



Strategic Priorities Overview

The Village of Pinehurst Strategic Operating Plan (SOP) is a tool used to develop and communicate the Village’s strategic priorities for the upcoming fiscal year and the five-year planning period. This section of the SOP identifies the Village’s strategic priorities to advance its vision to be a “charming, vibrant community which reflects our rich history and traditions.”

Strategic priorities consist of nine community goals that are established by the Village Council. Each year, the Council and Senior Staff update the SOP based on a review of the current environment at their annual strategic planning retreat in December. For each community goal, the Council has identified strategic objectives with Key Performance Indicators (KPIs) to demonstrate the Village’s performance in achieving desired outcomes.

The Village uses a Balanced Scorecard (BSC) to integrate strategic planning and resource allocation. The BSC uses four perspectives to ensure a balanced approach to evaluating achievement of organizational strategy:

1. Customer – Delivering the services customers want at the level desired
2. Internal – Enhancing services through continuous improvement
3. Workforce – Developing an engaged workforce to provide quality services
4. Financial – Managing resources to ensure financial sustainability





Strategic Planning Process

The evolution to a strategy-focused organization began with the implementation of the national Baldrige Performance Excellence Framework in FY 2012, when the Village embarked on its continuous process improvement effort and began participating in the North Carolina Awards for Excellence program.

The Pinehurst Village Council kicks off the strategic planning process with an annual retreat in December. At this retreat, the Council affirms or modifies the Mission, Vision, and Values (MVV), identifies core competencies, conducts an environmental scan, identifies the Village's strategic advantages and challenges, completes a SWOT analysis, identifies strategic goals and objectives, and Key Performance Indicators (KPIs).

Using the key inputs into the strategic planning process, the Village Council then sets short term and long term target performance levels for the KPIs included on the BSC based on a review of benchmark communities' performance relative to the Village's performance. The Council identifies the Areas of Focus for the five-year planning period, which include those strategic objectives and KPIs where more significant performance improvement is identified in both the short term and long term planning period.



With goals, objectives, and target performance levels set by the Council, management develops Initiative Action Plans (IAPs) aimed at addressing the strategic objectives for community goals, and ultimately accomplishing the Village's mission and vision. IAPs are identified at an annual retreat of Senior Staff and Council-appointed board chairs in January. Department Heads then develop and refine departmental goals that are directly linked to the community goals. Accomplishment of departmental goals is measured by KPIs on Department BSCs that cascade directly from the BSC. Department BSCs can be found in the *General Fund* section of the SOP.

All Initiative Action Plans (IAPs) are evaluated by the Strategic Planning Team, which consists of the Village Manager, Assistant Village Managers, Human Resources Director and Financial Services Director based on the following three criteria identified by the Village Council:

1. The extent to which the IAP is able to positively impact performance levels on the BSC and identified Areas of Focus,
2. The extent to which the Village has the organizational/workforce capacity to implement the IAP, and
3. The net financial impact of the IAP over the five-year planning period.

To help determine the Village's financial capacity to fund the Strategic Operating Plan, staff prepares a financial forecast that is included in the *Five-Year Financial Forecast* section of the SOP. Several assumptions are made relative to revenues and expenditures, based on historical trends and future projections. The five-year projections are inclusive of the five-year Capital Improvements Plan (CIP) that incorporates approved IAPs and all associated projected operating costs. The Five-Year Financial Forecast is developed to ensure fund balance remains within the target range of 30%-40% of budgeted



Strategic Planning Process

expenditures and operating margins fall within acceptable levels to ensure adequate levels of capital reinvestment.

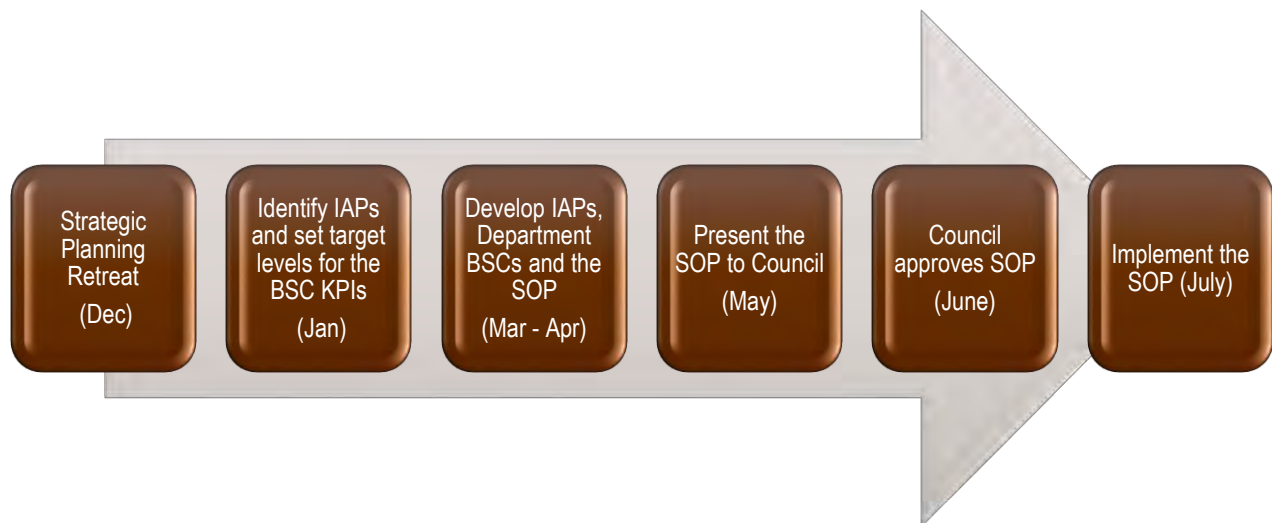
In developing the five-year CIP, the Strategic Planning Team reviews and determines the Fleet and IT replacement schedules and plans for other major capital improvements with the respective Department Heads. Based on the overall financial projections, the Strategic Planning Team determines which capital investments are best suited for installment financing to ensure there is adequate financial capacity for any required annual debt service.

The Five-Year Financial Forecast for FY 2017-2021 is summarized below:

	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021
General Fund Revenues	\$17,248,300	\$17,491,000	\$17,731,000	\$17,975,000	\$18,205,000
General Fund Expenditures	18,249,985	18,469,817	19,604,001	18,914,879	19,202,495
Revenues Over (Under) Expenditures	\$(1,001,685)	\$(978,817)	\$(1,873,001)	\$(939,879)	\$(997,495)
Budget to Actual Variance *	957,511	978,876	1,002,535	1,028,669	1,056,800
Projected Actual Gain/(Loss)	\$(44,174)	\$59	\$(870,466)	\$88,790	\$59,305
Projected GF Balance as a % of Total Budget	44.5%	44.0%	37.0%	38.8%	38.5%

**Assumes actual revenues of 101% of budget and actual expenditures of 95% of budget*

Once financial capacity for Initiative Action Plans and the baseline budget is determined, staff prepares and presents the Village's Strategic Operating Plan to the Village Council for review and approval. As required by NC General Statutes, the Council holds a Budget Public Hearing each year prior to adoption to allow residents the opportunity to comment on the Recommended Budget. The following diagram indicates the key steps and timing of the Strategic Planning Process:





Key Inputs into the 2017 Strategic Operating Plan

Mission, Vision, and Values

At the December 2015 Council Retreat, the Council affirmed the Village’s Mission, Vision, and core values. The Vision is what the Village intends to be, while the mission is what the Village must accomplish to achieve that vision. The Village core values are the guiding principles and behaviors that embody how Village employees are expected to operate as they provide services.

Core Competencies

Core competencies represent those areas of the Village’s greatest expertise and are those strategically important capabilities that are central to fulfilling the Village’s mission. At the December 2015 Retreat, the Council reviewed and amended the five core competencies of the Village to include:

1. Community Engagement
2. Continuous Improvement
3. Customer Focus
4. Effective Collaborative Relationships
5. Talented Employees and Volunteers



Strategic Advantages and Challenges

Strategic advantages are those benefits that exert a decisive influence on the Village’s likelihood of future success and are the source of competitive success. Strategic challenges are those external pressures that exert a decisive influence on the Village’s likelihood of future success. The strategic challenges and strategic advantages identified by the Village Council in December 2015 are below:

Strategic Challenges	Strategic Advantages
Meeting the needs of younger residents (address indoor recreation needs)	Financial strength
Identifying future financial resources due to limited revenue growth	Brand image
Addressing the needs of our neighborhoods	Culture of engagement
Clearly defining our commercial and residential identity	Collaborations
Transferring knowledge	Culture of continuous improvement
Developing the highest and best use for undeveloped land	Staff expertise
	Safe community
	Community appearance
	Customer focus

SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis

The Council also conducted a SWOT analysis at their December 2015 Strategic Planning Retreat and identified organizational and community strengths, weaknesses, opportunities, and threats.



