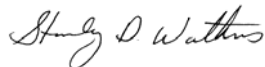


**City of Charlotte**  
**Neighborhood Development**  
**MEMORANDUM**

**DATE:** July 30, 2008

**TO:** Ruffin Hall, Director  
Budget & Evaluation



**FROM:** Stanley Watkins, Key Business Executive  
Neighborhood Development

**CC:** Julie Burch, Assistant City Manager  
Phyllis Heath, Budget Analyst

**SUBJECT:** FINAL FY09 Strategic Operating Plan

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This memorandum transmits the final FY09 Strategic Operating Plan (SOP). The final SOP reflects the decisions made by the City Council regarding Neighborhood Development's budget.

The FY09 budget enables Neighborhood Development to provide Code Enforcement, Housing Services and Neighborhood Services aimed at improving the quality of life in Charlotte's neighborhoods. We have adjusted the FY09 balanced scorecard targets based on the achievement of FY08 targets and we have redefined our FY09 training and development plans.

Thank you for the continued support of Neighborhood Development. Please call me at extension 6-3796 or Richard Woodcock at extension 6-8572 if you have any questions or need more information.

# Neighborhood Development FY2009 Strategic Operating Plan



CODE  
ENFORCEMENT



AFFORDABLE  
HOUSING



NEIGHBORHOOD  
SERVICES

July 30, 2008

Improving Charlotte's neighborhoods and the lives of people who live in them

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**Neighborhood Development  
FY09 Strategic Operating Plan  
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*“We’re all about making  
neighborhoods better”*

ND 2000

## I. Executive Summary

### Introduction

Neighborhood Development provides a variety of public services for the City of Charlotte which helps to maintain and improve the quality of life in the City's neighborhoods. These services include:

#### *Maintaining Community Standards*

- Minimum housing code enforcement
- Nuisance codes enforcement
- Zoning ordinance enforcement

#### *Providing Affordable Housing Opportunities*

- Financing affordable housing
- Providing rehabilitation services
- Funding housing support agencies

#### *Sustaining Neighborhoods*

- Implementing revitalization plans
- Neighborhood outreach and problem solving
- Neighborhood leadership and organizational training
- Managing neighborhood infrastructure investments

In order to meet service delivery expectations for these services, Neighborhood Development is requesting the following operating resources for FY09:

	ACTUAL	APPROVED	APPROVED
	FY2007	FY2008	FY2009
Operating Budget	\$9,766,264	\$10,487,723	\$11,121,477
Positions	138	136	137

### Mission Statements

The mission of the KBU is to *'improve Charlotte's neighborhoods and the lives of the people who live in them'*.

### Vision Statements

Neighborhood Development's vision is that *'every neighborhood is a desirable place to live, work, learn and play'*. The vision for the organization is to be known as a *'visionary organization with a knowledgeable, diverse, dedicated and professional staff committed to improving the quality of life in Charlotte's neighborhoods'*.

### Guiding Principles

The KBU embraces the City's Guiding Principles:

City Guiding Principles	KBU Definition
<b>Customer Service</b>	We are committed to providing professional, quality, seamless and prompt service to our customers and co-workers.
<b>Ethics</b>	We do the right thing even when no one is watching.
<b>Teamwork</b>	We work together by sharing knowledge, resources, responsibilities and recognition.
<b>Openness</b>	We listen and consider the opinions of our customers and co-workers.
<b>Accountability</b>	We keep our commitments to our customers and co-workers.
<b>Productivity</b>	We strive to increase our service delivery while lowering our cost.
<b>Problem Solving</b>	We will work together to solve neighborhood problems.
<b>Collaboration</b>	We will seek and take advantage of collaboration opportunities.
<b>Employee Development</b>	We are experts in our field and continuously improve our services and ourselves.
<b>Employee Recruitment &amp; Retention</b>	We will recruit and retain a knowledgeable, skilled, talented and diverse workforce.

**Key Issues and Challenges**

In FY09, Neighborhood Development will face a number of policy and service delivery issues and challenges. They can be organized around three general themes - *Preserving the Core Businesses, Enhancing Core Business Operations and Expanding Business Operations.*

**Preserving the Core Businesses**

The following areas are essential to maintaining the KBU's current service delivery capability:

Federal Housing Funding – The City's Community Development Block Grant funding continues to decline. Since FY06, total funding has been reduced by 12 percent or \$651,383. In FY09, the grant will be reduced by 3 percent or \$140,251. This creates additional pressures on our ability to fund our revitalization initiatives, support our financial partners and maintain adequate staff resources to manage our affordable housing programs.

Current Level Increases – Increased levels of code enforcement, housing and neighborhood services activities have not only created challenges in meeting community service level expectations, but has also increased our cost of conducting business. Examples of additional costs include added fuel and maintenance costs for our fleet, increases in building rent and security cost at satellite locations, citizen training expenses, advertising, court filing fees, and printing and office supplies.

Fleet Maintenance & Expansion – Although improvements have been made in our fleet, there are still 10 vehicles that are model year 1997 or older and some are unreliable. Reliable transportation is a must for staff working in the field, sometimes at night. Replacement and additional vehicles are needed to meet the mobility demands of our

code enforcement, housing and neighborhood services divisions.

**Enhancing Core Business Operations**

The following areas will help improve our current service delivery:

Managing Housing Assets – Since 2002, over 7,600 affordable housing units have been approved where the City has outstanding loans or grants. Two additional staff resources are needed to help manage these assets. These positions will be responsible for monitoring housing units funded by the Housing Trust Fund and other City housing programs to ensure ongoing compliance, in terms of number of assisted units, allowable rents, resident's income, building conditions, and other factors. Effectively managing this activity is especially critical given the volatility in the housing market over the past two years.

Code Enforcement Wireless – To enhance our efficiency, the Code Enforcement Division needs the capability to enter housing, nuisance and zoning violations data in the field and transmit the information to our backend databases. This project will increase the time inspectors spend in the field and improve the overall timeliness of the code enforcement operations.

Webcast/Podcasts for Neighborhood Services Demands for Community University and Good Neighbors training programs are increasing citywide. These programs inform residents of community standards and improve the skills of neighborhood organizations. Using webcasts and podcasts will not only expand efforts to reach more citizens and neighborhoods, but reduce the number of in-house training sessions.

Code Northeast Relocation – To meet increased demands for customer service, there is a need to strategically relocate in the Belmont Center office to the northeast area

of the city. Moving these operations closer to the centroid of the northeast service area will enhance the effectiveness and efficiency of our service delivery.

**Expanding Business Operations**

The following represent expansions of current business enterprises or new business endeavors to serve citizens and our customers:

Revitalization - Vision Charlotte

Over the past two years, the City has been working to improve its revitalization model by integrating social services with city service delivery and investment activities. In 2005, the Sisters of Mercy provided a three year grant to fund the Vision Charlotte - Wingate Neighborhood Initiative, which is designed to positively affect the lives of neighborhood residents by connecting them with other social service agencies, provide employment preparation and youth initiatives. To continue the program, \$200,000 is needed to match \$160,000 grant from the Sisters of Mercy.

Update Neighborhood Quality of Life Study

The current study's base methodology and boundaries are now over 10 years old. City Council and citizens have raised concerns about various aspects of the study. Now is the time for a comprehensive public review of the study.

Other Initiatives

There are several community issues which may impact operations in FY09. It is difficult at this time to forecast the costs associated with these initiatives. The issues are the growing foreclosure crisis, future code enforcement expansion and update of our affordable housing policies.

The number of foreclosure filings in Mecklenburg County has increased almost 20 percent over the past three years from 6,345 to 7,943. At the neighborhood level, one

neighborhood has experienced a 40 percent foreclosure rate. City staff is working on policy and operational updates that will be shared with the City Council in FY09.

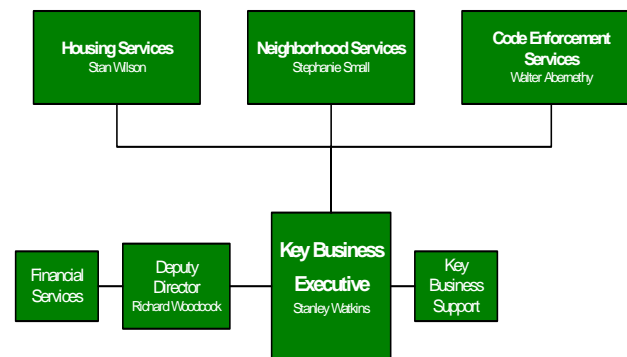
The development of a non-residential ordinance to address dilapidated commercial and industrial buildings is a new code enforcement initiative. The City Council will begin reviewing recommendations in the second quarter of FY09. If any policy changes are adopted, the equivalent of an additional Code Team and supporting equipment may be needed for code expansion.

The City is updating its affordable housing policies. About 70 citizens are working on developing affordable housing recommendations for City Council to address outreach, education and advocacy; rental housing subsidies; land acquisition; dedicated funding sources; and inclusionary housing policies. City Council is expected to begin reviewing recommendations in the second quarter FY09.

**Organizational Chart**

Displayed below is a high-level organizational chart for Neighborhood Development. *(See the appendix for the KBU's detailed organizational chart.)*

**General Organization Chart**





## II. Strategy and Planning

Strategy formulation and planning are essential for developing the KBU's Strategic Operations Plan. This section provides the context for the organization's activities and focuses on the following five components:

- Significant accomplishments over the past five years
- Linkages to the City's Corporate Strategy
- KBU's Strategy Map
- KBU's Strategic and Business Initiatives
- KBU's Special Plans

### **KBU Accomplishments**

Over the past several years, Neighborhood Development has a number of accomplishments related to its strategy, products and services to the citizens of Charlotte. Some major accomplishments include:

- The City's *2008 Neighborhood Quality of Life Study* showed a decline in the number of Challenged neighborhoods. The number of Challenged neighborhoods has been reduced to 20 from a high of 32 earlier this decade. The study has been recognized as a model nationally and internationally for measuring neighborhood conditions and change.
- The City completed over 7,600 affordable housing units in five years, far surpassing the goal of 4,500 affordable housing units, established by City Council in 2002. The Housing Trust Fund is cited as a national model for constructing affordable housing.

