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**Neighborhood & Business Services
FY12 Strategic Operating Plan
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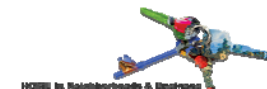
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“Charlotte’s neighborhoods and businesses are healthy and vibrant.”

(Neighborhood & Business Services Vision)



I. Executive Summary

Introduction

FY12 has been coined the year of movement in Neighborhood & Business Services (N&BS). The department has evolved over the past 18 months as staff work to consolidate the former Economic Development Office and Neighborhood Development department into one cohesive Neighborhood & Business Services department.

The next iteration of this evolution is to create a structure and culture where the department is no longer four separate divisions – instead, it is one business unit that encourages the talent in our department to work more closely together. This shift in how N&BS provides services is the culmination of *The Way We Work*: “We will own our work using critical thinking in an innovative and collaborative environment.”

Field operations have been enhanced and combined to include neighborhood and business outreach services in four geographical services areas as defined by the Charlotte Mecklenburg Police Department (CMPD). These teams will be physically located in the field. This new approach will allow the department to better align with CMPD to improve the overall quality of life in our community.

The FY12 goals are intentionally focused, aggressive, and measurable and require collaboration both inside and outside of the City. N&BS will concentrate its efforts on the work and the most effective execution of that work..

N&BS is responsible for affordable housing, code enforcement, neighborhood services, business corridor revitalization and economic development. N&BS provides a variety of public services to the City of Charlotte to help maintain and improve the quality of life in the City. These services work to make Charlotte’s neighborhoods and businesses healthy and vibrant through:

- Minimum housing code enforcement
- Nuisance codes enforcement
- Zoning ordinance enforcement
- Non-residential building code enforcement
- Affordable housing financing
- Rehabilitation services
- Foreclosure assistance
- Business corridor revitalization
- Infrastructure investments
- Neighborhood leadership and organization development
- Business attraction and retention
- Small business opportunity and development
- Workforce development
- Public/private partnerships
- Transit corridor development

In order to meet service delivery expectations for these activities, N&BS was approved for the following resources in FY11 and FY12:

	APPROVED FY2011	APPROVED FY2012
Operating Budget	\$14,097,167	\$14,281,872
Positions	157 Includes 7 temporaries	151 Includes 6 Temporaries

Vision Statement

Neighborhood & Business Service’s vision is “*Charlotte’s neighborhoods and businesses are healthy and vibrant.*”

Mission Statement

The mission of N&BS is to “strengthen and grow Charlotte’s neighborhoods and businesses.”

Guiding Principles

N&BS embraces the City’s 10 Guiding Principles –

- *Customer Service,*
- *Ethics,*
- *Teamwork,*
- *Openness,*
- *Accountability,*
- *Productivity,*
- *Problem Solving,*
- *Collaboration,*
- *Employee Development, and*
- *Employee Recruitment and Retention.*

Key Issues and Challenges

In FY12, N&BS anticipates a number of internal and external policy issues and service delivery challenges.

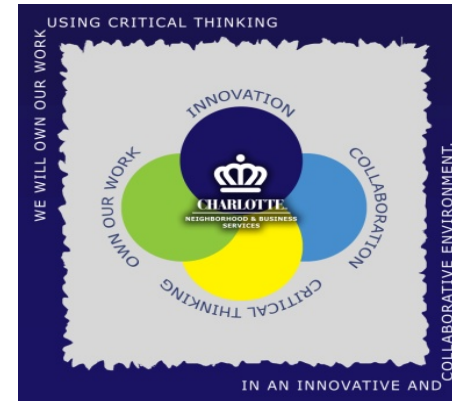
Internal Focus

The Way We Work

As the organization continues to grow and change, it is important to define and reinforce the core values that make up N&BS. It is from these core values that N&BS has developed and defined its culture, brand and business strategies. What expectations are set for employees and what values are important to the N&BS organization?

As a department, N&BS have identified four core values as a focus in FY12:

- ***Owning Our Work*** using
- ***Critical Thinking*** in an
- ***Innovative*** and
- ***Collaborative*** environment.



