



A Balanced Scorecard Approach for the Town of Stallings

FY 25-26 Mid-Year Report

FORWARD STALLINGS

March 5, 2026

A Report to Citizens, Council, & Staff – FY 2025-2026

The Town's system of linking its vision, mission, Council's top priorities, departmental actions, and performance measures to achieve the desired results is a balanced scorecard system called Forward Stallings. The Town strategy map, scorecards, top departmental priorities, and budgetary information are blended together to better align the Town's time, money, and resources with its top priorities. In essence, this annual report is both a "report card" and a "strategic learning tool" that should be used to help assess how well the Town is doing in pursuing its key objectives. One of the main purposes of the report is to generate discussion, like a post-game analysis, to determine whether particular strategies being used to accomplish objectives and initiative should be 1.) changed, 2.) abandoned, or 3.) maintained (i.e., "stay the course"). The next opportunity to analyze results and discuss possible changes to strategy will be at the Council's regular board meeting on March 9, 2026. At this meeting, the Manager will officially submit the FY 25-26 Mid-Year Report.

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

ORGANIZATIONAL PERSPECTIVES

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

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

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

Develop Know-How – What skills, tools, and organizational climate do our employees, elected officials, appointed officials, and volunteers need to meet the community's needs while achieving the mission and vision?

remember that departments often set “stretch targets” that are multi-year goals intended to help make a breakthrough by encouraging creative thinking, results-oriented problem solving and/or escaping the comfort zone.

Enclosed please find:

- 1.) Our Balanced Scorecard Policy.
- 2.) Our Strategy Map.
- 3.) Individual Department Reports.
- 4.) Individual Department Scorecards.

I am grateful to Council and staff for being willing to try something new. This is our sixth year, and this has been/will be a continuous learning experience for all of us. However, I am confident that we will be able to use the lessons learned to continuously improve.

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

Sincerely,

Alex Sewell
Town Manager

Rationale, Overview, & Processes

What is the Balanced Scorecard?

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

Rationale and Benefits of the Balanced Scorecard

- *Clarifies and Communicates Organizational Mission.* Translates your vision and strategy into a coherent set of measures, targets and initiatives that can be communicated throughout the organization and community by:
 - 1.) More clearly describing the Town Council's strategy by taking potentially vague policy directives (mission, vision, goals, and objectives) and making them easier to understand by defining them and choosing performance measures to gauge their progress; and
 - 2.) Sharing scorecard results throughout the organization and community gives employees and citizens the opportunity to discuss the assumptions underlying the strategy, learn from unexpected results, and deliberate on future modifications as necessary. Simply understanding an organization's strategy can unlock many organizational capacities, thus allowing employees and citizens, maybe for the first time, to know here the organization is headed and how they can contribute to the journey. The scorecard brings meaning and action to a vague objective like "provide excellence municipal services."
- *Better Data for Policy-Making.* The Balanced Scorecard promotes questions, dialogue, analysis, innovation, experimentation, adaptability, and accountability.
- *Helps Let Us Know if We Are Moving Toward Goal Achievement or Drifting Further Away.*
- *Resource Alignment and Allocation.* 1.) To successfully implement any strategy, it must be understood and acted upon throughout all levels of the organization and ultimately be enacted during departments' day-to-day activities; 2.) Establishing long-term "stretch targets" allows the organization to identify the key steps necessary to achieve its goals; and 3.) Aligns resources (time, effort, and money) so that the initiatives in all departments and levels share a common trait, their linkage to the Town's strategic goals.
- *Strategic Learning* – Any strategy we pursue represents a hypothesis or your best guess of how to achieve success. To prove meaningful, the measures of the scorecards must link

together to tell the story that describes what you are trying to achieve through your strategy.

- *Balance* – Between financial and non-financial indicators; 2.) Between internal and external constituents of the organization; and 3.) Between lag and lead indicators of performance (i.e., what we've done in the past and where we want to go in the future).
- *Increases Likelihood of Accomplishing Key Goals* – By not only helping to keep leadership, management, departments, and employees focused on top priorities, but also by improving communication between all interests thus making it easier to effectively troubleshoot and make logical "changes in course" that result in successfully delivering the type of services the community expects.

