

Engineering & Property Management Preliminary Balanced Scorecard FY 2013

Corporate Objective	KBU Initiative ***Focus Area Initiative	Measure (\$ = Incentive Goals)	FY 2012 Actual	Lead and/or Lag	Performance Data		
					FY 2013 Target	YTD	Status
Promote Economic Opportunity	***Promote SBE participation in formal contracting.	Help grow Small businesses in our community					
		Manage informal contracts so that 12% of E&PM contracted expenditures will be paid to SBE certified Prime Contractors.	New	Lag	12%		
		Manage formal contracts so that at the time of Final Payment, 85% of Prime Contractors meet or exceed their committed SBO goal.	87%	Lag	85%		
Strengthen Neighborhoods	Manage City resources to improve quality of life in neighborhoods.	Implement program to leverage public and private partnerships to plant the greatest number of trees possible toward the goal of 50% canopy by 2050.	New	Lag	Implement Program		
Provide Transportation Choices	***Effectively manage transportation projects to improve safety, neighborhood livability and transportation choices.	Begin construction on Charlotte Streetcar Starter Project.	Preliminary Engineering Completed	Lag	Begin construction by 3/15/2013		
Safeguard the Environment	***Protect natural ecosystems and habitats, including the tree canopy.	Maintain a significant and healthy tree canopy:					
		-- Achieve Arbor Foundation's "Tree City USA" status.	Met	Lead	June, 2013		
		Protect stream corridors, ponds and wetlands through public acquisition of additional conservation easements and enhancing existing buffers.	100% Met	Lead	100% of the time		
		-- Meet mitigation requirements through local rather than state-level restoration efforts 100% of the time when streams are negatively impacted by City projects.	100% Met				
	Per Clean Water Act requirements, develop and implement plans for storm water best practices for city buildings by June 2013.	New		Complete by June 30, 2013			
	***Adopt sound environmental practices in City facilities and operations.	Incorporate environmentally responsible elements in the design, construction and operations of City facilities and in other operating practices:					
Maintain energy use practices so that City facilities compare favorably with available benchmark information in the South Atlantic region (measured in thousands of BTUs per square foot).		EUI 64.2	Lag	Overall EUI<68			
Reduce Greenhouse gas emissions from City facilities and operations: Establish a process to measure the City's greenhouse gas emissions and set emission reduction goals.		New	Lead	Set Reduction Goal			
Support successful implementation of the Council-adopted Policy for Sustainable City Facilities:	-- Report annually regarding facility design, construction and operation, as required by the Policy for Sustainable City Facilities.	Met	Lag	June, 2013			
	-- Benchmark facilities against common benchmarks as required by the Policy for Sustainable City Facilities.	Met					
Deliver Collaborative Services	***Advocate business facilitation/business process improvements	Complete all LD permitting submissions within an average of less than 2.5 reviews.	1.85	Lag	<2.5 Reviews		
		Eliminate system barriers/conflicts/impediments in application of regulations by ensuring ordinances work together to achieve the City's development vision:	Met	Lead	June, 2013		
		FY 2013 Begin systematically addressing the top three issues identified in FY 2012					
Maintain AAA Rating	Balance bond and pay-as-you-go funding of the Storm Water Capital Program.	Increase pay-as-you-go funding of the Storm Water Capital program, reducing dependency on bond proceeds.	\$2.0M	Lead	Increase by \$1M/year		
Deliver Competitive Services	Maximize public resources through benchmarking, competition, privatization and optimization.	\$ - Ensure that services provided by E&PM are competitive by annually benchmarking selected services with the private sector. Services to benchmark in FY 2012 include: - Surveying & Mapping - In-house Project Design - CMGC Management and Maintenance	Met	Lead	Benchmark		
Invest in Infrastructure	***Improve the safety and appearance of neighborhoods with infrastructure improvements.	Complete 90% of voter approved bond Neighborhood Infrastructure and Business Corridor projects on schedule or as forecasted.	New	Lag	90%		
		Manage projects to meet major milestone and completion dates.					
	Achieve excellent Capital Investment Program (CIP) outcomes through project management.	Manage projects so that at least 85% are completed on or ahead of schedule.	82%	Lag	85%		
		Manage projects so that at least 85% are completed at a cost less than or equal to the approved budget.	92%	Lag	85%		
\$ - Start four new storm water capital improvement projects in FY 2013.		3	Lag	4			
Achieve Positive Employee Climate	Manage safety program that keeps employees and facilities safe.	\$ - Correct facility and operational safety hazards within 10 working days.	97%	Lag	95%		
	Encourage employee wellness.	\$ - Provide information to employees offering education and motivation for healthy living using accessible media and updating at least quarterly.	Met	Lag	Quarterly posters		
Recruit and Retain Skilled, Diverse Workforce	Identify work opportunities that enhance employee growth, development & agility	Provide work opportunities that increase departmental agility, meet organizational goals and promote employee development.	Met	Lead	Document occurrences		
Promote Learning & Growth	Plan and implement employee development and training.	- 100% of divisions will develop and implement annual training plans. - Develop strategies for cost-effective provision/implementation.	Met	Lead	June, 2013.		