Employees are encouraged to see and deliver their work through these core values and hold each other accountable at all levels of the organization.. The notion of appropriate recognition and real accountability is a challenge that requires constant monitoring and attention.

Customer Service

How employees treat each other and their customers is a direct reflection of N&BS and the City. Although N&BS generally provides good service, there is also the need to continually raise the bar and set expectations for employees about customer service.

During FY12, N&BS will implement a customer service policy with the goals of:

- Providing the best possible service to the citizens of Charlotte and all of our internal and external customers,
- Supporting the City’s overall customer service policy and
- Becoming the “go-to department for superior customer service.”



Risk Management

Managing risks is critical to N&BS. This includes the evaluation of programs and contracts for compliance as well as risks that could damage the City’s reputation. Identified weaknesses will be improved or reengineered. Additionally, transparent communications remains paramount to informing the public about N&BS programs and employees about the department’s activities. It is important that citizens have confidence that our programs are administered in an effective, efficient and fair manner. Transparent communications will also enable us to notify citizens when our programs are being reviewed, changed, or discontinued.

External Focus

Effective Communications

Communicating clearly and consistently to our customers remains a priority for our department. Along with a redesigned website, N&BS is exploring ways to engage customers as they want to be engaged – through meetings, email, instructional videos, the gov channel programming and social media. N&BS will focus on communicating our work programs and successes in the context of, the overall City organization. N&BS will prioritize communications initiatives based upon our Focus Area plans and our FY12 goals and objectives.

Community Revitalization

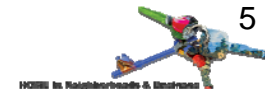
Redevelopment efforts on the five priority business corridors identified by Council will continue to be a focus, although with a slight adjustment. As part of an update of the business corridor strategy, N&BS will investigate broadening the geographic boundaries of the City’s revitalization efforts. No longer is the City enjoying a boom economy with numerous

opportunities for high-impact public/private partnerships. Opportunities to improve a larger portion of the City will be met through smaller, more grassroots projects and programs.

N&BS continues to work collaboratively throughout our divisions to help revitalize neighborhoods and businesses through loans and grants, training, code enforcement, education and housing programs.

N&BS is responsible for the City’s Community Cabinet, which oversees the implementation of City Council’s Housing and Neighborhood Development and Community Safety Focus Area Plans. This Cabinet has been broadened to include both internal and external partners. During FY12 the Community Cabinet will assist N&BS with updating the Quality of Life Study to be more reflective of and useful to the community. Additionally, each N&BS division is charged with certain aspects of community revitalization. The Code Enforcement division is responsible for Zoning, Housing, Nuisance and Non-Residential Code Enforcement as well as Emergency Relocation and enforcing the City’s new Noise Ordinance. Neighborhood and business corridor revitalization is achieved through various programs administered by the Community & Commerce and Economic Development divisions. Housing Services is charged with providing safe, decent and affordable housing.

Increased educational efforts will focus on creating and maintaining sustainable neighborhoods and businesses. In this way, N&BS will decrease the need for code enforcement, educate citizens on how to access government services and ultimately every neighborhood will be a desirable place to live.



Small Business

Small Business Development – A continuing challenge is to provide concrete options for small businesses to grow and expand through access capital. Small business loans continue to be down across the country. For example, Self Help has indicated that new loan applications are ½ of what they were in 2009 and 2010 and others have similarly indicated a comparable decline in new loan requests. It is generally believed that small business lending is not going to return to being as easily accessible as it was before the economic downturn. Businesses will be forced to be more strategic and innovative, and to take a hard look at their internal operations, processes and procedures to ensure that they are well positioned for long-term success.