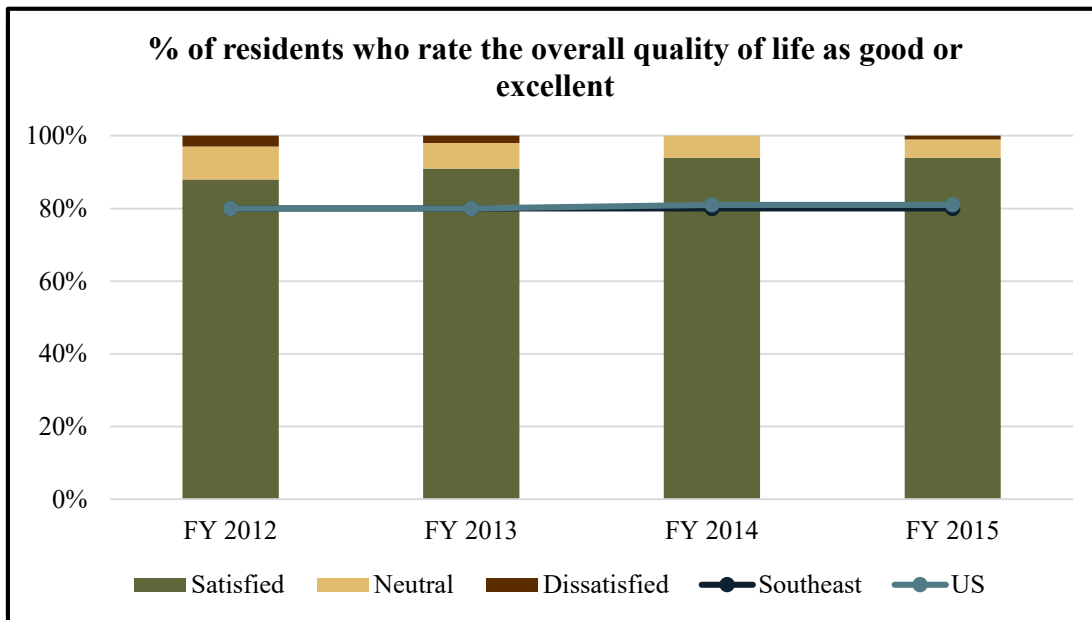
Environmental Scan

The environmental scan consists of a review of critical data and information that can impact service delivery. During the December 2015 Strategic Planning Retreat management reviewed demographic trends, customer feedback from the annual Community and Business Surveys, feedback from the annual Workforce and Volunteer Surveys, economic data, key performance indicators (KPIs), financial data, and emerging trends. Community survey results were segmented by neighborhood, resident age, and length of residence to facilitate further analysis. Workforce results were also segmented by department.

FY 2017 Strategic Goals, Objectives, and Key Performance Indicators

The Council’s strategic goals, objectives, and Key Performance Indicators (KPIs) for each of the four perspectives of the 2017 Balanced Scorecard are detailed on the following pages.

At the core of the BSC is the Village’s mission to “promote, enhance, and sustain the quality of life for residents, businesses, and visitors.” The Village measures its mission by asking residents to rate the overall quality of life in the Village during the annual Community Survey. In the most recent survey, **99% of residents rated the overall quality of life as good or excellent (including neutrals)**, up from 97% in 2012. This is in comparison to the Southeast and U.S. benchmarks of 80%, and 81% respectively.



This year, the FY 2017 and FY 2021 targets on the BSC for community survey results, workforce survey results, and volunteer survey results include the percentage of respondents who indicate “Neutral.” This change was made to more readily identify the percentage of respondents who are “Dissatisfied.” The Southeast and U.S. comparisons provided by the Village’s survey company, ETC Institute, do not include “Neutral” ratings and this information is not available.



Balanced Scorecard

The FY 2017 Village of Pinehurst Balanced Scorecard (BSC), by perspective, is shown below:

FY 2017 Balanced Scorecard							
MISSION: Promote, enhance, and sustain the quality of life for residents, businesses, and visitors.							
	Goal We intend to...	Strategic Objective How we will...	KPI Description How do we know...	Actual FY 2015	Est. FY 2016	ST Target FY 2017	LT Target FY 2021
Customer	Safeguard the community	Deliver effective public safety services	UCR index crime rate per 1,000 residents	7.86	9.00	12	12
			% of residents whose overall feeling of safety in the Village is good or excellent	99%	99%	95%	95%
			% of residents satisfied with how quickly fire personnel respond to emergencies	99%	99%	95%	95%
			% of residents satisfied with the enforcement of local traffic laws	89%	90%	90%	95%
	Ensure Pinehurst is a premier residential community	Maintain a high level of overall appearance of Pinehurst public spaces	% of residents who rate the overall appearance of the Village as good or excellent	99%	98%	95%	95%
			Improve the quality of neighborhoods AOF				
			% of residents satisfied with the enforcement of Village codes and ordinances	85%	85%	87%	90%
	Ensure a thriving business community	Provide a business-friendly environment	% of residents satisfied with Village efforts to maintain the quality of neighborhoods	89%	89%	90%	95%
			Attract future residents to strengthen the housing market	Single family home average sales price	\$257,000	\$262,000	\$267,000
	Provide multimodal transportation systems	Provide interconnected greenway trails, bike paths, and sidewalks AOF	1st floor occupancy rate in the Village Center	87%	94%	90%	90%
			% of businesses likely to recommend the Village as a business location	90%	90%	90%	90%
	Manage solid waste collection	Provide effective and efficient solid waste collection services	% of residents satisfied with the availability of sidewalks	64%	65%	68%	80%
			% of residents satisfied with the availability of greenway/walking trails	90%	90%	90%	90%
	Maintain an active, healthy community	Reduce, reuse, and recycle resources	Maintain high quality streets and right of ways	% residents satisfied with street and right of way maintenance	90%	90%	90%
% of residents satisfied with solid waste services			96%	96%	95%	95%	
Professionally manage a high performing organization	Provide recreation programs, leisure activities, and cultural arts events for all ages	% of refuse diverted from the landfill	35%	34%	35%	35%	
		% of residents satisfied with P&R programs	95%	95%	95%	95%	
Internal	Enhance community engagement AOF	% of residents satisfied with Village sponsored cultural arts events	91%	92%	90%	90%	
		% of residents satisfied with Village communications	97%	97%	95%	95%	
		% of residents satisfied with the level of public involvement in local decisions	86%	88%	90%	90%	
Workforce	Continuously improve operational effectiveness through quality performance, use of technology, and innovation	Full time equivalents per million \$ of revenue	7.9	7.8	8.0	8.0	
		% of residents satisfied with the value received for taxes paid	92%	90%	90%	90%	
		% of employees who agree that overall they are satisfied with their job	97%	95%	95%	95%	
Financial	Attract & retain an engaged workforce	% of volunteers satisfied with the volunteer experience	97%	95%	95%	95%	
		Employee engagement index	7.97	8.00	8.00	8.75	
Financial	Maintain a healthy financial condition	Unassigned GF fund balance as a % of actual expenditures	31%	26%	20%	20%	
		Maintain capital assets	Capital asset condition ratio	47%	47%	47%	45%

Items in red are Areas of Focus (AOF) for FY 2017 based on performance levels, strategic challenges, and resident priorities.



Initiative Action Plans

Initiative Action Plans (IAPs)

The 23 FY 2017-2021 IAPs total \$6.3 million, including ongoing operating costs, and address Council's strategic objectives and Areas of Focus, thereby helping to ultimately achieve the goals on the BSC.