Using Strategy & the Balanced Scorecard to Get Results

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

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

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

Key Definitions & Components

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 succeed and continuously improve?

Objectives by Perspective

Serve the Community

What do our citizens want? What must be done to implement the vision and mission?

- **Strengthen Citizen Engagement** – Improve the quality and frequency of communication to enhance public access to information about Town services, meetings, key issues, and emergency situations. Provide a variety of ways for citizens to meaningfully share ideas, concerns, and questions with Town officials.
- **Conserve Cultural & Natural Resources** – Protect the environment, historic assets, and intangible assets such as community and cultural events that help bring Stallings' citizenry together. Ensure that these resources are protected, conserved, celebrated and resilient to changing environmental conditions.
- **Increase Citizen & Community Safety** – Accomplish this by building relationships and problem-solving partnerships with citizens, businesses, and neighborhood watch groups and using best-practice strategies including having police officers and officials accessible and approachable, improving community appearance, addressing nuisances, & approaching community safety across departments will make our community safer.
- **Promote Economic Vibrancy** – While the Town recognizes that there are many factors influencing local economic conditions, the Town seeks to do its part with partners to achieve economic development and support locally owned businesses. The Town recognizes that achieving economic vibrancy also includes creating a sense of place and identity as well as enhancing the quality of life in Stallings as a place to work, live, play, and raise a family.
- **Enhance Recreation, Walkability & Connectivity** – Provide recreation and pedestrian facilities to encourage healthy lifestyles, citizen interaction, and to offer a variety of transportation choices that link Stallings' neighborhoods together in an accessible manner.

Manage Resources

How do we deliver quality services efficiently and remain financially sound while achieving the vision and mission?

- **Maintain Fiscal Strength** – Support fiscal policies, controls, and actions that keep the Town government in a financially strong position, thereby allowing it to respond to unforeseen problems, emergencies, and opportunities, as well as having sufficient reserves for cash flow and credit rating purposes.
- **Develop Long-Term Financial Plans** – Build upon current financial planning instruments to provide a longer-term view of what Stallings' finances and operations may look like in the future. These plans are intended to identify potential challenges, opportunities, and proactive response options.
- **Invest in Infrastructure** – Prioritize funding for infrastructure maintenance to avoid deterioration while

minimizing long-term operational and capital costs. New infrastructure investments help achieve key priorities and optimize the use of current assets.

- **Deliver Services Efficiently** – Ensure citizens are receiving a good value from their investments by delivering cost-efficient services. Maximize the use of public funds through service optimization, innovation, process improvement, competition, and other means.

Run the Operations

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

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

Develop Know-How

What skills, tools, and organizational climate do our employees, elected officials, and volunteers need to meet the community's needs while achieving the vision and mission?

- **Maintain a Skilled & Competent Workforce** – Create a work environment that allows the Town to hire, develop, and retain a workforce of skilled employees capable of meeting the community's needs. Focus includes career development, succession planning, and improving employee motivation and satisfaction. Hire competent staff who exemplify The Stallings Way.
- **Support Development of Citizen Volunteers** – Identify opportunities for volunteers to develop the technical and leadership skills that enable them to achieve the community's needs and understand the role of the advisory boards in Town government.
- **Enhance Relations with Other Entities** – Build relationships with others involved in the governing process, including governmental organizations, non-profits, and the private sector. Public-private partnerships should be explored as a potential problem-solving tool.

Developing Departmental Strategy

Departmental Balanced Scorecards

A good scorecard will do the following:

- Tell the story of the Department's strategy.
- Shows that every objective selected is a linkage in the cause-and-effect relationships that compose the Town's strategy.
- Drive performance by using a variety of measures and targets that look at short and long-term results to encourage proactive management.
- Involve the participation of division heads, key staff, and employees throughout the Department.
- Is financially viable.
- Positively changes departmental behavior by developing strategic initiatives.