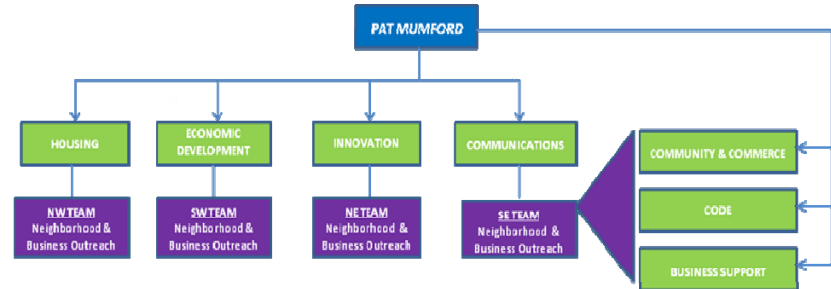
As traditional financing is no longer an option, N&BS is examining loans and grants for small businesses to determine if existing programs can provide relief or if they need to be altered. N&BS also will continue to conduct outreach to area banks via one-on-one meetings with small business lenders to develop relationships and market City programs.

Small Business Opportunity (SBO) Program – Setting an appropriate SBO goal and meeting that goal will continue to be a challenge. The SBO program staff reports informal discretionary dollars spent with SBEs as a percentage of all informal discretionary dollars spent by KBU and Citywide. The Council goal for informal spend fails to reflect the millions of dollars spent on formal contracts with SBEs. Informal spending accounts for approximately a third of all discretionary spending. The remaining two-thirds of City spending occurs as formal contracting.

As a result, we are combining formal and informal SBE utilization as one goal for each KBU and reallocating SBE utilization targets based on previous achievements.

Organization Chart

Displayed below is a high-level organization chart for Neighborhood & Business Services.



II. Strategy and Planning

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

- Significant accomplishments over the past several years
- Linkages to the City’s Corporate Strategy
- KBU’s Strategic and Business Initiatives

KBU Accomplishments

Over the past several years, N&BS has achieved a number of accomplishments related to its strategy, products and

services for the citizens of Charlotte. Major accomplishments include:

- NB&S code staff successfully implemented the non-residential building code, inspecting over 500 commercial structures and bringing more than 200 of those into compliance. Staff has established a good working relationship with business owners and as a result we are seeing improvements made in all areas of the City.
- The City created the Charlotte-Mecklenburg Coalition for Housing, a community based-board focused on implementing the 10-year Plan to End and Prevent Homelessness. This is the first time a group is reviewing the entire spectrum of housing strategies from homelessness to affordable housing in the community.
- The City continues to make physical and social improvements throughout the five priority business corridors identified by City Council (North Tryon, Rozzelles Ferry, Beatties Ford, Eastland area, Wilkinson/Freedom). Staff has helped integrate the neighborhoods adjacent to the corridors with commercial businesses in the area.
 - The City supported NorthEnd Partners, the business association for the North Tryon corridor, in hosting an annual 5K run which highlights the neighborhoods along the corridor.
 - An Urban Land Institute Study was conducted for the Beatties Ford Road corridor to identify potential new commercial uses and infrastructure improvements for the area surrounding Johnson. C. Smith University. The neighborhoods were heavily involved in providing input into the plan.

- Recognizing that small businesses are the engine of our local economy, a small business strategic plan was created to help the City better address the needs of small businesses in the community. A new business web portal (charlottebusinessresources.com) was launched in conjunction with Small Business Week. The portal is a collaborative effort of our community's business resource providers to provide information about resources available to you, the business owner. The goal is to connect businesses with the information they need so they can focus on starting and running a successful business in our community.



- An intensive public input effort was implemented for the revision of the Housing Location Policy. Stakeholders and the general public had the opportunity and were encouraged to provide their thoughts on the policy. Several drafts have been reviewed by the Housing and Neighborhood Development Committee. The full Council approved a final version in March 2011.
- A disposition process was created for the Johnston and Mecklenburg Mills, historic mill properties. Several qualified entities submitted bids, complying with the Council's desire to preserve the structures and provide affordable housing as part of the redevelopment.
- The long-term viability of the City's neighborhoods and businesses is dependent on integrating sound environmental practices and solutions into individual practices and business plans. Staff created and has been implementing three of the City's 17 Energy Efficiency and Conservation initiatives, all of which are fully-subscribed, including:

- Residential Energy Efficiency Improvements (\$600,000)
 - Energy efficiency and weatherization improvements for 100 homes.
 - This program targets homeowners who are in process of receiving, or have already received housing rehabilitation assistance.
 - Commercial Retrofit Program (\$1.2M)
 - Focused on older commercial buildings and apartment complexes.
 - Neighborhood Energy Challenge (\$560,000)
 - Provided \$80,000 grants to seven area neighborhoods who have committed to improving energy efficiency in their areas.
- N&BS successfully rebranded the department in conjunction with the citywide website conversion to a new platform. Information was seamlessly integrated from two departments into one cohesive and recognizable brand. The N&BS website continues to evolve with additional functionality being added on a regular basis. N&BS also launched a new Cnet site where internal audiences can access important information about N&BS programs and activities.

