



CHARLOTTESM

**BUSINESS SUPPORT
SERVICES**

**Strategic Operating Plan
Fiscal Year 2010**

**Charles Robinson, Key Business Executive
July 2009**

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I. EXECUTIVE SUMMARY

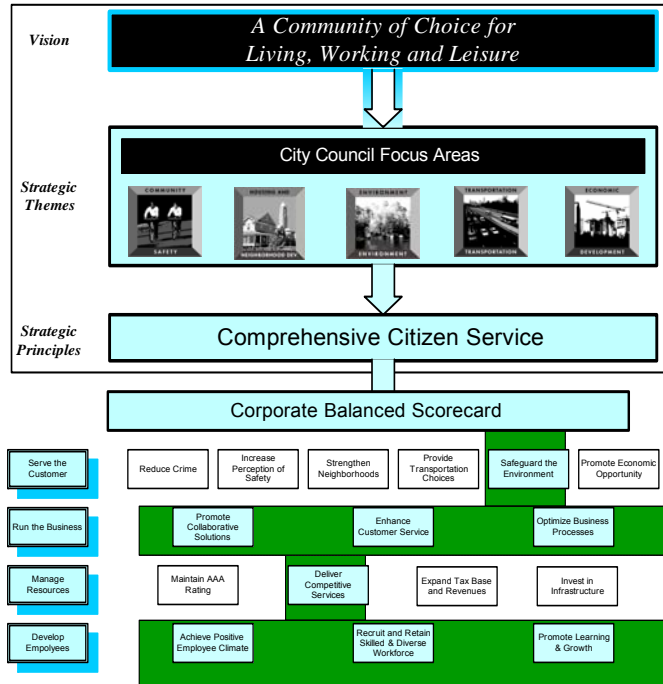
Introduction

Business Support Services (BSS) is one of four support business units in the City of Charlotte's organizational structure. As a support business unit, BSS is responsible for providing many of the *corporate shared services* and much of the service infrastructure necessary for the City's operational success. Corporate shared services includes a variety of products and services supporting corporate and business unit level functions such as equipment and fleet management, corporate technology, general business and regulatory and governance services. BSS also provides most of the technology, radio, and network communications infrastructure used by the business units in meeting their business goals.

These shared services and infrastructures are also used to provide services to other municipal, county, state, and federal government agencies.

BSS currently has an authorized staff of 223 employees providing products and services in six different functional areas. The organization is led by its Key Business Executive (KBE), deputy KBE and four division managers (see the organization chart on page 10). These leaders come together with representatives from the Office of Resource Management to form the BSS Leadership Team. The Leadership Team provides the strategic and tactical direction and decision support necessary for the organization's day-to-day operational success.

**Business Support Services Strategy Map
Fiscal Year 2010 & 2011**



Resource Summary

| | FY 2008 | FY 2009 | FY 2010 |
|---|---------------------|---------------------|---------------------|
| | Actual | Actual | Budgeted |
| Positions | 198 | 238 | 223 |
| Personnel | 14,738,686 | 16,678,389 | 17,469,380 |
| Operating | 13,005,061 | 12,969,962 | 12,453,522 |
| Other (debt service, capitalized tools, etc) | 2,651,524 | 2,451,524 | 4,453,253 |
| Internal Chargebacks | (15,154,152) | (14,499,781) | (14,609,435) |
| Prior Year Obligations | 2,024,773 | 956,239 | 387,978 |
| subtotal | 17,067,465 | 18,556,333 | 20,154,699 |
| External Chargebacks | (2,232,033) | (4,745,060) | (5,695,908) |
| Enterprise Fund CAP | (5,404,626) | (5,662,949) | (6,072,893) |
| Revenues Co Shared Services | (354,503) | (437,835) | (493,793) |
| Revenues Other (Contracts, Salvage Sale & Fees) | (9,436,639) | (10,254,560) | (8,332,200) |
| subtotal | (17,427,801) | (21,100,404) | (20,594,794) |
| Total General Fund Burden | (360,336) | (2,544,071) | (440,095) |
| Capital Investment Projects | 845,743 | 9,230,454 | 4,272,940 |
| TOTAL | 485,407 | 6,686,383 | 3,832,845 |

Vision and Mission

Business Support Services is a provider of Fleet, Technology, Procurement and Public Safety Communication Services. In supporting the City's focus of "comprehensive citizen service" we partner with the City's business units and other governmental customers with the goal of:

Excelling in the provision of reliable, innovative and best value government shared service to the public sector.

BSS' guiding mission statement is:

Advancing the Business of Public Service

This mission is a call to action to achieve the vision and the overarching City's Strategic Principle of *Comprehensive Citizen Service*.

Specific **Strategic Goals** that will guide our progress are:

1. **Build and effectively manage the service infrastructure** (people, process, systems and facilities) for Fleet, IT, Radio, and Procurement.
2. **Leverage partnerships** to more efficiently and reliably provide integrated services through sharing of resources.
3. **Build customer trust and loyalty** providing best value, customer-centric services.
4. **Grow the Business** by demonstrating and communicating the value of our services to existing and potential customers.

Commitment to the City of Charlotte's Guiding Principles

Along with supporting the City Council Priorities and the Corporate Scorecard, BSS is committed to conducting business in accordance with the City's Guiding Principles listed below:

- Value teamwork, openness, accountability, productivity and employee development;
- Provide all customers with courteous, accessible, responsive and seamless quality services;
- Take initiative to identify, analyze, and solve problems
- Attract and retain skilled, motivated employees; and
- Collaborate with stakeholders to solve problems and make decisions.

Key Issues and Challenges

In order to achieve the large mission, vision, and goals for BSS, specific issues and challenges are identified in each goal area. Components of each are:

1. Build and Effectively Manage the Service Infrastructure for Fleet, IT, Radio, and Purchasing.
 - *People – trained, ready to work, mission focused*
 - *Process – streamlined and document and data centric*
 - *Systems – corporately solidifying standards and change management practices for the enterprise infrastructure.*
 - *Facilities – adequate and properly equipped physical plants*
2. Leverage partnerships to more efficiently and reliably provide centralized services through sharing of resources.
 - *Service Level Agreements*
 - *Inter-local Agreements*
 - *Memorandum of Agreement (compliance & regulatory requirements)*
 - *Effective use of vendor services*
3. Build customer trust and loyalty providing best value, customer-centric services.
 - *Develop transparent reporting and tracking tools that match customer need*
 - *Provide compliance and guidance*
 - *Provide responsive feedback and quality service*
 - *Excel at team approach to asset management*
 - *Actively seek win-win solutions*
4. Grow the Business by demonstrating and communicating the value of our services to existing and potential customers
 - *Optimize use of resources to provide lowest cost service offerings*
 - *Streamline and standardize transactional functions*
 - *Develop and communicate service catalogue and fully loaded costing structure for our services*

Service Infrastructure

While BSS has always focused on delivering best value service and finding savings opportunities for all its customers, this will be even more critical over the next two years. BSS' role as corporate shared services provider means that the quality, efficiency and timeliness of its services have a direct impact on the ability of the operational business units to serve the citizen.

Whether it is managing and maintaining over 5,000 pieces of fleet related equipment; managing and maintaining the 15,200 pieces of radio and safety electronic equipment and providing the communications infrastructure for over 18,000 subscribers in one of the nation's top five consolidated radio systems; managing and supporting over 3,000 personal computers, 487 data center servers, 550 network devices, 100 data circuits and

thousands of technology service requests; or providing the procurement services and procurement oversight that ensure effective and proper use of City and County funds, BSS is a necessary and critical partner in *advancing the business of public service*.

As is true for any system, whether transportation, transit, banking or manufacturing, the limiting factor in successfully delivering services or products is the system's supporting infrastructure (roads, rails, facilities, and transmission lines). This is why the top strategic goal for BSS is *providing a service infrastructure (people, processes, systems and facilities) that effectively and efficiently meets the shared service needs of its customers*. This strategic goal establishes fundamental requirements that represent significant challenges in the current economic environment.

Service Infrastructure – People

Moving into FY2010, BSS has eliminated 12 positions. While there are no reductions of basic services associated with the elimination of these positions, all the players are now on the field. This means that the loss of staff members for any reason (voluntary or involuntary separation, military service or military leave, extended FMLA leave, etc.) will have a direct impact on services. A typical example of the staffing level challenges we face is not having the staff needed to support the City's data network.

- Effectively managing the City data network infrastructure. The City's corporate data network has grown by 73% in the last five years. The number of supported locations has increased by 74%, the number of network access ports increased by 72%, and the number of support devices has increased by 55% since FY2003. The growth in the network has not however, included any additional support staff. Corporate Information Technology (IT) currently supports over 550 network devices in 110 locations that provide the data network infrastructure critical to effective service delivery. At current staffing levels Corporate IT is limited in its ability to proactively "manage" the network, because network technicians spend their time reacting to the problems within the aging infrastructure (see Service Infrastructure – Systems below). Risk of system failure and extended down time increases as the infrastructure ages.

Service Infrastructure – Processes

Development and improvement of processes needed for a shared services model contribute to the infrastructure element that holds the greatest possibility for efficiency and savings. BSS is dedicated to working to improve both business-wide and division specific service processes. This effort has already brought significant improvement to the equipment procurement, commissioning and decommissioning processes and we are currently working on several other key practices. Defining and streamlining our processes will remain a top priority for BSS; however, the challenge will be finding the staff time to pull away from daily service provisioning to focus on these initiatives.

Service Infrastructure – Systems

- Optimize the City's procurement activities. A priority of City Council is improving the City's ability to effectively manage and report on the City's procurement activities. The shortcomings of GEAC financial system in this area are well understood and were further documented in the recent report to Council on the City's procurement practices in the Matrix Report.

BSS is participating in the Enterprise Resource Project, which currently includes a procurement module. BSS is also collaborating with the Office of the Chief Information Officer (OCIO) in the development of the City's information architecture for the Financial Management Core Business Function.

Service Infrastructure – Facilities

BSS currently provides services to its customers from 11 different locations. A key component of the BSS service strategy is to provide as many of our services as possible in the operational KBUs' service districts. This reduces customer windshield time, increases operational readiness, improves service efficiencies, and saves tax payer dollars. There are several facilities in various stages of development that are important to providing the service capacity to meet the ever-growing demand. These are:

- Seigle Avenue Light Vehicle Maintenance facility replacement is currently four years behind on its construction schedule. While the issues leading to the delays were unavoidable, moving this project forward is critically important to maintaining current service levels. It is currently anticipated that construction will begin in FY2010, with service beginning from the facility in FY2011. BSS is closely collaborating with Budget, Engineering, and its customers to ensure the project stays on the current schedule.
- Asset Recovery & Disposal (ARD) and Equipment Commissioning /Decommissioning facilities. The facilities currently being used for BSS' ARD services and for its commissioning/decommissioning services are separately leased facilities. These leases will expire in FY2011. BSS will analyze the value of combining these functions into a single facility because of the natural synergies between these two functions. The analysis will include whether leasing or capital construction offer the best facility value.