- Neighborhood Development integrated its housing, nuisance and zoning enforcement activities over the passed several years. The KBU opened a fifth code enforcement district office and developed an award winning program for training code enforcement officials.
- The Neighborhood Liaison Program, which addresses declining neighborhoods outside of the City's revitalization areas, was successfully launched. This program is designed to slow the decline of neighborhoods in Transitioning and Stable Neighborhood Statistical Areas.
- Vision Charlotte, a public/non-profit collaborative that integrates social services delivery with physical revitalization efforts, was launched in the Wingate neighborhood.

### **Corporate Strategy Linkages**

The diagram on the next page shows Neighborhood Development's contributions (shaded boxes) and linkages (small arrows) to the City's Corporate Strategy. The KBU supports 3 of the 5 focus areas and intersects 12 of the 16 City Corporate objectives.

To the right of the Corporate Strategy Map are the KBU's service area linkages to each corporate objective, organized by the KBU's major divisions. This chart highlights the accountabilities across the KBU.

### **KBU Strategy Map**

Neighborhood Development's Strategy Map is on Page 6. This is the KBU's strategy for supporting the Corporate Strategy, while implementing specific objectives to meet the needs of its customers.

**City of Charlotte Corporate Strategy Map**

*Vision*

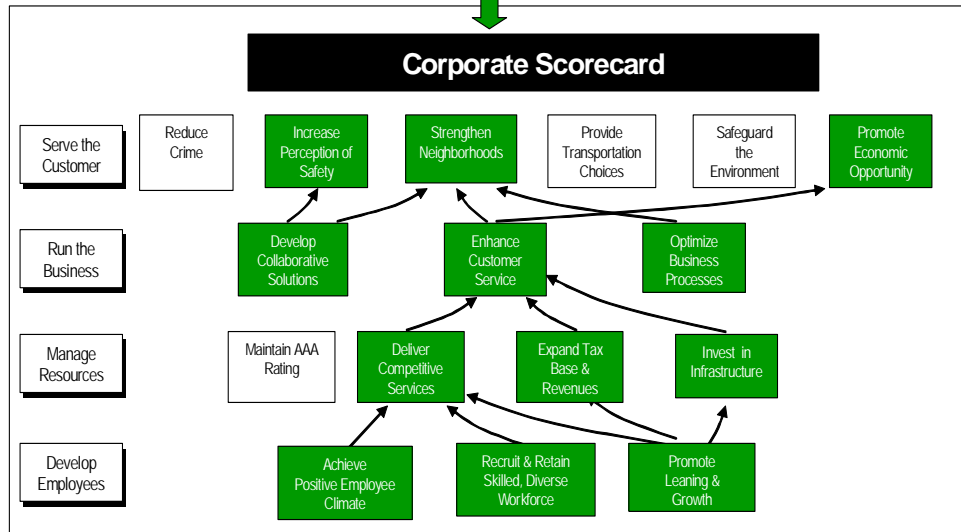
**Community of Choice for Living,  
Working and Leisure**

*Strategic  
Themes*



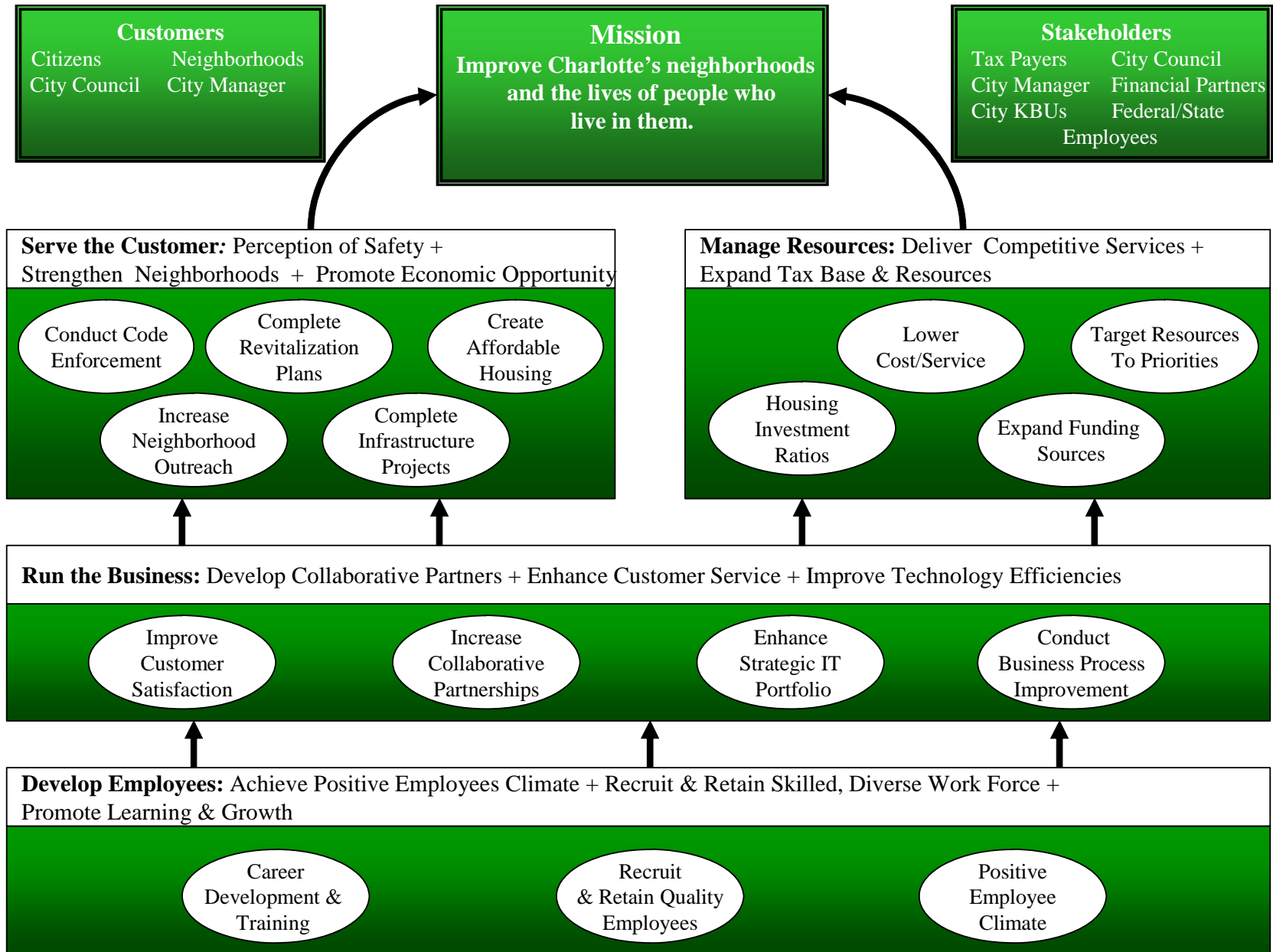
*Strategic  
Principle*

**Comprehensive Citizen Service**



Core Service Area	Strategy Map Linkages
<b>Code Enforcement Services</b>	<ul style="list-style-type: none"> <li>▪ Increase Perception of Safety</li> <li>▪ Strengthen Neighborhoods</li> </ul>
<b>Housing Services</b>	<ul style="list-style-type: none"> <li>▪ Strengthen Neighborhoods</li> <li>▪ Expand Tax Base &amp; Revenues</li> <li>▪ Promote Economic Development</li> </ul>
<b>Neighborhood Services</b>	<ul style="list-style-type: none"> <li>▪ Strengthen Neighborhoods</li> <li>▪ Develop Collaborative Solutions</li> <li>▪ Invest in Infrastructure</li> </ul>
<b>Key Business Support</b>	<ul style="list-style-type: none"> <li>▪ Enhance Customer Service</li> <li>▪ Optimize Business Processes</li> <li>▪ Deliver Competitive Services</li> <li>▪ Achieve Positive Employee Climate</li> <li>▪ Recruit and Retain Skilled, Diverse Workforce</li> <li>▪ Promote Learning and Growth</li> </ul>

FY09 NEIGHBORHOOD DEVELOPMENT STRATEGY MAP



### **Strategic and Business Initiatives**

Neighborhood Development has identified strategic initiatives to support the *Housing and Neighborhood Development Focus Area Plan* and business initiatives to improve the organization's capability and performance. The KBU's FY09 Strategic Initiatives from the focus area plan are:

- Reduce the number of challenged neighborhoods from 24 to 22 in FY09. *\*The 2008 Quality of Life Study showed that the number of challenged neighborhoods is 20, which exceeds the goal of 22.*
- Achieve annual affordable housing goals of 600 units in FY09.
- Attain 2% sub-standard housing goal; and nuisance (37,000) and zoning (5,750) compliance goals.
- Graduate one revitalization neighborhood from the City's Neighborhood Action Plan initiative in FY09.
- Engage in 360 neighborhood problem-solving initiatives each year achieving an 80 percent success rate.
- Invest \$15 million in neighborhood infrastructure.

Some of the major Business Initiatives that the KBU will engage in FY09 are:

- *Code Enforcement* – Develop a minimum non-residential ordinance and undertake five code enforcement special projects annually.
- *Housing Services* – Complete Housing Charlotte 2007 Affordable Housing Policy Updates and continue to integrate asset management program into the business operations.

- *Neighborhood Services* – Expand Neighborhood Revitalization Program.
- *Key Business Support* – Implement the workforce diversity plan, continue the “Raving Fans” customer service philosophy and implement KBU Special Plans.

More KBU Strategic and Business initiatives are highlighted in Section IV. *Balanced Scorecard and Performance Measures on page 12.*

### **KBU Special Plans**

Summaries of Neighborhood Development's technology, training and development, customer service, communications and competition plans are provided below:

***Customer Service Plan*** – Neighborhood Development embraces the principle of *Comprehensive Citizen Service*, which means *providing the customer with accessible information and service in the time, place and manner that meets their needs*. To that end, the KBU is working toward better integration of its available technology platform with its communication strategy, in order to better inform citizens and make services more accessible.