Corporate Strategy Linkages

The diagram on the next page shows N&BS' contributions (shaded boxes) and linkages (small arrows) to the City's Corporate Strategy. The Key Business Unit (KBU) supports 4 of the 5 focus areas and intersects 13 of the 16 City Corporate objectives.

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

City of Charlotte Corporate Strategy Map

Vision

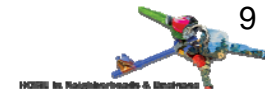
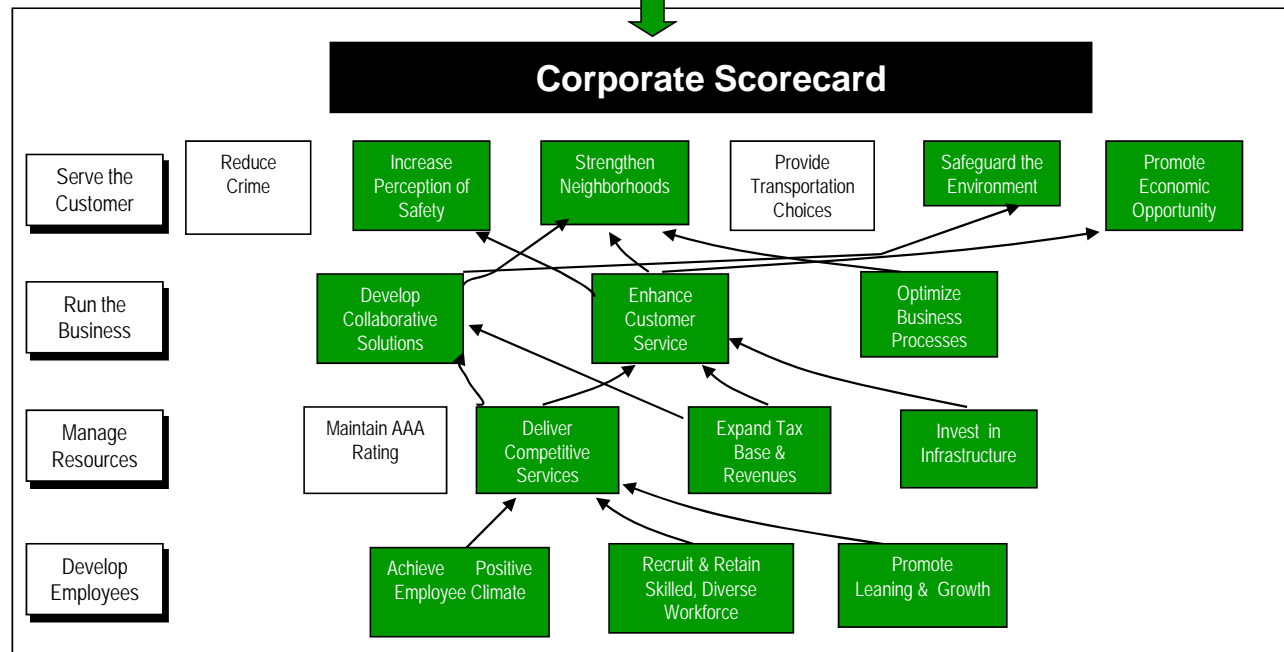
**Community of Choice for Living,
Working and Leisure**

Strategic Themes



Strategic Principle

Comprehensive Citizen Service



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

Focus Area Plans, Strategic Initiatives and Measures

N&BS is responsible for the achievement of a majority of goals in both the Housing and Neighborhood Development focus area plan and the Economic Development focus area plan. These goals are as follows:

Housing and Neighborhood Development

1. Create healthy and vibrant neighborhoods by improving and implementing quality physical infrastructure.
 - 90% of voter approved bond projects (Neighborhood Infrastructure and Business Corridor) will be completed or are forecasted to be completed on schedule.
2. Strengthen opportunities for public and private partnerships to encourage the integration of education,

recreation, employment and housing resources in identified redevelopment areas.