Leveraging Partnerships

We are working diligently to *expand BSS service capacity by leveraging City and external resources in joint service partnerships.* A great example of this is the Service Level Agreement established with the City of Gastonia for radio infrastructure services. As part of this agreement, City of Gastonia staff are

providing routine maintenance support for the City's infrastructure in Gaston County, which has reduced their overall service cost and our need for additional staff.

In addition to the expansion of partnerships for service provision, we are focusing on working with all customers to optimize business processes. These efforts on the retooling of business processes will serve to reduce time and ultimately costs associated with various tasks. The goal being to increase efficiencies, produce capacity gains and free up resources to focus on more value added services.

These types of partnerships will be key to growing BSS service capacity, while minimizing costs. Creative approaches to cost and return on investment models as well as budgeting will also be required. An area of focus for FY2010 will be on growing revenue associated with vendor services and winning support for fee models that support the Service Infrastructure strategies critical to BSS' core services.

Customer Trust & Service Value

Several of the initiatives described in the Service Infrastructure – Process portion of this document target *building customer trust and service value by quantifying service quality, accurately and appropriately costing services, and effectively forecasting resource use and availability*. One of the foundational components of building customer trust and demonstrating service value is increasing transparency within our business processes. Throughout FY10 and the coming years, BSS will be capitalizing on current City assets such as SharePoint, Black Pearl, ChangePoint, and the CNet to build the processes and workflows necessary to build customer trust and value.

Making progress in this area will be challenging because, as stated earlier, all the players are on the field delivering core services. This means we have extremely limited capacity to focus on service enhancements. The work being done on the elements of the Service Infrastructure, particularly on the process and systems infrastructure, will also advance BSS' ability build customer trust and value.

Growing the Business

Our development of Service Capacity Models and focus on building trust and value with our customers will allow us to continue to strategically grow our business in areas that we can provide the best service packages. Positioning ourselves to further grow our business will allow for us to review other potential service areas where we may be able to help the City. Taking the burden of more of the back office services from the operating KBUs would allow them to focus on their core services to citizens. In addition to the potential of adding new services to our portfolio, by expanding our customer base BSS will be able to spread the costs of our services further and create win/win partnerships throughout the region.

Organizational Structure

While the organization chart in Figure 2 below depicts a traditional hierarchical structure, BSS views its operational divisions more as “centers of expertise” than traditional “stove pipes.” Meeting the service expectations of our customers requires a matrix approach in developing and maintaining the corporate services infrastructure. This management approach enables BSS to demonstrate the corporate value of collaboration.

Business Support Services Key Business Unit

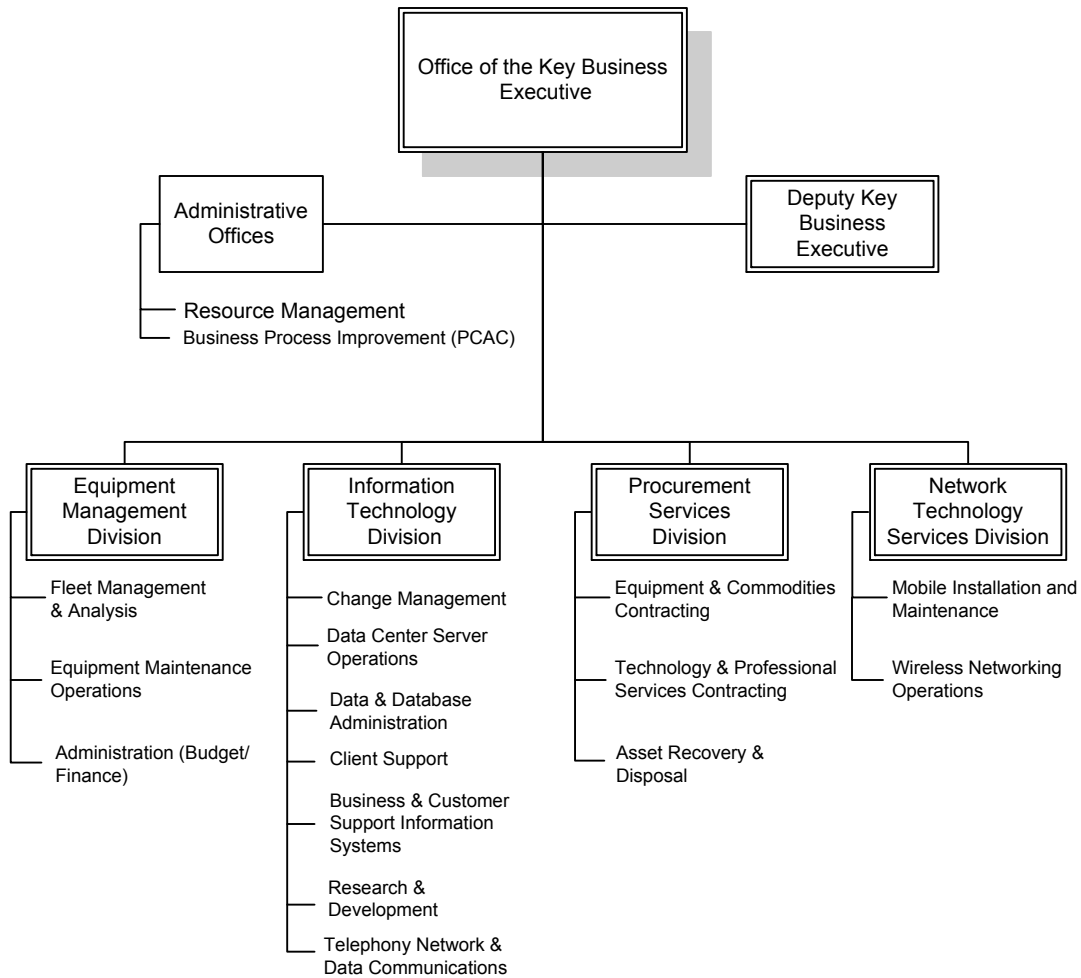


Figure 2

II. STRATEGY AND PLANNING

The BSS business strategy is designed to achieve our vision by accomplishing our mission as guided by the business priorities and measured by the BSS Balanced Scorecard. This relationship is demonstrated in the Strategy Map (Figure 3) below.

BSS Business Strategy Map

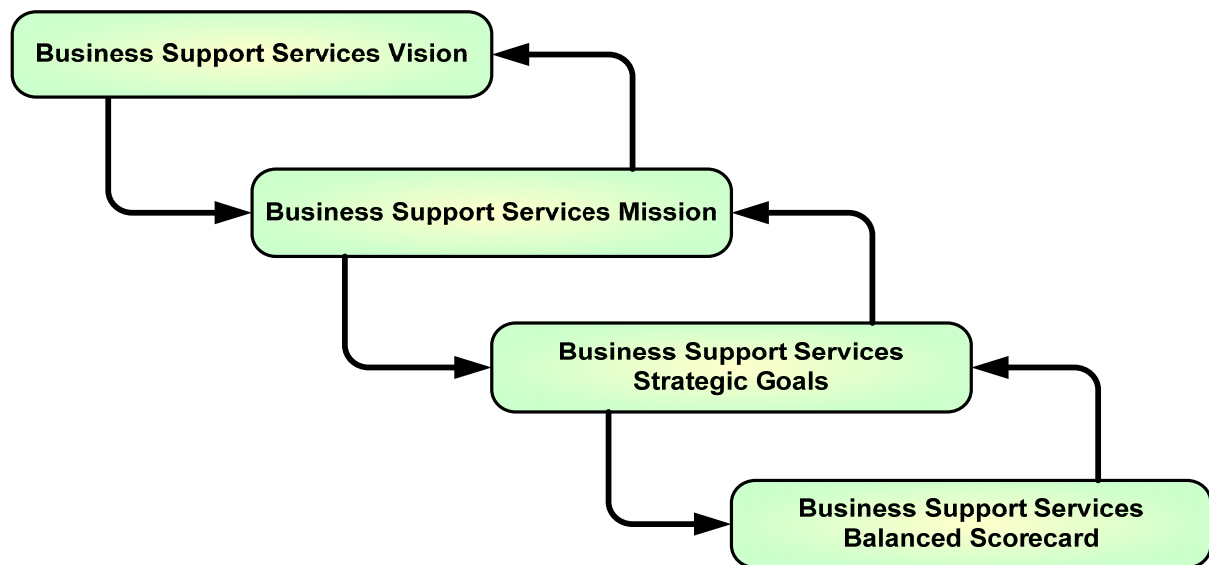


Figure 3

Key Accomplishments

Throughout the past few fiscal years, BSS has been moving forward in many of our services. Even with the economic downturn in FY2009, BSS has pushed forward with a continued focus to increase our value to customers. Many of our achievements are highlighted below by service area.

General Business Services

- The Procurement Services Division (PSD) has accomplished much in its support of corporate-wide purchasing. This includes:
 - **US Communities Contracting Partnerships** - Utilization of cooperative purchasing contracts available through U.S. Communities Governmental Purchasing Alliance has become a strategic tool for PSD to accomplish the mission of providing the right product, at the right time, for the right price. This allows PSD to re-align priorities and resources to have the capacity to bring value-added solutions and services to our customers. Combining the volumes of government agencies nationwide achieves cost effective pricing and reduces the administrative and overhead costs of suppliers and government agencies alike. All suppliers awarded contracts must sign a commitment that the U.S. Communities pricing is the lowest available to local agencies nationwide and a further commitment that, if

an agency is eligible for lower pricing through a state, regional or local contract, the supplier will match the pricing under U.S. Communities.

- **Auction Services** - The Asset Recovery and Disposal (ARD) section of PSD successfully managed five (5) auctions resulting in gross sales of nearly \$1,581,172. The total net sales for these auctions were \$988,908 with \$692,563 returned to the general fund. In addition, 682 items were reallocated this fiscal year for an estimated cost avoidance value of \$114,455.

- **Sustained Professional Purchasing Award** - PSD has been awarded the Sustained Professional Purchasing Award for the eighth consecutive year. This award is presented annually by the Carolinas Association of Governmental Purchasing (CAGP) and recognizes agencies in North and South Carolina who have demonstrated sustained excellence in purchasing standards during the calendar year. Procurement staff members must meet and maintain high standards in professional development, education, continuous improvement programs, ethics, environmental awareness, and electronic commerce to be eligible for this prestigious award.

Green Spending. Procurement is very involved in working with our customers to promote green spending options

- **Green products** - PSD, in support of the FY2008 and FY2009 Strategic Focus Area Plan, identified a list of products to use as a benchmark across the City to help ascertain the current level of spending on certain green products. The top ten (10) vendors currently supplying the majority of the identified benchmark products to the City provided quarterly itemized usage reports and worked collaboratively with BSS/PSD to define environmental preferable criteria for their respective commodities. According to the FY09 reports provided by our vendors, the purchase of green office supplies increased from 16% to 31%, and remanufactured toner/ink cartridges increased from 14% to 28% from July 2008 to June 2009.