The KBU has also prepared *customer service standards* regarding expectations related to telephone calls, personal contacts, e-mails, customer problem-solving and dealing with difficult customers. These are expectations placed upon every employee.

During FY09, special emphasis will continue on integrating “Raving Fans” customer experience in the business operations. Training and feedback will be provided on the philosophy, principles, and techniques involved in integrating this concept into the organization.

**Technology Plan** – This plan is important to achieving the customer service and productivity targets of the KBU. Neighborhood Development priorities are listed below in the order of importance:

Priority 1: Maintain the KBU's technology base. The KBU feels it is very important that every employee has the technology tools (hardware and software) to effectively and efficiently perform his or her work. The City's refresh program is critical to achieving this priority.

Priority 2: Integration of the Accela Zoning module into the Code Enforcement system. This is important to the City Manager's seamless customer service initiative. This will provide a common platform for zoning administration, review and enforcement with Planning and Engineering. The KBU will be required to effectively operate this system in conjunction with the Cityview system for nuisance and housing enforcement and effectively train employees to operate all technologies.

Priority 3: Developing Asset Management Database. Growth in the number of housing loans and grants from the Housing Trust Fund, revitalization initiatives and HouseCharlotte Down Payment Assistance program demand better accounting and tracking of the City's invested assets. The project will implement Housing's Asset Management Plan.

Priority 4: Implement a wireless program for Code Enforcement. This will permit the input of housing, nuisance and zoning inspection information in the field, which will allow code inspectors to spend more time in the field. This will help the code enforcement function to become more effective and efficient.

**Training and Development Plan** – Neighborhood Development's Training and Development Plan focuses on leadership, organizational development and employee

training. The plan is based on the City Manager's priorities, KBU Customer Service and Employee Opinion Surveys and specific internal business needs. The KBU's FY09 training and development priorities are:

- 1) **Supervisor Leadership Development** – equipping managers and supervisors with tools to lead a diverse and changing organization.
- 2) **Quality Employee Recognition Program** – authentically recognizing the contributions and talents of the KBU workforce.
- 3) **Employee Career Development** – developing pathways for each employee to be successful in his or her municipal career.
- 4) **Succession Planning** – providing roadmaps to employees interested in taking on leadership roles in the organization.
- 5) **Safety Training** – making sure each and every employee is secure in their working environment.
- 6) **Wellness Training** – helping each employee to achieve an appropriate work/life balance.

The aforementioned training initiatives will be sponsored by the KBU. Each KBU division has specific training and development needs for its employees. The KBU training objectives, along with specific divisional training requirements, are incorporated into individual employee training and development plans. Employees are expected to complete 75 percent of their training and development plans on an annual basis.

**Communications Plan** – The theme of the KBU's communication plan is providing *Comprehensive Citizen Service*. The strategy is to better manage video, web and print communications to focus on those services that customers and stakeholders care about most. The goal is to provide clear, concise and timely information about

the organization’s accomplishments, challenges, services and portals for access. Business initiatives will be built around:

- More employee utilization of the Intranet
- Publishing monthly, quarterly and annual reports for the major KBU activities
- Timely Public Service Announcements on key KBU initiatives

Communications will be targeted to City Council, neighborhoods, citizens and employees.

**Skilled, Diverse Workforce Plan** – The KBU will continue to build upon the City’s strategic direction and develop a strategy for recruitment and retention of a skilled, diverse workforce. Each division’s customer base and workforce have been assessed, a gap analysis conducted and divisional recruitment and retention goals will be established. The KBU will monitor implementation of those plans and assess accomplishments.

**Competition Plan** – In keeping with the City’s focus on making local government more competitive, Neighborhood Development continues to work toward maximizing its service delivery while minimizing costs. Currently, approximately 82 percent of the organization’s budget is contracted out through competitive bid or outsourcing to local private and non-profit service providers. The KBU’s objective is to gain efficiencies through examining remaining in-house programs.

During FY09, the KBU will examine the following business operations for efficiencies and improvements:

FTE – Full Time Equivalent

FY09 Competition Plan			
Services	Goal	FTE	FY09
Nuisance Abatement Contracts	Competition	---	\$400,000
Complex Problem Solving	Business Process Improvement	---	0
<b>Total</b>			<b>\$400,000</b>

### III. Service Delivery

#### Core Service Areas

Neighborhood Development's core service areas are outlined in the chart below:

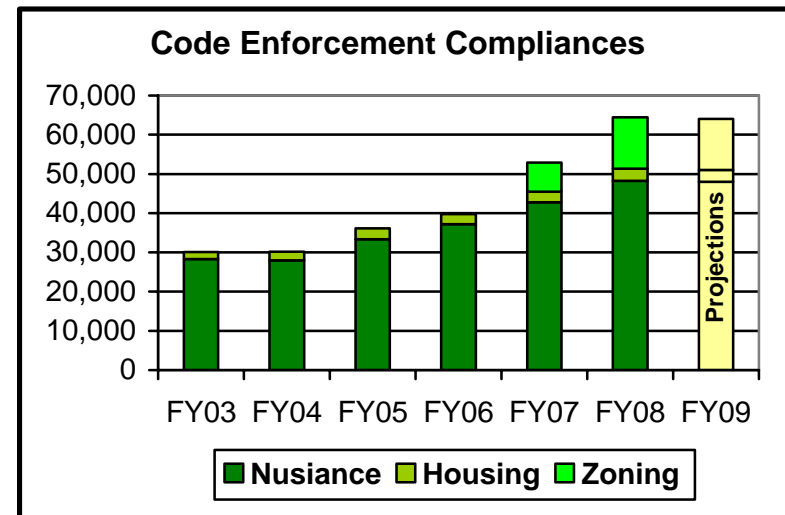
Core Service Area	Description
<b>Code Enforcement Services</b>	Conducts housing, property and zoning inspections to enforce City codes. <i>Examples of services are Housing Code, Weeds and Grass, Parking on Lawns, Junk/Abandoned Vehicles, Graffiti and Zoning Inspections.</i>
<b>Housing Services</b>	Provides loans and grants to finance affordable housing, provide rehabilitation services and fund housing support agencies. <i>Examples of services include Housing Trust Fund, HouseCharlotte Down Payment Assistance and Rehabilitation Services.</i>
<b>Neighborhood Services</b>	Provides neighborhood plan implementation, outreach and problem solving, leadership and organization training and infrastructure to neighborhoods. <i>Examples of services include Neighborhood Matching Grants, Community University, Neighborhood Action Plans, Neighborhood Improvement Program, Neighborhood Liaison Program, Weed &amp; Seed Initiative and Vision Charlotte Wingate Initiative.</i>
<b>Key Business Office</b>	Provides leadership, resources and support systems required for the organization to achieve its mission. Examples of services include <i>Business Planning, Policy Coordination, Financial Services, Compliance Monitoring, Technology/GIS Services and Communications.</i>

See Page 18 for more information on the KBU activities.

#### Service History and Trends

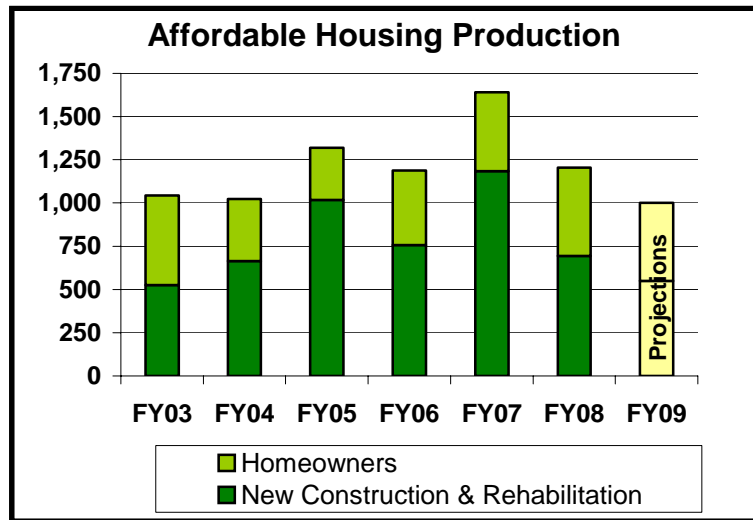
Neighborhood Development's key service trends include housing, nuisance and zoning inspections; affordable housing production; and neighborhood leadership and organization development training.

*Code Enforcement* – The number of enforcement compliances, which represents completed cases, has increased by 112 percent between FY03 and FY08. The combined number of housing and nuisance compliances increased from 30,349 in FY03 to 64,413 in FY08.



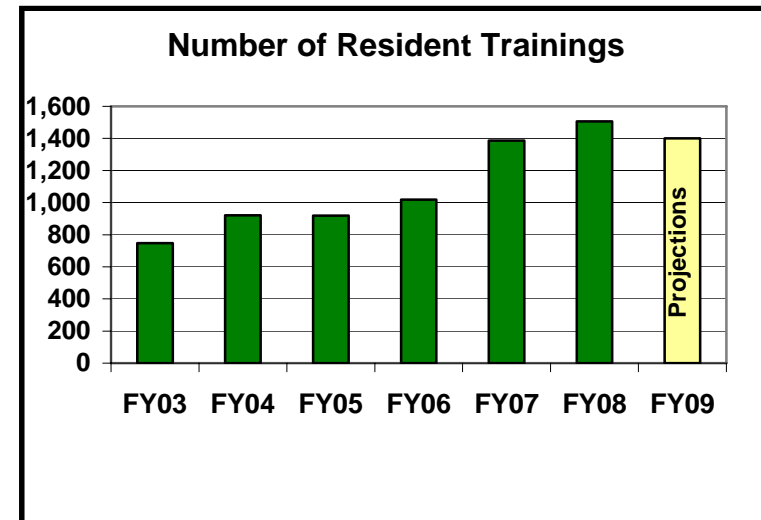
In FY08, there were 3,066 housing, 48,260 nuisance and 13,087 zoning compliances. For FY09, the total number of code compliances should again exceed 60,000 each year.

