



town of  
**MORRISVILLE**

# Performance Management Summary Report FY2013

## Balanced Scorecard

*Performance Management in the public sector is an ongoing, systematic approach to improving results through evidence-based decision-making, continuous organizational learning and a focus on accountability for performance. Performance Management is integrated into all aspects of an organization's management and policy-making processes, transforming an organization's practices so it is focused on achieving improved results for the public.*  
"National Performance Management Advisory Commission".

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# Introduction

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## Performance Management Reporting

FISCAL YEAR 2013

Performance Management can act as a powerful tool to integrate strategic planning, budgeting and management, with evaluation and reporting in a system that helps create an accountable, transparent, and responsive organization. Performance Management uses evidence from measurements to support governmental planning, funding, and operations. Better information enables elected officials and managers to recognize success, identify problem areas, and respond with appropriate actions – to learn from experience and apply that knowledge to better serve the public. Performance Management systematically uses measurement and data analysis as well as other tools to facilitate learning and improvement and strengthen a focus on results:

- *Identify and prioritize results that are most important to the community*
- *Better understand how to choose programs and services based on evidence of how they drive results (or fail to do so)*
- *Make programs more efficient*
- *Better explain to the public what tax dollars are paying for*
- *Improve results, and be able to show it*
- *Finally, traditional approaches to budgeting in financial stress have failed.*

A more strategic evidence-based approach method of decision making intentionally aligns processes, people, services, technology, and spending to achieve the organization's MOST important Goals. The fundamental foundation of Performance Management is to "Be Accountable to Learn and Improve".



# Town Strategy

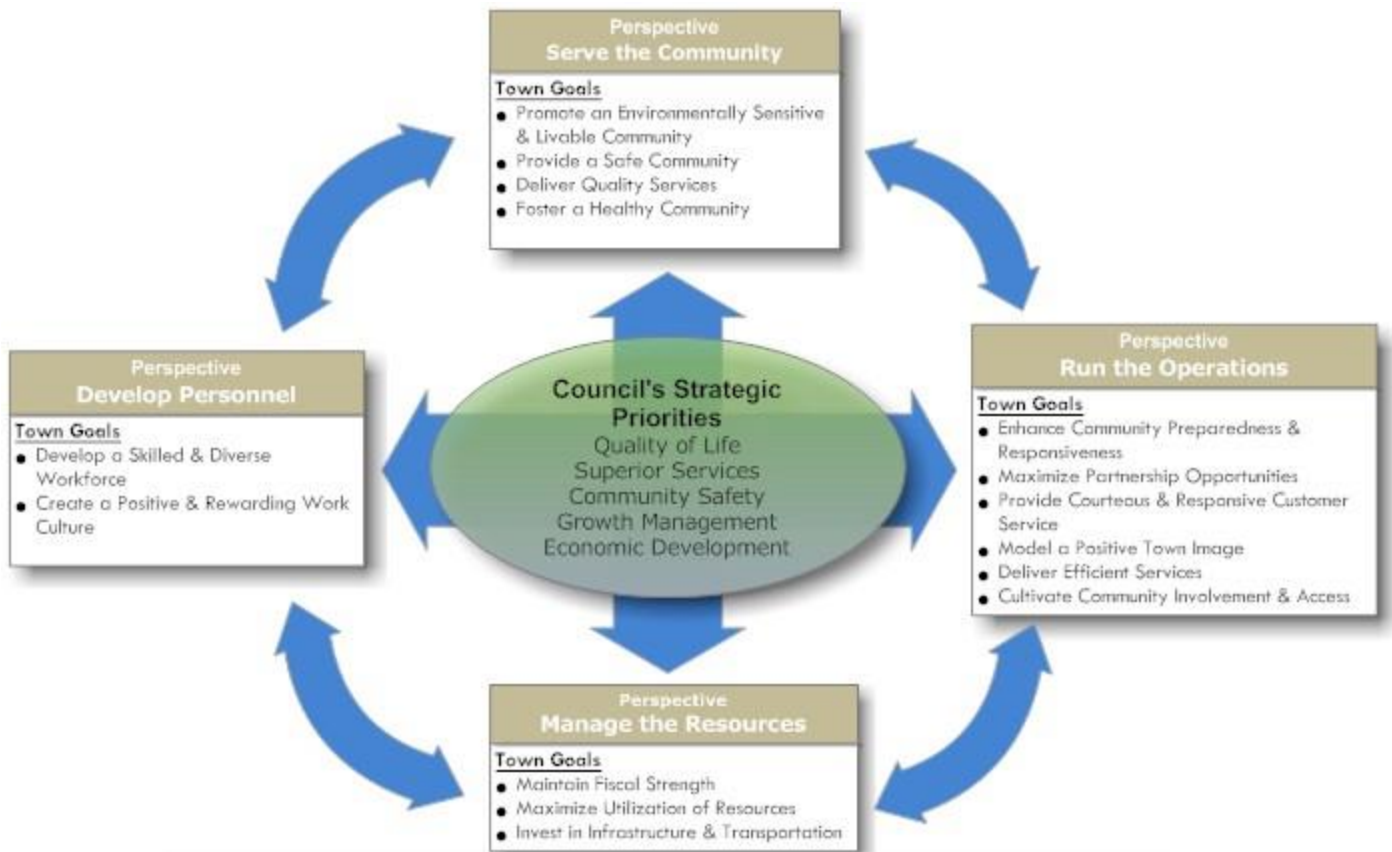
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## VISION STATEMENT

The Town of Morrisville will be an innovative crossroads where cultural heritage meets the next generation, nurturing vibrant communities of diverse families and businesses, while preserving small-town values.

## MISSION STATEMENT

The Town of Morrisville is dedicated to enhancing the quality of life by preserving our past and protecting our future through a collective community partnership. By balancing responsible growth with core values, we embrace a sense of membership, communication and support.



**STRATEGIC PRIORITIES**

- Quality of Life** The Town is always searching for ways to add value to the community by preserving history and heritage; providing parks, recreation opportunities, sidewalks and greenways; improving transportation; protecting the environment; and supporting cultural activities.
- Superior Services** Municipal services provided to the community should be a good value, customer service focused, dependable, relevant, well managed and sustainable. The Town will ensure that training opportunities are provided to employees, elected and appointed officials and volunteers. This will facilitate an environment of continual growth, learning and willingness to implement innovative strategies, technologies, processes and approaches that result in more efficient and effective services to the community.
- Community Safety** The Town will provide for a safe community. Citizens will feel safe wherever they may be in Town, driving, biking, strolling on sidewalks or greenways, playing in parks, and safe from fire threats. Citizens will feel confident that when emergencies arise the Town will be prepared to respond in a quick and effective manner.
- Growth Management** The Town will plan and manage growth in a manner that generates development, while maintaining a small town character and improves the quality of life for the citizens. The Town will establish and maintain policies, processes, requirements, and plans that address land use, transportation, environmental protection, recreation, public safety, financial and other critical issues. The Town will ensure new development enhances rather than detracts from the community.
- Economic Development** The Town will encourage and plan for economic development to promote sustainability, support current businesses, bring new businesses to Town, stimulate economic prosperity through quality job creation, and serve as a catalyst for growth and development.

**CORE VALUES**

Transparency in Government	Well Planned Community
Strategic Visioning	Efficiency
Environmental Responsibility	Vibrant Town Center
Strong Collaborative Relationships	Valued Workforce
Embrace History and Diversity	Continuously Improve

## TOWN GOALS BY PERSPECTIVE

### SERVE THE COMMUNITY: WHAT DOES OUR COMMUNITY WANT? WHAT MUST BE ACCOMPLISHED TO IMPLEMENT THE VISION AND MISSION?

**Provide an Environmentally Sensitive & Livable Community** – Create a community that is environmentally responsible valuing our historic heritage with gathering places and a small town feel.

**Provide a Safe Community** – Create a safe and accessible community environment that emanates comfort and security to those that live, work and play in Morrisville.

**Deliver Quality Services** – Conduct operations in such a way that citizens feel their needs are addressed through high quality & responsive services.

**Foster a Healthy Community** – Provide events, activities and programs that promote healthy lifestyles, citizen interaction, and greater pedestrian connectivity.

### RUN THE OPERATIONS: WHAT INTERNAL PROCESSES MUST WE EXCEL AT TO PROVIDE VALUABLE SERVICES WHILE ACHIEVING THE VISION AND MISSION?

**Enhance Community Preparedness and Responsiveness** – Improve 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.

**Maximize Partnership Opportunities** – Build reliable partnerships and relationships with both internal and external sources that provide opportunities to grow resources, enhance services, accomplish projects/plans and/or facilitate training and education.