FY 2017 – FY 2021 Initiative Action Plans (IAPs)						
	Goal	Strategic Objective	IAP Description	Fiscal Year(s)	\$ in Five-Year Plan	
Customer	Safeguard the community	Deliver effective public safety services	Traffic pre-emption program	FY 2017-2021	\$62,500	
			Fire Department accreditation	FY 2017	\$15,000	
			Citizens on Patrol	FY 2017-2018	\$0	
			Community Watch	FY 2018	\$0	
			Traffic enforcement	FY 2017	\$554,660	
	Ensure Pinehurst is a premier residential community	Improve the quality of neighborhoods AOF	Maintain a high level of overall appearance of Pinehurst public spaces	n/a	n/a	n/a
			Land use analysis	FY 2017	\$50,000	
			Code enforcement	FY 2017	\$73,900	
			Comprehensive Long Range Plan Update	FY 2018-2019	\$75,000	
			Street lighting	FY 2017-2020	\$19,600	
	Attract future residents to strengthen the housing market		Marketing and promotion	FY 2017	\$185,000	
	Ensure a thriving business community	Provide a business-friendly environment	Streetscape enhancements	FY 2017-2018	\$292,500	
	Provide multimodal transportation systems	Provide interconnected greenway trails, bike paths, and sidewalks AOF	Greenways	FY 2017-2021	\$350,000	
			Neighborhood sidewalks	FY 2017-2021	\$1,980,200	
			Maintain high quality streets and right of ways	n/a	n/a	n/a
	Manage solid waste collection	Provide effective and efficient solid waste collection services	Supplemental yard debris collection	FY 2017	\$20,000	
		Reduce, reuse, and recycle resources	n/a	n/a	n/a	
Maintain an active, healthy community	Provide recreation programs, leisure activities, and cultural arts events for all ages	Recreation facilities	FY 2017-2021	\$2,236,815		
Internal	Professionally manage a high performing organization	Enhance community engagement AOF	Civic engagement	FY 2017-2018	\$135,200	
			Performance dashboards	FY 2018	\$21,200	
		Continuously improve operational effectiveness through quality performance, use of technology, and innovation	Continuous process improvement	FY 2017-2021	\$67,000	
			P&I automation	FY 2018	\$41,250	
Workforce	Attract & retain an engaged workforce	Provide a supportive and rewarding work environment AOF	Workforce plans	FY 2017-2018	\$2,000	
			Learning and development system	FY 2017-2018	\$20,000	
			Incentive reward program	FY 2019	\$120,000	
			PD staffing	FY 2017	\$302,600	
Financial	Maintain a healthy financial condition	Meet or exceed established financial targets	n/a	n/a	n/a	
		Maintain capital assets	n/a	n/a	n/a	

Items in red are Areas of Focus (AOF) for FY 2017 based on performance levels, strategic challenges, and resident priorities.



The Initiative Action Plans in the Five-Year Financial Forecast strive to leverage the Village’s core competencies and strategic advantages, while addressing strategic challenges and opportunities. In many cases, IAPs are based on research of best practices in benchmark communities.

The Village is focused on continuous improvement and several IAPs in the 2017 Strategic Operating Plan are aimed at process improvements. More significant process improvements follow a systematic six step performance improvement process called BIRDIE. Less significant process improvements follow a simple three step process called ACE. The Village plans to conduct one BIRDIE on the Village’s permitting processes in FY 2017 & FY 2018 and 10 ACE process improvements between FY 2017 and FY 2021. The ACE process improvements are indicated on the applicable IAPs in the following pages.



The BIRDIE process is detailed below:

BIRDIE Process	
B	Bring the opportunity forward (identify what can be improved)
I	Investigate the opportunity (what does the data tell you?)
R	Review potential solutions (identify ALL possible solutions)
D	Determine the solution and develop the action plan (KPIs for desired outcomes, timing and resources)
I	Implement the solution according to the action plan
E	Evaluate the effectiveness of the solution based on performance data

The pages that follow include information on each BSC goal and their associated strategic objectives, short term and long term Initiative Action Plans, and Key Performance Indicators. While the vast majority of Council’s objectives have IAPs aimed at achieving them, resources have been allocated in the 2017 Strategic Operating Plan to higher priority IAPs and a few objectives are therefore not addressed. Based on current performance levels on the BSC, the Village is already demonstrating excellent performance levels (e.g. above 90% satisfaction ratings) for those objectives not addressed. See the individual department goals and department BSCs included in the *General Fund* section of this document for additional information.

The pages that follow also include graphs of the Village’s observed results for those KPIs on the BSC. The Village’s historical results are indicated by the green bars in the graphs. The FY 2017 and FY 2021 goals are indicated by the blue bars. Council has set goals for most survey related KPIs at 95% or 90%, based on historical results. Where results have been consistently above 95%, goals are set at 95% and when results have consistently hovered closer to 90%, goals are set at 90%. The Village’s surveys typically have a margin of error of 5%. When applicable and available, the graphs also include comparable information indicating the Village’s performance relative to others, as described below:

- Southeast – Average of cities using the Direction Finder Survey by ETC Institute in the southeast
- US - Average of cities using the Direction Finder Survey by ETC Institute in the United States
- Comp – A benchmark community selected for that KPI
- SHRM Avg – Society of Human Resources survey average



Goal: Safeguard the Community

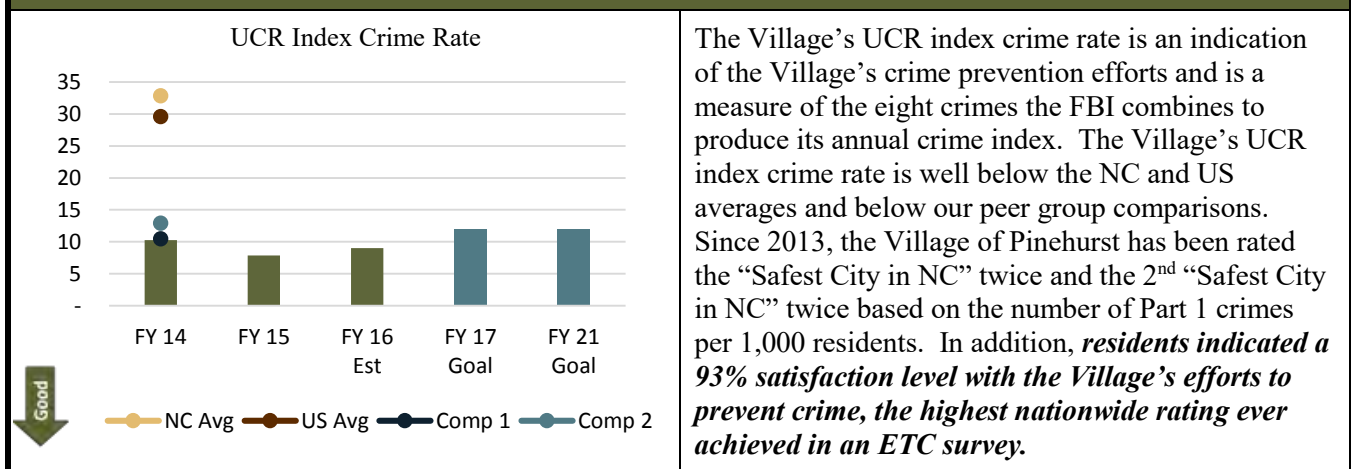
To safeguard the community means to protect the lives and property of residents, businesses, and visitors. Departments primarily responsible include Police, Fire, and Inspections. Applicable volunteers include Citizens on Patrol and Community Watch. See the *General Fund* section of this document for additional financial and performance information on the departments. There is one objective under the goal to Safeguard the Community: Deliver effective public safety services.

The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for that objective are identified below.

Objective: Deliver effective public safety services		
Initiative Action Plans	Timeline	Department
Traffic pre-emption program – install traffic pre-emption devices at signalized intersections	FY 2017-2021	Fire
Fire Department accreditation – achieve international accreditation in the Fire Department	FY 2017	Fire
Citizens on Patrol (ACE) – expand utilization of Citizens on Patrol	FY 2017-2018	Police
Community Watch (ACE) – expand the Community Watch program	FY 2018	Police
Traffic enforcement – increase enforcement of local traffic laws with two additional police officers	FY 2017	Police

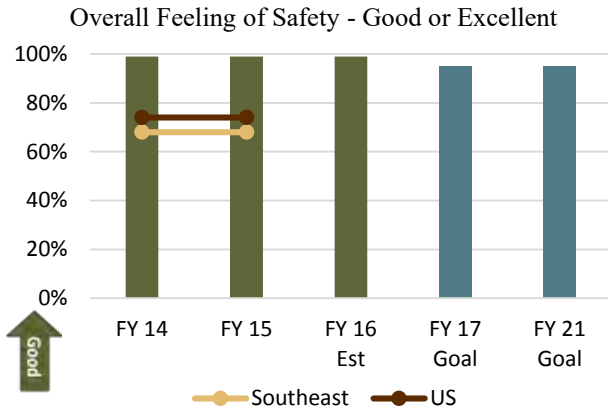
Key Performance Indicators (KPIs) – Deliver effective public safety services

Maintain a UCR index crime rate per 1,000 residents below 12



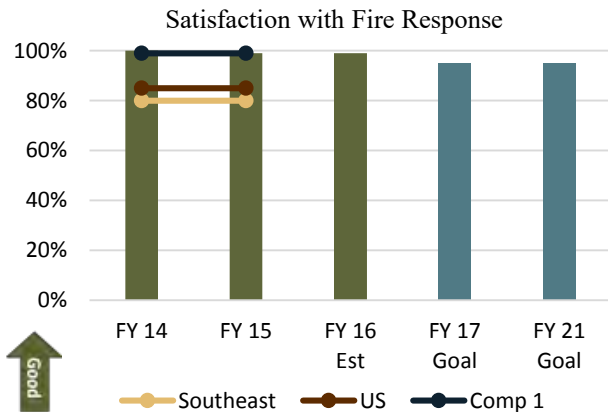


Maintain a 95% resident rating of the overall feeling of safety in the Village as good or excellent