*Housing Services* - The KBU had a steadily increased in housing production between FY03 and FY05, in which total new construction, rehabilitation and homeownership purchases increased from 1,043 to 1,319. In FY06, housing production fell back to 1,187 units.



In FY07, housing production was 1,640 units. The FY08, housing production retreated to 1,204 units. The target for FY09 is about 1,000 units. Lower projections are due to Housing Trust Fund reductions.

*Neighborhood Services* - The KBU has experienced a steady increase in demand by residents participating in training. Between FY03 and FY08, resident participation increased by 101 percent from 748 to 1,507. This includes participation in Community University, Neighborhood Symposium and customized training programs offered by Neighborhood Services. The target for FY09 is 1,400 residents.



#### IV. Balanced Scorecard and Performance Measures

##### Neighborhood Development Balanced Scorecard

Neighborhood Development's Balanced Scorecard (BSC) measures the KBU's progress toward achieving the City's corporate objectives and the KBU's strategy map objectives (*see appendix*). The BSC shows the organization's strategic objectives, measures and performance targets for FY09. The BSC also includes years of past performance history and incorporates the organization's strategic and business initiatives. The KBU incentive targets are shown as well. *The BSC is highlighted on the next page.*

Also included in this section are Neighborhood Development's revitalization neighborhood targets for FY09.



**NEIGHBORHOOD DEVELOPMENT  
FY09 STRATEGIC OPERATING PLAN**

FY09 Neighborhood Development Balanced Scorecard								
	Objectives	Measures	Lead /	FY06	FY07	FY08	FY09	KBU Strategic & Business Initiatives
			Lag	Actual	Actual	Actual	Target	
<b>Serve the Customer</b>	<b>C1) Increase Perception of Safety</b>	1. Number of Housing Code Compliances*	Lag	2,569	2,761	3,066	3,000	<ul style="list-style-type: none"> <li>▪ Achieve Council's code compliance goals</li> <li>▪ Complete Non-residential Ordinance</li> <li>▪ Undertake Special Projects</li> <li>▪ Achieve Council's Quality of Life Study goal</li> <li>▪ Achieve Council's neighborhood graduation goal</li> <li>▪ Achieve Council's neighborhood problem-solving goal</li> <li>▪ Update Quality of Life Study</li> <li>▪ Complete Housing Charlotte 2007 Policy Update</li> <li>▪ Achieve Council's affordable housing goal</li> </ul>
		2. Number of Nuisance Code Compliances*	Lag	37,204	42,732	48,260	48,000	
		3. Number of Zoning Code Compliances*	Lag	N/A	7,385	13,087	13,000	
	<b>C2) Strengthen Neighborhoods</b>	4. Percent of Revitalization Plans Objectives Achieved\$\$\$	Lead	120%	170%	187%	100%	
		5. Number of Revitalization Neighborhoods Graduated*	Lag	1	0	1	0	
		6. Number of Training Participants	Lead	1,018	1,386	1,507	1,400	
		7. Percent of Capacity Building Successes	Lag	99%	125%	95%	90%	
		8. Number of Neighborhood Initiatives*	Lead	NA	113	390	360	
		9. Number of Infrastructure Projects Completed	Lag	2	2	2	3	
		10. Number of Affordable Housing Units Financed	Lead	1,092	1,209	1,145	900	
		11. Number of New and Renovated Units Completed with City Funds*	Lag	1,187	1,640	800	1,000	
		12. Number of Homeowners created with City Funds	Lag	431	456	510	450	
<b>Manage Resources</b>	<b>R1) Deliver Competitive Services</b>	13. Change in KBU Cost per Service Delivery	Lag	NA	-36%	-33%	-10%	<ul style="list-style-type: none"> <li>▪ Achieve Council's infrastructure investment goal</li> <li>▪ Implement Competition Plan</li> </ul>
	<b>R2) Expand Tax Base &amp; Revenue Sources</b>	14. Percent of Expenditures Targeted to Revitalization Areas	Lag	25%	32%	25%	25%	
	<b>R3) Invest in Infrastructure</b>	15. Infrastructure Investments*	Lead	\$8.8m	\$8.9m	\$16.9m	\$15.0m	
		16. Ratio of City Housing Funds Leveraged with Other Funds	Lag	1:5	1:6	1:7	1:4	
<b>Run the Business</b>	<b>B1) Develop Collaborative Solutions</b>	17. Number of New or Expanded Financial Partnerships\$\$\$	Lag	5	4	5	3	<ul style="list-style-type: none"> <li>▪ Implement Accela Zoning Module</li> </ul>
	<b>B2) Enhance Customer Service</b>	18. Percent of Customer Satisfaction Achieved	Lag	90%	88%	89%	90%	
	<b>B3) Optimize Business Processes</b>	19. Number of Business Processes Analyzed	Lead	7	1	1	1	
		20. Develop Strategic IT Portfolio	Lag	1	1	1	1	

Continued on the next page

**NEIGHBORHOOD DEVELOPMENT  
FY09 STRATEGIC OPERATING PLAN**

FY08-09 Neighborhood Development Balanced Scorecard								
	Objectives	Measures	Lead /	FY06	FY07	FY08	FY09	KBU Strategic & Business Initiatives
			Lag	Actual	Actual	Forecast	Target	
Develop Employees	E1) Achieve Positive Employee Climate	21. Percent of Employee Satisfaction Achieved	Lag	85%	83%	83%	80%	<ul style="list-style-type: none"> <li>▪ Supervisor Leadership Development</li> <li>▪ Quality Employee Recognition Program</li> <li>▪ Employee Career Development</li> <li>▪ Succession Planning</li> <li>▪ Safety Training</li> <li>▪ Wellness Training</li> </ul>
	E2) Recruit & Retain Skilled Employees	22. Percent of Voluntary Employee Turnover	Lag	11%	4%	10%	10%	
	E3) Promote Learning & Growth	23. Percent of Employees Completing 75% of Training and Development Plan\$\$\$	Lag	100%	100%	100%	100%	
		24. Wellness information provided in each newsletter and staff meeting \$\$\$	Lead	NA	NA	23	20	
		25. Number of employees using the stairs in Old City Hall \$\$\$	Lead	NA	NA	44	40	

City Council's Focus Area Plan initiatives denoted by (\*)

Incentive Targets are denoted by \$\$\$

NA – Not Applicable

**FY09 Revitalization Neighborhoods Targets\***

Neighborhoods	Code Enforcement			Housing		Neighborhood Services		Totals
	Housing Compliances	Nuisance Compliances	Zoning Compliances	Rehabilitation Units	New Units	Training Sessions	Neighborhood Initiatives	
<b>Druid Hills</b>	30	400	15	4	2	6	6	463
<b>Lakewood</b>	15	100	15	4	2	6	6	148
<b>Lincoln Heights</b>	20	350	15	4	0	6	6	401
<b>Reid Park</b>	15	300	10	4	0	6	6	341
<b>Thomasboro/Hoskins</b>	15	200	20	4	3	6	6	254
<b>Washington Heights</b>	10	200	20	4	3	6	6	249
<b>Wingate</b>	0	175	10	4	3	6	6	204
<b>Totals</b>	<b>105</b>	<b>1,725</b>	<b>105</b>	<b>28</b>	<b>13</b>	<b>42</b>	<b>42</b>	<b>2,060</b>

\* The FY09 Revitalization Neighborhood Targets may be adjusted due to the Neighborhood Action Plan Teams work planning process occurring during the first quarter of FY09.

## IV. Resources

### Summary of Requests

In order to implement this FY09 Strategic Operating Plan, Neighborhood Development's operating budget is \$11,121,477. Neighborhood Development's operating budget includes a base budget of \$10,837,935 and approved service level changes of \$283,542. The base budget includes changes to the current level of \$71,000. In addition, offsetting revenues attributable to Code Enforcement are projected at \$360,957.

### Base Budgets

The KBU's base budgets are reflective of the guidelines presented by the Budget Office. Below are the KBU's general fund and federal funds operating budgets for FY09, along with the number of full time equivalent (FTE) positions:

ND Base Budgets		
Source of Funds	FY09	FTE
General Fund	\$7,198,604	85
CDBG Fund	2,101,882	25
HOME Fund	341,796	3
Other	1,286,653	24
<b>Total</b>	<b>\$10,837,935</b>	<b>137</b>

### Current Level Changes

In FY09, Neighborhood Development received \$71,000 in additional general funds for current level changes. This includes \$51,000 for the Neighborhood Symposium and \$20,000 for fuel for Code Enforcement.

### Service Level Changes

The KBU proposed a number of service level changes for FY09. These changes address critical customer service or operating issues, as well as City Council's focus areas and objectives. Below is a summary of the requested service level change for FY09, showing the change, costs and applicable full-time equivalent positions:

No.	FY09 Service Level Change	Costs	FTE
1.	Housing Services Operations	\$45,000	---
2.	Quality of Life Update	75,000	---
3.	Accela Zoning Module	72,542	--
4.	Wireless Project for Code Enforcement	91,000	--
<b>Total</b>		<b>\$283,542</b>	<b>--</b>

### Revenues

Neighborhood Development is forecasting General Fund Offsetting revenues of \$360,957 in FY09. (See Page 21 for details).

### Departmental Charges

A number of divisions in Neighborhood Development depend upon operating support outside of the General Fund. The forecasted departmental charges, which include contributions from the Capital Improvement Program, total \$2,759,620 in FY09. (See Page 22 for details).