**Provide Courteous and Responsive Customer Service** – Conduct operations in such a way that citizens feel their needs are addressed through high quality, friendly and responsive services. Staff, Town Council, and Volunteers model professionalism, friendliness and reliable interactions with community providing quality services.

**Model a Positive Town Image** – Emanate a strong, positive identity valued by residents, businesses, and visitors through quality development, community appearance, services, and programs.

**Deliver Efficient Services** – Ensure citizens are receiving a good value from their investments by delivering cost effective services.

**Cultivate Community Involvement and Access** – 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 share meaningful ideas, concerns, and questions with Town officials.

### MANAGE THE RESOURCES: HOW DO WE DELIVER QUALITY SERVICES EFFICIENTLY AND REMAIN FINANCIALLY SOUND WHILE ACHIEVING THE VISION AND MISSION?

**Invest in Infrastructure and Transportation** – Invest in infrastructure maintenance, upgrades, and improvements to plan for future needs and minimize long-term operation and capital cost. Continue developing infrastructure evaluation programs to analyze costs, prioritize maintenance, and secure funding.

**Maintain Fiscal Strength** – Support fiscal policies and controls that keep the Town government in a financially strong position, thereby allowing it to respond to unforeseen problems, emergencies, as well as opportunities. Continually look for opportunities to diversify revenue sources and leverage outside funding opportunities.

**Maximize Utilization of Resources** – Responsibly use all resources (funds, people, time, assets, partnerships, regional solutions) through service optimization, innovation, process improvements, competition, and other means.

### DEVELOP PERSONNEL: WHAT SKILLS, TOOLS, AND ORGANIZATIONAL CLIMATE DO OUR EMPLOYEES, ELECTED OFFICIALS AND VOLUNTEER ADVISORY COMMITTEE MEMBERS NEED TO MEET THE COMMUNITY'S NEEDS WHILE ACHIEVING THE VISION AND MISSION?

**Develop a Skilled and Diverse Workforce** – Create a work environment that allows the Town to hire and retain a diverse workforce of skilled employees who are capable of meeting the community needs. Focus on career development and succession planning.

**Create a Positive and Rewarding Work Culture** – Create a work environment that is friendly, open-minded, supportive, and consistent allowing our employee morale to flourish and job performance to excel. Employees are our primary assets delivering high quality services.

# Balanced Scorecard Summary

The chart below represents organizational key performance indicators rolled up to demonstrate progress towards Town Goals and ultimately the Vision and Mission of the community. The key performance indicators are selected by the Budget Office from departmental performance information to create a high level summary. Establishing quality key performance indicators can take time to effectively apply the Balanced Scorecard methodology as an analysis technique designed to translate an organization's mission statement and overall strategy into specific, quantifiable goals, objectives, and measures to monitor the organization's performance in terms of achieving these goals. Four perspective categories provide a framework: Serve the Community (customer), Run the Operations (internal processes), Manage the Resources (financial) and Develop Personnel (learning & growth). Each of these categories is critical to the overall success. The organization infuses layers of performance management from leadership, to departments to employees, each layer cascading down to a greater degree of detail.

Assigning targets drives a learning culture that progressively works to understand successes and works to improve service delivery for the price government is willing to pay. In instances where targets appear successful (☑), we should challenge the status quo and suggest strategies that encourage innovation, avoiding complacency. Conversely, if a target shows as missed (☒) it does not necessarily mean an improvement is warranted, but rather should spur an analysis of factors influencing the outcome to understand how to develop strategies for improvement and prioritize decisions. As Morrisville continues to develop this management program, the analysis function of the Balanced Scorecard methodology will become an invaluable resource.

Key: ☑ = Target met • ☒ = Target missed • TBD = To be determined • New = KPM to add/added

Town Goal	Key Performance Measure Indicators	FY11 Actual	FY12 Actual	FY13 Target	FY13 Actual	Quick View
<b>SERVE THE COMMUNITY</b>						
Promote an Environmentally Sensitive & Livable Community	Overall % Compliance with applicable environmental rules to maximum extent practicable – Phase II Stormwater Permit & Jordan Lake Buffer	n/a	34%	90%	90%	☑
	Pollution prevention & good housekeeping for municipal operation % municipal facilities inspected, found, or brought into compliance.	n/a	0%	70%	90%	☑
	Progress towards completion of Sustainability Plan	-	5%	70%	90%	☑
	Progress towards completion of the Town Center Main Street Plan conceptual design, preliminary financial analysis, & impact analysis	20%	50%	100%	100%	☑
	Progress towards completion of Unified Development Ordinance	10%	25%	75%	75%	☑
	Progress towards implementation of Transportation Plan Traffic Impact Analysis(TIA) & Transportation Improvements Policy.	75%	50%	100%	100%	☑
	Increase recycling waste tonnage by 3% annually as a % of Town Solid Waste collected.	25%	23.9%	25.7%	23.3%	☒
Promote a Safe Community	Maintain a Clearance rate of =>70% for Part I Violent Crimes (Calendar Year Reporting NC Dept. of Justice in Feb/Mar – estimated actual at this time)	70%	82%	=>70%	85%	☑
	Maintain a Clearance rate of =>20% for Part I Property Crimes (Calendar Year Reporting NC Dept. of Justice in Feb/Mar – estimated actual at this time)	25%	23%	=>20%	25%	☑
	Crash severity index of 3.50 or less	3.23	2.92	<3.50	2.5	☑
	% of private construction projects with all engineering inspections at required milestones and scheduled on time.	n/a	100%	85%	95%	☑
	Secured work related safety hazards within 2 days of notifications 90% of the time	100%	100%	90%	100%	☑

Town Goal	Key Performance Measure Indicators	FY11 Actual	FY12 Actual	FY13 Target	FY13 Actual	Quick View
Promote a Safe Community	% of property saved to loss for fire services	100%	100%	>95%	97%	<input checked="" type="checkbox"/>
	Turn out time for fire related fire calls within 80 seconds or less at least 90% of the time	94%	93%	90%	96%	<input checked="" type="checkbox"/>
	% of fire service calls with travel time of 4 minutes or less at least 90% of the time	72%	68%	70%	65%	<input checked="" type="checkbox"/>
	% of annual routine fire inspections completed	100%	96%	100%	105%	<input checked="" type="checkbox"/>
Delivery Quality Services	% of development project engineering reviews completed in first round comments 90% of time.	n/a	90%	90%	95%	<input checked="" type="checkbox"/>
	Receive above average or excellent ratings from at least 95% of participant surveys for recreational services.	93%	86%	95%	90%	<input checked="" type="checkbox"/>
	% of building inspections resulting in re-inspection.	8.2%	11%	10%	15%	<input checked="" type="checkbox"/>
Foster a Healthy Community	Preserve parkland consistent with adopted Town Development Ordinance at a rate of 28 acres per 1,000 dwelling units (acres preserve over acres needed)	<u>188 acres</u> 240	<u>188 acres</u> 240	<u>188 acres</u> 252	<u>188 acres</u> 246	<input checked="" type="checkbox"/>
	Miles of greenways completed as compared to miles required by master plan	<u>7.95 miles</u> 58	<u>9.02 miles</u> 58	<u>9.86 miles</u> 58	<u>9.35 miles</u> 58	<input checked="" type="checkbox"/>
<b>RUN THE OPERATIONS</b>						
Enhance Community Preparedness & Responsiveness	% of Full time employees completing National Incident Management System (NIMS) training annually	Completed	Completed	TBD	Completed	New
	% of firefighters scoring fair or higher on the annual Physical Fitness Assessment	97%	89%	90%	100%	<input checked="" type="checkbox"/>
	Average annual fire service training hours per firefighter	462	440	360	446	<input checked="" type="checkbox"/>
	Number of annual Citizen Emergency Response Team (CERT) Trainings provided by Fire Department	1	2	2	2	<input checked="" type="checkbox"/>
	% of rolling stock Police vehicles operational and available for duty	100%	100%	100%	100%	<input checked="" type="checkbox"/>
Maximize Partnership Opportunities	Number of crime prevention event opportunities provided annually	32	40	44	44	<input checked="" type="checkbox"/>
	Total dollars awarded to Morrisville from Grant Programs with State, Federal, or others as compared to the dollars required as Town's Matching Share for sidewalk, parks, greenway and roadway improvements	\$1.1M/ 586K	\$4.6M/ \$1.3M	\$500K/ \$150K	\$1.2M/ \$340K	<input checked="" type="checkbox"/>
	Recover at least 10% of Park program operation expenses through sponsorships and donations	4.2% / \$5,325	11% / 15,000	10%	3% / \$2,375	<input checked="" type="checkbox"/>
	Number of regional meetings attended for planning, transportation and public infrastructure	178	119	108	86	<input checked="" type="checkbox"/>
Courteous and Responsive Customer Service	% of Public Records requests responded to no later than 10-15 days from submittal (combined measures)	92%	90%	75%	95%	<input checked="" type="checkbox"/>
	Percentage of Public Works work orders completed on time by type:					<input checked="" type="checkbox"/>
	Fleet	99.3%	98.9%	80%	99.8%	<input checked="" type="checkbox"/>
	Facilities	98.6%	92.7%	80%	94.4%	<input checked="" type="checkbox"/>
	Parks & Grounds	86.3%	87.0%	80%	97%	<input checked="" type="checkbox"/>
Average response time for all calls 9 minutes or less for Police department	9.47	9.39	=<9 mins	9 mins.	<input checked="" type="checkbox"/>	
% of Building Inspections completed in 48 hours of request	100%	100%	100%	100%	<input checked="" type="checkbox"/>	
Model a Positive Town Image	% of Council Business items posted on internet in a timely manner by type:					<input checked="" type="checkbox"/>
	Agenda	96%	97%	96%	100%	<input checked="" type="checkbox"/>
	Audios	90%	93%	90%	92%	<input checked="" type="checkbox"/>