Engineering & Property Management's 2013 STRATEGIC OPERATING PLAN



E&PM's strategy for FY13-14 was amended slightly after City Council approved the 2013 budget without a bond referendum in support of a new Capital Improvement Program. The unanticipated budget outcome gives staff the opportunity to refine the plan, test our citizen-involvement methods and project delivery schedules, and better define the program's benefits.

The lack of a new CIP, however, does not alter our focus on delivering sustained value to the community and building a solid framework for citizen, neighborhood and business success. The strategic intent of Engineering & Property Management remains consistent with the direction of the last three years:

- Improve project management practices and outcomes
- Promote and preserve economic development and business vitality
- Champion sustainability and protect the environment
- Manage the property portfolio in alignment with City economic goals

Improve Project Management Practices and Outcomes

E&PM will continue to serve as the capital project managers for the City, and our challenge will be bringing work groups together in a broader, needs-based CIP context. This is consistent with the City Manager's goal of infrastructure fulfilling comprehensive needs, with City facilities having integrated functions and serving multiple constituencies. Police and fire stations may function as community centers for services in addition to public safety. Sidewalks and bike trails will be less likely installed as stand-alone neighborhood amenities, instead built with the aim of connecting neighborhoods to more and different services.

The focus for project management improvement will be evaluating the question: what determines a "successful" project? In particular, the public input process for projects must be refined, balancing the value of robust communication against the demand for accelerated and efficient project planning, design and construction.

E&PM has been given strong support by Council over the last few years, and when the next CIP is approved, there will be pressure to build those projects quickly.

In the meantime, E&PM Project Managers will complete projects already approved in past CIPs, and will critically examine their approach to their work so that the next slate of CIP projects can be addressed in a new and better way.

Additionally, more of E&PM's project management staff may be utilized to address the backlog of demand for Storm Water Services projects. Storm Water high-priority repair requests now wait longer than 6 months; additional resources may help to meet the 6-month goal.

DNC Prepares Charlotte for Increased Role in Future

The DNC is setting a stage for Charlotte of national and historical significance, adding to the city's stature on the global map and giving us the chance to manage an urban environment like never before. This mission will help us think more collaboratively and collectively. The creation of the Joint Information Center for the DNC is a good example of how we will change our approach to processing information in all circumstances going forward. Our city will be looked at differently as a result.



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Promote and Preserve Economic Development and Business Vitality

Over the last year, Land Development has successfully improved its processes to make them more customer-friendly. Refinements to the Accella Citizen Access system have made it easier to access and use development data. The unveiling of the Development Services Web Portal created a “one-stop shop” for everything concerning development. The introduction of the EPLAN Review web submittal process has brought praise from customers who are now saving time and money.

The next priority is to bring alignment to City ordinances and standards governing development. A cross-departmental team has

reviews the Post Construction Controls Ordinance, Urban Street Design Guidelines and the Tree Ordinance, with a goal of eliminating conflict, overlaps and gaps in development requirements.

The team will work to give the ordinances more flexibility, with different treatment for environmentally sensitive areas, new development versus redevelopment, and high density versus low density.

Their work is aimed at creating a comprehensive customer service that is flexible, fair, clear and includes the proper balance between a vibrant economy and sustainable environment.

Looking ahead, the decreased pace of development of the last two years is seen as the “new normal.” Though slowly coming back, the level of activity is not expected to increase substantially without a more global economic rebound. As a result of the slow-down, the City’s user fees no longer cover the full costs of development reviews. Under-utilized staff has been transferred to other roles within the City to reduce costs to the minimum. Now the question is whether to change the user fee calculations.

Exceeding Customer and Partner Expectations

Huge Siemens Project Made Successful Through Team Effort

There was a lot at stake when Siemens Energy announced a “Herculean” project for Charlotte. The plan was to build a \$170 million, 550,000 sq. ft. facility near Westinghouse Blvd. and Shopton Road, and it needed to be built in record time.