Step #1 – Town-Wide Objectives Selected to Build Scorecard & Map

Departments determine what they can do to support and respond to the town-wide strategy, Balanced Scorecard, and achieve the departmental mission. Departments select the objectives they can meet to help the town board in pursuing the achievement of the Town Council's Strategic Priorities, Vision, and Mission. The objectives selected from each of the four perspective areas are used to create the Department's strategy map.

Step #2 – Developing Departmental Initiatives

These are the critical activities the Department must pursue to achieve the Town-wide objective and the Department's mission.

- Initiatives detail what the Department must do to achieve a Town-wide objective or achieve the departmental mission.
- Initiatives identify the highest priority activities to show where resources are most needed to achieve the overall departmental strategy.
- Initiatives may apply to all divisions within a department or just one division.
- Initiatives describe how the Department will respond to the Town-wide objective.
- Initiatives are written so that divisions and employees can determine how they can respond to support the Department's effort to achieve the objective and mission.

Step #3 – Developing Measures and Targets

Each departmental initiative does not have to have a measure, but there should be a way to evaluate the achievement of the initiative or whether or not it was accomplished. There are two goals for strategic measures: organizational motivation and strategic learning.

Organizational Motivation – Measures are a very effective tool in improving performance and/or accomplishing goals. A November 2001 article by Edwin Locke in Harvard Business Review titled "Motivation by Goal Setting" cites a survey of more than 500

studies, which indicates that performance increases an average of 16 percent in companies that establish targets. A primary reason for this may be that measures give employees clear direction and guidance as to what they need to accomplish. When employees focus their efforts on achieving key initiatives that are aligned with town-wide objectives and strategic priorities, then there is much greater probability that a well-coordinated effort is made in fulfilling the Town's mission and the board's vision. The effort to clearly articulate the Town's top priorities to assist employees compliments the old saying that "people do what you inspect, not what you expect."

Strategic Learning – Measures are a way to monitor departments' progress in achieving the town-wide objectives and their initiatives. Any strategy used to achieve initiatives, objectives, or strategic priorities represents a hypothesis of how to succeed. Strategy to achieve a desired outcome or solve a problem is often a new destination, a place that the Town has not yet traveled to before. Measures and targets provide a way to test assumptions inherent in the strategies we select to pursue our goals. Documenting our strategy through measurement allows management, employees, elected officials, and the public to monitor, manage, validate, question, and/or deliberate possible adjustments to our strategy. If this can occur, then the Town starts becoming a "learning organization" where being analytical, adaptive, and responsive to the hypotheses we've tested become keystones of the organizational culture that helps the Town successfully implement its strategy.

Components of a Good Measure

- Measures should be specific. Stating the SPD will be the "best" police department or that Administration will "maximize customer satisfaction" are more like vision statements and are difficult to measure.
- Measures should be measurable. There are ways to measure seemingly less tangible goals. Surveys, if properly designed, can be used to measure the perception of service quality, awareness of issues, community satisfaction, etc.
- Does the measure really evaluate the initiative being pursued?
- Is the measure reliable?
- Is the measure easy to understand and explain?
- Are departments using a variety of measures in evaluating their initiatives (workload, results, efficiency, effectiveness, short-term vs. long-term)?
- Does the measure clearly communicate the expected performance?
- It is important to know where you are and where you want to go. Ideally, departments should have a baseline measure for current performance in the form of last year's actual data, best practices or industry standards for comparison. When baselines do not yet exist a TBD (to be determined) is placed in the appropriate area to indicate the Department is in the process of getting this data.

Guidelines for Setting Targets

1. Targets should be realistic but challenging enough to motivate greater accomplishments.
2. Departments can be more aggressive when setting multi-year targets.
3. Provide a rational explanation as to why achieving a target is important, especially with stretch targets.
4. When setting a target, Department should review the linkage (cause-and-effect relationship) of the “enabling” perspectives to make sure they have the ability to achieve the target, thus the following questions should be asked:

- Do departmental personnel have the skills and tools necessary to get the job done?
- Does the Department have sufficient resources/funding?
- Are internal operations adequate?

