

*A Balanced Scorecard Approach for the Town of Stallings*

*FY 22-23 Mid-Year Report*



*February 23, 2023*

**A Report to Citizens, Council, & Staff – FY 2022-2023**

The Town’s system of linking its vision, mission, Council’s top priorities, departmental actions, and performance measures to achieve the desired results is a balanced scorecard system called Forward Stallings. The Town strategy map, scorecards, top departmental priorities, and budgetary information are blended together to better align the Town’s time, money, and resources with its top priorities. In essence, this annual report is both a “report card” and a “strategic learning tool” that should be used to help assess how well the Town is doing in pursuing its key objectives. One of the main purposes of the report is to generate discussion, like a post-game analysis, to determine whether particular strategies being used to accomplish objectives and initiative should be 1.) changed, 2.) abandoned, or 3.) maintained (i.e., “stay the course”). The first opportunity to analyze results and discuss possible changes to strategy will be at the Council’s regular board meeting on February 27th. At this meeting, the Manager will officially present the FY 22-23 Mid-Year Report.

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?

Organizational Perspectives

The willingness to experiment by using new or innovative ideas is critical to continuously improving operations. At the same time, a learning organization must be able to identify both potential successes and failures early enough to adjust accordingly to changing conditions. This is a major benefit of this system – it provides a reality check, accommodates changes in direction, helps everyone make well informed decisions, and creates accountability by sharing the results (whether good or bad) with the citizens, media, elected officials, and Town employees. In instances where it appears the Town is being successful, the Council, staff and public should still be willing to challenge the status quo and suggest strategies that may allow an even higher standard of service to be delivered. This is the key to avoiding complacency. On the other side of the coin, just because an initiative missed its target does not necessarily mean a change in strategy is needed. As the old saying goes, “the devil is in the details.” Hence, asking probing questions to gain an understanding of the many factors affecting outcomes compared to the desired target can help clarify the performance picture and uncover a greater ability to assess what (if anything) should be done in response. It is also important to 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 continue to experiment with this. This is our fourth year(!), and this has been/will be a continuous learning experience for all of us. However, I am confident that we will be able to use the lessons learned to continuously improve.

Please do not hesitate to contact me if you have any questions, suggestions, concerns, or ideas related to this report. Most importantly, we look forward to listening and participating in the discussions that will help us take the next steps in positively impacting Stallings’ future.

Sincerely,

Alex Sewell

Town Manager

**Rationale, Overview, & Processes\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**What is the Balanced Scorecard?**

A management system that uses a group of measures/goals to help implement an organization’s strategy. It is a tool/system for the leaders to use in communicating to employees and the community the outcomes and performance drivers by which the organization will achieve its mission and strategic objectives.

**Rationale and Benefits of the Balanced Scorecard**

* *Clarifies and Communicates Organizational Mission*. Translates your vision and strategy into a coherent set of measures, targets and initiatives that can be communicated throughout the organization and community by:

1.) More clearly describing the Town Council’s strategy by taking potentially vague policy directives (mission, vision, goals, and objectives) and making them easier to understand by defining them and choosing performance measures to gauge their progress; and

2.) Sharing scorecard results throughout the organization and community gives employees and citizens the opportunity to discuss the assumptions underlying the strategy, learn from unexpected results, and deliberate on future modifications as necessary. Simply understanding an organization’s strategy can unlock many organizational capacities, thus allowing employees and citizens, maybe for the first time, to know here the organization is headed and how they can contribute to the journey. The scorecard brings meaning and action to a vague objective like “provide excellence municipal services.”

* *Better Data for Policy-Making.* The Balanced Scorecard promotes questions, dialogue, analysis, innovation, experimentation, adaptability, and accountability.
* *Helps Let Us Know if We Are Moving Toward Goal Achievement or Drifting Further Away.*
* *Resource Alignment and Allocation*. 1.) To successfully implement any strategy, it must be understood and acted upon throughout all levels of the organization and ultimately be enacted during departments’ day-to-day activities; 2.) Establishing long-term “stretch targets” allows the organization to identify the key steps necessary to achieve its goals; and 3.) Aligns resources (time, effort, and money) so that the initiatives in all departments and levels share a common trait, their linkage to the Town’s strategic goals.
* *Strategic Learning* – Any strategy we pursue represents a hypothesis or your best guess of how to achieve success. To prove meaningful, the measures of the scorecards must link together to tell the story that describes what you are trying to achieve through your strategy.
* *Balance* – Between financial and non-financial indicators; 2.) Between internal and external constituents of the organization; and 3.) Between lag and lead indicators of performance (i.e., what we’ve done in the past and where we want to go in the future).
* *Increases Likelihood of Accomplishing Key Goals* – By not only helping to keep leadership, management, departments, and employees focused on top priorities, but also by improving communication between all interests thus making it easier to effectively troubleshoot and make logical “changes in course” that result in successfully delivering the type of services the community expects.