Town Goal	Key Performance Measure Indicators	FY11 Actual	FY12 Actual	FY13 Target	FY13 Actual	Quick View
	% of citizen complaints sustained by Police	0%	0%	0%	0%	✓
	% of code enforcement cases closed/resolved per year	83%	75%	60%	89%	✓
	Number of Community Appearance Awards/Events per year	10	7	4	6	✓
Deliver Efficient Services	% of total Purchase Order encumbrances rolled over at Year-end as compared to Revised General Fund Budget - not to exceed 1% of total expenditures	<1%	<1%	<1%	2%	✗
	% of Planning development plan reviews processed within review schedule.	92%	91%	85%	96%	✓
	% Engineering site plan reviews completed within published schedule 80% of the time	n/a	90%	80%	95%	✓
	% of Permits issued within schedule for: New Commercial – 6 weeks of submittal New Residential – 2 weeks of submittal Residential Alterations – 2 weeks of submittal	100% 100% 100%	100% 100% 100%	100% 100% 100%	100% 100% 100%	✓
	97% of parks programs meet established cost recovery goals as defined by the Parks Master Plan	100%	100%	97%	100%	✓
	Contractual compliance for solid waste goals Trash Pick-ups Recycling Yard Waste	100% 91.7% 83.3%	100% 100% 100%	100% 100% 100%	100% 100% 100%	✓
	Reduce utility consumption in Town buildings annually Electricity Water	17.6 kWh 27.5 gal	15.4 kWh 23.2 gal	17.7 kWh 26.5 gal	15.6 kWh 27.3 gal	✓
	Cultivate Community Involvement & Access	Committee member turnover rate annually should be no higher than 30% of total recorded membership at fiscal year end	n/a	30%	<30%	35%
% of Morrisville 101 students ranking Morrisville 101 Citizen Academy good or better		n/a	100%	100%	100%	✓
Increase the number of hits/likes/followers on all Social Media Sites per year		n/a	3,216	>4,000	24,514	✓
Citizen volunteer hours dedicated annually to Planning Projects		853	578	650	408	✗
Volunteer hours received as a % of volunteer hours needed for Parks programs		107% / 6,595	104% / 6,431	100% / 6,178	118% / 6,178	✓
Received Distinguished Budget Award from GFOA – program focuses on communication and access of budget information to community		Yes	Yes, Plus 2 special recognitions	Yes	Yes	✓
<b>MANAGE THE RESOURCES</b>						
Invest in Infrastructure	Number of IT project hours completed for technology initiatives and improvements of IT infrastructure in accordance with IT plan	1,305	1,198	1,000 – 1,500	836	✗
	Acres of right-of-way secured via private infrastructure investment from new development for future transportation improvements	2.4 acres	9.8 acres	2.2 acres	17.7 acres	✓
	% of street budget spent per year (both Powell Bill and General Fund)	93.6%	96.8%	97%	99%	✓
	Total grant dollars programmed to maximize infrastructure funding opportunities	\$1.7M	\$0	\$120K	\$0	✗
Invest in Infrastructure	Parkland Payment in Lieu funds secured via planning review process to use for greenway and park improvements	\$124K	\$670K	TBD	\$300K	New
	\$s of transportation improvements secured during site plan review process	\$366K	\$1.78M	\$300K	\$1.5M	✓

Town Goal	Key Performance Measure Indicators	FY11 Actual	FY12 Actual	FY13 Target	FY13 Actual	Quick View
Maintain Fiscal Strength	Unassigned Fund Balance as a % of operating expenditures should be no less than 3 months or 25%	53.1% / \$10.1M or 6.37 months	49.5% / \$10.3M or 5.94 months	Target of 45%, but no less than-25%	49.7% / \$11.1M or 5.58 months	<input checked="" type="checkbox"/>
	Debt service should be no greater than 15% of expenditures	8.2%	7.9%	<=15%	7.2%	<input checked="" type="checkbox"/>
	Operational ratio (comparison of revenues to expenditures) should be 1.00 or better	1.11	1.03	1	1.05	<input checked="" type="checkbox"/>
	% of Expenditures covered by non-routine revenues & unpredictable revenues	n/a	7%	TBD	6.64%	New
	% of Actual Revenue collected within +/- 5% of Original Revenue Budget	+3.4%	+5.2%	+/-5%	+6%	<input checked="" type="checkbox"/>
	Improve Bond Ratings: Standard & Poor's Moody's	AA+ Aa2	AA+ Aa2	AAA Aaa	AAA Aa1	<input checked="" type="checkbox"/>
	Receive less than 2 Financial Statement Findings or Material Weaknesses identified by Independent Auditor annually	1	1	<2	0	<input checked="" type="checkbox"/>
	Receive the Government Finance Officers Association (GFOA) award for the Certification of Achievement for Excellence in Financial Reporting for the Comprehensive Annual Financial Report (CAFR)	Yes	Yes	Yes	Yes	<input checked="" type="checkbox"/>
Maximize Utilization of Resources	% of Employee Positions/Job Descriptions reviewed and found non-compliant requiring grade reclassification	<1%	6%	<3%	2.5%	<input checked="" type="checkbox"/>
	Maintain sufficient staffing levels at or above 4 police officers on patrol to meet daily operational service	6	6	>=4	6	<input checked="" type="checkbox"/>
	% of time critical IT systems are available:					
	Phone System	99.9%	99.95%	99.90%	99.95%	<input checked="" type="checkbox"/>
	AS400 System	100%	99.95%	100%	99.95%	<input checked="" type="checkbox"/>
	Windows Systems	100%	99.90%	100%	99.85%	<input checked="" type="checkbox"/>
Network Systems	99.9%	99.95%	99.90%	99.95%	<input checked="" type="checkbox"/>	
Number of contract modifications issued as compared to \$ value of modification approved	13 / \$132K	10 / \$300K	<15 / <\$100K	29 / \$287K	<input checked="" type="checkbox"/>	
Budget execution rate – Actual Expenditures as a % of Amended Budget	91%	95%	93%-97%	95%	<input checked="" type="checkbox"/>	
<b>DEVELOP THE WORKFORCE</b>						
Develop a Skilled and Diverse Workforce	% of employees completing mandatory OSHA training	85%	100%	100%	100%	<input checked="" type="checkbox"/>
	% of new hires completing introductory period successfully	98%	100%	100%	93%	<input checked="" type="checkbox"/>
	% of total expenditures directed toward workforce development training	<1%	<1%	TBD	<1%	New
	Average training hours per Police Officer	105.67	71.7	80	80	<input checked="" type="checkbox"/>
	% of building inspectors completing 24 hours of trade training per year	100%	100%	100%	100%	<input checked="" type="checkbox"/>
Create a Positive and Rewarding Work Culture	% of fulltime employees attending wellness activities	13%	14%	20%	42%	<input checked="" type="checkbox"/>
	% of employees rating benefits better or greater on Benefits Survey (survey every other year)	84%	n/a	84%	89%	<input checked="" type="checkbox"/>
	Fulltime Employee turnover rate per year	5.5%	5.4%	<8%	6.1%	<input checked="" type="checkbox"/>
	% of Fulltime Employees with longevity 10 years or greater	27%	33%	33% or 1/3 of FT workforce	33%	<input checked="" type="checkbox"/>

# Executive Evaluation Process

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This report represents a key step towards infusing a Performance Management culture in Morrisville's management practices. It is here that the Town's strategic plan begins to connect to organization processes. Throughout a performance year, departments are charged with monitoring, tracking and evaluating their effectiveness and efficiency towards planned targets. A meaningful analysis of what those indicators might be flagging is the point that an organization begins to be accountable for learning and improving results. Senior Directors serve as the Program's Evaluators. It is at this executive level that data driven decisions unfold, applying what is learned from both successes and failures. Developing, tracking and collecting performance measurement data can be a time consuming process, especially with limited resources (people and technology). However, the efforts are well worth the benefits in helping the organization identify successes as well as areas of needed improvement. Having a feedback system in place that realistically measures an organization's goals is of value to the public and can help to justify the cost of services provided.