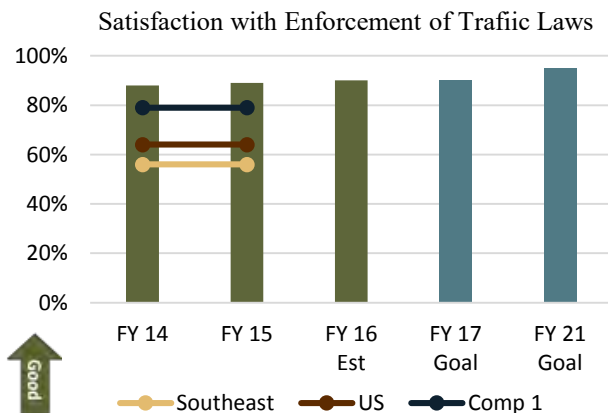
Each year residents indicate their overall feeling of safety during the annual Community Survey. The Village far exceeds both the US and Southeast in resident overall feeling of safety. In addition, **residents indicated a 99% satisfaction level with their feeling safety in their neighborhood during the day (excluding neutrals), the 2nd year in a row the Village achieved the highest nationwide rating ever achieved in an ETC survey.**

Maintain a 95% resident satisfaction rating with how quickly fire personnel respond to emergencies



Residents indicate their satisfaction with fire response during the annual Community Survey. Historically, residents have been extremely satisfied with the Fire Department's response times. As the department is in the process of seeking international accreditation, fire response times have been an area of focus for the department and have improved in recent years.

Maintain a 90% resident satisfaction rating with enforcement of local traffic laws



In the annual Community Survey, residents indicate their satisfaction with the enforcement of traffic laws. The Village exceeds both the US and Southeast and a comparable community. In addition, the NC Department of Transportation publishes a ranking of the safest roads in NC based on collisions, injuries, and population. **For the past several years, the Village has ranked in the top 5 in the state for the safest roads.**



Goal: Ensure Pinehurst is a Premier Residential Community

To ensure Pinehurst is a premier residential community means to deliver planning, infrastructure, code enforcement, police patrols, and grounds maintenance services to maintain a high level of overall appearance of public spaces and neighborhoods. Departments primarily responsible include Planning, Streets & Grounds, Police, Recreation, and Buildings & Grounds. Applicable volunteer committees include the Bicycle and Pedestrian Advisory Committee, Beautification Committee, Planning & Zoning/Board of Adjustment, the Historic Preservation Commission, and the Neighborhood Advisory Council. See the *General Fund* section of this document for additional information on the departments. There are three objectives under the goal to Ensure Pinehurst is a Premier Residential Community:

1. Maintain a high level of overall appearance of Pinehurst public spaces,
2. Improve the quality of neighborhoods ^{AOF}, and
3. Attract future residents to strengthen the housing market.

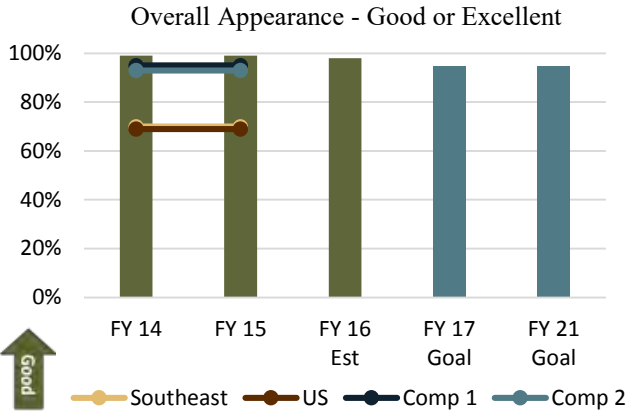
The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for these objectives are identified below.

Objective: Improve the quality of neighborhoods ^{AOF}		
Initiative Action Plans	Timeline	Department
Land use analysis – conduct a comprehensive land use analysis of the Village to determine the highest and best use of developable land	FY 2017	Planning
Code enforcement – increase code enforcement capacity and routinely patrol neighborhoods	FY 2017	Planning
Comprehensive Long Range Plan update – update the Village’s Comprehensive Long Range Plan	FY 2018-2019	Planning
Street lighting – expand street lighting in neighborhoods	FY 2017-2020	Streets & Grounds
Objective: Attract future residents to strengthen the housing market		
Initiative Action Plans	Timeline	Department
Marketing and promotion (ACE) – expand marketing and promotional efforts	FY 2017	Community Development



Key Performance Indicators (KPIs) - Maintain a high level of overall appearance of Pinehurst public spaces

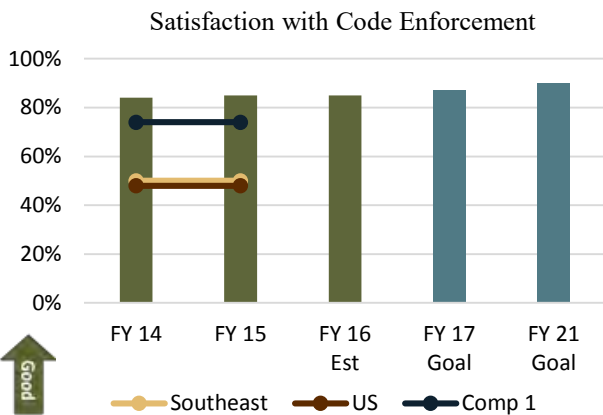
Maintain a 95% resident rating of the overall appearance in the Village as good or excellent



Each year residents indicate their assessment of the overall appearance of the Village during the annual Community Survey. Historically, residents have been extremely satisfied with the overall appearance of the Village, exceeding both the US and Southeast and comparable communities. The Village’s Beautification Committee has worked in conjunction with staff over the past several years to beautify the right of ways at key intersections with additional landscaping to improve the overall appearance of the Village.

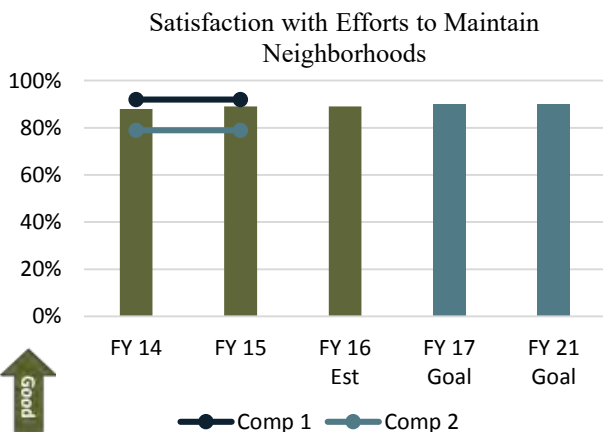
Key Performance Indicators (KPIs) – Improve the quality of neighborhoods AOF

Achieve an 87% resident satisfaction rating with the enforcement of codes and ordinances



Resident satisfaction with the enforcement of codes and ordinances has been historically low relative to other satisfaction ratings in the annual Community Survey. This year (and last year), code compliance is an *Area of Focus* for the Village, as the Village strives to improve these satisfaction ratings. In FY 2016, the Village conducted a BIRDIE on code enforcement and modified its process to include friendly reminders and additional public education on Village codes and ordinances. In FY 2017, the Village intends to incorporate routine patrols of neighborhoods to identify code compliance issues prior to receiving resident complaints.

Achieve a 90% resident satisfaction rating with efforts to maintain the quality of neighborhoods

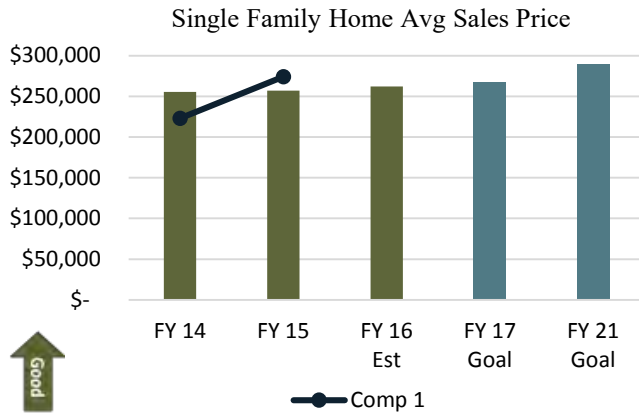


Another *Area of Focus* for the Village in FY 2017 is resident satisfaction with Village efforts to maintain the quality of neighborhoods. Striving to achieve “Excellent” results above 90% satisfaction levels, the Village has several IAPs to address the quality of neighborhoods in the SOP, such as increased traffic enforcement, code enforcement, land use analysis, and an update to the Village’s Comprehensive Long Range Plan.