Stretch Targets – These are usually long-term or multi-year goals. At most, departments should set one to two stretch targets per year. These are reserved for those initiatives critical in making a particular breakthrough. Stretch targets can be especially useful to help a department break form its comfort zone or traditional way of running operations so as to spark creative thinking and results-oriented problem-solving. Every Department should have at least one stretch target.

Vision for Stallings

To provide an inviting and safe community with a commitment to excellence where families and businesses can thrive as we embrace our future while preserving our past.



Mission of Town Government

To serve the residents and businesses of the Stallings community by providing excellent municipal services while upholding the public interest by maintaining a sound financial position and active stewardship of public assets and resources.



Serve the Community

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

Maintain Fiscal Strength	Develop Long-Term Financial Plans	Invest in Infrastructure	Deliver Services Efficiently
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Run the Operations

Enhance Emergency Preparedness	Improve Communication & Collaboration	Excel at Staff & Logistical Support	Provide Responsive & Dependable Services
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Develop Know-How

Maintain a Skilled & Competent Workforce	Support Development of Citizen Volunteers	Enhance Relations with Other Entities
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Town Council Strategic Priorities

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

"The Stallings Way" Core Values

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

ADMINISTRATION DEPARTMENT – 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 – In an effort to describe the nuance here, this has been both an accomplishment and a challenge. The Town continued to broadcast all Town Council meetings. Previously, the Town has had difficulties with the livestream cutting out, losing audio, etc. during the middle of the broadcast. However, the Town has worked with a contractor and these challenges have subsided. The Town's blog post continues to be a source for community education. The Town held a meeting between Town Council and Town committee members to provide a budget update and receive input. The Town held a public hearing where any residents can provide public input prior to the FY 25-26 budget adoption and published the FY 25-26 budget process meeting schedule so any interested resident can attend.

Hold an Occupancy Tax Referendum – This referendum passed. Staff is working toward implementation which is challenging as the Town is relying on the county to collect.

Supporting/Enhancing Union West Business Park – This is both an accomplishment and a challenge. The Town continues to work towards enhancing Union West Business Park including identifying members of the Town Council to engage with General Assembly members regarding road repair, focusing on how to best enhance the Park in the Economic Development Committee, and reaching out to ED partners. However, the largest challenge is how to pay for enhancements and potential sewer capacity issues in the Crooked Creek service area.

The Town continued to work towards this. On 7/14/25, the Town Council discussed strategy for approaching NC General Assembly members and in October the ED Committee hosted Union County ED Executive Director Ron Mahle to discuss several ED issues. Also, the Town met with Union County's ED retail recruitment specialist to determine how they can assist the Town and actions were identified.

Sewer Alternatives Evaluation – The Town Council opted to consider and evaluate projects on a case-by-case basis and not adopt a formal position. No formal applications were submitted.

Pursue Town Center Creation – Similar to the past several years, the Town continues to work towards creating a Town Center with an action strategy that strives to be both visionary and practical. This goal will take many years to achieve, but the Town's strategy is aimed at laying the foundation for a successful Town Center.

FY 25-26 Action Strategies

- Call it "Town Center" instead of "Downtown" **Complete.**
- To enhance Town Center as an activity center, develop and approve a lease with Armored Cow Brewery by 7/15/25 AC pulled out. **Engaged with new potential tenants.**
- Present information to TC on available listed land by 7/15/25 **Complete.**
- 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). **No proposals.**
- 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. **No proposals.**

- Continue to explore sewer alternatives. [See above.](#)
- Hold 11 parks events at Stallings Municipal Park [12 events.](#)

Implement Adopted Plans & Studies Not Dependent on Sewer Capacity – During the FY 25-26 budget creation process, staff presented additional project opportunities for Council to considering including greenways, sidewalks, streetscape plans, etc.