**Using Strategy & the Balanced Scorecard to Get Results**

Any strategy the Town pursues represents a hypothesis or a best guess of how to achieve success. To prove meaningful, the measures on the scorecard must link together the story of, or describe, that strategy. For example, if the Town believes that an investment in employee training will lead to improved quality, it needs to test the hypothesis through the measures appearing on the scorecard. If employee training does increase, but quality actually decreases, then it may not be a valid assumption. Instead, focus could turn to another possible factor, but more importantly, the Town has information in which to act and make decisions.

Strategy to achieve a desire outcome is often a new destination, somewhere the organization has not yet traveled to before. The Balanced Scorecard provides the Town with a method to document and test assumptions inherent in the strategies it adopts. It may take considerable time to gather sufficient data to test such correlations, but simply beginning to question the assumptions underlying the strategy is a major improvement over making decision based purely on financial numbers or subjective information.

A well-designed Balanced Scorecard should describe the Town or department’s strategy through the objectives and measures chosen. These measures should link together in a chain or cause-and-effect relationships form the performance drivers in the Develop Employees perspective (Employee Learning and Growth) all the way through Service the Community Perspective. Documenting our strategy through measurement, making the relationships between the measures so specific they can be monitored, managed, and validated. Only then can we begin learning about, and successfully implementing our strategy.

**Key Definitions & Components\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Vision:** Word picture of our desired future.

**Mission:** Why we exist.

**Core Values:** What we believe in, guiding principles.

**Strategic Priorities:** Themes on which the organization will concentrate efforts, dedicate resources, and strive to achieve significant improvements. The focus areas reflect what the current Stallings Town Council believes must be done to succeed.

**Perspectives:** The four different views that are used to create a “balanced” way of establishing objectives and measurements to assist the organization in accomplishing the vision and strategic priorities. The traditional four perspectives used in corporate strategic planning and program evaluation are 1.) Financial; 2.) Internal Business Process; 3.) Community; and 4.) Innovation, Learning & Growth. While the names and definitions of these perspectives are frequently modified to meet different organization’s specific needs, the original intent of these four traditional perspectives usually remains intact.

**Objective:** A concise statement describing the specific things the organization must do well in order to execute its strategy. Objectives often begin with action verbs such as “increase,” reduce,” “improve,” “achieve,” and similar words. Examples: Reduce Crime, Enhance Customer Service, Promote Learning & Growth, Invest in Infrastructure, Deliver Competitive Services, Maintain Fiscal Strength, Maintain a Skilled & Diverse Workforce, Create Unity Between Neighborhoods, Provide Affordable Services, Protect the Environment, Enhance Walkability, etc.

**Measure:**  A standard used to evaluate our community performance against desired results. Reporting and monitoring measures help organizations gauge progress toward effective implementation of strategy. Example: Percentage of water customers with an average pressure of 30 PSI or greater.

**Target:** The desired result of a measure that communicates the expected level of performance. Example: 98% of customers will have average water pressure of 30 PSI or greater. A “stretch target” is a challenging target that may not be met. It may be a multi-year goal with milestones.

**Cascading:** The process of developing “aligned” scorecards throughout an organization. Each level of the organization will develop scorecards based on objectives and measures it can influence from the group to which they report. For example, Police Patrol aligns/connects with the Police Department, who aligns/connects with the Town-wide Scorecard by developing their own objectives and measures based on how they influence the Town-wide objectives and measures.

**Cause & Effect:** The concept of cause and effect separates the Balanced Scorecards from other performance management systems. The measures on the Scorecard should link together in a series of cause-and-effect relationships to tell the organization’s strategic story.

**Perspectives\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

The “balanced portion of the Scorecard uses four perspectives to answer critical service delivery questions. This helps provide the balance that organization’s need to successfully plan, implement, measure, and evaluate performance.

**Community Perspective:**  *Serve the Community – What is our mission and vision? What do our citizens want?*

Managers must know if the Town is meeting citizen needs. They must determine the answer to the question: Is the organization delivering the services the community wants?