Key Performance Indicators (KPIs) – Attract future residents to strengthen the housing market

See an increase in the single family home average sales price to \$267,000



Because 98% of taxable property in the Village is residential property, the Village monitors the single family home average sales price as indicated by the Moore County Regional Association of Realtors. Projected growth in home values is based on Zillow.com forecasts of median sales price increases for Pinehurst.



Pinehurst Neighborhood



Goal: Ensure a Thriving Business Community

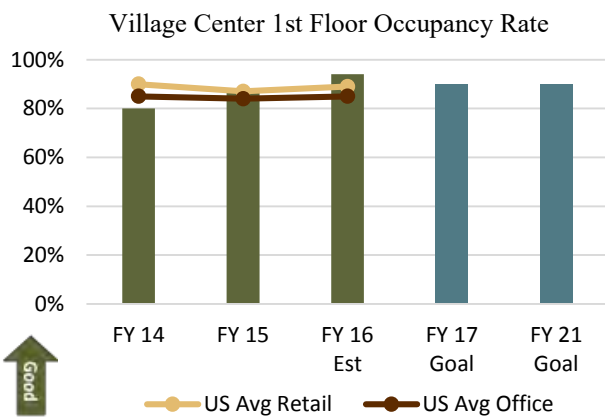
To ensure a thriving business community means to support economic and business development. Departments primarily responsible include Administration, Planning, and Community Development. Applicable volunteers include the Welcome Center volunteers. See the *General Fund* section of this document for additional information on the departments. There is one objective under Ensure a Thriving Business Community: Provide a business-friendly environment.

The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for this objective are identified below.

Objective: Provide a business-friendly environment		
Initiative Action Plans	Timeline	Department
Streetscape enhancements – expand brick sidewalks and streetscape improvements around the Village Center	FY 2017-2018	Streets & Grounds

Key Performance Indicators (KPIs) – Provide a business-friendly environment

Maintain at least a 90% occupancy rate for 1st floor space in the Village Center

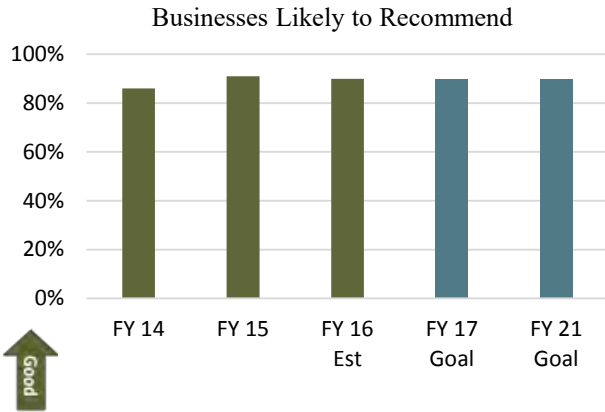


First floor occupancy rates in the Village Center is an indicator of the economic health of Village businesses. Occupancy rates have increased in the Village Center in recent years with a focus on supporting businesses and providing a business-friendly environment.



Key Performance Indicators (KPIs) – Provide a business-friendly environment

Maintain at least a 90% of businesses likely to recommend the Village as a business location



Each year, the Village conducts an annual Business Survey to determine business owner satisfaction levels. Businesses are one of the Village’s key customer groups and their likelihood to recommend is an indication of their engagement as a customer. Currently, the Village is achieving excellent results with approximately 90% of businesses likely to recommend the Village as a business location.



Village Center Business Sign



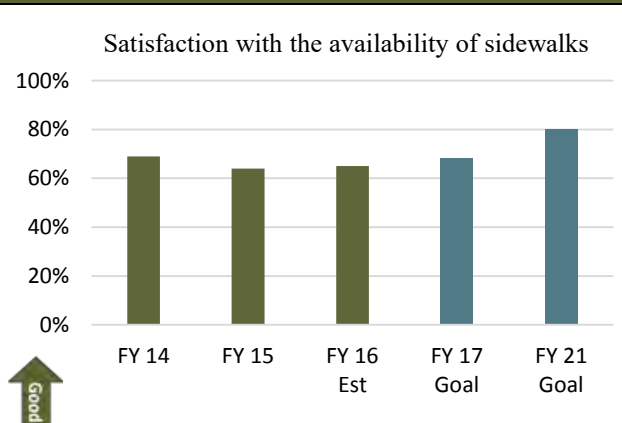

Goal: Provide Multi-Modal Transportation Systems

To provide multi-modal transportation systems means to provide efficient and well-maintained roadways, sidewalks, greenway trails, and other transportation alternatives to ensure safe and adequate mobility and connectivity. Departments primarily responsible include Streets & Grounds and Parks & Recreation. Applicable volunteers include the Bicycle and Pedestrian Advisory Committee. See the *General Fund* section of this document for additional information on the departments. There are two objectives under Provide Multi-Modal Transportation Systems:

1. Provide interconnected greenway trails, bike paths, and sidewalks AOF, and
2. Maintain high quality streets and right of ways.

The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for these objectives are identified below.

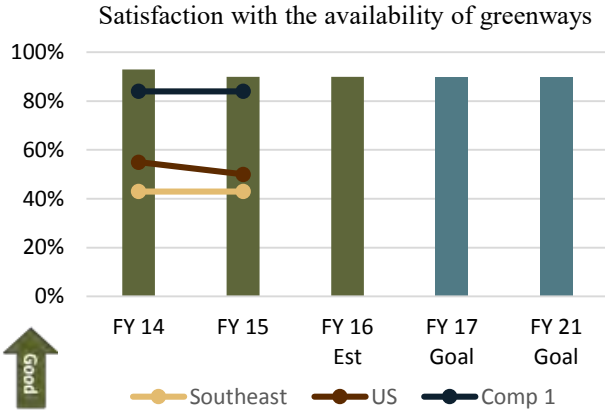
Objective: Provide interconnected greenway trails, bike paths, and sidewalks AOF		
Initiative Action Plans	Timeline	Department
Greenways – expand the greenway system and maintain/renovate existing trails	FY 2017-2021	Parks & Recreation
Neighborhood sidewalks – install sidewalks in Village neighborhoods, per the Comprehensive Pedestrian Master Plan	FY 2017-2021	Parks & Recreation

Key Performance Indicators (KPIs) – Provide interconnected greenway trails, bike paths, and sidewalks AOF													
Increase resident satisfaction with the availability of sidewalks to 68%													
<p>Satisfaction with the availability of sidewalks</p>  <table border="1"> <caption>Satisfaction with the availability of sidewalks</caption> <thead> <tr> <th>Fiscal Year</th> <th>Satisfaction Level</th> </tr> </thead> <tbody> <tr> <td>FY 14</td> <td>~68%</td> </tr> <tr> <td>FY 15</td> <td>~65%</td> </tr> <tr> <td>FY 16 Est</td> <td>~65%</td> </tr> <tr> <td>FY 17 Goal</td> <td>68%</td> </tr> <tr> <td>FY 21 Goal</td> <td>68%</td> </tr> </tbody> </table>	Fiscal Year	Satisfaction Level	FY 14	~68%	FY 15	~65%	FY 16 Est	~65%	FY 17 Goal	68%	FY 21 Goal	68%	<p>To address low resident satisfaction levels with the availability of sidewalks, the Village appointed a steering committee to develop the Comprehensive Pedestrian Master Plan that was approved by the Village Council in 2015. This plan identifies recommended locations for neighborhood sidewalks. Using this plan and Community Survey results segmented by neighborhood, the Village has identified four neighborhoods to target for sidewalk expansions. This is an <i>Area of Focus</i> for the Village and the Five-year Financial Forecast includes the construction of neighborhood sidewalks in each of the next five years to help improve resident satisfaction ratings.</p>
Fiscal Year	Satisfaction Level												
FY 14	~68%												
FY 15	~65%												
FY 16 Est	~65%												
FY 17 Goal	68%												
FY 21 Goal	68%												



Key Performance Indicators (KPIs) – Provide interconnected greenway trails, bike paths, and sidewalks

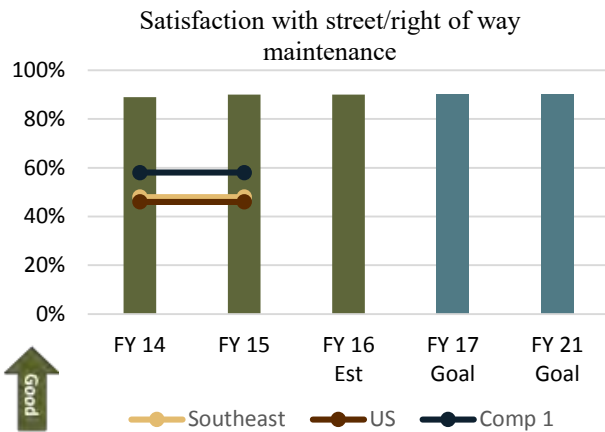
Maintain resident satisfaction with the availability of greenway/walking trails at 90%



The Village began construction greenways as a result of resident input in the Village’s first Comprehensive Long Range Plan in 2003. Over time, the Village has constructed over 7 miles of greenways and has achieved high resident satisfaction levels with the availability of greenways that exceed the Southeast and US averages as well as a comparable community.