- **Environmental Impact Analysis study** - PSD, in collaboration with the City Manager's Office, co-managed an environmental impact analysis study performed by Wake Forest University and University of North Carolina at Charlotte (UNCC). Paper towels, toner/ink cartridges, and carpet currently used within the City were analyzed to determine the environmental impacts, product performance, and availability. The study group also benchmarked the City's environmental purchasing initiatives against other best-in-class cities. Wake Forest and UNCC presented a summary of their findings, along with recommendations for strategies to decrease the City's environmental footprint, to the Environmental Purchasing Coordinators Team. The study findings may help the City to

further define environmental preferable criteria for identified commodities to assist in the selection of products that have a reduced effect on human health and the environment when compared with competing products or services that serve the same purpose without compromising overall budgetary or performance requirements.

Technology Services

- Network Technology Services (NTS) has accomplished much in its support of corporate technology infrastructure. This includes:
 - **Radio System Interlocal Agreements** - During FY08, NTS completed negotiations and interlocal agreements with Union County, Gastonia, Belmont and Mount Holly to join the Charlotte - Mecklenburg radio system and form a truly regional 800 MHz radio system. These agreements have continued as successful partnerships throughout FY09. Also during FY09, NTS began providing radio service to the agencies in Gastonia, Belmont, and Mt Holly. Currently, we also provide some support for Union County to assist them in the construction of their radio system. When Union County's system begins active use in March 2010, we will provide all radio network support. Negotiations continue with Cabarrus and Rowan counties to join the network. Our current support for these counties is related to grant development assistance. Overall our joint agreements allow for entities to capitalize on reduced overhead, economies of scale and improved efficiencies while most importantly promoting community safety by providing a more reliable and seamless radio system for use by public safety officials. Our Public Safety Radio Network in the Charlotte area continues to be recognized as one of the very best in the country.
 - **Radio Network Rebanding** - NTS initiated work processes to fulfill the FCC mandated 800 MHz rebanding effort in July 2008. Deployment of the project is expected to require a timeframe of 2.5 - 3 years. NTS negotiates, manages and implements the project on behalf of all City and County agencies utilizing the radio system. The many-faceted project process requires complete upgrading, replacement, template development, reprogramming and reinstallation of all radios utilizing the 800 band on the network. As of June 30, 2009, Phase I of the project has been completed for Charlotte-Mecklenburg Schools Bus Operations and the City's Solid Waste Services KBU. This process was completed on approximately 1,500 radios – both mobile and portable – for these two key customer agencies alone. NTS' Rebanding Team is currently implementing the required project process for all Law Enforcement agencies that utilize the radio system – over 3,000 radios are involved in this Phase. Other agency schedules will be determined in future phases as the project process moves forward.

- **RADIO Regional Site** - In September 2008, NTS implemented the R.A.D.I.O. (Regional Advanced Digital Inter-Operable Network) Project. This Project involved NTS developing and constructing a Motorola Digital Overlay System which will simulcast with the current Motorola Analog Radio System. This RADIO Regional Site will be the foundation block for the creation of a true Regional Interoperable Communications System.
- **Public Safety Radio Tower** - NTS and PSD released an ITB for construction of a new Public Safety Radio Tower in July 2008. The tower was erected at the City's Police & Fire Training Academy. The tower will support a high availability, reliable Public Safety connection from the backup 911 Center and Emergency Operations Center at the Training Academy to the current 800 MHz Public Safety Radio System.
- IT continues its pursuit of excellence despite the difficult conditions this fiscal year has presented. Some key achievements during FY2009 were:
 - **Best Practices in Information Technology Service Management (ITSM)** – Throughout FY09 our Information Technology services division has been working towards advancements with the Information Technology Infrastructure Library (ITIL) approach to technology services best practices. This approach has been advanced by several new customer agreements including SLAs with Mecklenburg County for BSS to manage the Charneck.org Internet site and CDOT to manage signal servers. The most notable advancement has been with the successful rebidding processes for the outsourced IT Service Desk. Customers were very active throughout this process and the result is a contract that includes increased services at a reduction in overall costs. The Remedy application which is part of the service desk contract also provides for an improved framework for overall IT service delivery. Remedy tools include components to improve processes including customer service requests, service catalogue, asset management, configuration management, change management, incident and problem management, SLA management and reporting. The applications of Remedy will provide for increased control and transparency in technology processes.
 - **Portfolio Management** - Completed the first phase of Portfolio Management implementation by initiating the TPET process for budget submissions for all KBUs and the TPET. The submission of requests for funding for budget year FY2010 were submitted, reviewed and acted upon

in the Portfolio Management tool and will allow visibility of all investments entered, now and in the future.

- **CNet Advances** - CNet continues to advance into facilitating everyday business process and informational needs and has become a collaborative hub for work throughout the City. Today, our employees access CNet nearly 7,500 times per day and the number of documents on CNet now exceeds 250,000.

Equipment & Fleet Services

- The Equipment Management Division (EMD) has accomplished much despite the challenges associated with recruiting and retaining skilled personnel. Highlights include:
 - **Fleet Consolidation with Mecklenburg County** - Effective July 01, 2008, the City of Charlotte and Mecklenburg County fleet maintenance services were consolidated under EMD. Over the FY09 transitional year, the merger brought increased efficiencies to the services provided and resulted in cost avoidance for both organizations. Fleet Availability targets and PM compliance were met and exceeded. Both the City and County budget targets were met. This success is the result of extensive collaborations between several city KBUs (City Manager's Office, BSS, Budget, and HR) and the County.
 - **Fleet Availability** - Exceeding performance expectations across all categories of fleet availability. While the incremental increases appear small, the effort to reach those higher levels is extremely difficult the closer any one category approaches 100%. For FY2009, overall fleet availability was 97.7%.
 - **Commissioning Decommissioning Site** - EMD opened a centralized Commissioning/Decommissioning site in October 2008, providing services for;
 - Installation of new vehicles for service
 - Preparation for disposal and/or auction of all removal vehicles or equipment repair
 - On-site vendors for installation and removal of add-on equipment including contractors for communication installation and programming
 - On-site Specification, Tag and Title personnel, providing a more seamless service for our customers and improving process efficiencies.

- **Fuel Study** - EMD is currently conducting a Fuel Reduction Study in partnership with UNCC and our customers. This is an on-going initiative which is designed to help the City identify and review for potential implement options to reduce fuel consumption.
- **Automotive Service Excellence (ASE) awards** - ASE Blue Seal awards were awarded to all EMD shops. This is a testament to the skill and certifications achieved by staff.

Regulatory & Governance Services

- **Countywide Procurement Policy** - PSD, in collaboration with Mecklenburg County Finance, has developed a Countywide Procurement Policy to establish guidelines and accountability for expenditure of public funds used to procure goods and services used by the County. This effort comes on the heels of the positive results with the Citywide Procurement Policy and the County believes that a formalized policy will provide County employees with uniform methods for daily procurement activities and strengthen internal controls in the countywide procurement process. The Countywide Procurement Policy is in final review with the County's Executive Team and should be finalized in early FY10. PSD will participate in training, implementation and monitoring of the Countywide Procurement Policy.
- **Citywide Policies** - BSS, in collaboration with broad stakeholder teams, is responsible for development and revisions to many citywide policies. Most recently BSS and stakeholders, completed development of the City new Restricted Data Policy and a revision of the City's Vehicle Use Policy.

Links to Corporate Strategy

Unlike most of the business units we support, the vast majority of the services provided by BSS are not to citizens, but to those who provide citizen services. Our connection to the citizen is through the business units we support and that connection is described in our Mission Statement.

Our unique organizational role has led to a slightly different view of corporate strategy and the corporate balanced scorecard. The Corporate Strategic Vision, Themes and Principles are the basis for the BSS Vision statement. Since our business is helping the other business units to deliver services to the citizen, our Mission Statement and Business Priorities focus on advancing those business units to Serve the Customer. With the exception of our governance role in the *Safeguard the Environment* objective, the BSS Balanced Scorecard establishes and measures the *Run the Business*, *Manage Resources* and *Develop Employees* objectives critical to enabling the other business units. This linkage to the Corporate Strategy is depicted in Figure 4.

Corporate Strategy Linkage Diagram

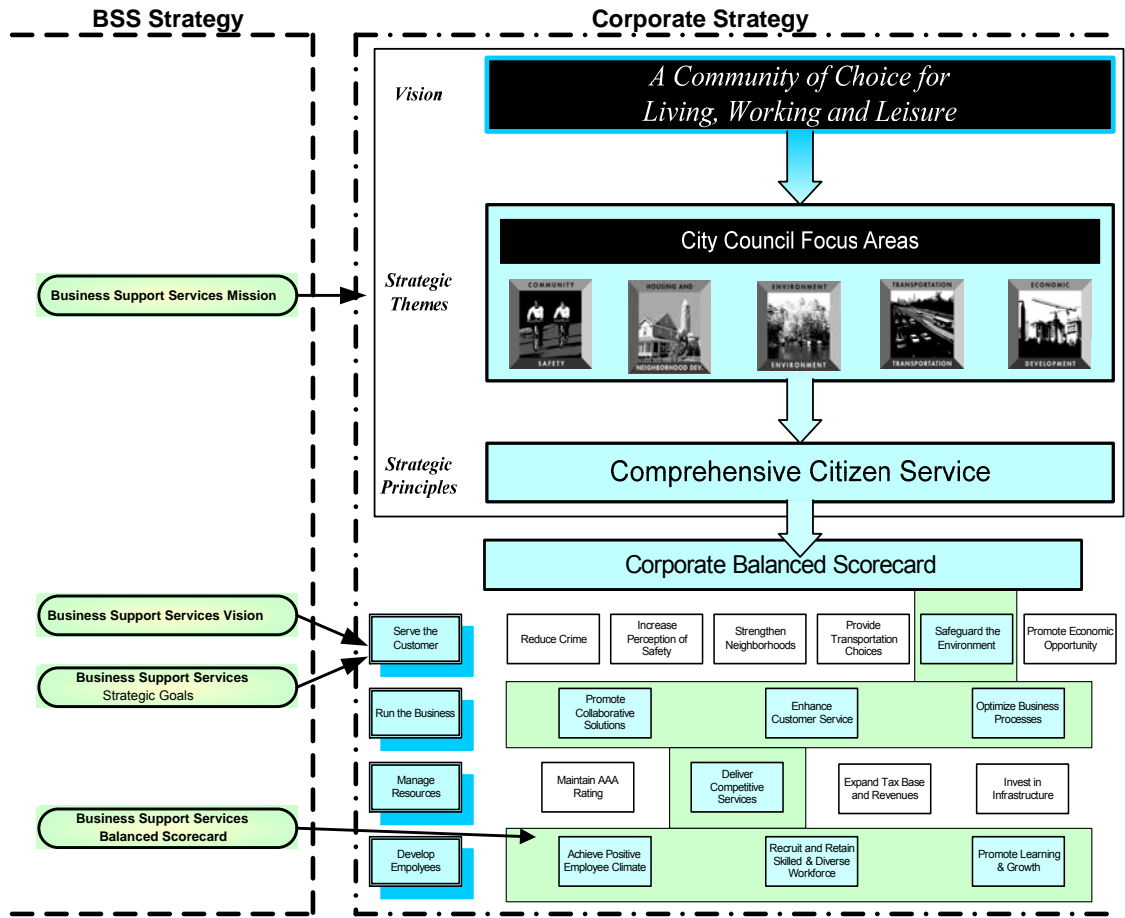


Figure 4

Strategic Initiatives

In addition to meeting performance objectives associated with our support of the corporate balanced scorecard, BSS is undertaking several initiatives that will be important to our strategic success. These include:

General Business Services

- In support of the *Develop Employees* perspective of the BSS Balanced Scorecard, BSS implemented several strategic initiatives in 2009 to demonstrate our commitment to our staff. Specific initiatives for FY 2010 include:
 - Implementing a Leadership Team development program designed to improve the team's management performance and collaboration skills.
 - Implementing changes as appropriate in focusing on continuous improvement in areas identified through the Employee Opinion Survey, follow up focus group sessions and employee feedback.