It can take years for an organization to make Performance Management the standard way of doing business. The initial implementation of key elements such as performance-driven planning, changing the budgeting process, and training staff to use data to improve programs and services can be accomplished with leadership commitment year after year. It is expected that some measures will need to be re-assessed and more high order (efficiency and effectiveness) indicators defined. Senior Directors are an essential piece to training, planning and putting to practice this methodology within all areas of the organization ensuring the success of the new management culture. Below is an outline of how Senior Directors' carried out their evaluations to produce Executive Evaluation Summaries provided within each department performance profile:

## Quality Control Check

- *Are Major Objectives/Outcomes represented by department.*
  - *Are they aligned to department mission and Town Goals.*
  - *Are they the primary/key outcomes the department should be working towards.*
  - *Are they in measurable terms.*
- *Do Measures for Objectives serve as a good indicator of success or effort*
  - *Does the data produced by the measures serve to flag to management a success or issue enough to cause management to request further analysis or acknowledge success.*
  - *Does the department offer high-order measures that would communicate efficiency or effectiveness toward the objective in terms of cost, labor, time, etc...*
- *Did departments offer explanations or supportive discussion within the "Conditions Affecting Service Levels, Performance and Cost" to the results.*

## Executive Evaluation

- *Use data as indicators of what areas to analyze further and conduct discussions with departments to determine causes and effects. Determine best action to improve service (workforce, funding, coordination, organizational matter, etc...)*
- *Use data as indicators to identify and celebrate successes toward accomplishing Town Organizational Goals. Focus on Key successes and why they were successful.*
- *Examine instances where targets appear successful to challenge the status quo and suggest strategies that encourage innovation avoiding complacency. Conversely, if a target is missed it does not necessarily mean an improvement is warranted, but rather should spur diving into the details of factors influencing the outcome.*
- *Meet with department on your review of their Performance Measures.*
- *Recommend any modifications you deem necessary to any objectives and/or indicators to improve the usefulness of the data for your evaluation purposes – please explain your basis for the recommendation.*
- *Determine what matters to elevate up the chain of command to highlight as successes, use in building future budgetary priorities, and communicate areas of improvement.*

## EXECUTIVE EVALUATION SUMMARIES

The Executive Evaluation Summaries frame evaluation feedback through the lens of Senior Directors using FIVE key questions that a Performance Management Program should address and report to the Town Manager:

HOW DOES THIS YEAR'S PERFORMANCE MEASURES REFLECT PROGRESS TOWARD THE STRATEGIC GOALS? PLEASE PROVIDE EXAMPLES.

WHAT ARE NOTABLE TRENDS, EXEMPLARY ACCOMPLISHMENTS, AND ACHIEVEMENTS TO CELEBRATE? THESE MAY INCLUDE TANGIBLE ITEMS CREATING SAVINGS, IMPROVED EFFICIENCY, OR EFFECTIVENESS.

WHAT ARE AREAS FOR IMPROVEMENT AND RECOMMENDED STRATEGIES TO IMPROVE PERFORMANCE? EXPLAIN ANY RELATED CHALLENGES THAT MAY HINDER PERFORMANCE AND/OR OPPORTUNITIES THAT MAY IMPROVE PERFORMANCE.

DEMONSTRATE HOW PERFORMANCE MEASURES WERE USED TO EVALUATE AND DIRECT OPERATIONS; HOW HAVE THEY BEEN USED TO MAKE IMPROVEMENTS OR VALIDATE CURRENT PRACTICES?

WHAT ARE THE SIGNIFICANT "BIG ROCK" PRIORITIES TO CONSIDER GOING FORWARD? EXPLAIN WHAT BUDGETARY IMPACTS MAY RESULT.

The Executive Evaluation Summaries are located in each Directorate section below representing information filtered up from departments to begin determining future needs and priorities. The Performance Management review concludes with a Strategy Meeting between Senior Directors and Town Manager producing a collaborative list of **Short and Long Term Budget Priorities** that offers focus toward FY2015 Budget development activities.

# Administration Directorate

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## OUR MISSION

The mission of the Administration Directorate is to take a leadership role in building a citizen-engaged community with a positive town image through good information exchange opportunities and guidance, delivery of cost efficient quality services, with a valued professional and skilled workforce that enables the organization to achieve the Town's Vision and Mission.

## SERVICE TO COMMUNITY

The Administration Directorate manages the functions of the town under the direction of the Town Manager. This consists of: promoting transparent government; encouraging public input and involvement; managing and preserving public records; disseminating timely and accurate public information; providing opportunity for citizen education concerning local government; establishing policy and practices for the organization, managing human resources and providing direct and general support to the Town Council and internal staff.

## EXECUTIVE EVALUATION SUMMARY

*How does this year's performance measures reflect progress toward the Strategic Town Goals? Please give examples.*

**Cultivate Community Involvement & Access** - The directorate is committed to maintaining a high state of transparency taking every opportunity to help communication and provide access to pertinent information through many outlets. An example of progress in achieving this goal is evident in the progression of social media vehicles. These communication outlets have become increasingly more popular causing staff to place more emphasis in the frequency, type of post, and inclusion of pictures providing a more human interest based approach, which has likely influenced the membership of these social devices.

**Deliver Efficient Services** – Efficient processes to recruit and fill vacant positions contribute toward hiring and maintaining qualified candidates.

**Create a Positive and Rewarding Work Culture** – Retention of institutional knowledge and the investment in employees is key to a productive organization. Morrisville continues to offer an attractive benefits package and work environment as evident by the consistency in employee longevity of 33% of fulltime employees with 10 or more years of service.

*What are notable trends, exemplary accomplishments, and achievements to celebrate? These may include tangible items creating savings, improved efficiency, or effectiveness.*

**Administration** – Improved response times with growing public records request by cross-training additional staff.

**Human Resources** – Successfully maintained a low rate of employee turnover, retaining significant institutional knowledge and resources within the organization. While final premiums increased overall, the organization did succeed in securing a significant reduction to the initial healthcare premium renewal increases through negotiations, participation in the Healthy Outcomes program, claims, and tenure.

*What are areas for improvement and your recommended strategies to improve performance? Explain any related challenges that may hinder performance and/or opportunities that may improve performance.*

**Administration** – The State Department of Records and Archives is developing a Digital Procedure and Disposition Policy specific to the effective treatment of electronic records. Once this policy is complete and case law established, we will have a better understanding of how to handle the auditing of such records.

**Human Resources** – Future healthcare premium renewal cost are likely to rise. To manage the impact and burden to employees it will be necessary to continue to assess plan designs to continue offer an attractive benefit package but at a reasonable cost.

While turnover has remained relatively stable, the improving economic conditions will likely cause an increase in the future. In anticipation of this probability, it will become important to understand the exit statistics of employee behavior to gain insight that may discern future improvements to better retain employees.

Demonstrate how performance measures were used to evaluate and direct operations; how have they been used to make improvements or validate current practices?

- While Human Resources and the Wellness Committee have tried a variety of programs to increase employee wellness participation, there has been little change over the years. In FY2013, the Town collaborated with BlueCross BlueShield (BCBS) for a “Healthy Outcomes” program that encouraged employees to meet certain pre-determined wellness targets, which included completing health assessments, nutritional training, and preventive medical screenings. By doing so, the Town earned a 2% reduction in medical premium renewals. Participation levels increased as a result.

What are the significant “Big Rock” priorities to consider going forward? Explain what budgetary impacts may result.

- Continued monitoring of benefit adjustments and premium cost increases that are required under the Affordable Care Act (ACA). One example is the requirement to offer the same medical premium cost structure to employees averaging a 30 plus hour work schedule as is offered to employees working a regular 40-hour schedule. While the Town currently offers medical coverage to these employees, the premium costs differ. To make the medical premiums the same will require a potential additional cost to the Town. Base on the current number of employees working a regular, 30 hour (three) the potential annual increase in Town medical premium costs range from approximately \$4,000 up to \$9,000 depending on the dependent care coverage elected, if any.
- Consideration given to modify the existing Performance Pay Plan structure to minimize complexity, improve understanding and acceptance, and bring plan values in line with market standards.