Key Performance Indicators (KPIs) – Maintain high quality streets and right of ways

Maintain resident satisfaction with street and right of way maintenance at 90%



Overall, the Village has achieved high levels of satisfaction with street/right of way maintenance. This is well above the Southeast and US averages and a comparable community. In addition, *residents indicated a 92% satisfaction level with maintenance of major streets in the Village in the most recent Community Survey (excluding neutrals), marking the highest nationwide rating ever achieved in an ETC survey.*



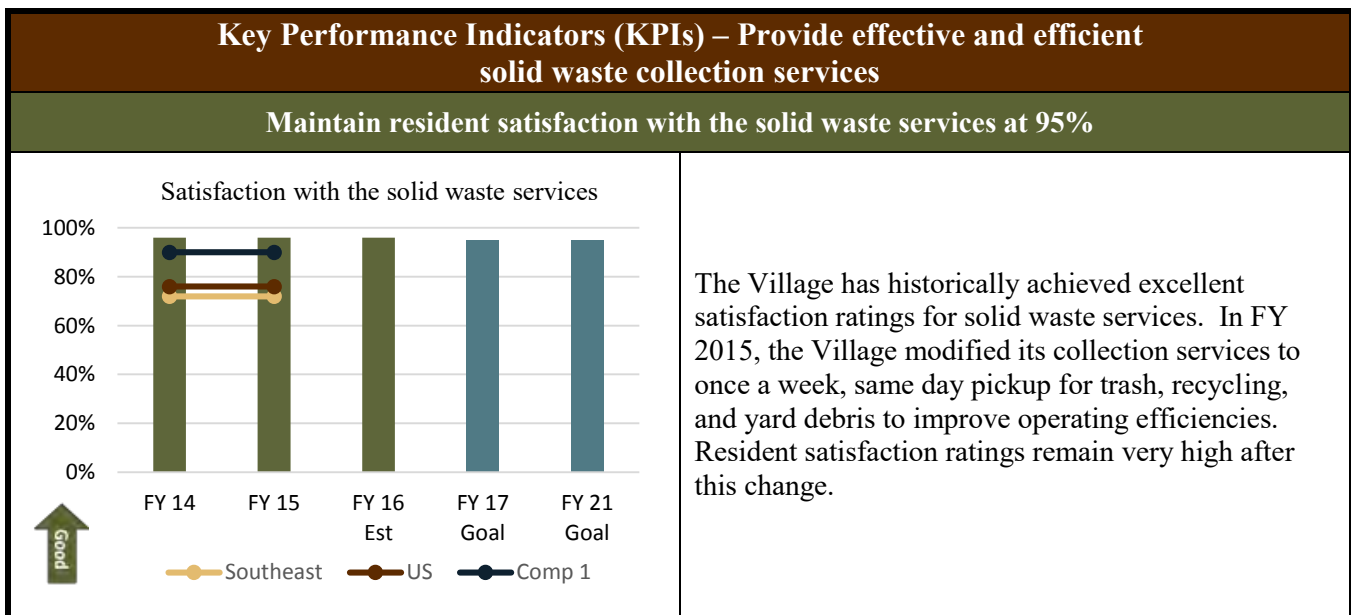

Goal: Manage Solid Waste Collection

To manage solid waste collection means to provide efficient and effective collection of household trash, recycling, and yard debris. The department primarily responsible is Solid Waste. Applicable volunteers include the Conservation Commission and its subcommittees. See the *General Fund* section of this document for additional information on the departments. There are two objectives under Promote Environmental Sustainability:

1. Provide effective and efficient solid waste collection services, and
2. Reduce, reuse, and recycle resources.

The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for these objectives are identified below.

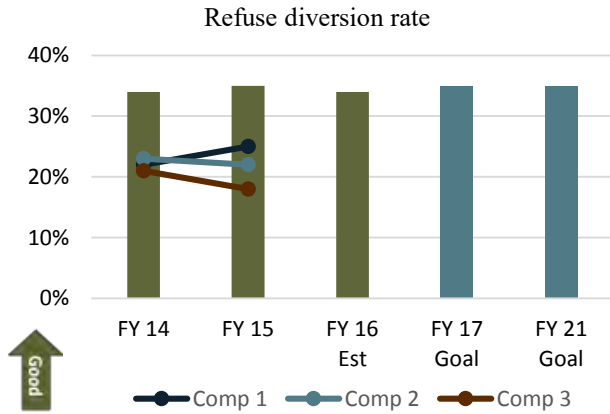
Objective: Provide interconnected greenway trails, bike paths, and sidewalks		
Initiative Action Plans	Timeline	Department
Supplemental yard debris collection (ACE) – provide supplemental fall leaf and storm debris collection	FY 2017	Solid Waste





Key Performance Indicators (KPIs) – Reduce, reuse, and recycle resources

Divert at least 35% of waste from the landfill



For the past three years, the Village has ranked in the top 4% in the state of NC for solid waste diversion rates, consistently exceed comparable communities. In addition, *residents indicated a 92% satisfaction level with curbside recycling services and a 96% satisfaction level with residential trash collection services (excluding neutrals), marking the highest nationwide ratings ever achieved in an ETC survey.*



“One and Done” Solid Waste Same Day Collection

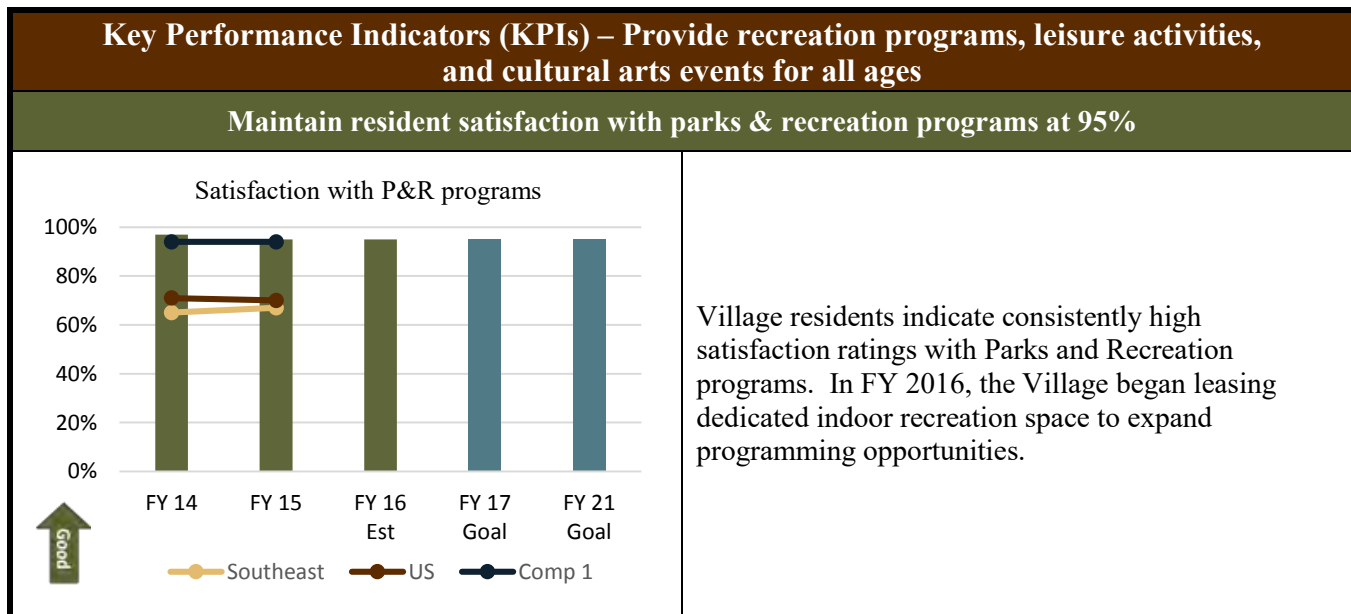



Goal: Maintain an Active, Healthy Community

To maintain an active, healthy community means to offer recreation programs, facilities, and community events to enhance the overall quality of life. The department primarily responsible is Recreation. Applicable volunteers include the numerous volunteer coaches. See the *General Fund* section of this document for additional information on the departments. There is one objective for Maintain an Active, Healthy Community: Provide recreation programs, leisure activities, and cultural events for all ages.