- In support of the *Run The Business* perspective of the BSS Balanced Scorecard, BSS is working on the following strategic initiatives in FY 2010:
 - Continuing to advance the Regional Communications Network and service model in order to maximize coverage and interoperability while developing sound service and cost structures to maximize cost effectiveness.
 - Working with the Office of the Chief Information Officer (OCIO) on developing options for an ERP Financial Platform.
 - Implementing electronic workflow to improve service delivery and service value.

- In support of the *Manage Resources* perspective of the BSS Balanced Scorecard, BSS will continue to work on the following strategic initiatives in FY 2010:
 - Continuing to provide leadership on the City's environmental initiative relative to benchmarking environmental purchasing and increasing green purchasing opportunities and benefits.
 - Evaluating the current Radio Services Cost Model against models based on radio air time usage to determine the most effective and efficient model for costing of radio services.
 - Implementing service costing tools within the IT Division, with a focus on Data Center Services.

Technology Services

- In support of the *Run The Business* perspective of the BSS Balanced Scorecard, BSS will continue work on the following strategic initiatives in FY 2010:
 - Capitalizing on the benefits of SharePoint 2007. This new platform will provide the benefit of leveraging the knowledge of contributors since it is the same platform currently in use by the City for its Intranet, CNet.
 - Advancing the regional public safety radio communications strategy through strategic inter-local agreements and expansion of the City's public 800 MHz and digital radio systems.

- In support of the *Manage Resources* perspective of the BSS Balanced Scorecard, BSS will work on the following strategic initiatives in FY 2010:
 - Advancement of the utility of Portfolio Management by beginning Phase II implementation of ChangePoint. This will align IT's resources with specific technology investments providing greater visibility and better analysis of the City's TCO (Total Cost of Ownership) of technology investments and how they relate to other systems and processes.
 - Implementation of the ITSM (Information Technology Service Management) model, starting with a comprehensive Service Catalog to continue to improve our service delivery to the City.

Equipment & Fleet Services

- In support of the *Run The Business* perspective of the BSS Balanced Scorecard, BSS will continue progress on the following strategic initiatives in FY 2010:
 - Expanding the customer base of EMD fleet services.
 - Collaborating with Engineering and Utilities on the new Light Vehicle Maintenance Facility.
 - Continuing the process of improving the fleet analysis function of EMD to optimize their parts management activities, preventive maintenance scheduling, and shop operations.
 - Continuing to improve customer visibility into the fleet maintenance operation through expansion of the fleet performance dashboards.

Regulatory & Governance Services

- In support of the *Run The Business* perspective of the BSS Balanced Scorecard, BSS is working on the following strategic initiatives in FY 2009:
 - Continue the implementation of the City's Technology Governance Policy.
 - Collaborating with Internal Audit and the individual KBUs in developing and carrying out an appropriate Procurement Compliance plan for the Citywide Procurement Policy.
 - Collaborating with the City Manager's Office, Internal Audit and the individual KBUs in the implementation of recommendations resulting from the Citywide Procurement Audit.
 - Working with Mecklenburg County on the collaborative implementation of the Procurement Policy and Compliance Plan.

III. SERVICE DELIVERY

With emphasis on strategic planning, maintaining mobility, enabling technology and streamlining procurement, BSS is focused on obtaining the best shared services value for our customers. The primary purpose of BSS is to support the City through providing all customers access to the tools and information necessary to serve the citizens.

Core services provided by Business Support Services are:

General Business Services:

City key businesses and County departments rely on BSS for a variety of General Business Services. These include:

- The acquisition of goods and services through competitive bid processes. BSS also facilitates cost savings through identifying and pursuing opportunities for pooling resources in procurement activities. Support is available to all City KBUs and County Departments for consulting, contract development, and administration and monitoring. (Key service indicator: Cost avoidance via P-Card usage)
- Providing support for the City's Privatization and Competition Program, including the City Council's Privatization/Competition Advisory Committee, whose focus is on the appropriate use of private and public sectors in the delivery of government services. Internal customers are provided important guidance for development of competition plans, preparation of requests for proposals, and responding to competitive bids for services.
- Services provided through the BSS Asset Recovery & Disposal program, which support property disposal for the City, County, School System, Charlotte Housing Authority, and other entities. (Key service indicator: Revenue and units disposed)

Technology Services:

Our focus is on ensuring that the City receives the most reliable and best value technology infrastructure available to enable the effective delivery of city services. Services include planning, design and implementation of the City's information technology infrastructure in support of the enterprise architecture; management of the corporate computing environment including office productivity environments; telecommunications technology including land-based and wireless; and application and database services. Our support for the desktop and mobility related applications allow our customers to focus on their missions. Support for corporate enterprise or KBU level technology initiatives is provided through project management, reengineering, software development and quality assurance services.

These services also support public safety and service delivery initiatives for the City and County through management of the 800 MHz radio communications systems. Through establishing an enterprise-focused technology planning effort,

BSS will facilitate the City's collaborative approach to matching business needs with available technology advancements. (Key service indicators: number of Service Desk Work Orders, and Radio Network availability)

Equipment & Fleet Services:

Multiple services are offered to our internal and external customers to ensure that their equipment and fleet assets yield the highest return on investment. This is accomplished through providing equipment specification assistance to ensure acquisition of the right equipment, combined with an aggressive program of predictable and preventative equipment maintenance focused on achieving the peak operating efficiency at the lowest cost. (Key service indicator: equipment units maintained per technician, number of work orders [fleet and radio])

Regulatory & Governance Services:

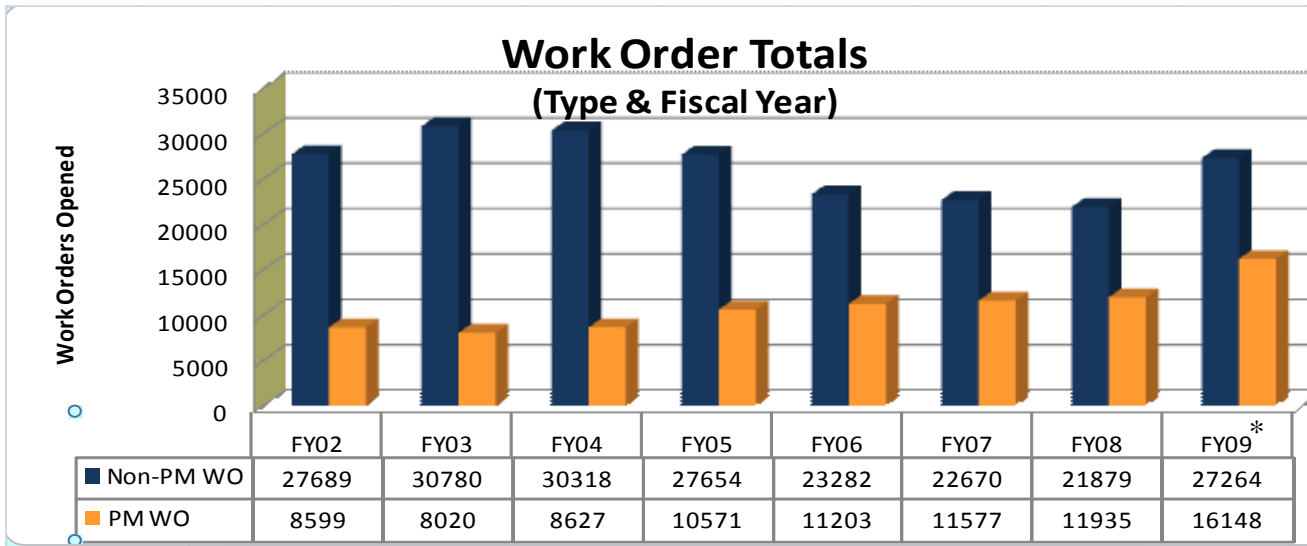
These services include a variety of activities from monitoring compliance with Federal and State regulation and Contract Compliance, to the development of City policies, processes and practices in support of corporate common business functions.

As the provider of corporate shared services to the City organization and beyond, the Operating Plan for Business Support Services Key Business is focused on tailoring services to most effectively meet the specific needs of our internal and external customers. All core service areas described above are actively involved in supporting the following Corporate Balanced Scorecard Objectives: *Safeguard the Environment, Develop Collaborative Solutions, Enhance Customer Service, Optimize Business Processes, and Deliver Competitive Services.*

Service History and Trends

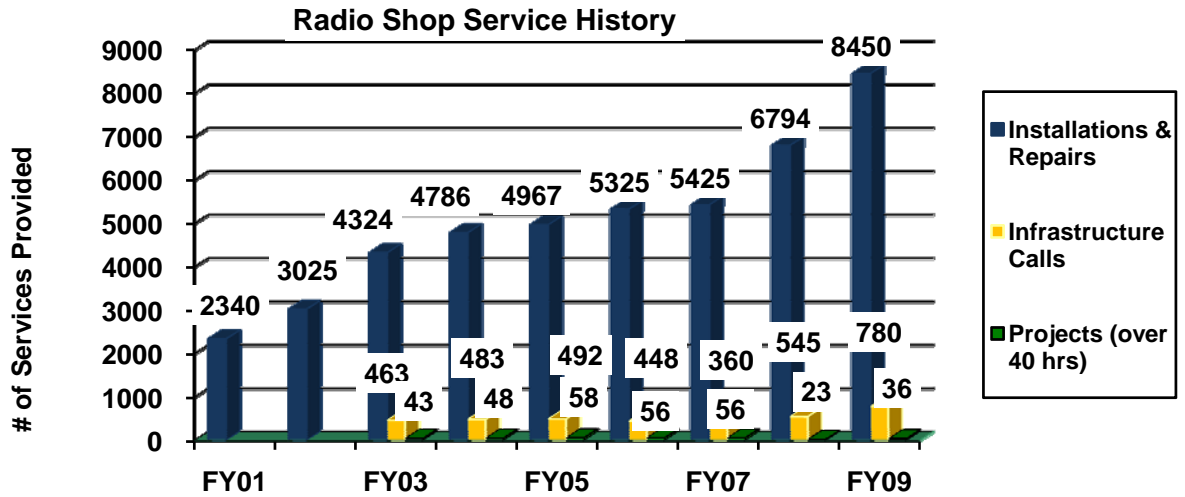
Equipment Management. FY09 is the first fiscal year of the consolidated City and County Equipment Management services. With the addition of over 1,100 County vehicles, the EMD leadership and staff have again achieved outstanding results and have been able to up hold their high service standards during the transitional year. Indicators include 99.6% of preventive maintenance services performed on time and only 0.17% of work orders being for repeat repairs.