**Financial Perspective:**  *Manage Resources – How we deliver quality services efficiently and remain financially sound while achieving the vision and mission?*

Managers must focus on how to meet service needs in an efficient manner. They must answer the question: Is the service delivered at a good price?

**Internal Business Perspective:**  *Run the Operations – What internal processes must we excel at to provide valuable services to the community while achieving the mission and vision?*

Managers need to focus on those critical operations that enable them to satisfy citizens. Managers must answer the question: Can the organization improve upon a service by changing the way a service is delivered?

**Learning & Growth Perspective:**  *Develop Know-How – What skills, tools, and organizational climate do our employees, elected officials, and volunteers need to meet the community’s needs while achieving the mission and vision?*

An organization’s ability to improve and meet citizen demands ties directly to the employees’ ability to meet those demands. Managers must answer the question: Is the organization providing employees with the training, technology, and proper work environment to enable them to success and continuously improve?

**Objectives by Perspective\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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|  **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.

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| **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.

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| **Run the Operations**What internal processes must we excel at to provide valuable services while achieving the vision and mission? |

* **Enhance Emergency Preparedness** – Improving the ability to effectively anticipate and respond to emergency situations, from minor incidents to major disasters, through planning, training, collaboration with public and private agencies, and community education.
* **Improve Communication & Collaboration** – Increase the quality and frequency of communications throughout all areas of the organization to promote problem-solving partnerships within and outside of the organization. Good communication enables the vision to be implemented.
* **Excel at Staff & Logistical Support** – Ensure outstanding internal support is being provided to all departments, employees, elected officials, advisory board members, and volunteers that deliver services or directly serve the community. Use technology, where practical to improve service delivery and save taxpayer dollars.
* **Provide Responsive & Dependable Services** – Provide quality services to citizens in a courteous, responsive, and reliable manner that is effective in achieving desired results. Excel at the technical aspects of delivery.

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| **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 responds 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**

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| Strengthen Citizen Engagement | Conserve Cultural & Natural Resources | Increase Citizen & Community Safety | Promote Economic Vibrancy | Enhance Recreation, Walkability & Connectivity |

**Manage Resources**

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

**Run the Operations**

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

**Develop Know-How**

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

**Town Council Strategic Priorities**

* Create a Stallings Downtown
* Review & Amend Land Use Plans to Better Align w/ Council’s Vision
* Economic Development
* Transportation
* Communications
* Enhance Blair Mill Park

**“The Stallings Way” Core Values**

* Integrity
* Commitment
* Flexibility
* Awesome Customer Service
* Team Before Self
* Continuous Improvement
* Qualified/Competent
* Supporting Each Other
* Everyone Pitches In
* Work/Life Balance
* Positive Attitude
* Collaboration
* Dialogue
* Have Fun
* Trust & Respect
* Open to Teach/Learn
* Healthy, Positive Environment

administration department – Mid-year Balanced Scorecard Overview

**Accomplishments:**

*What targets did your Department meet and/or exceed? What is the significance of meeting these targets? How did the Department meet/exceed these targets? What will be done to ensure continued success?*

Strengthening Citizen Engagement – This has been both an accomplishment and a challenge. The Town has continued to broadcast all Town Council meetings and has come back to holding in-person meetings all the time. The creation of another information source for the Stallings residents is complete, The Stallings Source. The Stallings Source is a blog with quarterly posts with various information for the residents.

Adopting a Fiscally Responsible Annual Budget – This has been completed – fiscal responsibility is a Council priority. The Town will continue to regularly monitor its fiscal situation and work towards managing public funds in a fiscally responsible manner.

Creating a Stallings Downtown - The Town continues to work towards creating a downtown with an action strategy that seeks to be both visionary and practical. This goal will take many years to achieve, but the Town has developed a strategy/action plan aimed at laying the foundation for a successful downtown.

