

Balanced Organizational Scorecard

Administration

Organizational Vision	Organizational Mission	Stallings Way Values	FY 2024-25 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">• Long-Range Financial Planning• Pursue Sewer Alternatives• Support/Enhance Union West Business Park• Pursue Town Center Creation• Maximize Positive Development Around the Hospital/Light Rail	<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	100%	ADM	Video all regular meetings stream live to the Town's YouTube Channel.	100% broadcast as Wi-Fi allows.
			Publish blog post quarterly	4	Fiscal Year	4	ADM	The Council saw the need for a location to house information about ongoing projects and issues for the Town.	These were published quarterly.
	Promote Economic Vibrancy	Implement Economic Development Strategic Plan with goal of 80%/20% (res/com) tax base by 2030	<u>Support/Enhance Union West Business Park ("UWBP")</u> Council identify members to engage with General Assembly members regarding repairing UWBP roads and potential property annexation	Y	12/31/2024	Y	TC	EDC to develop key points to share with state elected officials for UWBP roads advocacy.	
			<u>Support/Enhance UWBP</u> Encourage MUCEDC to prioritize marketing UWBP	Y	6/30/2024	Y	ADM	Staff drafting communication to MUCEDC, and MUCEDC reps coming to 08/12/24 Council Meeting	EDC is on communication via quarterly meetings with the now UCEDC
			Track MOU to work with MUCEDC to encourage/support economic development endeavors	Yes	9/1/2025	Y	TC, ADM	MUCEDC coming 08/12/24	MUCEDC attends Council meeting annually for a report. MOU may need to change to reflect UCEDC.
			<u>FY 24-25 Action Strategies</u> - Call it "Town Center" instead of "Downtown" - Per DFI's recommendation aimed at supporting						

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

Develop Know-How	Maintain a Skilled & Competent Workforce	Maintain an educated, dedicated, competent, and productive workforce	Turnover Rate: Non-PD: PD: (*Excludes retirements, Involuntary Separations, 6 month Probationary Period, P/T)	Turnover Rate: <10% Non-PD: <10% PD: <10% (*Excludes retirements, Involuntary Separations, & 6 month Probationary Period, P/T)	Annual	Turnover Rate: 9% Non-PD: 6% PD: 11% (*Excludes retirements, Involuntary Separations, 6 month probationary period separations, P/T)	ADM, HR		Employee turnover remain a focus area-each change is a chance to improve retention, strengthen our culture, and build a more engaged team.
			Fund, conduct, & implement a pay study during FY 24-25 that looks holistically at salaries, benefits, policies, etc.	Y	6/30/2025	Y	HR, ADM		
			Implement a functional performance pay policy	Y	6/30/2027	Ongoing	HR, ALL		
			Evaluate employee cost-savings incentive programs	Y	6/30/2025	Y	ADM, HR		Presented to Council on 2/24/25
		Caught Ya! Employee Recognition Program	# of Employee Recognition Awards	8	Annual	4	HR		Employee awards are a great way to recognize hard work and dedication-congratulations to all the well-deserved recipients