- The percentage of total work orders that are PM work order continues to increase from 33.8% in FY07, 35.3% in FY08 to 37.2% for FY09. This highlights our aggressive preventive maintenance program and the impact on our ability to maintain high fleet availability. The reduction in non PM work also reduces the overall costs associated with maintenance of equipment.

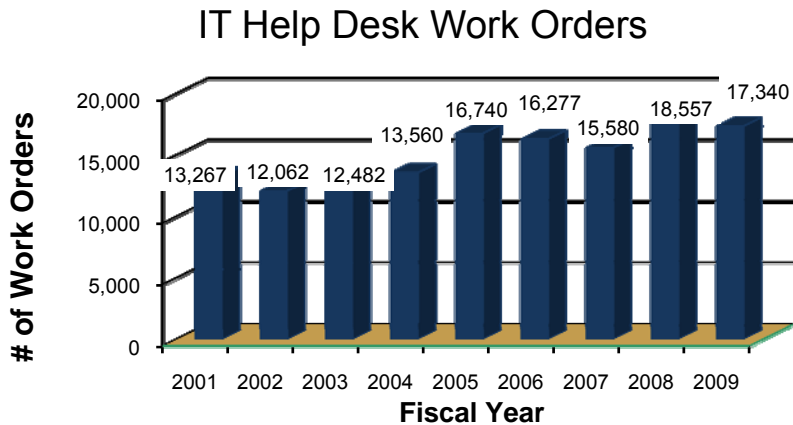


* FY09 includes addition of County Fleet

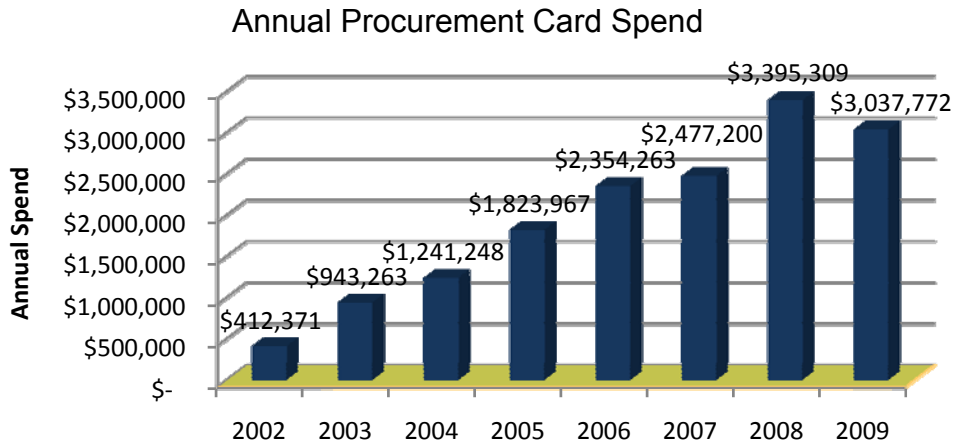
Radio Communications. The Public Safety radio network in Charlotte is recognized as one of the very best in the country. One of the reasons for the success is the integrated nature of the network, which includes all the services (City, County, School Board, Police, Fire, Medical, etc.) that our citizens rely on day-to-day and in emergency situations. This does, however, place a high demand on the Network Technology Service Division. The growth in these services over the last year, as demonstrated by the workload indicators below, is a reflection of the demand. The addition of radio sites and services into Gastonia, Belmont and Mt Holly during the FY2009 period will begin to have an impact on these service indicators in the coming year. With systems in Union planned to come on line in March 2010, current staffing will be stretched to its limits.



Information Technology. The number of Service Desk tickets decreased by 7% for FY09. Moving into FY10, we have a new vendor providing this service at a cost savings to the City. IT continues to make process improvements along with the implementation of BMC Remedy System. This software will help to move towards full implementation of Information Technology Infrastructure Library (ITIL) for Service Desks. ITIL implementation will help the City continue to improve services and reduce overall costs.



Procurement Card Program: A procurement card is a payment tool for routine or recurring purchases, particularly for a low dollar purchase. A procurement card allows a cardholder to buy goods and services necessary for the City’s business by doing work faster and with less paperwork than a traditional purchase order. Similar to a credit card, an imprinted City of Charlotte procurement card is for business use with billing consolidated into one monthly billing statement. A debit for the total payment amount is made to the City’s Bank of America account at a predetermined date each month.



The City Procurement Card Program shows steady growth since its inception in August 2001, but FY09 budget cuts affected procurement card spending during the second half of the fiscal year. The current program includes twelve (12) Key Business Units and four hundred and fifty-nine (459) cardholders. The City Procurement Card Program includes the use of cards for travel expenses.

In FY09, p-card spending was \$3,037,771.88 and average monthly transactions were 1072 per month. The average dollar value of a single transaction was \$236 with four (4) transactions per card used during a month.

Industry surveys suggest that cost avoidance can be estimated between \$40-\$60 per transaction by using a procurement card rather than the traditional PO/invoice/check. Procurement Services is using \$50 as the cost avoidance standard and can estimate that the City realized \$643,400 in FY09 cost avoidance by utilizing the City Procurement Card Program.

IV. BALANCED SCORECARD

Business Support Services uses performance measures to direct and monitor progress toward established goals and objectives in support of City’s corporate strategy. To follow is the complete BSS FY10 Balanced Scorecard.

Balanced Scorecard FY10 – Business Support Services

Performance plan proposal July 1, 2009 – June 30, 2010

| Perspective | Corporate Objective | KBU Initiative | Measure (Lead Division) <i>' * ' Indicates direct linkage to City of Charlotte FY09 Strategic Focus Area Plan</i> | Prior Fiscal Yr Actual | Lead / Lag | Target <i>'\$' Indicates incentive pay target</i> |
|--------------------|---------------------------------|--|--|-----------------------------|---|--|
| Serve the Customer | Safe Guard the Environment | Promote use of environmentally friendly products | Number of alternative Fuel or Hybrid vehicles and number of vehicles outfitted with emissions reducing technology in City Fleet (less CATS fixed bus route fleet and Aviation) EMD * | 374 vehicles | Lag | Semiannual report on number of alternative fuel and hybrid vehicles, and vehicles outfitted emission reduction technology |
| | | | Work the City's Fleet Management Advisory Team (FMAT) to establish a Green Fleet Policy and identify alternative fuels and technology options | | Lead | Green Fleet Policy and alternative fuels and technologies matrix developed by June 2010. |
| | | | Incorporate environmentally responsible elements in the design, construction, and operations of City facilities (PSD)* | | Lead | <p>Promote Green Spending Opportunities and Options Produce Annual Report on Green Spending for identified products with applicable vendors.</p> <p>Hold two (2) Green Vendor Fairs to provide environmental information and promote the use of green products.</p> <p>Develop a pilot program to perform costs/benefits analysis on environmentally preferable products and develop a methodology for reporting and rating green product performance and usability by July 2009*</p> |
| Run the Business | Develop Collaborative Solutions | Develop partnerships to optimize service delivery methods | Meet or exceed service levels established in Service Level Agreements (SLA's) or Memorandums of Understanding (MOU's) between BSS and its customers. | 100% | Lag | 99% |
| | | | Number of contracts put in place and total dollar volume spent on a regional basis through the Charlotte Regional Group Purchasing Organization. (PSD) | 2 regional contracts | Lag | Establishing additional Regional contracts and produce annual spend report for expenditures from the established regional contracts administered through CRGPO |
| | Enhance Customer Service | Optimize value services | BSS Customer Surveys Average rating on 5pt scale | FY08 = 7.4 (based on 10pts) | Lag | 4.5 (Stretch Target) |
| | | | Conduct customer focus groups to obtain input and feedback on services provided | | Lead | Focus group input obtained on at least three core services |
| | | | Partner with customers, staff and Corporate Communications to rebrand BSS. | | | Develop a plan for rebranding of BSS |
| | | Customer satisfaction with Service Desk work activities (IT) | 4.70 | Lag | Achieve a customer satisfaction rate of 92% or higher (>= 4.6 out of 5) | |

| Perspective | Corporate Objective | KBU Initiative | Measure (Lead Division) <i>' * ' Indicates direct linkage to City of Charlotte FY09 Strategic Focus Area Plan</i> | Prior Fiscal Yr Actual | Lead / Lag | Target <i>'\$' Indicates incentive pay target</i> |
|-------------------|-----------------------------------|--|---|----------------------------------|------------|--|
| | Optimize Business Processes | Provide timely, reliable high-value services | Index of the University of North Carolina's Institute of Government's Local Government Performance Measurement Project (Index using Cost Per Mile, Technician Utilization, Repairs Completed in 24 hours and Repeat Repairs) EMD | Achieved | Lag | Achieve a Quality Index Score in the 1 st Quartile |
| | | | % of time the 800 MHz Public Safety Radio System is available (NTS) | 99.9946% | Lead | 99.9% (\$) |
| | | | Provide customers with easily understood, consolidated service catalog | | | Development and Communication of Service Catalogue |
| | | | Review, streamline and document business processes | | | Complete full review of at least 3 core/cross functional business processes. |
| | | | Provide customers with costs of our various services and options. | | | Establish Roadmap for developing, reviewing and communicating cost models for BSS services. |
| | | | Percent of Contract award recommendations to City Council and Board of County Commissioners that are accepted as recommended (PSD) | 99% | Lead | 98% |
| | | | Days to complete or resolve third level support issues and problems (IT) | 96.89% | Lag | 90% of third tier support request Completed /closed within 7 days. (\$) |
| Manage Resources | Deliver Competitive Services | Provide the most reliable and cost effective services possible | Overall Fleet Availability (EMD) | 97.7% | Lead | 95% (\$) |
| | | | Percent of internal contracts in compliance with the contracted amount in their respective MOUs (PCAC) | 100% City MOUs compliant | Lead | Annual Report on Citywide Competition Plan |
| Develop Employees | Achieve Positive Employee Climate | Provide a productive and satisfying work environment | Employee perception Rating on BSS Employee Opinion Survey for 1) Management Practices of the KBU, 2) Employee Participation, and 3) Supervisor Communication and Performance & 4) Employee Evaluation & Recognition | FY08 7.5 7.6 8.1 6.9 | Lag | Rating of 7 or greater for each of the categories listed (Stretch target) |
| | | | Percent of performance reviews completed within 30 days of the employee's merit/PRD date. | 96.6% | Lag | 90% |
| | | | Based on results of BSS FY08 Employee Wellness Awareness Assessment: Participation in Stress Mgt education sessions and Stress Reduction Activities | 70% | Lag | 70% of BSS staff participate in at least one education session or stress reduction activity (\$) |
| | | | Participation in Corporate Sponsored Wellness Activities | BSS 7% higher | Lag | BSS Employee Participation higher than citywide average. (\$) |

| Perspective | Corporate Objective | KBU Initiative | Measure (Lead Division) <i>' * ' Indicates direct linkage to City of Charlotte FY09 Strategic Focus Area Plan</i> | Prior Fiscal Yr Actual | Lead / Lag | Target <i>'\$' Indicates incentive pay target</i> |
|-------------|---|--------------------------|---|-------------------------------|-------------------|--|
| | Recruit & Retain a Skilled, Diverse Workforce | Retain skilled workforce | Voluntary employment separations (less retirements) rate compared to the City's average voluntary separations (less retirements). | BSS 1.2% less | Lead | Less than the City's average |
| | Promote Learning & Growth | Develop Leadership | Conduct formalized development program for BSS Executive Team focused on putting a team approach to Comprehensive Citizen Service into common practice. | | Lead | All members of BSS Executive Team complete development plans by July 2010. |

VI. CONCLUSION

Business Support Services has been able to consistently meet and often surpass the expectations of our customers in the past. Maintaining standards in the future will be a challenge as resources become more constrained. With all of BSS' resources fully engaged in providing core services at current service levels, there is no capacity to respond to a growing demand for services without investment in the service infrastructure (people, processes, systems and facilities) or without significantly altering current City processes. BSS will continue to evaluate its service portfolio and assess which services provide the most added value to the enterprise and which may be abandoned in light of changing demands.