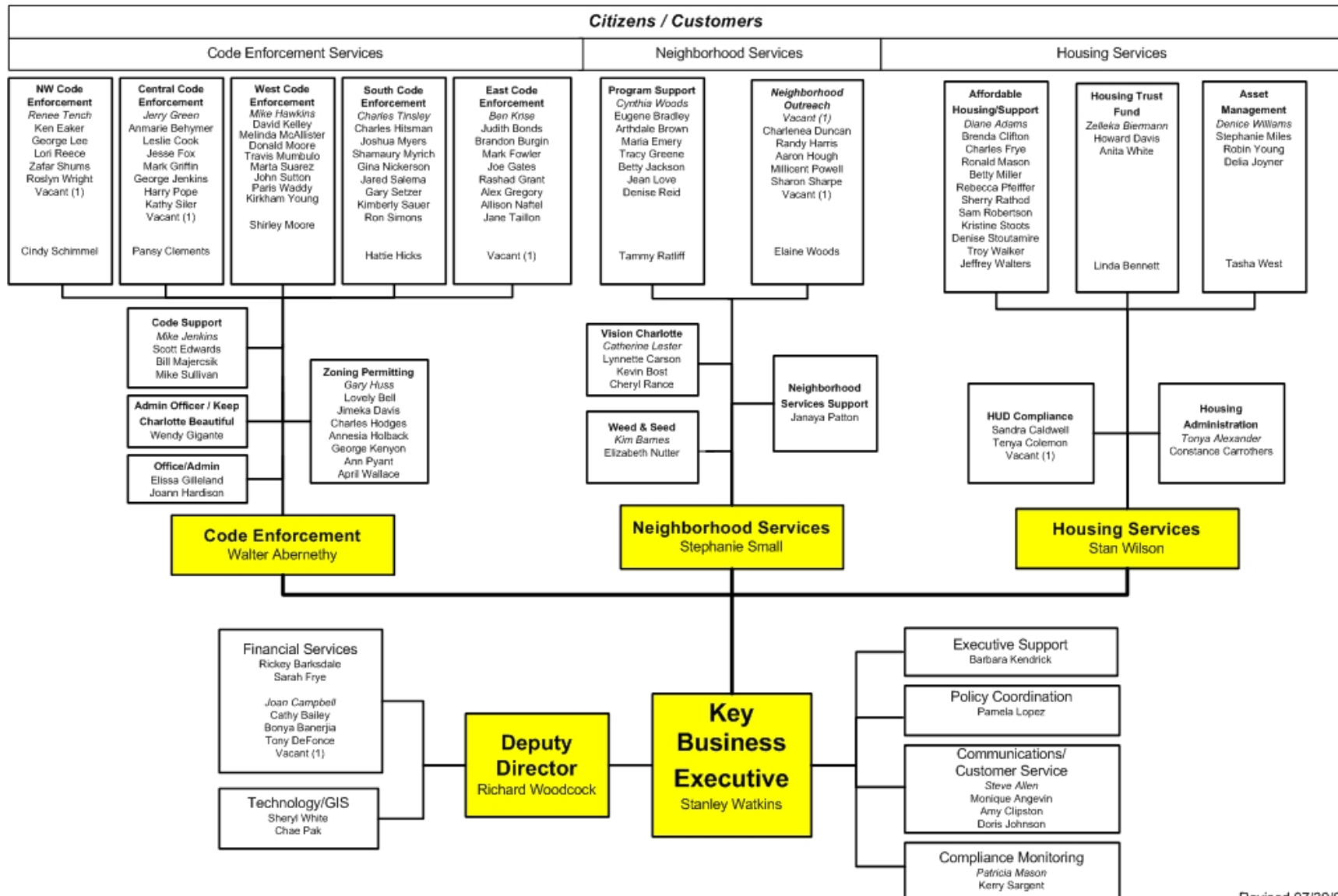
## **V. Conclusion**

In FY09, Neighborhood Development will be responsible for addressing a number of community, neighborhood and KBU policy and operational issues. This Strategic Operating Plan addresses both external and internal challenges in response to budgetary changes and service delivery expectations of our customers and citizens. Demand for the KBU services - code enforcement, housing and neighborhood services - continues to grow. Without the necessary operating resources, the KBU cannot continue to meet service delivery demands.

This Strategic Operating Plan also reaffirms Neighborhood Development's commitment to the missions of the City and the KBU. The funding of this Strategic Operating Plan will assist in creating empowered and self-sustaining neighborhoods, which will help improve Charlotte's overall quality of life.

## **VI. APPENDIX**

## Neighborhood Development Organization Chart - FY2009

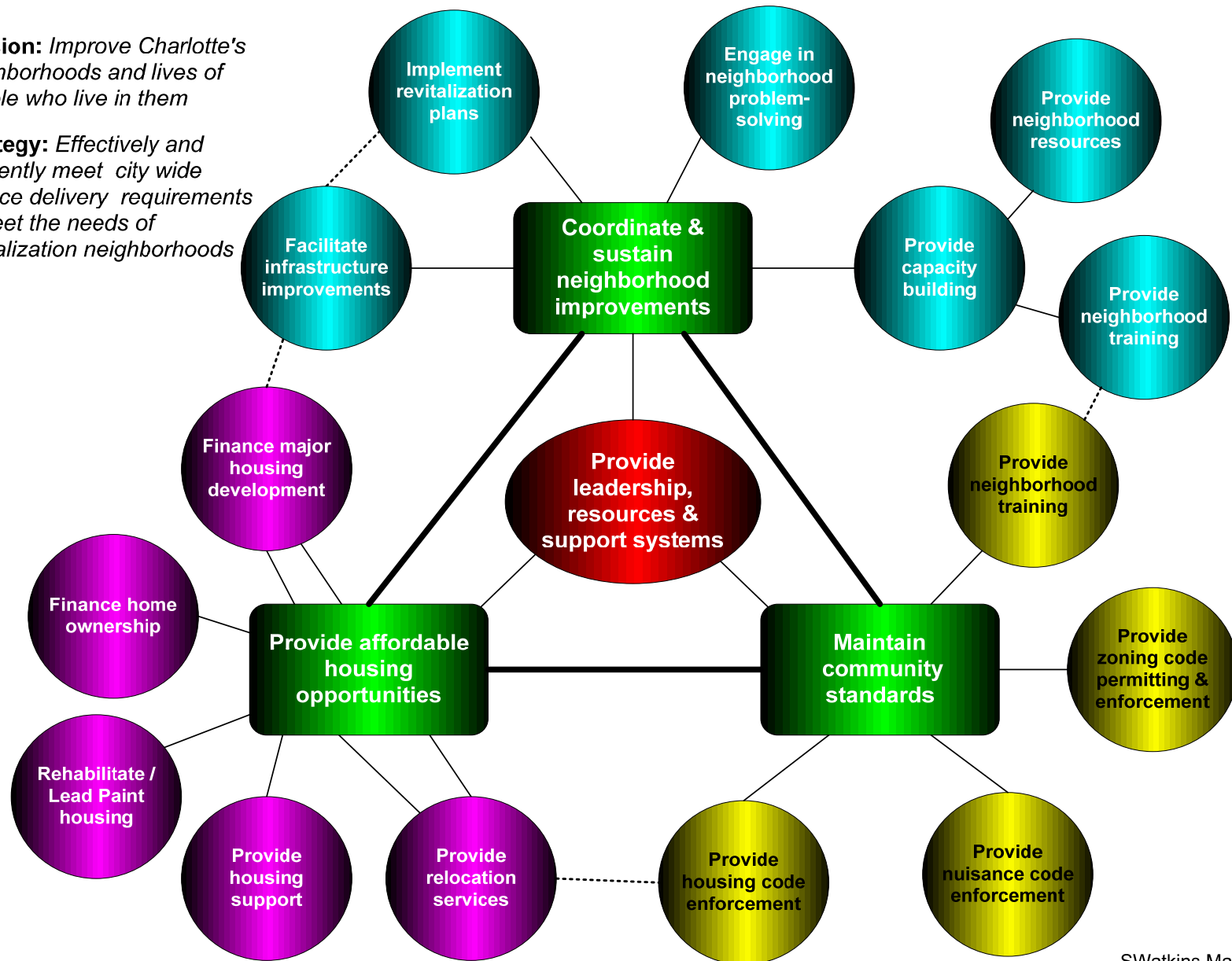


Revised 07/30/08  
*Italics Represent Supervisory Positions*  
 127 Funded Position  
 9 Temporaries

# Neighborhood Development's Activity System

**Mission:** *Improve Charlotte's neighborhoods and lives of people who live in them*

**Strategy:** *Effectively and efficiently meet city wide service delivery requirements & meet the needs of revitalization neighborhoods*



SWatkins March 2005

## **FY09 Service Level Changes**

Below are Neighborhood Development's approved FY09 service level changes:

- 1. Contribution to Housing Services**  
**FY09 Funding Request -- \$45,000**  
**Linkage to Focus Areas – Housing and Neighborhood Development**  
**Linkage to Strategic Objective – Strengthen Neighborhoods**

Neighborhood Development received \$45,000 in general funds that will be contributed to the operating budget to help fund two existing housing development positions. These positions are responsible for producing housing units created by the Housing Trust Fund including evaluating affordable housing proposals, working with the HTF Board and developing contracts with affordable housing providers.
- 2. Redesign the Quality of Life (QoL) Study**  
**FY09 Funding Request -- \$75,000**  
**Linkage to Focus Areas – Housing and Neighborhood Development**  
**Linkage to Strategic Objective – Run the Business/Serve the Customer**

Neighborhood Development received funds for consulting services to engage in a process to examine the present QoL methodology and propose changes that will define the QoL report for the next decade. This study will determine how the QoL Report is designed beginning in 2010.
- 3. Accela**  
**FY09 Funding Request -- \$72,542**  
**Linkage to Focus Areas – Housing and Neighborhood Development**  
**Linkage to Strategic Objective – Strengthen Neighborhoods**

Funding to collaborate with Engineering and Property Management to utilize the Accela system for zoning is required. This represents annual funding for maintenance and off-site hosting. These costs may be recovered utilizing a 10 percent surcharge on the zoning fee structure.
- 4. Wireless Project for Code Enforcement**  
**FY09 Funding Request -- \$91,000**  
**Linkage to Focus Areas – Housing and Neighborhood Development**  
**Linkage to Strategic Objective – Strengthen Neighborhoods**

Neighborhood Development is proposing a program that would enable Code Enforcement Inspectors to use highly durable laptops in the field to review data and input code inspection data in real time with the ability to use GIS applications anywhere within the City and ETJ. This program would be implemented in FY09, after evaluation of the technology available and the purchase of durable laptops.