The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for this objective are identified below.

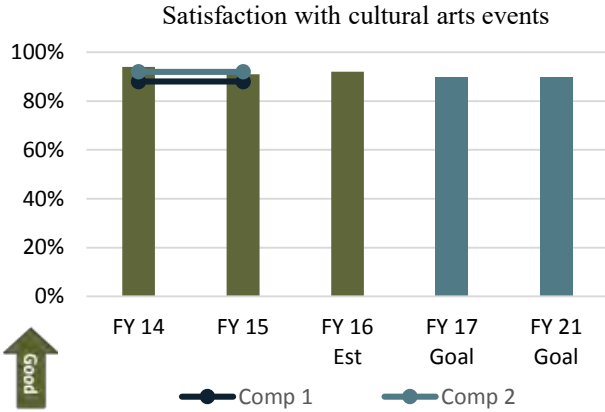
Objective: Provide recreation programs, leisure activities, and cultural arts events for all ages		
Initiative Action Plans	Timeline	Department
Recreation facilities – expand park amenities at Rassie Wicker Park and develop new recreation facilities	FY 2017-2021	Parks & Recreation





Key Performance Indicators (KPIs) – Provide recreation programs, leisure activities, and cultural arts events for all ages

Maintain resident satisfaction with Village-sponsored cultural arts events at 90%



In 2013, the Village hired a dedicated Events Coordinator to plan and execute cultural arts events. In 2015, the Village assumed responsibility for the Live After Five music series and other new events (e.g. movie nights) have been added to enhance resident satisfaction with Village sponsored cultural arts events.



Live After Five in Tufts Park




Goal: Professionally Manage a High Performing Organization

To professionally manage a high performing organization means to continually improve service delivery to internal and external customers. ALL departments are responsible for this goal, with ultimate responsibility falling to Administration. Applicable volunteers include the Risk Management Committee. See the *General Fund* section of this document for additional information on the departments. There are two objectives under Professionally Manage a High Performing Organization:

1. Enhance community engagement ^{AOE}, and
2. Continuously improve operational effectiveness through quality performance, use of technology, and innovation.

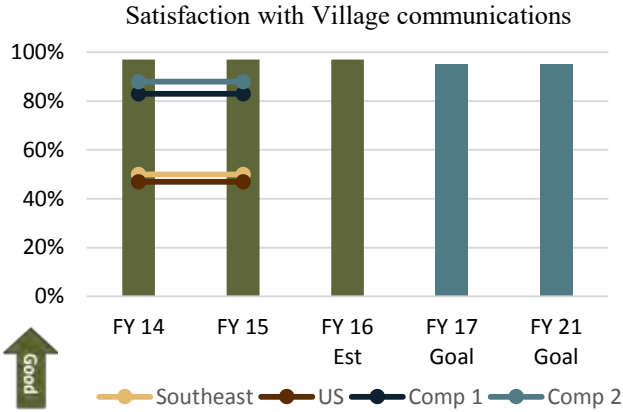
The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for these objectives are identified below.

Objective: Enhance community engagement ^{AOE}		
Initiative Action Plans	Timeline	Department
Civic engagement (ACE) – increase resident engagement in-person and online and create a centralized Communications Specialist position	FY 2017-2018	Administration
Performance dashboards (ACE) – report performance information online	FY 2018	Administration
Objective: Continuously improve operational effectiveness through quality performance, use of technology, and innovation		
Continuous process improvement – continue to use the Baldrige Performance Excellence Framework and participate in associated award programs	FY 2017-2021	Administration
P&I automation (ACE) – replace Planning & Inspections software	FY 2018	Planning & Inspections



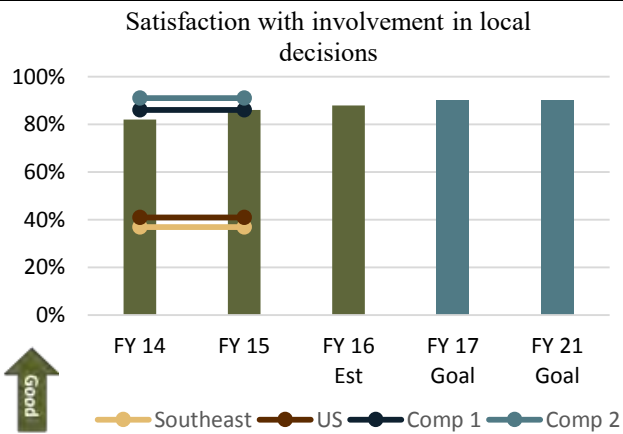
Key Performance Indicators (KPIs) – Enhance community engagement AOF

Maintain resident satisfaction with Village communications at 95%



The Village has had several initiatives to improve communications with residents in recent years including enhancements to the quarterly newsletter, Open Village Hall (an online civic engagement portal), posting Council meeting videos, monthly e-News, and social media enhancements. In 2014, *residents indicated an 88% satisfaction level (excluding neutrals) with Village communications, marking the highest nationwide rating ever achieved in an ETC survey.*

Increase resident satisfaction with the level of public involvement in local decisions to 90%

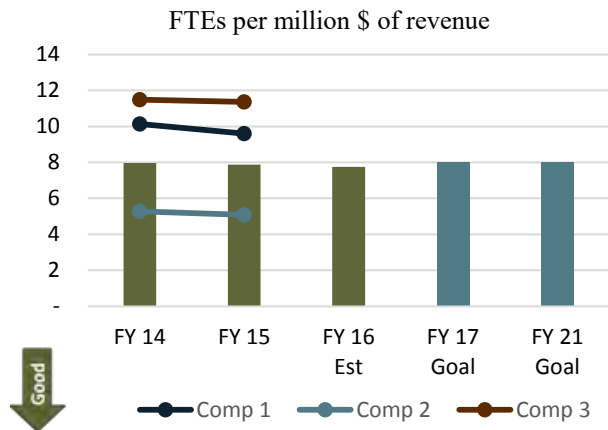


Increasing the level of public involvement in local decisions is an *Area of Focus* in FY 2017, with satisfaction levels falling below 90% and comparable communities. Planned actions to address community engagement include the reorganization of Administration staff to create a dedicated Communications Specialist position in FY 2017. This position will manage all Village external communications to allow for maximum resident involvement in decisions.



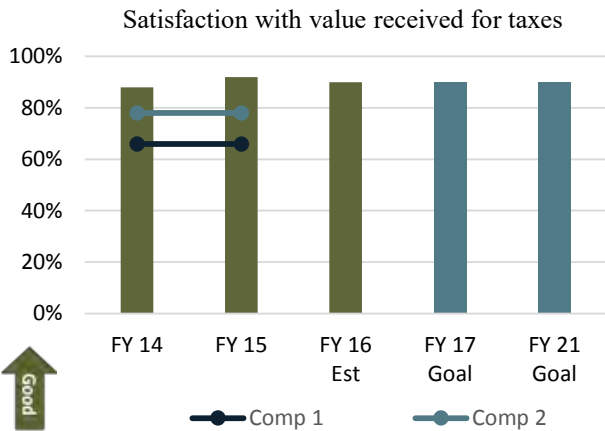
Key Performance Indicators (KPIs) – Continuously improve operational effectiveness through quality performance, use of technology, and innovation

Maintain fewer than 8 full time equivalents (FTEs) per million \$ of revenue



FTEs per million \$ of revenue is an indicator of the Village's ability to provide services with the minimum number of staff, indicating operational efficiency. The Village compares favorably to two of the three comparable communities.

Maintain resident satisfaction with the value received for taxes paid at 90%



Resident satisfaction with the value received for taxes paid is an indicator of resident perceptions of Village operational effectiveness. With satisfaction levels around 90% and exceeding comparable communities, the Village demonstrates its ability to provide an excellent value for taxes.