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| FY 22-23 Downtown Action Steps (Update)- Meet with DFI reps and approve Downtown District Feasibility Assessment Proposal by 2/28/22 – (Complete)- Complete the DFI Phase 1 Downtown District Feasibility Assessment by 2/28/23 Anticipate Completion 2/27/23 (Anticipate completion 2/27/23)- Council will secure at least 4 members for a downtown support committee within one year of Phase 1 complete (N/A) |

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

Maintaining a Skilled & Competent Workforce – This is both an accomplishment and a challenge. Overall, the Town has met its turnover goal. Even the best organizations will not always meet turnover goals in today’s environment where the average worker tends to change jobs more often than in the past which is compounded by the “Great Resignation”. However, the Town should always strive to adopt best practices to ensure that we are able to attract, develop, and retain a competent workforce. The Town has setup stay and exit interviews so management can identify trends and recommend changes if systematic problems arise. Recently, the Town implemented an incentive pay initiative for the police departments based on feedback received and research. Also, the Town gave out the Marie Garris Award for the employee of the year, officer of the year, and continues to do the “Caught Ya!” employee recognition program. Additionally, the Town was able to hold 3 teambuilding events thus far.

**Challenges:**

*Which targets did your Department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?*

Maximize Positive Development Around Hospital/Light Rail – This is both an accomplishment and a challenge. The Town has put funding in the budget to maintain enhanced bypass landscaping but are waiting for a NCDOT interlocal agreement. Council opted not to fund monument signage for the Stallings Road roundabout.

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

Citizen Survey – Council is thinking over draft survey content. Staff will put it on a future agenda for further direction.

Implementing Economic Development Strategic Plan – The Town has put funds in the budget to contract with the Union County Economic Development entity for a part-time commitment in personnel for implementation of the ED plan. However, the County’s ED entity has undergone a reorganization and the County likely has a sewer capacity issue looming. The County’s ED representatives are going to be presenting a new updated proposal in March 2023.

Secure Occupancy Tax – Rep. Arp has reported to the Mayor that there might be a window of opportunity to get a bill approved by the General Assembly. A resolution to support this effort is proposed for the 2/27/23 Council Meeting.

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.

Maintaining A Workforce – This is both an accomplishment and a challenge. Timing has limited ability to have the “All hands on deck” meetings”. The performance evaluation system has experienced numerous challenges including the pandemic, our trainer getting into a car accident, and staff turnover. When our trainer recovers, we will plan on implementing. Holding this training in-person is essential.

**Other comments:**

**Waste Connections**

Waste Connections approached Town with a request a significant rate increase to coincide with the Town’s request to execute its first available contract extension. After much negotiation, we were able to settle on contract extensions terms that benefit the Town and provide the citizens with additional solid waste services.

**American Rescue Plan**

The staff received favorable audit reviews from the NCLM on its ARPA reporting and project allocations. These audits are crucial tool should the Town be subject to a federal audit of these funds.

engineering department – Mid-year Balanced Scorecard Overview

**Accomplishments:**

* The Engineering Department became fully staffed in November of 2022.
* 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.
* Staff has completed 25 storm water repair and maintenance projects so far in Fiscal Year 2023, with 24 projects on our list to be completed. These projects have been completed in a timely manner, typically within a couple weeks of the execution of the purchase order for the projects. The Town Associate Engineer promptly coordinates with contractors and the Town Engineer, coordinates a solution, prepares the PO, routes the PO for appropriate Town Staff approvals, coordinates schedule with the contractor, and follows-up to ensure the contractor is responsive and effective.
* Staff has currently made significant progress in recording and mapping Stallings’ storm water systems and infrastructure through GIS Data. Once all storm water infrastructure is recorded, staff will be able to consistently track, inspect, and maintain Stallings’ storm water infrastructure in accordance with the North Carolina Department of Environmental Quality’s (NCDEQ) required Municipal Separate Storm Sewer (MS4) Permit Program.
* The Town Engineer has renewed their North Carolina Professional Engineering License through the 2023 Calendar Year. 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.  Additionally, the Engineering staff have attended two out of a minimum of three continuing education classes associated with storm water inspection(s) and resurfacing techniques.
* Stallings completed a large-scale roadway patching project in the Fall of 2022. Additionally, the Engineering Department has executed a contract with J.T. Russell and Sons, Inc. to perform repaving and roadway reconstruction work on approximately 2-miles of Town-owned streets. This work is expected to begin in Spring of 2023. Lastly, staff is working to advertise a Phase 2 Resurfacing Contract, that focuses on preventative roadway maintenance, prior to the end of Fiscal Year 2023.