Adopt a Fiscally Responsible Annual Budget, Follow the Priority Setting Process, and Develop a Property Reevaluation Strategy with a Range of Options for Council to Consider – The Town Council committed more time this year to evaluating budget options given projections and the property reevaluation.

Continuing Updating Annually CIP – The Town Council has approved an updated budget process, and CIP updates are underway.

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

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

Safety Program – Zero OSHA recordable injuries and 99% of the workforce has completed mandatory safety training thus far.

Employee Pay & Performance Policies – This both an accomplishment and a challenge. Town continues to make progress on modernizing our employee pay and performance systems. The Town has funded, conducted, and implemented a pay and benefit study that looks holistically at salaries, benefits, policies, etc. The performance pay policy continues to be worked on administratively for future implementation. An employee cost-savings incentive program was presented to Council, and the Council opted to cap future CPI increases at 5%.

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)?

Turnover Rate – This is both an accomplishment and a challenge. The Non-PD number met its number while PD did not meet its number. The Town should continue to be vigilant about ways to keep and retain good people. As indicated above, the Town has taken a number of steps

Implementing Economic Development Strategic Plan – The Town has partnered with Monroe Union County Economic Development Commission (MUCEDC) for assistant with economic development in Stallings. However, the Town must change its approach to economic development due to looming sewer capacity issues in the Crooked Creek area, where much of the Council's economic development priorities are focused.

Employee Recognition Program – The Town has given out 3 employee recognition awards this year. We need to continue to encourage staff to submit these when they see a peer going above and beyond.

Hold "All Hands-on Deck" Meeting – The Town has not done this yet this fiscal year. Scheduling is always the biggest challenge due to police department shifts so we need to hold multiple meetings to ensure everyone can attend.

OTHER COMMENTS:

ENGINEERING 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?

- Since the beginning of FY 2026, the Public Works Department (PWD) has completed numerous infrastructure repair projects, including sinkhole repairs, sidewalk repairs, pothole patching, and other roadway maintenance activities. By leveraging newly acquired equipment, staff was able to complete a significant portion of this work in-house, resulting in an estimated cost savings of approximately \$50,000. These efforts have allowed the Town to address infrastructure issues more quickly, reduce reliance on contractors, and maximize the return on recent equipment investments.
- The Engineering Department and PWD have continued to be highly responsive to questions and issues raised by Town residents. Staff has maintained clear, consistent, and timely communication, helping to resolve concerns related to infrastructure repairs, drainage, roadway conditions, and construction activities. This level of engagement strengthens public trust and improves overall service delivery.
- The Engineering Department is nearing completion of the FY 2026 Resurfacing Contract and has successfully solicited bids for the FY 2026 Preventative Maintenance Contract, focused on crack sealing and microsurfacing. The Preventative Maintenance Program, originally piloted in FY 2024, has proven to be highly cost-effective—saving the Town approximately eight times the cost of traditional resurfacing methods. Continuing to implement preventative maintenance in conjunction with roadway reconstruction allows the Town to extend pavement life, reduce long-term costs, and strategically manage roadway assets.
- The Engineering Department has successfully hired a Storm Water Compliance Manager, a key milestone in strengthening the Town’s stormwater program. Since onboarding, staff has made significant progress inventorying and inspecting Storm Water Control Measures (SCMs) throughout Town and advancing compliance efforts under the MS4 Program. These efforts have positioned the Town to better meet MS4 Permit Year 3 requirements and establish a more sustainable, long-term compliance framework.
- Staff has hired a third Public Works employee, significantly enhancing the operational capacity, flexibility, and efficiency of the Public Works Department. This additional staffing has improved response times, expanded in-house maintenance capabilities, and allowed staff to better balance reactive repairs with planned maintenance activities.
- Staff has continued to coordinate with multiple stakeholders—including Charlotte Water, Union County, developers, and regional partners—regarding potential options for increasing sanitary sewer capacity. While solutions remain limited, continued coordination ensures the Town remains informed and prepared to pursue opportunities as they arise, particularly within the Town Center and Hospital areas.

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)?