# Business Management Directorate

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## OUR MISSION

The mission of the Business Management Directorate is to render a superior level of quality service to citizens and employees of the Town of Morrisville. Committing to the highest standards of accountability, timeliness and accuracy while leading the organization in making informed and successful decisions in resource allocation, program evaluation and long range financial and managed planning. While furnishing a modern, reliable, full-featured computing and telephony environment through which employees may effectively and efficiently perform their duties, we are entrusted to provide for the needs, interests and priorities of our community.

## SERVICE TO COMMUNITY

The office of Business Management provides open, accountable and informative financial records that support the Town's operation. We also offer technological equipment, software and support for staff and citizens to use the Town information efficiently within a secure environment. Our professional staff is committed to provide better services, enhanced performance measures, maximum accountability and improved business procedures. The directorate manages the Finance, Budget, Purchasing & Contracts and Information Technology departments.

## EXECUTIVE EVALUATION SUMMARY

*How does this year's performance measures reflect progress toward the Strategic Town Goals? Please give examples.*

**Cultivate Community Involvement & Access** - The directorate is committed to maintaining a high state of transparency taking every opportunity to help communication and educate the public through surveys, public input opportunities, Morrisville 101 Citizen Academy, Comprehensive Annual Financial Report, the publishing of the Annual Budget Report and on-line posting of monthly financials.

**Maintain Fiscal Strength** - Maintaining a strong focus on fiscal strength and providing for both effective and quality services; the Finance department implemented a new privilege license database maintaining a 95% collection rate of billed privilege license. In addition, the department also collected 100% of the new stormwater fees introduced in FY2013. Additionally, our budget team effectively monitors accuracy of revenue performance within a +/-3% margin which is a more aggressive indicator as compared to the Town's policy +/-5% allowing for enhanced and proactive forecast assumptions.

**Maximize Utilization of Resources** - We have seen an increase in contracts from 40 in FY2012 to 80 in FY2013. Despite this increase our team has managed to maintain efficient and expeditious services while applying for 4 grants totaling \$1.2 million in funds and capitalizing on surplus property items to get a maximum return on taxpayer's dollars.

**Courteous & Responsive Customer Service** - With Information Technology service ratings always over 90% and in most cases approaching 100%, staff have demonstrated timely and effective responses to support calls and projects, and ensured critical applications, services and equipment were available and upgraded as necessary. This is due to staff expertise and methodical approach to replacement and upgrade planning strategies implemented by the department.

*What are notable trends, exemplary accomplishments, and achievements to celebrate? These may include tangible items creating savings, improved efficiency, or effectiveness.*

**Finance** - Standard and Poor's Rating Services raised Morrisville's bond rating to 'AAA' from AA+ and Aa2 to an Aa1 by Moody's Rating Agency. This upgrade reflects the Town's diverse and expanding economy and management's formalized financial policy framework that led to strong financial performance. The upgrade yielded a positive effect on the interest rate for the bond sale in June 2013.

With the implementation of SAS 112 by the American Institute of Certified Public Accountants (AICPA) in 2006, established standards, responsibilities, and guidance for auditors during the audit engagement were given. Auditors identify and evaluate a government's internal control over financial reporting and are required to report any significant deficiencies and material weakness. The Town noted many changes in 2013 but one remarkable event was receiving "no management letter" comments with the FY13 audit and staff is commended for this substantial first time accomplishment. This is a high-level indicator of financial performance for the Town signifying sound financial practices at work in Morrisville. In addition, the Finance Officer prepared the financial statements, which noted a cost savings of \$7,750 in the FY2013 audit contract.

**Budget** - Morrisville received the Distinguished Budget Presentation Award for the seventh consecutive year and the Certificate of Achievement for Excellence in Financial Reporting for the twenty-first consecutive year by the Government Finance Officer

Association. Satisfying nationally recognized standards as a policy document, financial plan, operations guide, and communications device, the report and award recognition can be an influential resource for rating agencies, regional partners, and other government agencies.

Unassigned Fund Balance has remained healthy at 49.7% in FY2013 and may present an opportunity as defined by the Town's Policy to utilize dollars above the policy's upper target of 45% for the purposes of one-time expenditures without jeopardizing the Unassigned Fund Balance position.

**Information Technology** - To maximize the funding allocation for the Technology Replacement Plan, staff was able to obtain and reduce contract pricing by \$11,000 in 2013, which was redirected to other technology requirements.

Internal operations within IT have significantly improved with the redistribution of job functions and improved skillsets of staff and are demonstrated by reduced help desk ticket logs. The Information Technology Manager completed an 11 month – 240-hour course to become a Certified Government Chief Information Officer in FY2013.

**Purchasing & Contracts** – The Purchasing & Contract Manager is in progress of completing the Paralegal program at UNC-Chapel Hill and will become the first Certified Paralegal on staff in FY2014 and is set to complete required training to become a Certified Local Government Purchasing Official in February 2014. With increasing demands to foster better lines of communication and streamline project management throughout the organization, a project management team was developed in FY2013. Our team is continuing progress, but we see that this will improve efficiency and better organization effectiveness.

**Other** - The Town's Local Government Retirement System Unfunded Liability was officially resolved in January 2013 changing the anticipated payoff date from 2027 to 2018 saving the Town approximately \$2.7 million. The four-year effort in working with the State to challenge the actuarial analysis provided to the Town not only was a benefit to Morrisville but it enabled other municipalities across North Carolina to also attain benefits.

What are areas for improvement and your recommended strategies to improve performance? Explain any related challenges that may hinder performance and/or opportunities that may improve performance.

**Purchasing & Contracts** - DBM staff continues efforts to expand training opportunities and increase awareness in all financial areas but can be difficult to accomplish with competing work demands. In spring of 2014, staff will begin offering training Town-wide in purchasing and contracting laws and requirements. The training goal is to reinforce Town policies and procedures.

**Information Technology** - During the migration of new equipment in the future, staff will consider options to provide redundant services to mitigate downtime that occurred in FY2013 because of equipment replacement. Implementing redundant services will require additional funding.

**Budget** – Staff has identified workload redundancies and inefficiencies currently required with the process of generating the Town's budget that could be addressed in order to simplify those processes and improve workflow concerns. It is recommended that Morrisville's Pay Plan be reviewed with an objective to reduce the complexity of the merit calculation and lump sum payout component opting for a process that can be produced by the financial software package being utilized by the Town for all payroll calculations. This recommended enhancement will provide stronger internal controls and reduce man-hours required to process annual changes.

**Other** - DBM staff has mounting workload demands in Finance and Budget areas. One indicator demonstrates approximately 25% of staff capacity spent supporting, preparing, facilitating and fulfilling one Panel's mission which presents significant challenges with current daily requirements. Staff requests that Council review the charter to determine if the need exists to have this type of oversight in lieu of the Town's current financial position and enhanced transparency levels.

A major area of concern as staff moves forward in FY2014 is being successful with the implementation of a new software product without additional staff.

Demonstrate how performance measures were used to evaluate and direct operations; how have they been used to make improvements or validate current practices?

- Staff utilized customer satisfaction ratings to gather feedback from internal customers to gauge quality.
- With a growing number of unforeseen circumstances within the FY2013 budget staff was able to redirect appropriation within existing budgetary limits reducing budget ordinance amendments as compared to FY2012. This action requires a great deal of oversight and communications within the organization to accomplish.
- Although reports evolve and improve over time, our team continues to bring consistencies to improve the effectiveness of performance measures as an evaluation tool.



What are the significant "Big Rock" priorities to consider going forward? Explain what budgetary impacts may result.

- In 2013 a critical decision was made to improve efficiency within the organization by replacing the current operating software. With a 2 to 3 year implementation process staff is now faced with the challenge to ensure a successful outcome through training and implementation along with establishing new effective workflows for the application. IT staff is faced with maintaining 2 operating systems and the challenge to manage a double workload for an extended period of time. Furthermore, the skills that will be required to support the new software are not currently available; potentially necessitating a change in staffing action within DBM.
- The Revenue Laws Study Committee of the General Assembly is preparing to discuss the municipal privilege license tax and all indicators are that the tax could be removed or reduced. The current annual revenue from privilege license is \$836,000, which is almost 3 cents on the tax rate.
- The increasing demand of services underscores the need to improve efficiencies, reduce workload, or increase staffing levels. If this is not accomplished the organization could be faced with deadlines not being met, staff turnover, absenteeism, conflict and ineffectiveness. It is recommended that consideration be given to provide for an additional staff position in Finance.
- Morrisville is fortunate to be located in the heart of the triangle where the refocus is to accommodate new companies for research and development. However, some of the changes can present a negative impact of the Town's critical network infrastructure (voice, data and internet) is often victim of service interruption by accidental service interruption by our providers. Staff requests some funding consideration for the implementation of redundant network service to help reduce down time.