The FY2010 Strategic Operating Plan is focused on supporting essential functions and meeting the service requirements of currently approved corporate strategic plans. This Strategic Operating Plan clearly illustrates our efforts to optimize the service infrastructure and provide the most competitive services possible to all customers, yet also illustrates the limitation we have to meet future challenges. As always, BSS remains committed to its role as the provider of corporate shared services and will do everything we can to meet the needs of our customers in a proactive and collaborative way.

VII. APPENDICES

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A. BSS Revenue Projections

| Revenue Account Number | Description | FY08 Actual | FY09 Actual | FY10 Projections | FY11 Projections |
|---------------------------------------|---|--|--|--|--------------------------------------|
| 5414 | Radio Shop consolidated services w/Mecklenburg County & services to small towns | 1,555,553 | 1,968,674 | 2,328,670 | 2,362,956 |
| 5660 & 5662 | Surplus Property Auctions | 1,306,906 (967,270 to General Fund) | 1,139,327 (806,305 to General Fund) | 1,354,019 (854,500 to General Fund) | 988,458 (537,850 to General Fund) |
| 5461 | Telecommunication services provided to Mecklenburg County | 676,480 | 588,335 | 581,660 | 610,338 |
| 5643 | Telecommunications Commissions | 41,965 | 264,303 (includes \$226,706 ATT Continuity Award) | 40,000 | 48,000 |
| 5220 | Cable Franchise Fees | 8,289,157 | 9,060,069 | 7,400,000 | N/A |
| 5445 | Procurement – County | 354,503 | 437,835 | 493,793 | 511,635 |
| 5555 | Procurement – Co. P-card Program | 67,459 | 70,663 | 71,050 | 71,800 |
| | Procurement – Cooperative Purchasing Programs/Lead Agency Administrative Fees | 18,981 | 67,038 | 100,000 | 110,000 |
| | P-Card rebates | | 20,634 | 30,000 | 35,000 |
| 5438 | County Fleet Services | | 1,960,811 | 2,446,832 | 2,431,032 |
| 5439 | Website Hosting to County | | 68,906 | 137,696 | 138,700 |
| 5550 & 5669 | Miscellaneous Revenues | 51,807 | 68,172 | 25,000 | 25,000 |
| 5421-5429, & 5646 | Cost Allocation Recovery from non general fund customers | 5,404,626 | 5,662,949 | 6,085,593 | 6,046,521 |
| 5219 | PEG Channel Support | | 30,862 | | |
| 5668 | Contribution/Donation from Private Services | | 24,849 | | |
| Total for All Funds | | \$17,826,800 | \$21,433,427 | \$21,094,313 | \$13,379,440 |
| Total Revenues to General Fund | | \$17,487,164 | \$21,100,405 | \$20,594,794 | \$12,928,832 |

B. Capital Improvement Projects

| PROJECT TITLE | FY10 | FY11 | FY12 | TOTAL |
|---|--------------------|-------------|-------------|--------------------|
| <u>BUSINESS SUPPORT SERVICES</u> | | | | |
| <u>Facility Investments</u> | | | | |
| Public Safety Digital Communications | 4,272,940 | | | 4,272,940 |
| Total Facility Investments | \$4,272,940 | | | \$5,107,940 |
| REVENUE SUMMARY | | | | |
| | FY10 | FY11 | FY12 | TOTAL |
| COPs | 4,272,940 | | | 4,272,940 |
| Revenue Total | \$4,272,940 | | | \$4,272,940 |

C. BSC Measure Validation

| Business Support Services | | |
|--|--|--|
| Adoption of Alternative Fuels and Emission Efficient Technologies | | |
| Measure Validation | | |
| Corporate Objective: Safeguard the Environment | | |
| KBU Initiative: Monitor the use of alternative fuels and hybrid vehicles in the City's Fleet (less CATS fixed bus route fleet and Aviation) | | |
| Measure and Target: Number of alternative Fuel or Hybrid vehicles in City Fleet (less CATS fixed bus route fleet and Aviation); Gallons of alternative fuel used in City Fleet (less CATS fixed bus route fleet and Aviation) | | |
| Units of Measure: Percent of Total Fleet; Percent of total fuel purchases | | Frequency of Update: Semi-annually |
| Measurement Intent: <ul style="list-style-type: none"> Monitoring the use of alternative fuel and hybrid vehicles to demonstrate the adoption of technologies and products to reduce City fleet emissions by the key business units within the City. Monitoring the purchase and use of alternative fuels (bio and low sulfur diesel, and F85 gasoline) to reduce City fleet emissions by the key business units. | | |
| Measurement Formula: <ul style="list-style-type: none"> Adoptions of alternative fuel and hybrid vehicles is calculated by dividing the total number of alternative fuel and hybrid vehicles in the City fleet (less CATS fixed bus route fleet and Aviation) by the total number of non-construction rolling stock. Adoptions and use of alternative fuels is calculated by dividing the total number of gallons of alternative fuels purchased for the City fleet (less CATS fixed bus route fleet and STS, and Aviation) by the total number of gallons of fuel purchased by the key business units for rolling stock. | | |
| Data Elements and Sources: <ul style="list-style-type: none"> Vehicle type and classification data maintained in the BSS Equipment Management Division's (EMD) fleet asset management system will be used for calculating the alternative fuel and hybrid vehicle adoption percentage as described in the Measurement Formula. Fuel reports received from fuel vendors on the purchase of bio, low sulfur and F85 fuels purchased by the key business units will be used for calculating the alternative fuel and hybrid vehicle adoption percentage as described in the Measurement Formula | | |
| Source For and Approach to Setting Targets: <ul style="list-style-type: none"> This information is not currently available through standard reports. The information will be captured in the EMD fleet asset management system. The point of contact for this information will be the Equipment Management Division Manager. | | |
| Data Contact: (Name the person responsible for this measure) The POC for the monitoring of this information is Rudy Payton 704-336-6831 | | |
| Target Setting Responsibility: Individual Key Business Units | Accountability for Meeting Target: Individual Key Business Units | Tracking/Reporting Responsibility: BSS Equipment Management Division |
| Notes/Assumptions: BSS/EMD guides the key business units in making decision on fleet and equipment, but the individual key business units have the final say in the type of vehicles and fuels purchased. For this reason, BSS/EMD can only monitor the "adoption" of these products and technologies. | | |

Business Support Services
Green Fleet Policy with Alternative Fuels and Technology Options
Measure Validation

Corporate Objective: Safeguard the Environment

KBU Initiative: Promote use of environmentally friendly products

Measure and Target:

Work the City's Fleet Management Advisory Team (FMAT) to establish a Green Fleet Policy and identify alternative fuels and technology options

Units of Measure:

Policy and options matrix

Frequency of Update:

n/a

Measurement Intent:

Promote environmentally friendly practices

Measurement Formula:

N/a

Data Elements and Sources:

- n/a

Source For and Approach to Setting Targets:

Reviewing current City practices to identify areas where green options are viable alternatives

Data Contact: Karen King - EMD Deputy Manager

Target Setting

Responsibility:

Fleet Management Advisory Team (FMAT)

Accountability for Meeting

Target:

Individual Key Business Units

Tracking/Reporting

Responsibility:

BSS Equipment Management Division

Notes/Assumptions:

BSS/EMD guides the key business units in making decision on fleet and equipment, but the individual key business units have the final say in the type of vehicles and fuels purchased.

| | | |
|--|--|--|
| <p><u>Business Support Services</u> Incorporate environmentally responsible elements in the design, construction, and operations of City facilities Measure Validation</p> | | |
| <p>Corporate Objective: Safeguard the Environment</p> <p>KBU Initiative: Promote use of environmentally friendly products</p> | | |
| <p>Measure and Targets:</p> <ul style="list-style-type: none"> • Produce annual report on Green Spending for identified products with applicable vendors • Hold two (2) Green vendor Fairs • Develop a pilot program to perform costs/benefits analysis on environmentally preferable products and develop a methodology for reporting and rating green product performance and usability by July 2009 | | |
| <p>Units of Measure: n/a</p> | <p>Frequency of Update: Annually</p> | |
| <p>Measurement Intent: Lead by example, adopting sound environmental practices in City facilities and operations</p> | | |
| <p>Measurement Formula: There is not a formula for this measure.</p> | | |
| <p>Data Elements and Sources: Input from Environmental Committee and end user feedback.</p> | | |
| <p>Source For and Approach to Setting Targets: These measure were established by PSD and/or the Environmental Work Team for the purpose of developing recommendations for future performance targets associated with environmentally friendly methods, outcomes and products through the City's procurement activities.</p> | | |
| <p>Data Contact: Chuck Robinson, Business Support Services / Kay Elmore, BSS/Procurement Services Division</p> | | |
| <p>Target Setting Responsibility: Environmental Work Team</p> | <p>Accountability for Meeting Target: BSS KBE</p> | <p>Tracking/Reporting Responsibility: BSS Procurement Services Division</p> |
| <p>Notes/Assumptions: These measures establishe recommendations for the introduction and implementation of environmental purchasing. This initiative will be followed up with more specific performance targets to increase environmental awareness and implementation of environmentally friendly methods, outcomes and products through the contracting and purchasing activities of the City.</p> | | |

Business Support Services
Customer SLA/MOU's
Measure Validation

Corporate Objective: Develop Collaborative Solutions

KBU Initiative: Partner with customers to optimize service delivery methods

Measure: Meet or exceed service levels established in Service Level Agreements (SLA's) or Memorandums of Understanding (MOU's) between BSS and its customers.

Target: 99%

Units of Measure: Percent of service levels achieved or exceeded.