- Ensuring full compliance with the MS4 Permit Year 3 requirements remains a significant challenge. While progress has been made, the Town is effectively building its MS4 program from the ground up. Compliance is a state mandate, and the Town is subject to audits by regulatory agencies. Moving forward, staff will

continue implementing corrective actions, refining internal procedures, and developing a comprehensive action plan to address remaining permit years. Ongoing coordination with residents and businesses remains critical, as community participation is a key component of successful MS4 compliance.

- As the Engineering Department and PWD continue pursuing more efficient and cost-effective maintenance and repair methods, staff faces ongoing learning curves associated with implementing new techniques and workflows. Although additional equipment and a third Public Works employee have improved capabilities, staff has found it impractical to perform certain larger-scale infrastructure repairs—such as extensive roadway patching, major stormwater repairs, and larger sidewalk replacement projects—due to limitations in manpower and specialized equipment. In short, while capacity and efficiency have improved, the department remains constrained in its ability to fully self-perform larger projects.
- Sanitary sewer capacity continues to be one of the Town’s most significant long-term challenges. Charlotte Water has limited capacity near the Town Center and is actively developing a Capital Improvement Plan (CIP) to address system constraints; however, these improvements will not provide immediate relief. Union County has indicated that no short-term or long-term (30-year) capacity expansion plans exist for the Crooked Creek watershed, and once existing capacity is exhausted, it is permanently unavailable. Any potential solutions to provide sewer capacity to the Town Center or Monroe Expressway areas would require substantial financial investment, whether through public funding, private development, or partnerships. As a result, there is currently no viable short-term opportunity to increase sewer capacity to support development in these areas.

OTHER COMMENTS:

The Engineering and PWD continue to collaborate and diligently meet the needs of the residents and business community regarding repairs, contractor activities, flooding, plan review, and construction coordination. Additionally, the PWD continues to provide effective maintenance on the building and grounds.

FINANCE DEPARTMENT – MID-YEAR BALANCED SCORECARD OVERVIEW

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?

Maintain Skilled and Competent Workforce – The new Finance position approved with the FY26 budget was filled in December 2025. Current staff have participated in training and continue to do so. Not only does this provide continuing education hours needed to maintain certifications, but it also ensures staff stay up to date in their field of expertise or increases knowledge as necessary.

The Finance Officer came to the Town already certified from both the NC Government Finance Officers Association and the NC Local Government Budget Association. Currently, these certifications are valid for a five-year period. Effective January 1, 2026, her finance certification was successfully renewed for another five-year period; budget recertification will be due soon.

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)?

Multiple targets have not been met solely due to timing with projected completion dates that are in the future, while others have not been met due to current software and staffing constraints. The latter limitations were acknowledged, and funding was provided in the FY26 budget to assist with solutions. Highlighted as an accomplishment above, the new position has been filled. However, additional time is needed to successfully complete the remaining goals as well.

Having sufficient financial software is such an important necessity but it is also a huge undertaking. The need to recreate, rather than migrate the current financial chart of accounts, makes this project even more complicated and time-consuming. In addition, other departments are presently using their own online platforms to serve their needs, some of which include billing and payment capabilities that do not integrate with the current financial software. Overall, this is an incredibly significant task, but staff must get a few other things taken care of before being able to devote the appropriate focus to this project.

All goals remain, but target dates need to be extended to maintain an environment that promotes the Town's core values.

OTHER COMMENTS:

While there appear to be many unmet targets, Finance has made considerable strides. Due to both staff turnover and the lack thereof, many processes and procedures required revisions without formal policy rewrites. In addition, there were tasks that were overlooked due to a lack of capacity that are now being completed. Also, the additional Finance staff is enabling more segregation of duties and internal controls. Finance is working diligently to make improvements as needed, while keeping the daily operations of the Town afloat and working on these big picture goals.

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?