Balanced Organizational Scorecard		Finance		
Organizational Vision	Organizational Mission	Stallings Way Values	FY 24-25 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">• Long-Range Financial Planning• Pursue Sewer Alternatives• Support/Enhance Union West Business Park• Pursue Town Center Creation• Maximize Positive Development Around the Hospital/Light Rail	<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 transparency and excellence in financial reporting	Conduct a comprehensive review of the financial pages on the Town's website; update and archive where appropriate	Yes	6/30/2025	No	FIN		
			Create and implement monthly financial report for Council that will also be posted on the website	Post monthly beginning in January 2025 for December 2024	Monthly	Not yet implemented, pushed to FY26	FIN		
			Receive the GFOA Certificate of Achievement for Excellence in Financial Reporting	Awarded Certificate - Audit for the fiscal year ended 6/30/2025	4/1/2026	Target date not yet arrived, but will not receive. Postponing submission until the FY26 audit.	FIN		Must be submitted within six months of fiscal year end, but receipt is contingent upon GFOA notification
			Receive the GFOA Distinguished Budget Presentation Award	Achieve Award for FY 27-28 budget	12/1/2027	Target date not yet arrived	FIN		Must be submitted within 90 days of budget adoption, but receipt is contingent upon GFOA notification
Manage Resources	Maintain Fiscal Strength	Maintain system of internal controls that meets and exceeds the standards of generally accepted accounting principles	No material weaknesses or significant deficiencies identified	0	Annually	1	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	Y - Submit to TM and TC	Annually	Y - Distributed multiple times during budget process	FIN		
		Conduct a comprehensive review of financial-related policies and procedures; create and update as appropriate	Create a fund balance policy that at least aligns with LGC recommendation and addresses what to do with excess funds	Complete	12/31/2024	Adopted 12/9/2024	FIN		Discussed during FY 2025 budget process, needs to be in place for FY 2026 budget process
			Update the credit card policy	Complete	12/31/2024	Not yet complete, pushed to 12/31/2025	FIN		
			Create a purchasing policy	Complete	12/31/2024	Not yet complete, pushed to 12/31/2025	FIN		Multiple individual policies will be updated and combined into a single purchasing policy that also addresses additional related procurement items
			Update the grants policy	Complete	12/31/2025	Not yet complete, pushed to 12/31/2025	FIN		
			Create a cash/investments policy	Complete	12/31/2025	Not yet complete, pushed to 12/31/2025	FIN		
			Create a debt policy	Complete	12/31/2025	Not yet complete, pushed to 12/31/2026	FIN		

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			Write Strategic Operating Procedures (SOPs) for Finance	Yes	6/30/2025	Not yet complete, pushed to 12/31/2026	FIN		Procedures will change with the implementation of new software, so this will be an ongoing initiative
	Invest in Infrastructure	New financial software	Implementation of new software	Yes	6/30/2027	Target date not yet arrived, plan to select software by 6/30/2026	FIN		Current software is outdated and inefficient, lacks certain controls and many reporting features
Run the Operations	Provide Responsive & Dependable Services	Provide accurate and timely financial information to internal and external customers to improve decision-making and to promote fiscal responsibility respectively	Centralize invoicing to external parties	Complete	6/30/2025	Not yet complete, pushed to 6/30/2026	FIN		
Develop Know-How	Maintain skilled and competent workforce	Continuing education and maintain certifications	Participate in conferences, classes and webinars	Certifications must be renewed every five years and require 100 hours of CPE; minimum of one activity annually for non-certified personnel	6/30/2025	Ongoing	FIN		

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Engineering and Public Works