Frequency of Update:
Quarterly

Measurement Intent: Gauge the level of success in achieving the stated service expectations of our customers

Measurement Formula: Total number of agreed upon service levels achieved divided by the total number of agreed upon service levels

Data Elements and Sources: Specific service level contained in SLAs or MOUs

Source For and Approach to Setting Targets:

Data Contact: Marie Harris

Target Setting Responsibility:
BSS Lead Team

Accountability for Meeting Target:
Division Directors

Tracking/Reporting Responsibility:
BSS Divisional Contacts

Notes/Assumptions:

Business Support Services

Charlotte Regional Group Purchasing Organization (CRGPO) Measure Validation

Corporate Objective: Develop collaborative solutions.

KBU Initiative: Provide services on a regional basis through the CRGPO.

Measure: Number of contracts put in place and total dollar volume spent on a regional basis.

Target: Establish new regional contracts administered through CRGPO and produce spending report on existing.

Units of Measure:

Number of contracts established by PSD for the CRGPO and dollar volume of spending on each.

Frequency of Update:

Annually

Measurement Intent: To increase awareness and use of cooperative purchasing opportunities that increase savings, generate revenue and increase staff efficiency.

Measurement Formula: Total number of CRGPO contracts established. The total dollars spent by participating public agencies will also be tracked.

Data Elements and Sources: Total number of CRGPO contracts established and number of participating organizations provided by the vendor or contractor.

Source For and Approach to Setting Targets: BSS will analyze continue to analyze spend data and customer needs as available to determine further contracting opportunities.

Data Contact: Kay Elmore (6-2524)

**Target Setting
Responsibility:**

BSS Leadership

**Accountability for Meeting
Target:**

BSS Procurement Services
Division

**Tracking/Reporting
Responsibility:**

BSS Procurement Services
Division

Notes/Assumptions:

Business Support Services
BSS Customer Survey
Measure Validation

Corporate Objective: Enhance Customer Service

KBU Initiative: Promote Stakeholder satisfaction

Measure: BSS Customer Surveys

Target: 4 out of 5 (stretch target)

Units of Measure: Responses from individual surveys

Frequency of Update: Quarterly

Measurement Intent: Rate customer satisfaction and identify areas in which to focus improvement initiatives.

Measurement Formula: Overall Average = sum total of all (sum of number rating for each question on survey/[total # of questions answered on the survey])/total # of returned surveys

Data Elements and Sources: ratings from very satisfied to very dissatisfied on survey questions.

Source For and Approach to Setting Targets: Target set to drive behavior of continuous improvement and support high standard of customer service.

Data Contact: BSS Customer Communications Officer

Target Setting Responsibility:
BSS Lead Team

Accountability for Meeting Target:
BSS Lead Team

Tracking/Reporting Responsibility:
BSS Customer Communications Officer

Notes/Assumptions:

**Business Support Services
Core Service Focus Groups &
Rebranding of BSS
Measure Validation**

Corporate Objective: Enhance Customer Service

KBU Initiative: Optimize Value Services

Measure & Target:

- Focus group feedback on at least 3 core services
- Partner with customers, staff and Corporate Communications to rebrand BSS -Development of a rebranding plan

Units of Measure: Number of core services with focus group input. Rebranding Plan

Frequency of Update: Quarterly

Measurement Intent: Obtain customer feedback to improve on service offerings.

Measurement Formula: count of core services that were subjects of focus groups, development of report

Data Elements and Sources: number of core services on which focus groups were conducted, rebranding report

Source For and Approach to Setting Targets: Target set to drive behavior of continuous improvement and support high standard of customer service.

Data Contact: BSS Customer Communications Officer

Target Setting Responsibility:
BSS Lead Team

Accountability for Meeting Target:
BSS Lead Team

Tracking/Reporting Responsibility:
BSS Customer Communications Officer

Notes/Assumptions:

These measures are part of an overall focus on improving our services and aligning services offerings with the corporate needs.

Business Support Services

Promote Customer Satisfaction with the Service Desk Measure Validation

Corporate Objective: Optimize Business Processes & Enhance Customer Service

KBU Initiative: Enhance the effectiveness of City's business processes in order to better service the citizens

Measure: Customer satisfaction with Service Desk work activities

Target: Achieve a customer satisfaction rate of 92% (≥ 4.6 out of 5) or higher

Units of Measure: Overall satisfaction rating of Service Desk on 0 – 5 scale.

Frequency of Update:
Monthly

Measurement Intent: To improve Service Desk effectiveness by determining the customer's perception of the work performed.

Measurement Formula: Average percent satisfaction for the year

Data Elements and Sources: Unisys survey report of serviced customers

Source For and Approach to Setting Targets: Unisys monthly report of survey results will be extracted by Data Administration for reporting on monthly basis for the previous month. Composite Target set at 92% compliance annually in aggregate.

Data Contact: Denise Hampton(x66882); Philip Borneman (65363); Al Alonso (68090)

**Target Setting
Responsibility:**
BSS Leadership

**Accountability for Meeting
Target:**
BSS Leadership

**Tracking/Reporting
Responsibility:**
Denise Hampton

Notes/Assumptions: : BSS/IT Data Administration will publish results on CNET on a monthly basis with trending and cumulative year to date toward target.

Business Support Services

Provide Competitive Equipment Maintenance Services

Measure Validation

Corporate Objective: Optimize Business Process

KBU Initiative: Provide high quality, high value fleet maintenance services

Measure: Provide high quality fleet maintenance services based on the University of North Carolina's Institute of Government's Local Government Performance Measurement Project

Target: Achieve a quality index in the First Quartile when compared to other municipalities participating in the Performance Measurement Project.

Units of Measure:

An index score consisting of cost per vehicle mile; percent of work hours billed; work orders completed with 24 hours; percent of repeat repairs.

Frequency of Update:

Annually. The calculation is made after the IOG publishes the annual report. (usually in February)

Measurement Intent: To demonstrate the overall quality of fleet maintenance services provided by the Equipment Management Division when compared to other fleet maintenance operations around the State.

Measurement Formula: Hours Billed Percentage (provided in IOG report) + Percent of work orders completed in 24 hrs (provided in IOG report) - Percent of Repeat Repairs (provided in IOG report) * 10 /2 + 0 - Cost per mile *.1 (Computed from IOG report data).

Data Elements and Sources: The data elements are described above and the source for all of the data (direct or computed) is the IOG Local Government Performance Measurement Project annual report.

Source For and Approach to Setting Targets: The source of the target was a BSS analysis of the IOG Performance Report data. The approach to setting the target was an acknowledgement that while analysis showed the intense use of equipment by City of Charlotte would preclude a target of being #1 in the quality index, First Quartile performance should be achieved. EMD was in the 2nd Quartile in the FY2005 annual report.

Data Contact: Marie Harris (6-7885) or Chuck Robinson (2-3539)

Target Setting

Responsibility:

BSS Leadership

Accountability for Meeting

Target:

EMD

Tracking/Reporting

Responsibility:

Marie Harris

Notes/Assumptions:

Business Support Services
Radio System Availability
Measure Validation

Corporate Objective: Optimize Business Processes

KBU Initiative: Provide timely and reliable high value services

Measure: % of time the 800 MHz Public Safety Radio System is available

Target: 99.9%

Units of Measure: time

Frequency of Update:
Quarterly

Measurement Intent: Critical indicator of system reliability

Measurement Formula: 100.00% - (seconds system is down/total seconds FYTD)

Data Elements and Sources: data provided by external contractor, Motorola

Source For and Approach to Setting Targets:

Data Contact: Dennis Baucom, Network Technology Services Director

Target Setting

Responsibility:

Dennis Baucom,
Communications Services
Director

Accountability for Meeting

Target:

Dennis Baucom,
Communications Services
Director

Tracking/Reporting

Responsibility:

Motorola

Notes/Assumptions:

Business Support Services
Service Catalogue, Streamline Business Processes and Cost Modeling
Measure Validation

Corporate Objective: Optimize Business Processes

KBU Initiative: Provide reliable high-value services

- Measure & Target:**
- Service Catalogue – Develop and Communicate Service Catalogue
 - Streamline Business Processes – full review of at least 3 core/cross functional business processes
 - Cost Modeling – Establish Roadmap

| | |
|--|---------------------------------------|
| Units of Measure: Actual Plans, and number of processes reviewed. | Frequency of Update: Quarterly |
|--|---------------------------------------|

Measurement Intent: Promote our services, Improve Efficiencies, Provide transparency.

Measurement Formula: n/a

Data Elements and Sources: n/a

Source For and Approach to Setting Targets: Targets set as part of BSS overall improvement initiatives.

Data Contact: BSS Business Process Improvement (BPI) Manager

| | | |
|--|--|--|
| Target Setting Responsibility: BSS Lead Team | Accountability for Meeting Target: BSS Lead Team | Tracking/Reporting Responsibility: BSS BPI Manager and/or Business Manager |
|--|--|--|

Notes/Assumptions:
 These measures are part of an overall focus on improving our services and aligning services offerings with the corporate needs.

Business Support Services
City Council-Board of County Commissioners Approval
Measure Validation

Corporate Objective: Optimize Business Processes

KBU Initiative: Provide Timely and Reliable Response to Customer Requests for Assistance

Measure: City Council-Board of County Commissioners Approval

Target: 98% of contract award recommendations

Units of Measure: Percentage

Frequency of Update: Quarterly and Monthly

Measurement Intent: PSD targets a 98% acceptance of all contract award recommendations taken before the City Council and the Board of County Commissioners that are awarded as recommended by PSD. This measurement was chosen because it affords PSD the opportunity to both assist our customers with the contract award phase of their projects while also ensuring that the process, as well as all policies, statutes, guidelines and best business practices are carefully and ethically followed on all procurements.

Measurement Formula: The number of items approved as recommended by PSD divided by the total number of items taken before City Council and the Board of County Commissioners.

Data Elements and Sources: All PSD recommended items taken before the City Council and Board of County Commissioners and a verbal indication from each governing body at a scheduled meeting as to whether or not the items were approved or deferred. The City and County Clerk also provide e-mail notifications regarding all items and the City Clerk provides an approved copy of all Consent I or II items after approval by the Council. PSD further requests staff monitor all items taken before the two governing bodies and report monthly regarding the outcome.

Source For and Approach to Setting Targets: The sources for obtaining target data include information gathered from all City/County meetings where award decisions are made, the approved copy of all PSD submitted agenda items returned from the City Clerks' Office, and the PSD monthly report on Council and Commission items.

Data Contact: Kay Elmore

Target Setting Responsibility:
BSS/Procurement Services

Accountability for Meeting Target:
BSS/Procurement Services

Tracking/Reporting Responsibility:
BSS/Procurement Services

Notes/Assumptions:

Business Support Services

Improve Service Delivery Timing for Third Level Support

Measure Validation

Corporate Objective: Optimize Business Processes

KBU Initiative: Provide timely and reliable services

Measure: Improve responsiveness of IT services by reducing the time to complete or resolve third level support issues and problems

Target: Establish a level (90%) of completion / closure within 7 days to be met or exceeded

Units of Measure:

Percentage of third level break-fix incidents completed and closed within 7 calendar days (weekly basis) by Corp IT third level support of the Service Desk

Frequency of Update:

Captured daily, aggregated and measured weekly, reported to BSS Leadership Team on monthly basis.