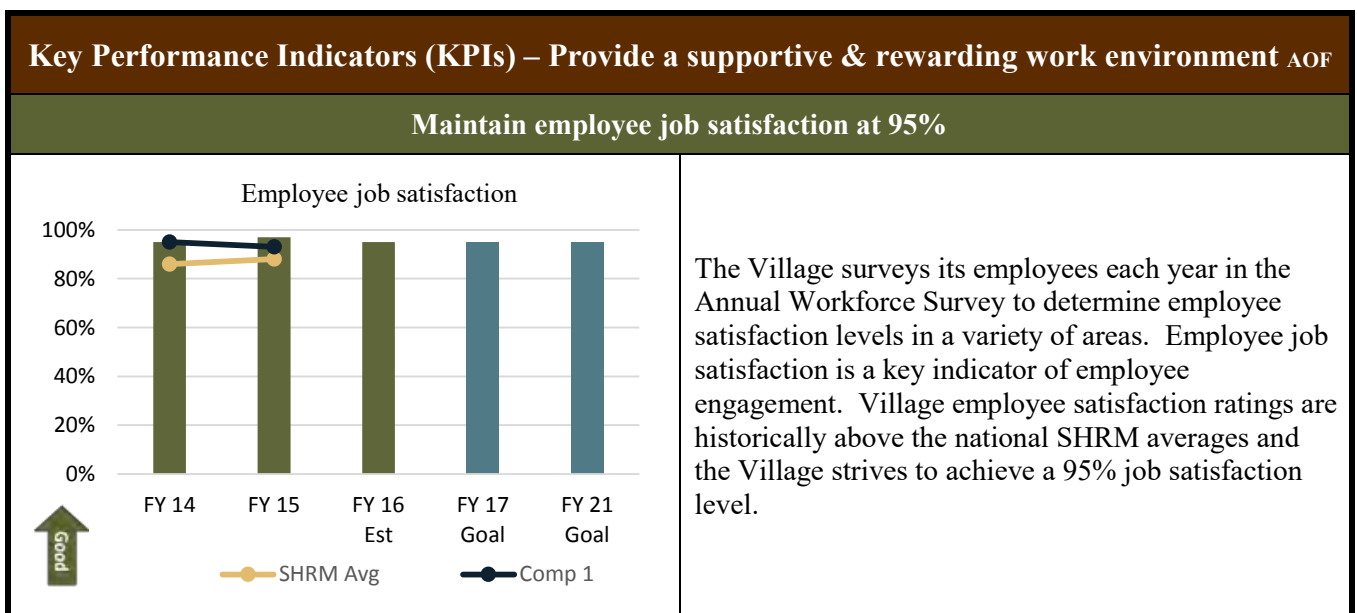


Goal: Attract & Retain an Engaged Workforce

To attract and retain an engaged workforce means to select, retain, and develop a qualified and diverse workforce of employees and volunteers. ALL departments are responsible for this goal, with ultimate responsibility falling to Human Resources. See the *General Fund* section of this document for additional information on the departments. There is one objective under Attract & Retain an Engaged Workforce: Provide a supportive and rewarding work environment AOF.

The five-year Initiative Action Plans (IAPs) and Key Performance Indicators (KPIs) for this objective are identified below.

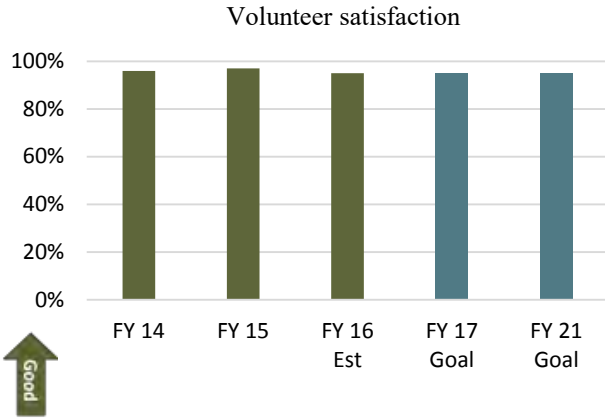
Objective: Provide a supportive and rewarding work environment AOF		
Initiative Action Plans	Timeline	Department
Workforce plans (ACE) – forecast future workforce capacity and capability needs and close any gaps	FY 2017-2018	Human Resources
Learning & development system (ACE) – develop a systematic learning & development system to include formalized succession planning	FY 2017-2018	Human Resources
Incentive reward program (ACE) – develop and provide an incentive reward program to supplement merit based rewards	FY 2018-2019	Human Resources
Police Department staffing – reorganize the Police Department to improve operating efficiency and effectiveness	FY 2017	Police





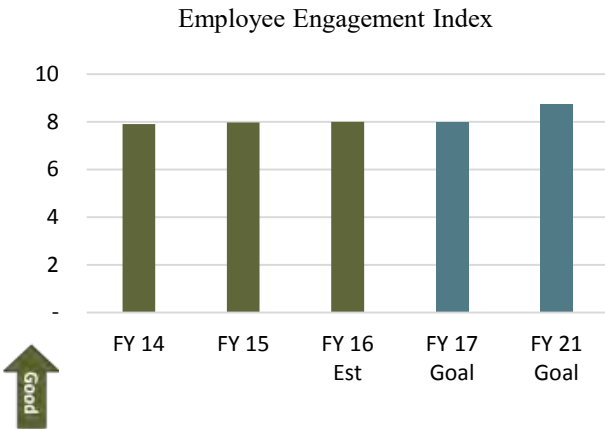
Key Performance Indicators (KPIs) – Provide a supportive & rewarding work environment AOF

Maintain volunteer satisfaction at 95%



The Village surveys its volunteers each year in its Annual Volunteer Survey to determine volunteer satisfaction levels in a variety of areas. Volunteer satisfaction is a key indicator of volunteer engagement. The Village demonstrates excellent results with over 95% of volunteers indicating they are satisfied with their volunteer experience.

Increase the Employee Engagement Index to 8.00



The Employee Engagement Index is a composite of six questions in three categories on the Annual Workforce Survey identified as the drivers of engagement: trust in leadership, reward and recognition, and opportunities for growth and development. Satisfaction ratings are converted to a numeric format on a scale of 1-10. The Index is segmented by departments and departments with more significant opportunity for improvement are taking actions to improve their individual department engagement index ratings.

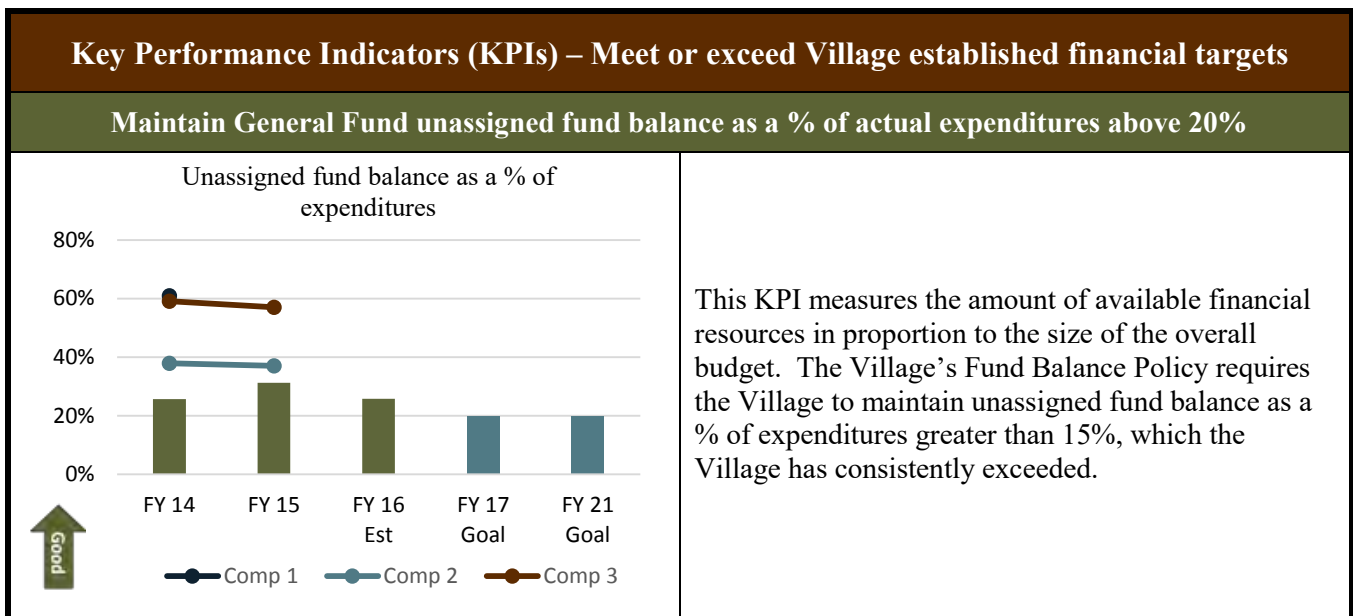


 **Goal: Maintain a Healthy Financial Condition**

To maintain a healthy financial condition means to ensure financial sustainability and strength by achieving financial targets and maintaining capital assets. ALL departments are responsible for this goal, with ultimate responsibility falling to Financial Services and Administration. See the *General Fund* section of this document for additional information on the departments. There are two objectives under Maintain a Healthy Financial Condition:

1. Meet or exceed Village established financial targets, and
2. Effectively maintain capital assets.

There are no five-year Initiative Action Plans (IAPs) for these objectives. Key Performance Indicators (KPIs) for these objectives are identified below.





Key Performance Indicators (KPIs) – Meet or exceed Village established financial targets

Maintain a capital asset condition ratio of 47%