**Service Level Change Summary Pages from Budget System  
(See Separate Document)**

## Revenue Projections

### General Fund Offsetting Revenues FY09

	<u>FY09 Projections</u>
5305 Housing Code Violations	\$ 21,590
5514 Underbrush/Debris Removal	326,018
5542 Vehicle Towing and Storage	13,349
5668 Contribution from Other Sources	<u>0</u>
	<u>\$360,957</u>

## Charges to Capital Investment Plan

**General Fund  
Departmental Charges  
FY09**

	FY09
Community Development Block Grant	\$2,101,882
HOME Grant	\$ 341,796
Lead Based Paint Grant	\$ 89,942
Capital Projects Fund	<u>\$ 226,000</u>
	\$2,759,620

## Summary of Revenues

Neighborhood Development  
Source of Funds  
FY09

<u>Division</u>	<u>Cost Center</u>	<u>Total</u>	<u>CDBG</u>	<u>CIP Fund</u>	<u>CIP/IT</u>	<u>Home</u>	<u>Lead Based Paint</u>	<u>General Funds</u>	<u>User Fees</u>
<b>FY09:</b>									
Key Business Executive	90050	1,255,658	79,262	75,000		341,796		759,600	
Financial Services	90051	532,961	153,548					379,413	
Housing Code Enforcement	90056	4,207,004		60,000	91,000			4,056,004	
Neighborhood Services	90058	1,798,582						1,798,582	
Belmont Center	90063	167,667						167,667	
Wilmore Community Center	90069	34,880						34,880	
Housing Services	90027	2,154,014	1,869,072				89,942	195,000	
<b>Total</b>		<b>10,150,766</b>	<b>2,101,882</b>	<b>135,000</b>	<b>91,000</b>	<b>341,796</b>	<b>89,942</b>	<b>7,391,146</b>	<b>-</b>
Zoning	90074	970,711							970,711
		<b>11,121,477</b>	<b>2,101,882</b>	<b>135,000</b>	<b>91,000</b>	<b>341,796</b>	<b>89,942</b>	<b>7,391,146</b>	<b>970,711</b>

**Balanced Scorecard Measures Formulas**

<b>Measures</b>	<b>Formulas</b>
1. Housing Code Compliances	Number of housing units brought into code compliance.
2. Nuisance Code Compliances	Number of health, sanitation and graffiti violations brought into compliance.
3. Zoning Code Compliances	Number of zoning code compliances.
4. Neighborhood Action Plans' Objectives completed	Percent of Neighborhood Development Revitalization Neighborhood objectives completed.
5. Revitalization Neighborhoods Graduated	Number of Revitalization Neighborhoods that annually graduate and no longer need an action team for support.
6. Residents Trained	Number of residents participating in organization capacity building training.
7. Capacity Building Successes	Total number of neighborhood initiatives divided by the total number of neighborhood trainings in the preceding two years.
8. Number of Declining Neighborhood Initiatives	The number of neighborhood initiatives completed in neighborhoods in declining Neighborhood Statistical Areas.
9. Infrastructure Projects Completed	Number of infrastructure projects closed out.
10. Affordable Housing Units Financed	Number of City financed housing units within the reporting period.
11. New and Renovated Units Completed with City Funds	Number of City financed housing units receiving a Certificate of Occupancy within the reporting period.
12. Homeowners Created with City Funds	Number of HouseCharlotte subsidies plus total CMHP 1 <sup>st</sup> , 2 <sup>nd</sup> , and 3 <sup>rd</sup> mortgages.
13. KBU Cost Per Service Delivery	KBU budget divided by the total units of service delivery.
14. Expenditures Targeted to Revitalization Areas	Percent of Neighborhood Development's staff, program and capital dollars directed annually to the targeted revitalization areas.
15. Infrastructure Investment	Amount of dollars invested annually on roads, sidewalks, curb & gutter and other amenities for existing neighborhoods.
16. Ratio of Housing Funds Leverage with City Funds	Ratio of total housing development cost compared to City investment in the housing project.
17. New and Expanded Financial Partnerships	Number of partnerships that have entered into a contractual agreement with Neighborhood Development.
18. Customer Satisfaction Achieved	Average ranking of nine survey questions in the neutral and strength categories.
19. Business Process Analyzed	Number of business process improvement analyses completed annually.
20. Develop Strategic IT Portfolio	Number of IT projects completed.
21. Percent of Employee Satisfaction	Average ranking of 54 survey questions in the neutral and strength categories.
22. Percent Employee Turnover	Number of employees that leave Neighborhood Development during the year divided by the number of employees on board at the beginning of the fiscal year.
23. Percent of Employees Completing 75 percent of their Training Plans	Percent of employees completing 75 percent of their training plans.
24. Wellness information provided in each newsletter and staff meetings.	Number of newsletters and staff meetings.
25. Number of employees using the stairs in Old City Hall	Number of employees voluntarily using the stairs instead of elevators in Old City Hall.

## Measures Validation

<i>Neighborhood Development</i>		
<b>1. Housing Code Compliances</b>		
<b>Corporate Objective:</b> (C1) Increase Perception of Safety.		
<b>KBU Initiative:</b> Achieve Council's Housing Goals.		
<b>Measure:</b> 3,000 housing code compliances.		
<b>Units of Measure:</b> Monthly Production Report.	<b>Frequency of Update:</b> Monthly	
<b>Measurement Intent:</b> Ensure safe and healthy housing conditions in neighborhoods.		
<b>Measurement Formula:</b> Number of houses units brought into code compliance.		
<b>Data Elements and Sources:</b> Tracked in Code Information Management System		
<b>Source For and Approach to Setting Targets:</b> Historical data regarding compliances; productivity improvements as a result of code consolidation		
<b>Data Contact:</b> Walter Abernethy		
<b>Target Setting Responsibility:</b> Stanley Watkins/ Walter Abernethy	<b>Accountability for Meeting Target:</b> Code Enforcement Division	<b>Tracking/Reporting Responsibility:</b> Walter Abernethy
<b>Notes/Assumptions:</b> <ul style="list-style-type: none"> <li>• Compliance numbers will be tracked monthly</li> <li>• Performance targets are tied to inspector PRD</li> </ul>		

<b><i>Neighborhood Development</i></b> <b>2. Nuisance Code Compliances</b>		
<b>Corporate Objective:</b> (C1) Increase Perception of Safety.		
<b>KBU Initiative:</b> Achieve Council's Nuisance Goals.		
<b>Measure:</b> 48,000 property and appearance code compliances.		
<b>Units of Measure:</b> Nuisance violations.	<b>Frequency of Update:</b> Monthly	
<b>Measurement Intent:</b> Ensure safe and healthy living conditions in neighborhoods.		
<b>Measurement Formula:</b> Number of property and appearance code violations brought into compliance.		
<b>Data Elements and Sources:</b> Tracked in Code Information Management System (CityView).		
<b>Source For and Approach to Setting Targets:</b> Historical data regarding compliances; productivity improvements as a result of code consolidation.		
<b>Data Contact:</b> Walter Abernethy		
<b>Target Setting Responsibility:</b> Stanley Watkins/ Walter Abernethy	<b>Accountability for Meeting Target:</b> Code Enforcement Division	<b>Tracking/Reporting Responsibility:</b> Walter Abernethy
<b>Notes/Assumptions:</b> <ul style="list-style-type: none"> <li>• Compliance numbers will be tracked monthly</li> <li>• Performance targets are tied to inspector PRD</li> </ul>		

***Neighborhood Development***

**3. Zoning Enforcement Compliances**

**Corporate Objective:** (C1) Increase Perception of Safety.

**KBU Initiative:** Achieve Council's Zoning Enforcement Compliance Goals.

**Measure:** 13,000 zoning violations compliance.

**Units of Measure:** Number of zoning violations.

**Frequency of Update:** Monthly

**Measurement Intent:** Ensure safe and healthy living conditions in neighborhoods.

**Measurement Formula:** Number of zoning compliances.

**Data Elements and Sources:** Tracked in Code Information Management System (CityView)

**Source For and Approach to Setting Targets:** Historical data regarding zoning compliances.

**Data Contact:** Walter Abernethy

**Target Setting Responsibility:**  
Stanley Watkins/ Walter Abernethy

**Accountability for Meeting Target:**  
Code Enforcement Division

**Tracking/Reporting Responsibility:**  
Walter Abernethy

**Notes/Assumptions:**

- Compliances will be tracked monthly



***Neighborhood Development***

**4. Neighborhood Revitalization Plans Objectives**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:**

**Measure:** 100 percent of Neighborhood Action Plans achieved.

**Units of Measure:** Percentage of revitalization plans objectives achieved

**Frequency of Update:** Monthly

**Measurement Intent:** Degree to which area plan initiatives are achieved to stabilize neighborhoods and reach neighborhood's organizational sustainability.

**Measurement Formula:** Percentage of Neighborhood Development Revitalization Neighborhood objectives completed annually.

**Data Elements and Sources:** Progress on Area Plan Implementation is monitored by Neighborhood Services Specialists.

**Source For and Approach to Setting Targets:** Adopted Area or Action Plans; Historic Approach to monitoring neighborhood improvement.

**Data Contact:** Stephanie Small

**Target Setting Responsibility:**  
Stanley Watkins/ ND Managers

**Accountability for Meeting Target:**  
ND Executive Team

**Tracking/Reporting Responsibility:**  
Stephanie Small

**Notes/Assumptions:**

- All objectives are intended to achieve neighborhood stability as defined by Quality of Life Index.

*Neighborhood Development*

**5. Revitalization Neighborhoods Graduated**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:** Graduate Revitalization Neighborhoods.