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Perspectives	Objectives	Initiatives	Measure	Target	Timeline	Status/Result	Responsible Entity	Action Plan	Notes
Serve the Community	Maintain Sufficient Customer Service	Effectively communicate to all inquiries.	Respond to residents and business owners within 2 business days	Yes/No	6/30/2025	Yes	PW/Eng		
	Implement ADA Action Plan to ensure we're bringing our pedestrian infrastructure to ADA and PRWAG Standards	Use right-of-way study to repair sidewalks accordingly.	Invest \$50,000 on sidewalk repairs as outlined in ROW study	\$50,000	6/30/2025	\$5,000	PW/Eng		
Run the Operation	Optimize resurfacing budget by increasing efficiency with roadway repairs.	Maintain and repair roadways in a cost effective manner	Implement reconstructive and preventative maintenance contracts	Yes/No	6/30/2025	Yes	Eng		
			Perform pothole and small patching repairs in house	Yes/No	6/30/2025	Yes	PW		
	Maintain MS4 Permit Compliance and Optimize the MS4 Program	Permit Year 2 Compliance	Meet all of Permit Year 2 Requirements	100%	6/30/2025	No	Eng		
		Prepare a budget for permit year 3.	Prepare a budget for FY2026's MS4 Program and have Task orders ready.	Yes/No	6/30/2025	Yes	Eng		
	Development Oversight	Plan Review	Complete plan reviews in accordance with our plan review timeline(s)	100%	6/30/2025	Yes	Eng		
		Update Roadway Acceptance Policy	Update Subdivision/Roadway Acceptance Policy	Yes/No	6/30/2025	No	Eng		
		Update Land Development Standards	Update current land development standards.	Yes/No	6/30/2025	No	Eng		
	Storm Water Repair Program	Maximize the amount of storm water projects completed in house	Maintain list of projects and associated costs of SW projects completed by PW	Yes/No	6/30/2025	Yes	PW		This list will be used to determine cost savings to assist with hiring additional employee(s).
	Sewer Capacity Study	Continue coordination with Charlotte Water and Union County	Closeout existing task order to finish SS study	Yes/No	9/1/2024	Yes	Eng		
			Analyze implementation feasibility and come to a verbal agreement with Union County and CLT Water	Yes/No	6/30/2025	No	Eng		
	Manage Budgets	FY2025 Adopted Budget	Maintain Transportation, SW, and PW Budgets	Yes/No	6/30/2025	Yes	Eng/PW		
		FY2026 Proposed Budget	Formulate costs for additional personnel and equipment	Yes/No	2/1/2025	Yes	PW		


Manage Resources	Manage Personnel	Expand Public Works Department	Develop budget analysis for additional PW employee	Yes/No	6/30/2025	Yes	PW		
	Manage Equipment		Develop Budget Analysis for Additional PW Truck	Yes/No	6/30/2025	Yes	PW		
			Repair Town Hall HVAC	Yes/No	12/31/2024	No	Eng		
Developer Know How	Maintain, Expand, Improve Professional Knowledge, Expertise, and Certifications	Engineering	Associate Engineer to pass PE exam	Yes/No	6/30/2025	No	Eng		
			Town Engineer to obtain SCM Inspection Certification	Yes/No	6/30/2025	Yes	Eng		
		Public Works	Utilize new equipment to expand scope of project capabilities	Yes/No	6/30/2025	Yes	PW		
			Formulate Public Works "tiers" to determine promotions appropriately	Yes/No	6/30/2025	Yes	PW		

		ease public confusion.		Y/N	12/1/2026	Y	PR	Research other municipalities Tennis Court Rental Fees/scheduling Working with local Pickleball enthusiasts to ensure equal game play is ensured.	Tennis Court conversion to pickleball has been a huge success ; however, the department does not believe it's wise to rent out the courts at this time due to staff limitations.
	Enhance Emergency Preparedness	Develop a Standard Operations Manual for Parks and Recreation	Create Standard Operations Manual	Y/N	<u>Set Park Ordinances in Place by</u> 12/31/24; Create Standard Operations Manual 12/31/25	y	PR /Police	Step 1 - Create ordinances, then can develop Standard Operations Manual. 'Working with Chief Franks to establish Ordinances for the Park that do not currently overlap/contradict current ordinances	Some ordinances have been set into place (Park Hours, etc.) ; however, park continues to address issues as needed to
Manage Resources	Invest in Infrastructure	Strive to improve existing facilities while seeking opportunities for future development.	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 - Dec. 2025 1 Long Term per park - Dec. 2026	N	PR	Once standard is met at ALL facilities - maintenance will move forward with enhancements rather than replacements.	Short terms plans are nearly finalized; however, long term plans still have not been established.
Develop Know-How	Maintained a Skilled & Competent Workforce	Improve Employee Retention and Job satisfaction through recognition and reward programs	Create Career Progression Plan for Each P/R Position	Y/N	6/1/2025	N	PR	Working on Developing a Growth plan per position.	Currently still working on career progression plan
	Enhance Relationships with other entities	Conduct joint research and data collection on local needs, preferences, and trends.	# of surrounding departments involved in Data Collection	6	6/30/2025	N	PR	Conduct joint research and data collection on regional needs, preferences, and trends that results in data-driven decision-making and program development benefiting Union County as a whole.	Struggle working with surrounding municipalities while balancing everyone's schedules/work load