# Community Services Directorate

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## OUR MISSION

The Community and Emergency Services departments are committed to providing customer oriented services related to protecting the health, safety and welfare of our citizens while directly contributing to the enhancement of their quality of life by providing both cultural and recreational activities supported by the development and conservation of a parks, open space and greenway trails system for both current and future Morrisville residents.

## SERVICE TO COMMUNITY

- Ensure high quality reliable emergency response services are available and provided to the community on a 24/7 basis.
- Provide for the maintenance and repair to the Town's infrastructure utilizing both Town forces and contracted services.
- Provide for and maintain a comprehensive Parks and Greenway system for the enjoyment of town residents and visitors.
- Create and provide quality recreational and cultural programs for the community.
- Provide a comprehensive Risk Management Program that contributes to the safety and health of employees and citizens as well as protecting the Town's physical and financial resources.
- Risk Management Services is committed to providing a comprehensive Risk Management Program that contributes to the health and safety of employees as well as protecting the Town's physical and financial resources. Risk Management's goal is to identify, analyze, and reduce risks or exposures and make recommendations for appropriate levels of risk retention, risk transfer, and loss control measures.

The directorate manages Public Works & Facility Management, Police, Fire, Parks & Recreation and Safety & Risk departments.

## EXECUTIVE EVALUATION SUMMARY

*How does this year's performance measures reflect progress toward the Strategic Town Goals? Please give examples.*

**Safe Community** - The Fire Department is increasing its effort to educate the public by providing educational programs and exhibitions to both residents and the business community. The annual Fire Safety Day event, Fire Department Open House event and the two CERT training sessions conducted contribute toward maintaining a safe community. This year the department implementation of the Home Inspection Program is another example of how the Fire Department helps meet the Town goal of providing a safe community.

The Police department's speed enforcement program, seat belt and DWI enforcement programs are proactive traffic related initiatives that further contribute to the increased level of safety to the community.

The Public Works department continued high performance with securing serious traffic and pedestrian safety hazards in combination with their pro-active street light inspection program, which contributes to the overall safety to the community.

Performance Measures in the Safety and Risk division helped to ensure all employees are receiving the safety training requirements and helping to promote a work place safety culture. This in turn contributes to a well-trained and safe staff that provides services to the community.

**Quality Service** - One of the primary Town goals is to provide services that the users consider to be of high quality. The Parks, Recreation, and Cultural Resources department assesses this effort by regularly providing opportunities for participants to evaluate programs through written surveys. This year 90% of those surveyed reported an overall satisfaction rating of above average or excellent.

The Public Works department through its development of park maintenance standards and parks inspection program continues, to improve the quality of maintenance services thereby enhancing the "user's experience" having clean well-maintained parks.

**Cultivate Community Involvement & Access** - The Parks, Recreation and Cultural Resources department provides advisory committees, coaching opportunities, and other volunteer options throughout the year and tracks the number of hours contributed by the community. This year the citizens contributed well over 100% of the hours that were needed by the department to provide its services.

The Police Departments National Night Out program provides the community the opportunity to interact positively with both Police and Fire department staff.

What are notable trends, exemplary accomplishments, and achievements to celebrate? These may include tangible items creating savings, improved efficiency, or effectiveness.

Departments continue to operate in a post-recession environment as the local and national economies continue to make a sluggish comeback. Despite the effects of the slow-moving economy, town departments continue to review and evaluate internal operations and processes looking for ways to maximize efficiency and cost savings where practical. As illustrated below: with the growth of revenue from conventional sources remaining uncertain due to the economy and State legislature, expansions to programs and facilities have largely been through single year department savings, one time allocations by the Town Council, or other non-conventional funding avenues such as grants or private sponsorships. The latter methods require considerable staff time to acquire. Departments have also turned to advancements in technology to assist with maintaining and improving operations and balancing employee workloads. Greater emphasis will be needed going forward on developing long-term strategic plans and revenue streams to fund them.

**Safety and Risk Management** - The Town's work place injuries have continued a downward trend from a high of 10 in 2007 to a low of 2 on 2011 with 2012 coming in at 3. This is likely the result of continued emphasis on safety training using both practical and on-line training methods. Increasing the quality of facility inspections is evident by follow-up inspections by the Dept. of Labor with only minimal findings.

Competing for employee time continues to be a challenge with engaging and expanding employee involvement in work place safety. Going forward expansion of the online training classes and lunch and learn type programs will be utilized to continue engaging employees in the work place safety program.

The safety and risk office has implemented a Job Safety Analysis program that has increased safety awareness with individual employees that helps to raise job safety awareness thereby supporting the trend of lower incident rates and serious accidents.

**Fire** - The Fire Department met or exceeded performance goals in most areas in FY2013.

Despite a 61% increase in plan reviews and new construction inspections the department met its performance expectation through the use of a temporary plans reviewer and utilizing the shift staff to help with routine fire inspections, which allowed the Fire Prevention staff to focus more on plan reviews and new construction inspections.

The continued implementation the staffing and Quint plan will help achieve incident mitigation goals, improve the turnout times and increase firefighter safety.

**Police** - The Police Department met or exceeded performance goals in most areas in FY2013. Going forward the officer uncommitted patrol hours will be reported out in arrears as this data is collected and reported to the SBI on a calendar year rather than a fiscal year basis.

The Police department earned their CALEA re-accreditation certification this past year. A new Crime Analyst/ Accreditation Manager position requested in FY2014 should effectively maintain a proactive crime analysis program and CALEA accreditation program.

A new Police Records Management system was implemented to help improve overall operational efficiencies. The new RMS will enable the department to enhance their data collection and processing abilities allowing them to concentrate /surveillance/ enforcement activities using a more "intelligence based" statistical process.

**Parks, Recreation, and Cultural Resources** – Budget execution levels for FY2013 remained high (97%) for the second year in a row.

In FY2012, the PR&C department generated its highest single year of revenue (\$862,140) recorded. FY2013 revenues were slightly lower at \$862,095. The single major reason for the reduction was due to a reduction coming in sponsor ship revenue from a major sponsor (NC Museum of Life and Sciences). Staff will continue efforts in 2013 to diversify its sponsorship portfolio as they recruit additional sponsors for program and special events.

The PR&C Sponsorship Program participation and revenue decreased last year due in part to the policy change of a key sponsor eliminating their ability to continue sponsoring several dept. programs. Staff will be working on a plan to diversify sponsorship opportunities as a means to help offset the effects of losing a single large sponsor.

PR&C Volunteer hours for programs and activities continue to exceed (118%) the minimum needed for program delivery. The

continued commitment by citizens to provide these volunteer services has a significant and positive monetary value to the town as well as further illustrating the support of the community for these programs.

**Public Works** - Town Council recognized Public Works for its dedication to the safety and health of its employees and for achieving two years of no work related injuries.

Completion of the installation of electronic school zone signs on Morrisville Parkway, Town Hall Drive, and Treybrook Drive, serving Morrisville Elementary, Cedar Fork Elementary, and Sterling Montessori schools enhanced pedestrian safety around these areas.

The town is currently equal to or in many cases collecting a higher percentage of recycled waste than other Wake County towns (Raleigh 17%, Fuquay-Varina 19%).

What are areas for improvement and your recommended strategies to improve performance? Explain any related challenges that may hinder performance and/or opportunities that may improve performance.

**Safety & Risk Management** - The competition for employee time continues to be a challenge with engaging and expanding employee involvement in work place safety training. Employee involvement in Town Safety Programs might improve with more diverse and creative training opportunities.

**Fire** - Continuing to meet the Fire Departments performance goal of having 4 personnel on the scene within the desired timeframe is a struggle. The use of volunteer personnel to help achieve this performance goal is not consistently working and the full cost benefit is not being realized. A possible strategy to evaluate will be the use of certified part time personnel during critical staffing and response periods.

**Police** - To improve the effectiveness of K-9 coverage for all patrol shifts as well as maintain the Police department's ability to conduct drug education to area schools and businesses it would be necessary to attain an additional K-9 unit. Currently this need is fulfilled through mutual aid agreements with other departments. As the K-9 use continues to increase county wide the availability of outside K-9 units is decreasing. The department will also need to implement a replacement plan for the existing K-9 program.