**Measure:** Zero revitalization neighborhoods graduated.

**Units of Measure:** Revitalization Neighborhoods.

**Frequency of Update:** Annual

**Measurement Intent:** Measure success in completing neighborhood revitalization plans.

**Measurement Formula:** Number of Revitalization Neighborhoods that annually graduate and no longer need an action team for support.

**Data Elements and Sources:** Progress on Revitalization Plan Implementation as monitored by Neighborhood Services.

**Source For and Approach to Setting Targets:** Recommendation from the Neighborhood Cabinet.

**Data Contact:** Stephanie Small

**Target Setting Responsibility:**  
Stanley Watkins/ ND Managers

**Accountability for Meeting Target:**  
ND Executive Team

**Tracking/Reporting Responsibility:**  
Stephanie Small

**Notes/Assumptions:**

- In order for a Revitalization Neighborhood to graduate it must have: 1) 75 percent of the neighborhood plan completed, 2) ranked at least *Transitioning* in two consecutive Quality of Life Studies; and 3) have in place an effective neighborhood organization with a score of 80 percent.

**Neighborhood Development**

**6. Residents Trained**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:**

**Measure:** 1,400 residents trained.

**Units of Measure:** Residents participating in training.

**Frequency of Update:** Monthly

**Measurement Intent:** Demand for neighborhood organization development training.

**Measurement Formula:** Number of residents participating in organization capacity building training.

**Data Elements and Sources:** Data from attendance sheets for workshops and classes (Community University, Neighborhood Matching Grants, Neighborhood Symposium and Customized Training).

**Source For and Approach to Setting Targets:** Historical Data on training demand.

**Data Contact:** Stephanie Small

**Target Setting Responsibility:**  
Stanley Watkins/ Stephanie Small

**Accountability for Meeting Target:**  
Cynthia Woods

**Tracking/Reporting Responsibility:**  
Stephanie Small

**Notes/Assumptions:**

- All objectives are intended to achieve neighborhood stability as defined by the Quality of Life Index.

<b>Neighborhood Development</b>  <b>7. Capacity Building Successes</b>		
<b>Corporate Objective:</b> (C2) Strengthen Neighborhoods.		
<b>KBU Initiative:</b> Percent of Capacity Building Successes		
<b>Measure:</b> 90 percent of capacity building successes.		
<b>Units of Measure:</b> Neighborhood Activities.	<b>Frequency of Update:</b> Annual	
<b>Measurement Intent:</b> To increase neighborhood resident and organizational ability to manage neighborhoods successfully.		
<b>Measurement Formula:</b> The number of neighborhood activities completed by residents in neighborhoods within two years of completing a City sponsored neighborhood training. The formula is the total number of neighborhood initiatives divided by the total number of neighborhoods that participated in training in the preceding two years.		
<b>Data Elements and Sources:</b> Data from Community University Sessions; Neighborhood Matching Grants; Neighborhood Symposium and Customized Training.		
<b>Source For and Approach to Setting Targets:</b> Training Units support NAP and neighborhood revitalization efforts.		
<b>Data Contact:</b> Cynthia Woods		
<b>Target Setting Responsibility:</b> Stanley Watkins/ Stephanie Small	<b>Accountability for Meeting Target:</b> Stephanie Small	<b>Tracking/Reporting Responsibility:</b> Cynthia Woods
<b>Notes/Assumptions:</b>		
<ul style="list-style-type: none"> <li>• A neighborhood initiative is any activity by the neighborhood that can be linked to the training provided by the City. A survey is conducted annually with neighborhood leaders to identify neighborhood activities, which is then matched with the Neighborhood Development training database.</li> </ul>		

***Neighborhood Development***

**8. Number of Neighborhoods Initiatives**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:** Number of Neighborhood Initiatives

**Measure:** 360 neighborhood initiatives.

**Units of Measure:** Neighborhood Initiatives.

**Frequency of Update:** Monthly

**Measurement Intent:** To show progress in neighborhoods managing problems.

**Measurement Formula:** The number of initiatives taken on by neighborhoods as reported by Neighborhood Services Specialists.

**Data Elements and Sources:** Data from Neighborhood Liaison Program, capacity building survey, and NAP work plans.

**Source For and Approach to Setting Targets:** Neighborhood Liaison Program Activity Sheet, capacity building survey and NAP work plans.

**Data Contact:** Stephanie Small

**Target Setting Responsibility:**  
Stanley Watkins/ Stephanie Small

**Accountability for Meeting Target:**  
Stephanie Small

**Tracking/Reporting Responsibility:**  
Stephanie Small

**Notes/Assumptions:**

- A neighborhood initiative is any activity by the neighborhood that can be linked to the Neighborhood Liaison Program, Community University, or similar capacity building activities.

*Neighborhood Development*

**9. Infrastructure Projects Completed**

**Corporate Objective:** (C2) Strengthening Neighborhoods.

**KBU Initiative:**

**Measure:** Three projects completed.

**Units of Measure:** Completed projects

**Frequency of Update:** Annual

**Measurement Intent:** To monitor timeliness of project completion and scope of neighborhood physical improvements.

**Measurement Formula:** Projects closed out at completion.

**Data Elements and Sources:** Capital Improvement Program.

**Source For and Approach to Setting Targets:** Neighborhood Improvement Bonds Process; annual improvement plan monitoring process.

**Data Contact:** Carl Jarrett, Engineering

**Target Setting Responsibility:**  
 Engineering/Neighborhood Development

**Accountability for Meeting Target:**  
 Engineering/ Neighborhood Development

**Tracking/Reporting Responsibility:**  
 Stephanie Small/Pam Lopez

**Notes/Assumptions:**

*Neighborhood Development*

**10. Affordable Housing Units Financed**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:** Meet Council's Affordable Housing Goal.

**Measure:** 900 new and renovated units financed with City funds.

**Units of Measure:** Housing Units.

**Frequency of Update:** Monthly

**Measurement Intent:** Increase in the number of affordable housing units.

**Measurement Formula:** Total number of City financed housing units within the reporting period.

**Data Elements and Sources:** Housing Trust Fund, HouseCharlotte, Lead Based Paint, Charlotte Neighborhood Fund, etc.

**Source For and Approach to Setting Targets:** City Council Housing Objective.

**Data Contact:** Stan Wilson

**Target Setting Responsibility:**  
Stanley Watkins/ Stan Wilson

**Accountability for Meeting Target:**  
Stan Wilson

**Tracking/Reporting Responsibility:**  
Tonya Alexander

**Notes/Assumptions:**

***Neighborhood Development***

**11. New and Renovated Units Completed with City Funds**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:**

**Measure:** 1,000 new and renovated units completed with City funds.

**Units of Measure:** Housing Units.

**Frequency of Update:** Monthly and Quarterly (CDCs and CMHP, Developers).

**Measurement Intent:** Increase in the number of affordable housing units.

**Measurement Formula:** Total number of City financed housing units receiving a Certificate of Occupancy within the reporting period.

**Data Elements and Sources:** Housing Trust Fund, HouseCharlotte, Lead Based Paint, Charlotte Neighborhood Fund, etc.

**Source For and Approach to Setting Targets:** City Council Objective.

**Data Contact:** Stan Wilson

**Target Setting Responsibility:**  
Stanley Watkins/Stan Wilson

**Accountability for Meeting Target:**  
Stan Wilson

**Tracking/Reporting Responsibility:**  
Tonya Alexander

**Notes/Assumptions:**



*Neighborhood Development*

**12. Homeowners Created with City Funds**

**Corporate Objective:** (C2) Strengthen Neighborhoods.

**KBU Initiative:**

**Measure:** 450 homeowners created with City funds.

**Units of Measure:** Housing Units.

**Frequency of Update:** Monthly

**Measurement Intent:** Track the number of newly created homeowners.

**Measurement Formula:** Total number of HouseCharlotte subsidies plus total CMHP 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> mortgages.

**Data Elements and Sources:** Housing Trust Fund, HouseCharlotte, Lead Based Paint, Charlotte Neighborhood Fund, etc.

**Source For and Approach to Setting Targets:** Historical data on production and funding.

**Data Contact:** Stan Wilson

**Target Setting Responsibility:**  
Stanley Watkins/ Stan Wilson

**Accountability for Meeting Target:**  
Stan Wilson

**Tracking/Reporting Responsibility:**  
Tonya Alexander

**Notes/Assumptions:**

- CMHP will meet its goal
- Sufficient HouseCharlotte funding (no control over the size of the subsidies)
- Market demand

*Neighborhood Development*

**13. KBU Cost Per Service Delivery**

**Corporate Objective:** (R1) Deliver Competitive Services.

**KBU Initiative:**

**Measure:** 10 percent reduction in budgeted KBU service delivery per unit cost.

**Units of Measure:** Cost per composite unit

**Frequency of Update:** Monthly

**Measurement Intent:** Measure the organization's efficiency.

**Measurement Formula:** The KBU total budget divided by the number of service units forecasted. Goal is actual cost of service delivery is 10% less than budgeted cost per service delivery

**Data Elements and Sources:** Balanced Scorecard and ND Expenditures Report.

**Source For and Approach to Setting Targets:** Baseline established on most recent estimate of expenditures and tracking of service delivery achievement data.

**Data Contact:** Richard Woodcock

**Target Setting Responsibility:**  
Stanley Watkins/ Richard Woodcock

**Accountability for Meeting Target:**  
Stanley Watkins

**Tracking/Reporting Responsibility:**  
Richard Woodcock

**Notes/Assumptions:**

- Cost does not include City overhead.

***Neighborhood Development***

**14. Expenditures Targeted to Revitalization Areas**

**Corporate Objective:** (R2) Expand Tax Base and Revenue Sources.

**KBU Initiative:**

**Measure:** 25 percent of Expenditures to targeted neighborhood revitalization areas.

**Units of Measure:** Percent of Dollars.

**Frequency of Update:** Quarterly

**Measurement Intent:** Measure effectiveness in directing resources to address revitalization areas.

**Measurement Formula:** The percent of Neighborhood Development's staff, program and capital dollars directed annually to the targeted revitalization areas.