Measurement Intent: To improve response, resolution, and closure of third level support break-fix incidents escalated by the Service Desk.

Measurement Formula: Ticket closed in 0 – 7 days = 1, ticket open after 7 days = 0. $100 * (\sum \text{break-fix incidents closed within 7 days} / \text{total break-fix incidents opened})$

Data Elements and Sources: Initiative ID, Metric ID, Metric Value, Reported Year, Reported Month. Data captured automatically on daily basis within data vault, reported on weekly basis to IT and monthly to BSS.

Source For and Approach to Setting Targets: Data Administration will collect and report on monthly basis for the previous month using tickets in the data vault as source. Composite Target set at 90% compliance annually in aggregate. This is a stretch goal, exceeding the level if responsiveness achieved in previous years.

Data Contact: Denise Hampton (x66882); Philip Borneman (x65363); Al Alonso (x68090)

Target Setting

Responsibility:

BSS Leadership

Accountability for Meeting

Target:

BSS Leadership

Tracking/Reporting

Responsibility:

Denise Hampton / IT staff

Notes/Assumptions: Data and statistics captured daily based on Service Desk nightly download from Unisys. BSS/IT Data Administration will publish results on CNET on a monthly basis with trending and cumulative year to date toward target.

Business Support Services
Fleet Availability
Measure Validation

Corporate Objective: Deliver Competitive Services

KBU Initiative: Provide the most reliable and cost effective services as possible.

Measure: Fleet Availability

Target: 95%

Units of Measure: Overall Number of units available per day for service delivery

Frequency of Update: Measured daily, Monday thru Friday and reported monthly.

Measurement Intent:

To achieve or exceed the minimum percent of fleet availability necessary to provide uninterrupted service to City customers.

Measurement Formula:

(Total number of units minus number of units out of service = number of units available for service) / (total number of units) = percent available

Data Elements and Sources: Number of units in the fleet grouped into 6 categories determined by equipment class and/or specified usage; number of units out of service by category as identified by FASTER's work order system.

Source For and Approach to Setting Targets: Primary data source is FASTER (Equipment Management's fleet management system). Targets established by fleet management contract team with customer input.

Data Contact:

Jerry Coates and Marcus Stewart

Target Setting

Responsibility:

Equipment Management Director

Accountability for Meeting

Target:

Operations Supervisor, Shop Managers and Team Leaders

Tracking/Reporting

Responsibility:

EMD Fleet Management and Analysis Division

Notes/Assumptions: Equipment availability is measured by an automated report that runs at 9:00 am daily Monday thru Friday.

Business Support Services
Competition Plan Status
Measure Validation

Corporate Objective: Deliver Competitive Services

KBU Initiative: Provide the most reliable and cost effective services possible

Measure: Percentage of internal contracts in compliance with the contracted amount in their respective MOUs

Target: Report status of the city competition initiatives

Units of Measure: report

Frequency of Update: fiscal year end

Measurement Intent: To see if the competition plan is being completed as expected

Measurement Formula: # of MOU's in Compliance/Total # of internal MOUs

Data Elements and Sources: reporting as provided to the PCAC

Source For and Approach to Setting Targets: David Elmore – PCAC liaison

Data Contact: David Elmore – 704-336-8694

Target Setting Responsibility:

Restructuring Govt Subcommittee

Accountability for Meeting Target:

Effected KBU's

Tracking/Reporting Responsibility:

David Elmore – PCAC liaison

Notes/Assumptions: The competition plan is a flexible document that is intended to be able to change throughout the year.

Business Support Services
Measure Validation

Corporate Objective: Achieve Positive Employee Climate

KBU Initiative: Provide a productive and satisfying work environment

Measure: Employee perception Rating on BSS Employee Opinion Survey for 1) Management Practices of the KBU, 2) Employee Participation, and 3) Supervisor Communication and Performance & 4) Employee Evaluation & Recognition

Target: 7 out of 10

Units of Measure: average ratings

Frequency of Update:
Annually

Measurement Intent: Gauge employee opinion and pinpoint areas to target for improvement in employee climate and work environment.

Measurement Formula: overall ratings in the specified categories of questions.

Data Elements and Sources: Employee Opinion survey results and statistics

Source For and Approach to Setting Targets: Employee Opinion Survey results.

Data Contact: BSS Human Resource Officer

**Target Setting
Responsibility:**
BSS Lead Team

**Accountability for Meeting
Target:**
BSS Lead Team

**Tracking/Reporting
Responsibility:**
BSS Human Resource Officer

Notes/Assumptions:

Business Support Services
PRD Timeliness
Measure Validation

Corporate Objective: Achieve Positive Employee Climate

KBU Initiative: Provide a productive and satisfying work environment

Measure: Annual performance review sessions held with employees within 30 days of merit date.
Target: 90% of PRDs within 30 days of annual merit date

Units of Measure: days

Frequency of Update:
 Quarterly

Measurement Intent: Gauge timely feedback to employees on meeting personal performance expectations.

Measurement Formula: Number of performance sessions held within 30 days of merit due date/total number of merits due within 30 days of the quarter

Data Elements and Sources: Date employee signs PRD or if not signed day of session, date of session as reported by supervisor. People Soft data and Internal spreadsheets tracking PRD dates.

Source For and Approach to Setting Targets: Internal spreadsheets tracking PRD dates.

Data Contact: BSS Human Resource Officer

Target Setting Responsibility:
 BSS Lead Team

Accountability for Meeting Target:
 BSS Lead Team

Tracking/Reporting Responsibility:
 BSS Human Resource Officer

Notes/Assumptions:

Business Support Services

Promote Wellness in the Worksite Environment Measure Validation

| | | |
|--|---|---|
| Corporate Objective: Achieve Positive Employee Climate | | |
| KBU Initiative: Promote Wellness in the Worksite Environment | | |
| Measure: Participation in Stress Mgt education sessions or Stress Reduction Activities | | |
| Target: 70% of BSS staff participate in at least one education session or wellness activity | | |
| Units of Measure: Percentage of total BSS employees participating in at least one session. | Frequency of Update: Fiscal Year End | |
| Measurement Intent: Improve employee awareness of stress related issues and healthy practices | | |
| Measurement Formula: Number of employees attending at least one session divided by the total number of BSS employees during the assessment period. | | |
| Data Elements and Sources: Names of employees attending sessions/participating in activity; Number of BSS employees. | | |
| Source For and Approach to Setting Targets: In FY2008 BSS conducted a wellness awareness survey to establish an awareness baseline of current wellness initiatives, preferred/most effective methods of communication with BSS staff, and input as to potential future wellness initiatives based on staff preferences,. Based on the survey data, BSS is targeting stress management and stress reduction techniques for FY09. | | |
| Data Contact: BSS HR Officer - Melia James (2-1551) | | |
| Target Setting Responsibility: BSS Leadership | Accountability for Meeting Target: BSS Leadership | Tracking/Reporting Responsibility: BSS Business Manager |
| Notes/Assumptions: | | |

Business Support Services

Promote Wellness in the Worksite Environment Measure Validation

| | | |
|--|---|---|
| Corporate Objective: Achieve Positive Employee Climate | | |
| KBU Initiative: Promote Wellness in the Worksite Environment | | |
| Measure: Improve employee awareness of Wellness Works activities and events | | |
| Target: BSS Employee Participation in Corporate Sponsored Wellness Activities higher than the citywide average. | | |
| Units of Measure: Percentage of BSS employees participating in City HR sponsored Wellness activities compared to percentage of city employees participating in City HR sponsored Wellness activities. | Frequency of Update: Annually | |
| Measurement Intent: To improve employee awareness and participation in the City's Wellness Program. | | |
| Measurement Formula: Number of BSS employees participating in City HR sponsored Wellness activities divided by the average annual number of BSS employees and compared to the total number of city employees participating in City HR sponsored Wellness activities divided by the average annual number of City employees. | | |
| Data Elements and Sources: Number of BSS and City employees participating in Wellness activities as recorded by City HR; Average of the number of filled positions (BSS & citywide) at the beginning of the FY and the number of filled positions (BSS & citywide) at the ending of the FY from People Soft. | | |
| Source For and Approach to Setting Targets: Since this is the first fiscal year Wellness Initiatives will be included as Incentive Targets goals citywide, the FY08 goal will be to exceed the City average once more baseline data is collected target will be reviewed for FY09. | | |
| Data Contact: BSS HR Officer - Melia James (2-1551) | | |
| Target Setting Responsibility: BSS Leadership | Accountability for Meeting Target: BSS Leadership | Tracking/Reporting Responsibility: BSS Business Manager |
| Notes/Assumptions: Wellness activities focused on small sub-populations of employees (e.g. Tobacco Cessation) will not be included in this calculation since there is no way to determine the total target population. | | |

Business Support Services

Employee Retention Measure Validation

Corporate Objective: Recruit and Retain a Skilled, Diverse Workforce

KBU Initiative: Retain Skilled Workforce

Measure: Voluntary employment separations (less retirements) rate compared to the City's average voluntary separations (less retirements).

Target: below city average

Units of Measure:

Staff

Frequency of Update:

Annually

Measurement Intent: To assess achievement of retaining skilled staff

Measurement Formula: (Number of City employees voluntarily leaving the city minus retirements divided by total number of city staff) Minus (number of BSS employees voluntarily leaving the city minus retirements divided by total number of BSS staff) divided by (number of BSS employees voluntarily leaving the city minus retirements divided by total number of BSS staff).

Data Elements and Sources: Number of BSS and City employees Voluntarily leaving the city as recorded by City HR; Average of the number of filled positions (BSS & citywide) at the beginning of the FY and the number of filled positions (BSS & citywide) at the ending of the FY from People Soft.

Source For and Approach to Setting Targets: Benchmark against Citywide average.

Data Contact: BSS HR Officer - Melia James 704-432-1551

Target Setting

Responsibility:

BSS Leadership

Accountability for Meeting

Target:

BSS Leadership

Tracking/Reporting

Responsibility:

BSS Business Manager

Notes/Assumptions:

Business Support Services

Employee Retention Measure Validation

| | | |
|--|---|---|
| Corporate Objective: Promote Learning and Growth | | |
| KBU Initiative: Develop Leadership | | |
| Measure: Completion of Development Plans by all members of BSS Executive Team | | |
| Target: all members of BSS Executive Team complete development plan | | |
| Units of Measure: Staff | Frequency of Update: Annually | |
| Measurement Intent: To drive continuous improvement specifically on expanding leadership competencies | | |
| Measurement Formula: n/a | | |
| Data Elements and Sources: Number of staff completing plan as rated through annual PRD processes | | |
| Source For and Approach to Setting Targets: Targets set as part of BSS overall improvement initiatives. | | |
| Data Contact: BSS HR Officer - Melia James 704-432-1551 | | |
| Target Setting Responsibility: BSS Leadership | Accountability for Meeting Target: BSS Leadership | Tracking/Reporting Responsibility: BSS Business Manager |
| Notes/Assumptions: | | |