**Challenges:**

* The Engineering Department has not yet begun tabulations and evaluations of sidewalks throughout Stallings. The staffing resources needed to achieve this goal have not been available the first half of the year. Staff will seek to begin this evaluation and tabulation by the end of the fiscal year.
* The Engineering Department has begun to look in depth at amending the storm water fee and fee schedule but has not been able to complete the task. Now, with fully staffed Engineering Department, staff is coordinating to retrieve necessary information regarding parcel numbers and uses, existing storm water revenue(s), and impervious data. Staff needs this data to analyze and evaluate and equitable storm water fee increase and fee schedule change that will provide sufficient revenue to keep our storm water program functioning.
* For approximately two months, the Engineering Department paused the Town-wide storm water maintenance and repair program while storm water fee revenue(s) were transmitted to the Town from Union County. This inhibited staff from completing two storm water projections within two months of their executed P.O dates. Staff hopes that the change(s) to the storm water fee schedule will prevent this from occurring in the future.

**Other comments:**

The Engineering Department continues to be diligent to meet the needs of the residents and business community regarding repairs, contractor activities, flooding, plan review, and construction coordination.

Finance Department – Mid-year Balanced Scorecard Overview

**Accomplishments:**

*What targets did your Department meet and/or exceed? What is the significance of meeting these targets? How did the Department meet/exceed these targets? What will be done to ensure continued success?*

* In November, the FY22 audit, along with the AFIR (formerly the CAFR), was submitted to the Local Government Commission. The current audit has no Material Weaknesses or Significant Deficiencies. The findings from the FY21 audit are corrected per the most recent audit. This is a big hurdle crossed and a huge win for the Town.
* The five-year financial forecast is complete, and Council received an update on this item at its December Council meeting.
	+ General Fund Balance is above $6 million, and Council’s goal of 20 percent in reserves is achieved per the most recent audit.
* In December, the Town’s application to the Government Finance Officers Association (GFOA) for the [Certificate of Achievement for Excellence in Financial Reporting](https://www.gfoa.org/coa-award) was submitted for consideration of this award. This is an opportunity for the GFOA to review our AFIR particularly our financial standing, financial policies, procedures and internal processes. The Town has received this award since 2015. The Council and Town Staff will be updated on this item, when new information becomes available.

**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)?*

* External factors of concern include Union County’s sewer capacity shortage. This issue could adversely affect Stallings tax base, any new development in the area, and stymy the Town’s revenue growth.
* The Stormwater Fund is stable; however, a revised fee schedule per the five-year forecast will be considered for the long-term growth and stability of this fund. If multiple, major unexpected repairs to infrastructure should occur, this fund’s reserves may rapidly slip below the $1 million threshold implemented per Council direction. The Town Manager, Town Engineer and Finance Officer continue to monitor and discuss the financial stability of this fund.
* Forthcoming: Updates to the Finance pages on the Town’s website. Currently, there is language that is dated in the text, and older data files can be archived. In addition, the current Balanced Scorecard annual goals, targets, and measures will be reviewed and refined for the next fiscal year.

**Other comments:**

* In December, the Finance Department onboarded a new Finance Officer. Marsha Gross retired from the position in January. Staff celebrated her contribution to the Town at the December Council Meeting and with a farewell lunch.
* The new Finance Officer is continuing to learn and to manage the day-to-day operations of the department. The current goal is to listen, build relationships and communicate continuously with internal and external customers/stakeholders to improve customer satisfaction, responsiveness, and transparency.
	+ - The Finance Officer is conducting face-to-face meetings with department heads and staff as part of this goal.

Parks & Rec department – Mid-year Balanced Scorecard Overview

**Accomplishments:**

*What targets did your Department meet and/or exceed? What is the significance of meeting these targets? How did the Department meet/exceed these targets? What will be done to ensure continued success?*

The Parks and Recreation Department continues to grow within the Town of Stallings. The department has hit some huge goals within the last few months & we hope to continue making headway on these in the future. Even with 3 new full-time employees within the last 3 months we have kept moving forward with making some improvements to our parks department. Within the past 6 months we have added the following:

* Monthly Newsletter to Citizens
* Summer Camps for Children & Adults for Pickleball and Tennis (Summer)
* Tennis & Pickleball lessons for all skillsets (Summer)
* Installation of Privette Playground
* Park benches at Blair Mill Park
* Security Cameras in SMP
* 5 New Events in 2023
* *New Full-time Senior Maintenance Technician, Event Coordinator & Administrative Assistant*

Along with these additions we have also been working on some internal structure for our department. We require all full-time and part-time staff to be CPR/First Aid/AED trained & will be moving forward with training plan implementation for each staff member. This will ensure that all our park facilities are properly maintained while ensuring citizen safety.