- Achieve a leverage ratio within the corridor of 1:10 for business corridor funds.
3. Develop and recommend policies that will assist with increasing the supply of affordable housing.
 - Develop and revise policies
 4. Redesign the Quality of Life (QOL) study to more accurately reflect the City’s neighborhood conditions.
 - Completion of the 2012 Quality of Life

Economic Development

1. Help grow small businesses in our community.
 - Implement the Small Business Strategic Plan, which includes the following major objectives:
 - Build and strengthen a consortium of business resource partners
 - Develop a web portal with a recognizable brand and on-going marketing strategy
 - Provide information and resources that meet changing market needs
 - Promote partnerships that enable business owners to find capital
 - Increase opportunities for small businesses to expand sales locally
 - Developing partnerships to support high growth entrepreneurs
2. Continue to focus on job and tax base growth in business corridors.
 - Revise and implement the City’s Business Corridor Strategy, including an examination of the five priority corridors of North Tryon, Beatties Ford Road, Rozzelles Ferry Road, Wilkinson/Morehead and the Eastland area, which will include the following elements:
 - Review of accomplishments
 - Review of current geography



- Prioritization of goals with a focus on image building for distressed corridors
 - Establishment of roles for the City and its partners.
 - Input from business owners, community leaders and developers
 - Benchmarking of similar programs in peer cities
3. Work with economic development partners to grow businesses in the community's targeted industry sectors of energy & environment, finance, manufacturing, health care, defense, motorsports, tourism and film.
- Design and implement a strategy to introduce local businesses into supplier relationships with large and mid-size businesses.
 - Work with tourism partners to develop a plan for growing amateur sports in the Charlotte Region.

Strategic Initiatives

N&BS will engage in a number of Strategic Initiatives that are coordinated with Balanced Scorecard and Focus Area Plan goals. The following Initiatives are listed on the Balanced Scorecard.

1. Housing Strategy

- Through the Charlotte-Mecklenburg Coalition for Housing (Coalition), strategic priorities and an affordable housing work plan will be created to reach beyond government for endorsement by the community.

The Coalition has established the following committees to accomplish this work:

- Development,
- Community Engagement,
- Advocacy; and
- Research

2. Comprehensive Citizen Service Model

- N&BS is taking the lead to create a new comprehensive citizen service model that moves our work closer to the customer, where measurable success is dependent upon the integration of the collective services of our four divisions, as well as focused collaboration with other City departments, CMS, the County, private and nonprofit organizations. This group will address systemic changes to move the community closer to real solutions.
- The Community Cabinet will serve as the oversight group for this team and will focus on the Northwest quadrant of Charlotte. Success measures will be determined by an update of the Quality of Life Study.
- Participants in this project include the following groups:
 - N&BS
 - Charlotte-Mecklenburg Schools
 - E&PM
 - Planning
 - CATS
 - CDOT
 - Mecklenburg County
 - Human Services
 - Park & Rec
 - CMPD
 - Goodwill Industries
 - Workforce Development Board

3. Design and Implement a strategy to inventory local products and services and to introduce local businesses into supplier relationships.

- Through the Business First initiative, local suppliers will be identified that can service larger employers that will be attracted to Charlotte. This strategy will be employed in the target growth

sectors to leverage N&BS's other efforts and collective community resources.

4. *Develop Recognition Program*

- The success of N&BS hinges on motivated and engaged employees. A recognition program will be created and implemented to identify and reward those employees who are exhibiting the behaviors identified in the *Way We Work* cultural initiative.