Targets Met and Exceeded

- **Town Center Activation and Community Programming**
The department exceeded its 2025 target of hosting more than 10 events at Stallings Municipal Park by successfully delivering **12 events**. This milestone directly supports the Town’s Town Center vision by activating public space, increasing community engagement, and enhancing the economic and social vitality of the area. Success was achieved through intentional event planning, interdepartmental coordination, and strong community partnerships. Continued success will be supported by maintaining annual event benchmarks and expanding event offerings aligned with Town Center development goals.
- **Standardization of Event and Program Documentation**
A standardized event and program planning template was fully implemented ahead of the 2026 deadline. This achievement improves operational efficiency, ensures consistency across department-led events, and strengthens documentation and accountability practices. The department will continue to utilize and refine this template as programming expands.
- **Community Engagement and Public Outreach**
The Parks and Recreation Department reached 1.5 million views on Facebook over the past year, with overall engagement increasing by 6.7%. This demonstrates enhanced visibility, improved communication with residents, and growing public trust. Continued success will be supported through cohesive branding, consistent messaging, and expanded outreach strategies.
- **Workforce Development and Training**
Department staff participated in CPR/First Aid/AED training, Fire Extinguisher Training, Event Management School and Maintenance Management School. These efforts strengthen operational readiness, safety compliance, and professional development. The department plans to formalize quarterly training goals beginning in FY27.

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)?

Targets Not Yet Achieved

- **Adult-Focused Programming Expansion**
The target of launching three adult-focused programs has not yet been met. Challenges include assessing community interest and identifying appropriate program partners. To address this, the department has opened Park Partner applications to expand adult programming opportunities.

- **Inclusive and Sensory-Based Event Enhancements**
While inclusion remains a priority, no sensory-based or inclusive features have yet been implemented at large-scale events. This is due to ongoing research into best practices and feasible implementation strategies. The department plans to keep researching how to make inclusion a priority at events.
- **Multi-Use Trail Connectivity**
Progress toward the development of a comprehensive multi-use trail network is ongoing; however, the annual construction target has not yet been met. Challenges include funding availability and coordination across departments. Continued collaboration with Engineering and Council through the CRTPO grant process remains a priority.
- **Splash Pad Downtime Reduction**
The goal to reduce splash pad downtime has not yet been achieved due to aging infrastructure and maintenance demands. The department is actively working with the Fountain Division to implement equipment upgrades and proactive maintenance strategies.
- **Department-Wide SOP Development**
The Standard Operating Procedures Manual is currently 50% complete. While progress has been steady, the time-intensive nature of documentation has impacted completion timelines. The department remains on track to finalize the SOP Manual by the end of 2026, followed by staff training.

OTHER COMMENTS:

The Parks and Recreation Department continues to make steady progress toward strategic objectives while balancing operational demands, staffing capacity, and infrastructure needs. Strong momentum in community engagement, event programming, and internal process improvements positions the department for continued success. Focus areas for the remainder of the fiscal year include advancing inclusivity initiatives, expanding adult programming, strengthening infrastructure planning, and completing key operational systems to ensure long-term sustainability.

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?

All Town Center development projects submitted to date comply with the adopted Streetscape Master Plan, meeting the goal of 100 percent compliance for new projects. Two projects have been submitted; one has been approved with required streetscape improvements, and the second is currently under review. This progress has been achieved by meeting with applicants early, clearly communicating expectations, and using established review tools to ensure projects align with adopted plans. Staff will continue early coordination and quarterly tracking to maintain consistency as additional projects move forward.

Significant progress has been made in improving communication and customer service. The “Welcome to Stallings” handbooks for builders and residents have been completed and published, and major development review process handouts are partially complete. These materials help reduce confusion, improve transparency, and support more efficient reviews. Staff will continue expanding and updating these resources as ordinance and policy work progresses.

Most Town planning maps have been standardized to a consistent format, with only one remaining to be updated. All Planning and Zoning and Code Enforcement staff have completed at least one professional training course at mid-year, supporting consistency, certification requirements, and long-term capacity.

What will be done to ensure continued success?