**Challenges:**

*Which targets did your Department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?*

The Parks and Recreation Department has noticed struggles of advertising and informing the public of upcoming events/programs. We have noticed that Stallings Municipal Park is our “Main Hub” of information; however, know that there is a need for more information to be provided at Blair Mill Park. We also know that Blair Mill needs multiple upgrades; however, need to work on a site-specific plan to get things together moving forward.

The parks department has also been reaching out for more event sponsors; however, we have not received much feedback. The parks event coordinator plans to start going out to local businesses, in person, and meet with business owners about sponsoring some of our town events!

**Other comments:**

The Blair Mill Greenway is making great progress. Currently, the next steps consists of planting some shrubbery around the entrance of the greenway trail while we await the arrival of the Hawk Signal. A hopeful opening will be around the end of Summer ’23.

planning department – Mid-year Balanced Scorecard Overview

**Accomplishments:**

*What targets did your Department meet and/or exceed? What is the significance of meeting these targets? How did the Department meet/exceed these targets? What will be done to ensure continued success?*

* The Planning Department continues to excel in providing responsive and dependable services. We created submittal guidelines or a “cheat sheet” to help residents and developers with submittals. We added these guidelines to our website for anyone to review. We continue to ensure success by altering our review cycle from 30 to 20 business days to clarify when reviews will be completed.
* We completely reorganized the Planning Website so that the public and developers can access more information. Every permit, plan, and policy have a description of what they are used for. We also added our permit and code enforcement reports to the website. We continue to add more information to the website. We are currently working on adding frequently asked questions to the code enforcement page.
* We organized digital files, GIS files, and paper files. We organized the planning room upstairs to help better find files and alphabetically stored historic development files in storage.
* We applied for the CRTPO Grant and will hear back from them sometime in June-July to find out if we are awarded the grant. Our goals are: Integrate the future Lynx Silver Line Project into the Stallings Comprehensive Land Use Plan to include timelines, benefits, studies, and education; Reimagine the Monroe Expressway Small Area Plan/create a Silver Line Station/Atrium Hospital Small Area Plan to include renderings and specs, Incorporate an updated Transportation Oriented Development Overlay in the Development Ordinance with preservation and promotion techniques along the proposed Silver Line alignment.
* Code violation compliance exceeded the targeted goal of 60% and is currently at 65%.

**Challenges:**

*Which targets did your Department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?*

* The TOD Overlay along the proposed Silverline has been challenging, and we have started creating it in-house.
* Streetscape Design plans have not yet been adopted because we are waiting for DFI’s final report. If DFI’s report is favorable for the streetscape design, we plan to bring this back to the Council for adoption once the DFI report is complete.
* Accumulating new Planning Board members has been an ongoing challenge. We are continually mentioning our vacancies to qualified residents.
* Interactive Maps have yet to be made. We need more training for our employees to create interactive maps.

**Other comments:**

police department – Mid-year Balanced Scorecard Overview

**Accomplishments:**

*What targets did your Department meet and/or exceed? What is the significance of meeting these targets? How did the Department meet/exceed these targets? What will be done to ensure continued success?*

* Provide CPR/First Aid Training to residents: First Aid/CPR training for the public has been scheduled. We are working through some certification issues with the Red Cross
* Create/Staff Chaplains program: Policy has been created and candidates have been identified. PD is working on selecting a chaplain’s liaison and finalizing candidate selection.
* Create/Staff Reserve Officer program: Three candidates have been identified and background investigations are underway. Completion of 5 step process of CALEA accreditation-this is a three-year goal-PD has completed the assessment phase and all department policies have been aligned with CALEA standards. We are moving into the “proof” collection phase. We are on track for an on-site assessment in 2024. The PD was recently awarded a grant from the NCGCC to assist with accreditation

**Challenges:**

*Which targets did your Department not meet? What challenges did the department face in meeting these targets? What will be done to try to meet the targets going forward (i.e. adjustments in strategy)?*

* Create a Technology Strategic Plan-Process in the works. The biggest issue has been the lack of interest among department members. The Special Service Lieutenant is working with his group of volunteers and is making progress.
* Increase impaired driving enforcement by 5%- SPD has conducted 18 traffic checkpoints so far this year. These checkpoints can lead to arrests, but also serve as a deterrent to committing traffic violations. We have seen a decrease of 5% in arrests compared to the same time frame as last year. Arrests are part of the job, but educating the community to not drive impaired is a key component of traffic enforcement.

**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 proving a high level of service to our community. Overall, all department members have participated in the work done so far to accomplish our goals.