A team from E&PM’s Land Development Division worked closely with Siemens staff, contractors, designers and other City, County and State agencies to facilitate the project, which included major roadway construction, as well. The team spent a lot of time on the front end describing to two different design teams how to get through the process

“To accommodate their aggressive timetable we had to do many phased reviews rather than the usual unified review,” said Jordan Miller, Plan Review Engineer for the project. “This was a design/build effort, with exterior walls going up while the interior was still being designed.”

As a result of the collaborative, customer-focused approach, the facility that will have more than 1,000 employees was designed and built in 10 months, extremely fast for a project of that magnitude.

“We could not have been successful without the guidance and leadership of the Land Development staff,” said Tim Wilson, the Siemens officer with the lead role in design and construction. “I have worked with many municipalities across North America, and the management team for Land Development exceeded my expectations. They committed a toolkit of experts to this project whose guidance and cooperation helped create a world-class production facility on an expedited schedule.”

This is one more example of Land Development’s commitment to the City “One Business” philosophy, said Miller. “With multiple agencies involved, we kept this a team effort with everyone pulling together on a common goal that benefits our community and the entire region.”

“We could not have been successful without the guidance and leadership of the Land Development staff.”

-TIM WILSON,
Siemens Energy

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Moving our Goals Forward - US 29/NC 49 Roadway Improvement Project

E&PM continuously strives to improve project management practices and realizes how they can directly impact the citizens of Charlotte.

In the world of capital construction projects, there is no more welcome phrase than “ahead of schedule.” And that’s just what E&PM staff was celebrating when they completed the US 29/ NC 49 Roadway Improvement Project.

This project involved teamwork and collaboration from numerous City departments, as well as partnerships with the North Carolina Department of Transportation, Gannett Fleming, Crescent Resources, University City Partners and Blythe Construction.

“I couldn’t be more pleased with how well construction went on this project,” said Council Member Michael Barnes. “This project was

completed 10 months ahead of schedule and Blythe Construction did an excellent job ensuring the safety of pedestrians, motorists and construction employees.

In addition to the teamwork, there was a communication plan in place for traffic control that included email blasts to businesses, property owners and commuters, live-time updates via Facebook and Twitter, stakeholder meetings and media opportunities.

“I did not receive one complaining email, letter or note from anyone in the public, which says to me that E&PM did a great job

communicating the project status with the surrounding area,” said Council Member David Howard. “I just thought someone should stop to say, ‘Great Job!’”



Charlotte staff and elected officials open the 29/49 Project.

Light Vehicle Maintenance Facility Saves Energy, Serves Citizens

When the Light Vehicle Maintenance Facility opened in October, 2011, it showed the City’s commitment to the environment, citizens and staff. The facility at 1031 Atando Avenue boasts sustainable features including low flow plumbing, reflective roof elements, effective use of natural light and the use of drought-tolerant native plants.

“The new facility replaces the ‘City Barn’ which was built in 1927,” said E&PM Project Manager Kathleen Santimaw. “The Barn was used to stable and shoe the horses and mules that transported the City’s vehicles for solid waste and public works. It remained the City’s only maintenance facility until 1981.”

The new facility sits on 8.9 acres and includes more than 40,000 square feet of maintenance space and parking. The building contains approximately 450 parking spaces including stacked parking for commissioning and decommissioning vehicles. The primary customers include Police, Light Vehicles and Medium Duty Service



Trucks. The state of the art technology in the new facility allows City staff to service vehicles quickly and get them back on the road.

“I have represented the City Council at many openings of museums uptown and I think these are important to our community,” said Council Member Patsy Kinsey. “But a facility like this is more important because it helps us improve our service to our staff and ultimately our citizens.”

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-PATSY KINSEY,
Charlotte City Council

Staff Workload, Agility and Collaboration

The coming budget year will present challenges in staffing, especially in light of Council's rejection of the CIP budget. After months of planning for a substantial new CIP workload, there will now be an undetermined amount of ebb in the flow of projects through the pipeline. Also unknown is how much planning and design money may be available to lay the foundation for coming CIP projects, enabling us to hit the ground running on construction when bonds are approved.

The anticipated CIP, whether it starts in one or two years, will be an eight-year capital program. These eight years could see a substantial number of retirements from among senior leadership within the Department. An examination of competencies needed

for the future and the preparation of junior staff for future responsibility will help to ensure continuity.

Storm Water Services has looked at staffing issues and is reorganizing to address pressing and future concerns, including span of control (too many supervisor direct reports), management succession, workload/organizational growth and expectations of the City-wide culture shift. The reorganization may take several years to complete, and is partly dependent on growth in storm water fees and clarity on federal and state water quality requirements.