Balanced Organizational Scorecard

Planning and Zoning

Organizational Vision	Organizational Mission	Stallings Way Values	FY 2024-25 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	Pursue a thriving town center, the heart of our community. A place where locals and visitors gather, stroll along walkable streets, and discover unique shops, enticing restaurants, welcoming breweries, and vibrant public spaces.	FY 24-25 Action Strategies - Call it "Town Center" instead of "Downtown" - Per DFI's recommendation aimed at supporting Town Center oriented retail, continue to encourage higher residential density (multi-family) in the Town Center. (TBD based on opportunities). - If the Town receives a significant development plan within the Town Center area from a private developer that requests public participation, consider contracting with DFI for a third-party review of the development plan.	Y/N	Ongoing	A recent DFI study identified low residential density as a barrier to attracting specialty retail stores. To address this, the Town will encourage higher density housing projects within the Town Center area. Additionally, if a significant development proposal is submitted by a private developer and requires public input, the Town will consider contracting DFI for an independent review of the plan. This review would assess the proposal's potential to achieve our goals for the Town Center, including attracting desired retail and creating a vibrant mixed-use environment.	P/Z	Consider revisiting a master plan outlining the town center's layout, zoning regulations, and architectural guidelines once Old Monroe Rd is complete.	
			Council approval of the Streetscape Plan and implementation into the SDO.	Y/N	12/31/2023	Complete	P/Z	Determine if Council wants to consider investing in streetscape improvements in front of certain Town properties in the future and, if so, the phasing of such investments.	
		Maximize Positive Development Around Hospital/Light Rail (Economic Development).	Complete the Silverline Integration Plan with our consultant, Bolton & Menk. The station area SAP/DO/CLUP updates will incorporate the light rail and atrium.	100%	12/31/2024	90% - CRTPO grant awarded. Alter based on Atrium and planned light rail corridor/station with a consultant. The updates will include the station area in SAP/DO/CLUP and will incorporate the light rail and atrium.	P/Z	Coordinate with consultant Bolton & Menk and CRTPO throughout the year for updates to SAP/DO/CLUP.	
			Ensure Atrium can participate as a stakeholder in the SAP/DO/CLUP planning process for the Silverline.	Y/N	12/31/2024	Complete	P/Z		
		Support and grow economic development efforts for existing and new businesses in Union West Business Park ("UWBPP") as an opportunity to help foster a sustainable tax base for all residents and businesses in Stallings.	Remove industrial setbacks so that industrial parcels are more marketable/developable.	Y/N	12/31/2024	Complete	P/Z		
		Enhance the Development Ordinance so that is more desirable for new development and attracts developers.	Rewrite the Ordinance in-house to save money	Y/N	Ongoing	N - Specific ordinance sections will undergo a review process. The goal is to improve clarity and effectiveness while preserving the overall theme and consistent formatting of the current ordinance.	P/Z	Create an internal timeline with Ordinance re-write milestones.	
		Enhance the FLU category Place Types to create more categories for the uses.	Rewrite the Place Type specifications in-house to save money	Y/N	Ongoing	N - The comprehensive plan's place types are being assessed to identify a more targeted list of permitted uses. This revision will ensure consistency with the plan's overall theme and format.	P/Z	Incorporate the changes as a bridge documenting the Comp Plan to be easily accessible.	
Manage Resources	Improve Resource Management	Condense paper storage into digital storage to make more readily available for the staff and the public.	Transition to digital storage for all current documents.	7/1/2025	12/31/2024	50% - Our goal is to condense storage to facilitate easier access for staff and public use.	P/Z, Code Enf.	Use the plotter and scanners to scan all paper documents	
Run the Operations	Improve Communication & Collaboration with the Public	Enhance the Development Review Process	Create handouts for processes that make it easier for everyone to understand ordinance processes.	Y/N	Ongoing	N - Not started yet. Create informational guides and spreadsheets or online resources to increase awareness of Ordinance requirements.	P/Z	Create guides along with the ordinance re-write.	
		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	7/1/2025	Not started yet - 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.	Not feasible with just 1 staff member.
Develop Know-How	Maintain a Skilled & Diverse Workforce	Continuing education for department staff & maintain credits for certifications.	1-2 minimum Trainings/Continuing Education Plan for Department Staff	Y/N	Annual	Y - Ensure each staff member is signed up for continuing education courses.	P/Z & Code Enf.	See Status/Result	
	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	Y - Retrain PB & BOA when new members are voted in. Annual training every March.	P/Z	See Status/Result	

