we took down most interactive maps due to budget constraints.	P/Z	Review maps to see which would be the most beneficial for public use.	Continue to provide updates maps to the public.
Run the Operations	Deliver Services Efficiently	Provide timely and effective response to ordinance code violations	Document % of violations brought into voluntary compliance within 60 days	67% (increased from 60% previous BSC)	Annual	64.7% - almost at target even with a new code officer	Code Enf.	Documents all Code Enforcement cases.	Continue to provide code enforcement that cleans up the town.
		Educate the public on Code Enforcement duties/what types of issues are code violations.	Create educational resources or informational materials to provide to the public.	Y/N	7/1/2024	Ongoing - Create information such as brochures, guides, or online resources to raise awareness about code compliance.	Code Enf.	Create a monthly educational resource to provide to the public.	
Develop Know-How	Ensure Staff Are Growing as Professionals to Better Serve the Citizens	Continuing education for department staff & maintain credits for certifications.	1-2 minimum Trainings/Continuing Education Plan for Department Staff	100%	Annual	Ongoing - Ensure each staff member is signed up for continuing education courses.	P/Z & Code Enf.	See Status/Result	CZO for Code Enforcement and Planning Tech.
	Support Development of Citizen Volunteers	Promote efficiently run meetings by providing training for Planning Board and Board of Adjustment members	Annual Training of Planning Board and Board of Adjustment Members	Y/N	Annual	PB is receiving training in Feb 2024.	P/Z	See Status/Result	

Balanced Organizational Scorecard

Police

Organizational Vision	Organizational Mission	Stallings Way Values	FY 2023-24 Town Council Priorities	Department Mission Statement
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.	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.	<ul style="list-style-type: none">• Integrity• Commitment• Flexibility• Awesome Customer Service• Team Before Self• Continuous Improvement• Competent/Qualified• Supporting Each Other• Everyone Pitches In• Work/Life Balance• Positive Attitude• Collaboration• Dialogue• Have Fun• Trust & Respect• Open to Teach/Learn• Healthy, Positive Environment	<ul style="list-style-type: none">• Downtown Creation• Pursue Sewer Capacity Alternatives• Maximize Positive Development Around Hospital/Light Rail• Encourage Completion of Critical State Intersection Projects• Sustain Core Services	<u>Mission:</u> Our mission, collectively as a department and as individual officers, is to provide an exemplary level of service and protection to the residents and businesses of the Town of Stallings and to all those who may visit, work in, or travel through our community. We will serve the community through professional conduct at all times and the enforcement of criminal and traffic laws without prejudice or bias, with respect for the rights of all people, to assure a safe and secure environment for all.



Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Serve the Community	Strengthen Citizen Engagement	Implement programs to increase interactions between community and police staff	Y/N - Host quarterly coffee w/a cop; bi-monthly lunch w/ a cop at Stallings Elementary; host a fishing derby w/ NC Wildlife for kids	Y/N - Host quarterly coffee w/a cop; bi-monthly lunch w/ a cop at Stallings Elementary; host a fishing derby w/ NC Wildlife for kids	6/30/2024	Event calendar has been created and events are slated/lunch w/a cop is being changed to recess w/a cop	PD	Patrol squads and CID will partner to ensure events are held	
	Increase Citizen & Community Safety	Increase roadway safety and decrease traffic accidents.	Y/N - Increase impaired driving enforcement by 5%. Conduct 10 traffic safety awareness campaigns (PSA's/bike rodeo/car seat installs/traffic checkpoints/youth driving clinics)	Establish comprehensive outreach programs to be the community to include collaborative efforts and enforcement	Annually	63% increase in DWI arrest from 7/22-12/22 to 7/2 to12/23. Have done two community events. 19 checkpoints and heavy utilization of message boards with traffic safety info	PD	Utilize Traffic Team and Community Service Unit	Establish comprehensive outreach programs to the community to include collaborative efforts and enforcement
		Deter and decrease citizens from fraud victimization by increasing awareness, education and enforcement of fraudulent crimes	Y/N - Host two community events to educate citizens on fraud awareness and financial safety. Increase clearance rate on fraud related crimes by 3%	Host awareness training and increase clearances of this type of crime	6/30/2024	Working with NCSECU to host a fraud course. Working on social media campaign to discuss fraud. Case clearances have increased 3.8%	PD	CID will partner with community groups to host fraud awareness training	
		Provide alternate patrol capabilities to areas within Town	Create bicycle patrol unit and motor unit utilizing sustainable initiatives	Create bicycle patrol unit and motor unit utilizing sustainable initiatives	6/30/2024	Identified officers interested in bike patrol	PD	Identify volunteers and find sources for funding	
Manage Resources	Deliver Services Efficiently	Ensure adherence to best practices for police services and help reduce risk exposure and liability insurance costs	Completion of 5 step process of CALEA accreditation	Completion of 5 step process of CALEA accreditation	5/1/2024	The assessment phase has been completed. PD is in the process of starting to collect proofs. PD was awarded a grant to assist with the Calea process	PD		
Run the Operations	Provide Responsive & Dependable Services	Provide technology resources to keep up with police investigative demands	Create a Technology Strategic Plan	Create a Technology Strategic Plan	6/30/2024	Report is being written	PD	Special Services Lt. will spearhead effort to create technology plan	
		Provide effective/efficient police services.	Create and staff a community volunteer program/increase methods of obtaining citizen feedback/ update PD website	Create and staff a community volunteer program/increase methods of obtaining citizen feedback/ update PD website	6/30/2024	Volunteer coordinator has been established. Still in research phase for program structure. Have met with surrounding department that have volunteer program.	PD		
Develop Know-How	Develop a Skilled & Competent Workforce	Ensure that staff have the highest level of training possible to perform in their role	Increase firearms proficiency by 5%	Increase firearms proficiency by 5%	6/30/2024	Over 2 year period goal was met with an overall increase in firearms scores of 5.3%	PD	Get firearms instructors input as to what areas should be covered	
		Provide updated guiding police philosophy for PD staff	Review and update existing mission statement and core values	Review and update existing mission statement and core values	6/30/2024	Committee has been established and material has been distributed to assisted committee members on mission statement development	PD	Departmental effort to determine philosophy	

Balanced Scorecard Annual Timeline

Event	Timeline	Outcomes	Actors
Council Annual Retreat	February	Set of Draft Council Priorities	Town Council
Council Priorities Final Approval	End of February	Final Council Priorities	Town Council
Department Level Draft Goals	14-Jun-23	Draft Department Goals	Town Manager, Staff
Final Budget Approval (Adjust goals as needed)	6/30/2023	Final Annual Budget	Town Manager, Staff
Departments Submit Final Year-End Report	8/30/2023	Final Department Report	Town Manager, Staff
Annual Report	2nd September Meeting	Report and Presentation Council & Public	Town Council, Town Manager, Staff
Mid-Year Report	February	Report to Town Council	Town Council, Town Manager, Staff