**Public Works** - The existing Public Works facility is not large enough to accommodate the growing needs of the department in terms of equipment, material storage, parking, and office space. Definitive plans and funding strategies are necessary to make improvements. The Town's Capital Investment Program has included an unfunded Project Concept for many years. The concept typically does not draw overwhelming support from the community when weighed against strong community support for concepts that represent traffic improvements in competition for the same limited resources. Outsourcing some of the public works functions might be an effective strategy to reduce the overall size and impact of the new facility.

Uncertain fuel pricing in the general economic market may modify established work schedules and operating methods in FY2014.

The Town's aging stormwater facilities combined with new regulations will put an additional workload on the limited number of existing staff. Without additional resources, department demands on workloads will push project completions further out and negatively affect productivity.

While electrical and water consumption usages continue to be within acceptable ranges due to the utility conservation efforts by the departments using led lights, water conservation devices in bathrooms, and HVAC control monitoring improving beyond this point without additional funds presents a challenge.

To enhance recycling collection effectively in the future will likely require improved methods and additional dollars as the performance has reached a plateau.

Public Works continues to work toward attaining professional accreditation for the department.

**Parks, Recreation, and Cultural Resources** - The department is progressing through the self-assessment module of their accreditation process. The entire accreditation process will concluded in the Fall of 2014 or Spring of 2015.

Demonstrate how performance measures were used to evaluate and direct operations; how have they been used to make improvements or validate current practices?

- In recent years, staff has closely evaluated the budget execution ratio to help guide the development of future budget requests (maintaining execution rates above 95%) to reflect the needs.

- In addition, staff monitors the results of recruitment efforts for volunteers and program sponsors to adjust staff responsibilities and programs.
- Performance measures in the Fleet Division provide data that directly affects the department's customer service goals and vehicle availability goals.
- Tracking performance measures helped to identify the upward trend in plan reviews and new construction inspections and the effect on the organization as a whole. The data collected helped staff reallocate resources within the department as well as identify that the goals could not be met without additional part time staff. Decisions made based on performance measure analysis helped meet the annual fire inspections schedule, plan reviews, and new construction inspection requests.
- Crime and accident data collected by the police department help to identify that the existing records management system could not produce the needed analysis necessary for the department to deploy staffing resources effectively to high impact areas. The new records management system implemented this year will fill this existing need within the department.
- The Parks and Grounds Division used the work order system and park inspections to improve the base-line standards of the Town's parks and grounds. Work order completion improved from 87% to 97%. Quality of parks maintenance improved from 75% to 84%.
- Performance measures tracked in the fleet division identify workload distribution, maintenance costs and vehicle availability. This information was used to determine what level of maintenance should be performed in-house and what maintenance should be outsourced to a private vendor based on workload and cost. Additionally the available performance measures are used to determine the number of reserve units need to be kept in an in-service condition allowing for the maximum number of vehicles to be sold at surplus.
- Performance measures have helped to identify higher maintenance and repair costs per vehicle anticipated with the aging fleet and help to maintain vehicle availability standards.
- Performance measures have helped evaluate the Town's safety program to ensure progress is being made to provide a safe work environment for all Town employees. This evaluation is helping identify gaps in the program that furthers the goal of creating a safety culture and safe workplace.

What are the significant "Big Rock" priorities to consider going forward? Explain what budgetary impacts may result.

- Funding for the Public Safety communications replacement program. Multi-year program with estimated costs approaching \$1M.
- Feasibility study for MAFC Bond project. \$25K -30K
- Traffic Signal Pre-emption program, implemented over 3-4 year timeframe, potential 25K – 30K/year
- Continue funding for the Fire Apparatus Reserve Fund.
- Provide full funding of the Police department's wellness program (annual officer physicals) to implement department's officer physical training program.
- Provide funding for a second K-9 in order to effectively cover all patrol shifts. \$10K - \$15K
- Revise and fund staffing plan for the departments
- Maintain funding for the Solid Waste program. Explore alternative revenue and program delivery options to stabilize program expenses.
- Fund infrastructure maintenance to adequate levels.
- Continue funding the implementation of the Quint program.

# Development Services Directorate

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## OUR MISSION

The mission of the Directorate of Development Services is to enhance the quality of life in the Town of Morrisville through the promotion of quality growth that capitalizes on our central location within the region, promotes a mix of land uses with choices in housing and transportation for Morrisville residents, and provides a sustainable built and natural environment. The Directorate is dedicated to the highest standards of accountability, professionalism, and innovation in providing services that not only meet but exceed the expectation of those we serve.

## SERVICE TO COMMUNITY

- Promote and ensure a high level of quality in the built environment, both private and public facilities.
- Coordinate the effective and efficient functioning of the Planning, Engineering, and Inspections Departments.
- Develop, maintain, apply, and enforce key policy and regulatory documents, including but not limited to the Land Use Plan, Town Center Plan, Transportation Plan, Zoning Ordinance, Subdivision Ordinance, Stormwater Management Plan, Design and Construction Ordinance, and the International Building Code.
- Encourage land use patterns and developments consistent with the Town's adopted Town Center Plan, Land Use Plan, Transportation Plan, and other adopted planning policies, regional initiatives, and plans of surrounding communities.
- Encourage the timely development of streets, sidewalks, stormwater management systems, and other infrastructure to support private development.
- Ensure the safety of habitable structures through conscientious and accurate application and enforcement of building standards.
- Promote environmentally sensitive policies for the Directorate and Town.
- Establish and maintain a predictable, efficient, and effective project review process.
- Define, train for, and encourage good customer service within the proper limits of regulatory responsibilities.
- Develop strong positive working relationships with the private sector development community.
- Coordinate economic development recruitment activities with the Morrisville Chamber of Commerce.

The directorate manages the Engineering, Stormwater, Inspections, Planning and Economic Development departments.

## DDS - EXECUTIVE EVALUATION SUMMARY

*How does this year's performance measures reflect progress toward the Strategic Town Goals? Please give examples.*

**Environmentally Sensitive and Livable Community-** Development of the *Sustainability Plan*; implementation of the Town's NPDES Phase II Stormwater Permit; UDO (*Unified Development Ordinance*) provisions dealing with compact and walkable land use patterns, environmental protection, and sustainability; pursuit of grants (including transportation-related funds from CAMPO [Capital Area Metropolitan Planning Organization]) for sidewalks;

**Safe Community** – Building Inspections enforcement of the *North Carolina Building Code* to assure safe, habitable structures; enforcement of the Stormwater Management Ordinance, applicable State law (e.g., Jordan Lake nutrient loading requirements), and provisions of the NPDES (National Pollution Discharge Elimination System) Phase II Permit;

**Quality Services** – Administration of the Town's stormwater management program; standards for high quality development contained in the UDO; award-winning policy documents (*McCrimmon TOD Small Area Plan*) and programs (Historic Christian Church; Pugh House renovation);

**Maximize Partnership Opportunities** – Coordination with Town of Cary (e.g., Western Wake Water Reclamation Facility, Inter-basin Transfer, permitting function); participation in various regional venues and policy efforts (CAMPO, Jordan Lake Partnership, TJCOG, RTP, etc.); leadership in professional societies (American Public Works Association; North Carolina Chapter of American Planning Association, professional associations of inspectors of various building trades); stakeholder groups utilized in preparing the UDO; support for various citizen advisory boards (PZB, ZBOA, CAC, RAIN);

**Courteous and Responsive Customer Service** – Quantitative results reported by all three departments indicate a large volume of citizen contact and service; Inspections Department and the DDS administrative personnel excel in strong customer service; marked improvement in quality of service and relations with development community developed by Engineering Department staff; outstanding effort by Planning staff to engage variety of stakeholders in lengthy, substantial participation in various projects (especially UDO, McCrimmon TOD Small Area Plan, McCrimmon Parkway Extension Development Guide);

**Efficient Services** – Inspections and DDS Administrative staff handle a large amount of permitting in an efficient manner (meeting or exceeding internal schedules); all three departments have improved in meeting internal schedules set for site plan and construction drawing (CD) review; Planning developing idea for a self-serve kiosk in DDS lobby area to facilitate customers who wish (and are able) to self-serve;

**Cultivate Community Involvement & Access** – As noted above, outstanding effort by Planning staff to engage stakeholders as part of developing various policy documents (UDO, McCrimmon TOD Small Area Plan, eMcCrimmon Parkway Extension Development Guide – 2 Plans and a Code); two requirements of the Town's Phase II Stormwater Permit entail public education and public involvement which the Engineering Department has proactively addressed (meetings with HOA's, citizens, conducting a project at a local middle school); Planning Department's *Planners Day in the Classroom*; DDS staff support for a variety of citizen advisory boards (PZB, ZBOA, CAC, RAIN);

**Investment in Infrastructure and Transportation** – Planning staff actively participates in CAMPO representation (including supporting Town Council Members) and coordinates transportation planning and pursuit of various funding sources; DDS staff participates as team members on Town-initiated projects; Engineering oversees design, construction, and maintenance of stormwater facilities (BMP's).