**Data Elements and Sources:** Balanced Scorecard and ND Expenditures Report.

**Source For and Approach to Setting Targets:** Baseline established base on most recent estimate of expenditures.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins/ Division Managers

**Accountability for Meeting Target:**  
Stanley Watkins

**Tracking/Reporting Responsibility:**  
Richard Woodcock

**Notes/Assumptions:**

- Cost does not include City and departmental overhead.

***Neighborhood Development***

**15. Infrastructure Investments**

**Corporate Objective:** (R3) Invest in Infrastructure.

**KBU Initiative:**

**Measure:** The number of dollars obligated annually by Council action for neighborhood infrastructure projects.

**Units of Measure:** Dollars

**Frequency of Update:** Quarterly

**Measurement Intent:** Measure efficiency that bond infrastructure dollars are being expended

**Measurement Formula:** The number dollars actually approved by City Council for planning, design, real estate and construction of infrastructure projects within a given fiscal year.

**Data Elements and Sources:** City financial system and Council Minutes.

**Source For and Approach to Setting Targets:** Baseline established base on City Council's Housing and Neighborhood Focus Area targets.

**Data Contact:** Pam Lopez

**Target Setting Responsibility:**  
Stanley Watkins/ Stephanie Small

**Accountability for Meeting Target:**  
Stephanie Small

**Tracking/Reporting Responsibility:**  
Pam Lopez

**Notes/Assumptions:**

*Neighborhood Development*

**16. Ratio of City Housing Funds Leveraged with Other Funds**

**Corporate Objective:** (R3) Invest in Infrastructure.

**KBU Initiative:**

**Measure:** 1:4 Ratio of City housing funds to other funding sources.

**Units of Measure:** City and Other Funding.

**Frequency of Update:** Quarterly

**Measurement Intent:** Compare City investment and other funding sources.

**Measurement Formula:** City and other funding sources.

**Data Elements and Sources:** Individual Reports.

**Source For and Approach to Setting Targets:** Unknown

**Data Contact:** Stan Wilson

**Target Setting Responsibility:**  
Stanley Watkins/ Stan Wilson

**Accountability for Meeting Target:**  
Stan Wilson

**Tracking/Reporting Responsibility:**  
Tonya Alexander

**Notes/Assumptions:**

*Neighborhood Development*

**17. New or Expanded Financial Partnerships**

**Corporate Objective:** (B1) Develop Collaborative Solutions.

**KBU Initiative:**

**Measure:** Three new or expanded financial partnerships.

**Units of Measure:** Partnerships

**Frequency of Update:** Monthly

**Measurement Intent:** Develop a broad partnership base to achieve Neighborhood Development's mission.

**Measurement Formula:** A partnership, which Neighborhood Development has entered into a contractual agreement with.

**Data Elements and Sources:** Each division is responsible for obtaining one new or expanded partnership.

**Source For and Approach to Setting Targets:**

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
Each Division Manager

**Tracking/Reporting Responsibility:**  
Patricia Mason

**Notes/Assumptions:**

*Neighborhood Development*

**18. Customer Satisfaction Achieved (Annual KBU survey)**

**Corporate Objective:** (B2) Enhance Customer Service.

**KBU Initiative:**

**Measure:** 90 percent customer satisfaction achieved.

**Units of Measure:** Survey questions – Percentages in neutral and strength categories.

**Frequency of Update:** Annual

**Measurement Intent:** Degree to which customers are satisfied with the service provided by Neighborhood Development.

**Measurement Formula:** Average ranking of nine survey questions in the neutral and strength categories.

**Data Elements and Sources:** Survey conducted by outside consultant.

**Source For and Approach to Setting Targets:** Historical indicator of customer satisfaction.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
All employees

**Tracking/Reporting Responsibility:**  
Pamela Lopez

**Notes/Assumptions:**

- Survey is conducted annually at year-end.
- Results aren't available until year-end.
- A randomly selected list of customers from each division.
- Survey is anonymous.

*Neighborhood Development*

**19. Business Processes Analyzed**

**Corporate Objective:** (B3) Optimize Business Processes.

**KBU Initiative:**

**Measure:** One Business Improvement Process analyzed.

**Units of Measure:** Projects

**Frequency of Update:** Monthly

**Measurement Intent:** Gain efficiencies through business process improvements.

**Measurement Formula:** Measures the number of business process improvement analyses completed annually.

**Data Elements and Sources:** Monthly progress reports.

**Source For and Approach to Setting Targets:** Definition of projects.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
Richard Woodcock/ Division Managers

**Tracking/Reporting Responsibility:**  
Richard Woodcock

**Notes/Assumptions:**



*Neighborhood Development*

**20. Strategic IT Portfolio**

**Corporate Objective:** (B3) Optimize Business Processes

**KBU Initiative:** Implement Accela Zoning Module.

**Measure:** Develop Strategic IT Portfolio.

**Units of Measure:** Completed projects.

**Frequency of Update:** Annual

**Measurement Intent:** To achieve Strategic IT Portfolio.

**Measurement Formula:** Projects closed out at completion.

**Data Elements and Sources:** CIP/NAP

**Source For and Approach to Setting Targets:** KBU resources and capability.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
Selected Division Manager

**Tracking/Reporting Responsibility:**  
Richard Woodcock

**Notes/Assumptions:**

*Neighborhood Development*

**21. Employee Satisfaction Achieved (Annual KBU survey)**

**Corporate Objective:** (E1) Achieve positive employee climate.

**KBU Initiative:** Undertake Teamwork, Supervisor Training Initiatives and Business Process Improvement.

**Measure:** 80 percent Employee Satisfaction.

**Units of Measure:** Survey questions – Percentages in neutral and strength categories.

**Frequency of Update:** Annual

**Measurement Intent:** Degree to which employees are satisfied as it relates to job, supervisor, and management of organization and employee benefits.

**Measurement Formula:** Average ranking of 54 survey questions in the neutral and strength categories.

**Data Elements and Sources:** Survey conducted by outside consultant.

**Source For and Approach to Setting Targets:** Historical indicator of employee satisfaction.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
All employees

**Tracking/Reporting Responsibility:**  
Sonja Sanders

**Notes/Assumptions:**

- Survey is conducted annually at year-end.
- Results aren't available until year-end.
- All employees have the opportunity to complete survey.
- Survey is anonymous.

**Neighborhood Development**

**22. Employee Turnover**

**Corporate Objective:** (E2) Recruit and Retain Skilled Employees.

**KBU Initiative:**

**Measure:** 10 percent Employee Turnover.

**Units of Measure:** Percent of employees voluntarily leaving compared to employees on board.

**Frequency of Update:** Monthly

**Measurement Intent:** To determine if Neighborhood Development is losing a disproportionate number of employees.

**Measurement Formula:** The number of employees that leave Neighborhood Development during the year divided by the number of employees on board at the beginning of the fiscal year.

**Data Elements and Sources:** Peoplesoft

**Source For and Approach to Setting Targets:** Accepted definition of turnover rate.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
All KBU Employees

**Tracking/Reporting Responsibility:**  
Richard Woodcock

**Notes/Assumptions:**

- Only include employees who voluntary resigned. (Does not include retirements and involuntary terminations).

***Neighborhood Development***

**23. Employees Completing 75 Percent of their Continuing Education Plan**

**Corporate Objective:** (E3) Promote Learning and Growth.

**KBU Initiative:**

**Measure:** 100 percent of Employees completing 75 percent of their continuing education plan.

**Units of Measure:** Percent of Employees.

**Frequency of Update:** Year-end

**Measurement Intent:** Ensure employees are pursuing career development.

**Measurement Formula:** Each employee has a training plan with defined priorities. Those priorities equal 100 percent. Each employee must complete 75 percent of his/her plan priorities.

**Data Elements and Sources:** Divisions are responsible.

**Source For and Approach to Setting Targets:** Goal of career development for all employees.

**Data Contact:** Stanley Watkins

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
Each Division

**Tracking/Reporting Responsibility:**  
Cynthia Woods

**Notes/Assumptions:**

- The plan may be amended during the year to recognize training opportunities or lack thereof.

*Neighborhood Development*

**24. Provide Wellness Information**

**Corporate Objective:** (E3) Promote Learning and Growth.

**KBU Initiative:**

**Measure:** Wellness information provided in each newsletter and staff meeting.

**Units of Measure:** Percentage – Number of newsletters and staff meetings.

**Frequency of Update:** Monthly

**Measurement Intent:** To make available wellness information to staff via the monthly newsletters and staff meetings.

**Measurement Formula:** The total number of newsletters and staff meetings.

**Data Elements and Sources:** Information will be gathered from the Wellness Works Coordinator, the internet, books, and/or the department's Wellness Ambassadors.

**Source For and Approach to Setting Targets:** Creating a work environment that supports the Wellness Works priorities.

**Data Contact:** Richard Woodcock

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
Each Division

**Tracking/Reporting Responsibility:**  
Sherry Rathod

**Notes/Assumptions:**

The actual target for this initiative will not be set until January 2008.

**Neighborhood Development**

**25. Support Physical Activity**

**Corporate Objective:** (E3) Promote Learning and Growth.

**KBU Initiative:**

**Measure:** Number of Neighborhood Development employees that will use the stairs in Old City Hall.

**Units of Measure:** Number of employees committing to use the stairs

**Frequency of Update:** Quarterly

**Measurement Intent:** To encourage staff to take the stairs when possible in Old City Hall.

**Measurement Formula:** The total number of employees that sign commitments to take the stairs.

**Data Elements and Sources:** Copies of written stairs commitments.

**Source For and Approach to Setting Targets:** Creating a work environment that supports the Wellness Works priorities.

**Data Contact:** Richard Woodcock

**Target Setting Responsibility:**  
Stanley Watkins

**Accountability for Meeting Target:**  
Each Division

**Tracking/Reporting Responsibility:**  
Sherry Rathod

**Notes/Assumptions:**