Balanced Organizational Scorecard		Police							
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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	Host quarterly coffee w/a cop; bi-monthly lunch w/ a cop at Stallings Elementary; fishing derby.	Y	Annually	Y	PD	Patrol squads and CID will partner to ensure events are held	4 Coffee w/Cop were held 2 lunches were held but SES asked for us to pause due to distractions in lunch. Fishing
	Increase Citizen & Community Safety	Increase roadway safety and decrease traffic accidents.	# of traffic safety awareness campaigns (PSA's/bike rodeo/car seat installs/traffic checkpoint/youth driving clinic)	20	Annually	78	PD	Utilize Traffic Team and Community Service Unit	Message board deployments remain high. 54 DWI arrests, 24 safety campaigns. Participated in bike safety rodeo, crash/seatbelt simulator and one car seat safety check
		Deter and decrease citizens victimization by increasing awareness, education and enforcement of crimes	# of training for emergency preparedness, home/business security and self defense/situational awareness	3	6/30/2025	3	PD	PD will partner with UCEM/CERT to provide some of the training	3 events hosted with no community turnout. We then created short videos with the material and posted to our social media platforms
		Provide technology resources to enhance police investigative abilities and increase crime solving	Implement and Fund Public Safety Camera System	Y	6/30/2025	Y	PD		Camera system was approved by Council. Five locations have had cameras installed and are operational.
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 re-accreditation	Y - PD CALEA RE-ACCREDITED	5/1/2028	Y	PD		Year 1 remote assessment will be completed in August 2025.
Run the Operations	Provide Responsive & Dependable Services	Ensure streamline management of records and evidence systems	Utilize scanning to archive department records and create training program to maintain evidence integrity and reliability	Y	6/30/2025	Y	PD	PD will need to confirm scanning requirements from NC Archives and will utilize volunteer program	Scanning was determined to not be a practical solution. Training program for evidence has been established and has been codified into SPD field training
		Provide effective/efficient police services.	Be designated as a Permanent Car Seat Checking Station	Y	6/30/2025	N	PD	Utilize officers and volunteers to be certified as safety seat installers	Staffing issues did not allow for this to be accomplished. This goal has been extended for another year.
			Send all command officers to NCSU Administrative Officers Management Program	Y	6/30/2031	Y	PD	Funding for this initiative was approved in FY25 budget	One supervisor has begun the program and a second supervisor will attend in late 2025
			Create voluntary fitness program	Have 80% of members participate in fitness testing and 60% pass rate	6/30/2026	56% participated; 86% passed (of those that participated)		Utilize comp time for participation and successful completion	Fitness program was approved by Council. Off 25 officers 14 participated and 12 passed the assessment. 56% participation.

Develop Know-How	Develop a Skilled & Competent Workforce	Ensure that staff have the highest level of training possible to perform in their role	Improve proficiency in moving and shooting through precision shooting and tactical training 1.) Increase overall qualification score to 80% 2.) Implement movement-based tactical decision-making training	Yes/No	6/30/2026	1.) 95%; 2.) Yes	PD	Firearms instructors will build upon previous goals and measures	1. Department average firearms score between both day and night qualification was 95%. The lowest individual score was 76% 2. Decision making scenarios and training are in process.
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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