What are notable trends, exemplary accomplishments, and achievements to celebrate? These may include tangible items creating savings, improved efficiency, or effectiveness.

**Planning** – During the past year, several policy documents either were adopted or substantially completed - *McCrimmon TOD Small Area Plan*, *McCrimmon Parkway Extension Development Guide*, UDO, and the *Telecommunications Master Plan*. In addition, Ben Hitchings and his team coordinated the nomination process for awards given the Town for historic preservation (Pugh House – renovation by Public Works); coordinated the relocation of an historic tobacco barn to the Shiloh Community (which otherwise would have been demolished); continued to pursue implementation of the Main Street area of Town Center; and was heavily involved in educating local officials and providing input into legislation coming out of the North Carolina General Assembly during its 2013 session (some harmful to the interest of Morrisville and other municipalities);

**Engineering** – The first full year of implementation of the Town's stormwater program as a self-supported entity (through the stormwater fee) has been very successful, both in terms of accomplishments (particularly in regard to the NPDES Phase II Permit requirements) and public acceptance of the program and its requirements (the latter a tribute to the courteous but firm approach of Engineering staff); continuing improvement in the traditional engineering services - development plan review and construction management – in terms of timeliness, accuracy of work, and professional growth of staff;

**Inspections** – Inspections has taken the initiative to improve working relations with Fire Marshal staff; internal permitting procedures, including coordination with Town of Cary staff, continue to improve; Inspections recovered 139% of its costs through fee-generated revenues, not only supporting the Town's overall revenue picture but also indicating a continuing high level of building and inspections activity;

**Other** – Resolution of a lawsuit, which had been a focus of attention for three years.

What are areas for improvement and your recommended strategies to improve performance? Explain any related challenges that may hinder performance and/or opportunities that may improve performance.

**Planning** – The major areas for Planning in the coming year include 1) adoption of the UDO, including the conversion of the zoning maps; 2) implementation of the UDO, which may reveal major or minor inconsistencies which will need to be addressed through text amendments; 3) continuing to pursue implementation of the Main Street of the Town Center, including developing a public private partnership and working with local property owners; 4) participating in the Town's NC 54 Bypass project to make sure the broad objectives of the *NC 54 Bypass Development Guide* are incorporated into plans; 5) implementation of the *McCrimmon TOD Small Area Plan*; 6) Monitoring the North Carolina General Assembly during its 2014 session for legislation that is not in the Town's interests and which inject uncertainty into the regulatory environment;

**Engineering** – Engineering issues for FY2014 include 1) funding levels for the stormwater program (the current SW fee is 50% of the original staff recommendation, and staff has cut back its required efforts to match the reduced revenues); 2) as with Planning, monitoring the North Carolina General Assembly during its 2014 session for legislation that particularly weakens

environmental law and creates greater uncertainty; 3) the increased development activity as the economy rebounds and strengthens may strain staff capacities (management will be monitoring);

**Inspections** – Four areas are noted: 1) as with Planning and Engineering, there is a need to monitor new State legislation in 2014; 2) since so much of Inspections work is development-driven, the increased economic and development activity will likely push staff capacity; 3) greater progress in green building services is an objective; and 4) the increased number of code violations indicate uncertainty due to the changing code requirements (due largely to new State and Building Code Council requirements);

**Other** – Other issues affecting all three departments in DDS include: 1) the planned switch to a new software (HTE to OneSolution) will require a long lead time and substantial amount of staff work to prepare the data and internal procedures (preliminary introduction to DDS in fall 2014); 2) electronic review software (E-review) may enhance procedures in DDS and staff is interested in pursuing this upgrade in service; 3) a new lawsuit pertaining to a land use matter has been filed (this will result in staff time in FY2014 and likely beyond).

Demonstrate how performance measures were used to evaluate and direct operations; how have they been used to make improvements or validate current practices?

The measures were used to identify areas of activity where objectives were not met (e.g., progress toward finalizing the *Sustainability Plan*). Data regarding internal staff review schedules provides objective evidence regarding provision of this aspect of customer service; such information is particularly useful in reporting out to the Council.

What are the significant “Big Rock” priorities to consider going forward? Explain what budgetary impacts may result.

Overall, the Big Rocks” for DDS include:

- Adoption and implementation of the Unified Development Ordinance (UDO);
- Update 2009 Land Use & Transportation Plans
- Continuation of funding for Community Development Block Grant (CDBG)/NC Capital Area MPO Locally Administered Projects Program (LAPP) Project grants
- Completion of Church St/Town Center Walking Loop
- Continuing to grow the stormwater management program;
- Continuing to improve the development review process and internal staff communication;
- Supporting Town-initiated projects, including the NC 54 Bypass, RTP Park, MAFC discussions (location, design), the Municipal Service District (MSD), Main Street Site Control, and Phase 1 of Pavilion for Western Wake Farmer’s Market
- Responding to citizen and property owner queries;
- Making progress in the area of sustainability: completing and adopting the *Sustainability Plan*; expanding Inspections services; supporting Public Works efforts; completing the Secondary & Cumulative Master Mitigation Plan (SCIMMP).



# Budget Priorities

The priorities listed below were the result of a collaborative meeting with Senior Directors and Town Manager at the conclusion of the Performance Management to learn and identify areas of focus as budget development activities begin.

Category	Short-Term (1-2 years)	Long-Term (3-5 years)
<b>Revenues</b>	Monitor legislative discussions on Privilege License Tax Authority (approximately \$836K Revenue); short term mitigation plan in the event authority is removed or changed	Develop long-term approach to offset any loss in revenue should Privilege License Authority be lessened or removed
	Develop a consistent funding strategy for CAMPO/LAPP Grants for sidewalk/roadway improvement projects	Continuation of funding strategy to qualify for CAMPO/LAPP Grants and construct
	Stormwater Management funding enhancements for special projects (BMPs) in accordance with mandates	Sustained funding mechanism for Stormwater Management
	Continue funding Capital Reserve Fund (CRF) for Fire Apparatus Replacement	Sustain CRF
	Revisit Solid Waste cost recovery mechanism	
<b>Personnel</b>	Wellness & Recognition Plan	Long Term Wellness & Recognition
	Performance Pay Plan Updates & Improvements	Sustainable Performance Pay Plan
	Healthcare cost under Affordable Care Act	Sustainable Healthcare Benefit Package
	One Solution Implementation GMBA	One Solution Plan Review Implementation
	Staffing Resources Information Technology & Finance - growing workload demands	Staffing Resources in Development Services -implementing new software
	Revisit Staffing Needs Assessment Plan	
<b>Operations</b>	2009 Land Use & Transportation Plan (LUTP) Update	LUTP is Multi-year professional service project
	Complete Sustainability Plan	Organizational enhancements relating to implementation of Sustainability Plan
	Project Wolverine Incentive	
	UDO Implementation	
	Second Phase Main Street Site Control	
<b>Capital Outlay/Debt</b>	Church Street Sidewalk (CDBG) and Town Center Walking Loop (LAPP) project completion	
	Re-commitment to Town Center Plan	Pavilion Phase 1 - Public Private Partnership Farmer's Market (relates to an unfunded CIP project concept)
	MAFC Feasibility Study (remodel or relocation – active CIP project) & relationship to Town Center	MAFC design & construction 2012 Bond Project
	Continuation design & construction NC54 Bypass 2012 Bond Project	
	Police/Fire Radio Equipment Replacement	Multi-year replacement of Radio equipment
	Fund an additional K-9 Unit	Develop a K-9 Replacement Plan
	Plan for implementation and funding MSD Projects	Design & construction of MSD Projects
	Street Maintenance Plan – funding necessary to impact deficit (\$1M)	Legislative impact to Powell Bill funding for street maintenance
	Establish funding for sidewalk gaps and greenway segments relating to Parks Master Plan	Sustain funding for sidewalk and greenway installation
	Redundancy Network Systems IT to mitigate down time	
	Public Works Facility improvements or relocation (relates to an unfunded CIP project concept)	
	Traffic Signal Pre-emption Project – Smart Thinking Project	

Performance Management program is adapted from the Balance Scorecard System. Performance information is used to produce the Citizen Report annually.