The City's implementation of a new Enterprise Resource Planning program will move more to the forefront next year and impact many employees.

Work will especially change for staff performing critical budget and finance work. There will be a premium placed on collaboration across work group lines.

E&PM's record of collaborative success and reputation for reliability puts us in position to help lead the City in building this community. The coming year will be a challenge, especially in light of the lack of a CIP, but tough assignments bring out the best from a staff that has proven itself under trying conditions. We will continue to improve our staff agility, making sure the right people are in the right positions to take care of the City's needs today and in the future.



The strength of E&PM's staff is in delivering quality projects on time and on budget. As the coming CIP is defined, E&PM will take a lead role in producing the infrastructure this a stronger and livable community.



Champion Sustainability and Protect the Environment

For E&PM, environmental sustainability permeates everything we do. This is the way we do our work now.

In facilities, our Energy Use Index is already one of the lowest in the southeast among peer facilities, and we will continue to reduce our use, by providing true savings that can be used for other operating costs. The next step with the most potential savings is staff education to change behavior. We have created a new staff position for an Energy & Sustainability Coordinator, who will be the champion and leader in making that happen.

The last year has seen great advances in addressing the need to preserve and grow Charlotte's signature asset – our tree canopy. With Council adoption of the "50% by 2050" tree canopy initiative, the stage has been set to do something no other large American city is doing, increase its canopy in an era of continued growth and development.

Since Council's approval of "50x50" an extraordinary coming-together of community partners has resulted in the creation of a program that can take Charlotte from a 46% canopy to 50% by 2050: TreesCharlotte. This broad-based, collaborative initiative involved multiple City departments, Foundation for the Carolinas, Knight Foundation, Charlotte Tree Advisory Committee, the Catawba Lands Conservancy and others. What this group created is unprecedented:

- A non-regulatory plan to engage the community in helping plant 25,000 trees a year for 20 years, in addition to City-contracted plantings.
- Coordinated effort across government, corporate and philanthropic agencies working together to create and stand behind a unified brand.
- Development of public/private partnerships to raise and sustain private capital, and position the canopy initiative as a community rather than government goal.
- Track progress with continuing aerial analysis every three years, with program adjustments as needed.
- Developing Charlotte's Urban Forestry Management Plan as a "play book" to guide efforts.

Plans to Support 50x50 Tree Canopy Goal Bearing Fruit

Charlotte has long been recognized for its abundance of trees. In 2011, City Council set a goal of 50% tree canopy by 2050. E&PM responded by coordinating two collaborative efforts to reach this goal.

While both programs involve the local Charlotte community, the first was truly a hands-on event. The City contributed 1,200 trees, at a cost of \$9,500, to the Creek ReLeaf Program for planting along Briar Creek tributaries between Myers Park High School and Park Road.

"Trees play a vital role in the health of our communities," said Terri Bennett of Do Your Part For Everyday Green Living. "Thanks to partners like the City of Charlotte, Creek ReLeaf is on track with its ultimate goal of maintaining and improving Charlotte-Mecklenburg's tree canopy."

The second effort is a partnership with the Knight Foundation. E&PM hired former Catawba Lands Conservancy Director Dave Cable

to conduct outreach, research and program development toward increasing community involvement in tree planting and tree care.

"The Knight Foundation's involvement maintains a key connection between the City's work on the tree canopy goal and the work of the Tree Canopy Committee," said Tom Johnson, Land Development Senior Urban Forester. "This dedicated group of diverse community professionals and volunteers was convened by the Knight Foundation over the past 18 months to discuss the value of the canopy to the community and activate increased tree planting in Charlotte."

The City committed \$29,400 and the Knight Foundation \$15,000 to support work that includes a well-defined program outline, funding criteria for future planting initiatives and pilot projects to increase neighborhood plantings during 2012 and 2013.



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The program has already had positive community impact with the successful pilot project in the Peachtree Hills neighborhood with its 16% tree canopy. On March 17, 2012, volunteers supported by civic, corporate and non-profit agencies planted 115 trees, substantially raising the potential of canopy coverage in the neighborhood. This model is replicable and scalable for other low-canopy neighborhoods, several of which have been identified for implementation in the coming planting season.

Behind the scenes of the TreesCharlotte effort, Landscape Management staff has been working to address a key challenge of the "50x50" plan: where to find enough quality trees. In the past we only planted trees in city rights-of-way. With the TreesCharlotte program we are potentially moving into private, school and park property. At a time when many nurseries are reducing inventory as a cost-cutting measure, staff is working with the NC Nursery Association to obtain as many high-quality trees as possible over an extended period of time.