- Continue meeting with applicants early in the process and clearly explaining Town Center, ordinance, and plan expectations so projects are designed correctly from the start.
- Track progress on major initiatives through regular internal check-ins to keep projects moving and identify issues early.
- Keep improving internal consistency and customer service by finishing remaining map updates, maintaining staff training, and updating public guidance as policies and ordinances change.

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)?

Some Balanced Scorecard items are behind mid-year targets due to workload, project scope, or external factors rather than lack of progress.

Major ordinance rewrites and Future Land Use place type updates show no mid-year completion because they are intentionally scheduled for the second half of the fiscal year. These efforts require concentrated staff time, legal review, and coordination with other adopted plans. Staff is sequencing this work to align with available capacity and will continue using interim guidance and checklists to support applicants while updates are underway.

Digitization of paper records has progressed more slowly than anticipated due to the volume of historical documents. Conditional Use Permit files have been fully scanned, but remaining records will take additional time. Staff is prioritizing the most frequently used and public-facing materials first, with the expectation that remaining work will extend into the next scorecard cycle.

Implementation of the Transit-Oriented Development overlay remains constrained by state legislative changes related to zoning authority. This delay is outside the Town's control. Staff will continue monitoring legislative activity and legal guidance.

What will be done to try to meet the targets going forward (adjustments to strategy)?

- Sequence ordinance rewrites and policy updates to match available staff capacity and legal review timelines, while using temporary guidance documents and checklists in the meantime.
- Refocus large, time-intensive projects like record digitization on the most frequently used and public-facing materials first, with remaining work carried into the next scorecard cycle.
- Continue monitoring state legislation and legal guidance affecting TOD and similar initiatives.

OTHER COMMENTS:

Our Code Enforcement Officer, Matt Dillard, was named the town's 2025 Marie K. Garris Award Employee of the Year.

Matt is consistently professional, helpful, and dependable, and he regularly exceeds the expectations of his role. He guides applicants and property owners through code and zoning requirements, helps interpret ordinances, manages sensitive cases with a calm and customer focused approach, and supports planning staff through thorough research and review. His strong skills, collaborative mindset, and positive attitude clearly demonstrate that he deserves the 2025 Marie K. Garris Award.

POLICE DEPARTMENT – MID-YEAR BALANCED SCORECARD OVERVIEW ACCOMPLISHMENTS:

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?

- **Completion of Re-Accreditation process**-In August 2025 the SPD was successful in our year 1 assessment
- **Create voluntary fitness program**-We will conduct our second fitness assessment in June 2026.
- **Improve proficiency in moving and shooting through precision shooting and tactical training**- The Department had an average firearm score of 95% over both day and night qualifications, with the lowest score being 76%. We have recently purchased tactical equipment for scenario-based training that will be utilized in 2026.
- **Conduct 20 traffic safety awareness campaigns (PSA's/bike rodeo/car seat installs/traffic checkpoints/youth driving clinics)**. Changes in leadership of our traffic team and allowed for a “reenvisioning” of our TEST team. These changes are ready to be implemented as our staffing solidifies.
- **Send all command officers to an Administrative Officers Management Program**-Lt. Ben Davis was the first graduate from SPD this past fall. Lt Rian Fuller just began his class the first week of February.

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 SPD went through a period where 6 officers left in a very short span of time. One of those was our community officer. The delay in selecting and moving an officer into that position has created delays in the following goals.**
 - **Become a designated permanent car seat checking station**
 - **Host a Citizens Police Academy**
 - **Host quarterly coffee w/a cop; bi-monthly lunch w/ a cop at Stallings Elementary; host a fishing derby w/ NC Wildlife for kids**
 - **Create a Police Explorers program**
- **Certify staff members in Crime/Intelligence Analysis and Report Management System data analysis**-The SPD had an officer registered to attend training in Crime/Intelligence Analysis, but the class was cancelled due to lack of enrollment. Both of our Records Techs were trained and are utilizing Crystal Reports for our RMS system.

OTHER COMMENTS: The SPD is still on schedule to meet our goals set. Overall, all department members have participated in the work done so far to accomplish our goals.