Strategic plans for water quality efforts are still waiting on the federal Environmental Protection Agency to issue its new requirements. Originally due out in November of 2011, new requirement now may not become effective until 2014. What is even less clear is whether/how much more money may be needed to meet new standards.

Electric Vehicle Charging Stations and Vehicles

One of the EECBG projects selected for Department of Energy funding was the installation of electric vehicle charging stations and the purchase of electric City fleet vehicles. The first charging stations were installed at the CMGC Parking Deck.

A total of 26 charging stations at seven different sites across the City were online this spring.



Land Development Gets Faster, Greener

In January, Land Development began requiring all commercial building plans be submitted electronically as PDFs. Using Adobe Acrobat software, LD staff can review and comment on-screen, turning plans around faster and saving customers time and money.

"I thought the process worked very well and it certainly saved time and gas," said Engineering Designer Gerald Burke of WSP Sells. "I wasn't sure if I would like the process at the beginning but I am hard pressed to come up with a way it isn't superior to the other way of doing things."

Customer feedback points to cost savings with less paper and storage required, reduced courier costs, and ease and flexibility in making changes to plans. Other comments highlight environmental stewardship, a reduced number of trips to the CMGC and a quicker plan review process.

If email submissions aren't a viable option for a customer, plans can be saved on a CD and submitted in person at the LD front counter. Last year approximately 300 plans were submitted for review as EPLANS.



It is estimated in the first year of accepting PDF plan submittals, approximately 18,000 24"x36" sheets of paper were saved -- the equivalent surface area of almost two football fields.

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Manage the Property Portfolio in Alignment with City Economic Goals

To better manage the City property portfolio, Building Services and Real Estate staff is working to gain a better understanding of our corporate assets: what's done at each of our properties, who works there and what future plans may impact the property. This underscores the need for a corporate space plan, and getting our efforts in front of the curve, knowing where and how we are going to place people. In this respect, the City has been in a reactive mode as long as anyone can remember.

This has been largely due to having no dedicated funding source for space planning. In the past, project savings have been used to incrementally improve the situation, but over the past two years, less project savings have been available due to budget pressures.

An area that Real Estate anticipates continued heavy involvement is the disposition of surplus housing acquired through foreclosure of rehab loans by Neighborhood & Business Services. Working closely with non-profit groups such as Habitat for Humanity, Real Estate in the last year has made possible the return of more than 50 homes to affordable housing stock. It is anticipated a similar number may be returned to the market in the coming year.

Real Estate's main strategic need for this year is building awareness across the City organization of the services they provide. As part of the shift to a more collaborative culture, Real Estate staff has the expertise to partner with City agencies and leadership to save money and prevents unanticipated consequences. Their deep understanding of the real estate market and skill at negotiating and determining feasibility can be much better taken advantage of by partner departments.

Employee Highlights

Employees Shine at City Manager's Awards Program

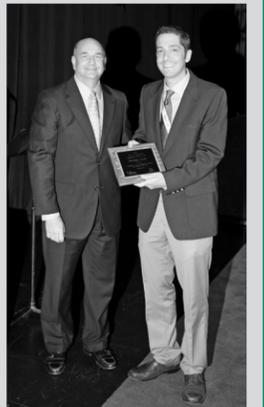


City Engineer Jeb Blackwell poses with the 2012 City Manager Awards Winners: Philip Lopina - Inspiration Award, Cary Chereskoff - Community Ambassadorship Award, Brendan Smith - City of Charlotte Employee of the Year and Mike MacIntyre - Collaboration Award.

Brendan Smith is City of Charlotte Employee of the Year

On June 11, City Council recognized Brendan Smith as City Employee of the Year for his extraordinary contributions to the Land Development division and the City organization.

Sponsored by the Employers Association and selected by an independent panel of judges, this 49-year tradition acknowledges an employee whose efforts, ideas and courtesy in job performance deserve special recognition. Brendan was nominated for his leadership role in implementing both the electronic plan submittal option (EPLAN) and the Development Services Web Portal.



Safety Collaboration Supports Culture Shift

One area where collaboration has succeeded quietly and effectively is in safety. E&PM's Jim Emmons is seen as a corporate leader who has taken the initiative to make E&PM a safer place to work, then shared that understanding with his peers in the City organization where his work is viewed as the Gold Standard for safety. In the areas of the City that have succeeded in making the culture shift, he has done it effectively and without fanfare.