III. Service Delivery

Core Service Areas

N&BS' core service areas are outlined in the chart below:

Core Service Area	Description
Housing Services	Provides loans and grants to finance affordable housing, provide rehabilitation services and funds housing support agencies. <i>Examples of services include Housing Trust Fund, HouseCharlotte Down Payment Assistance, Rehabilitation Services and development and implementation of the Ten Year Plan to End and Prevent Homelessness in conjunction with the Charlotte-Mecklenburg Housing Coalition.</i>
Economic Development	Supports public/private partnerships, business attraction and retention, small business growth and opportunity, workforce development and transit corridor development. <i>Examples of services are Synthetic Tax Increment grants, BusinessFirst problem resolution, Small Business Enterprise program services, Smart Growth Fund, Creation and maintenance of a Small Business Web Portal, Workforce Investment Act grants/Workforce Development Board, including stimulus program funding, Business Investment and federal grants.</i>

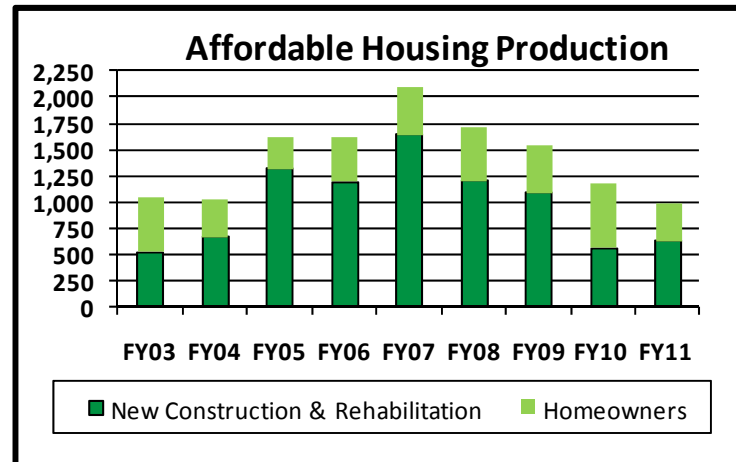
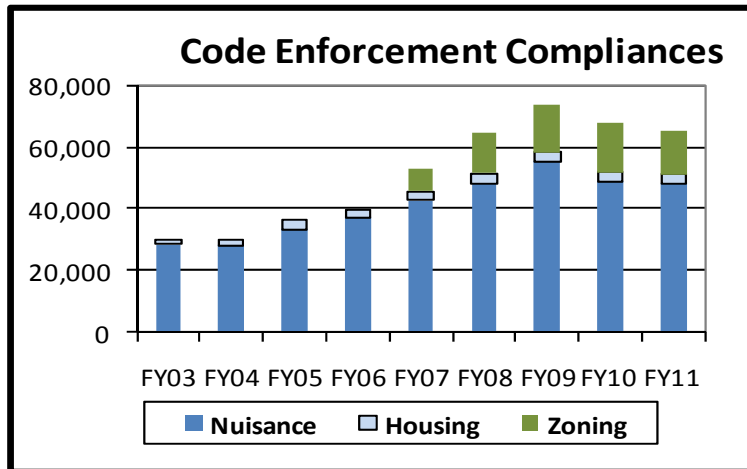
Core Service Area	Description
Community & Commerce	Provides neighborhood plan implementation, outreach and problem solving, leadership and organization training and infrastructure to neighborhoods and businesses. <i>Examples of services include Neighborhood Matching Grants, Facade and Small Business Enterprise loan programs, Community University, Neighborhood Action Plans, Business Corridor Development, Neighborhood Improvement Program, Weed & Seed Initiative and Vision Charlotte Wingate Initiative.</i>
Code Enforcement	Conducts housing, property and zoning inspections to enforce City codes. <i>Examples of services are Housing Code, Weeds and Grass, Parking on Lawns, Junk/Abandoned Vehicles, Graffiti, Zoning Inspections, Relocation and Non-Residential Code Enforcement</i>
Key Business Office/ Strategic Support and Business Support	Provides leadership, resources and support systems required for the organization to achieve its mission. <i>Examples of services include Strategic Planning, Policy Coordination, Financial Services, Innovation, Compliance Monitoring, Technology/GIS Services and Communications.</i>

Service History and Trends

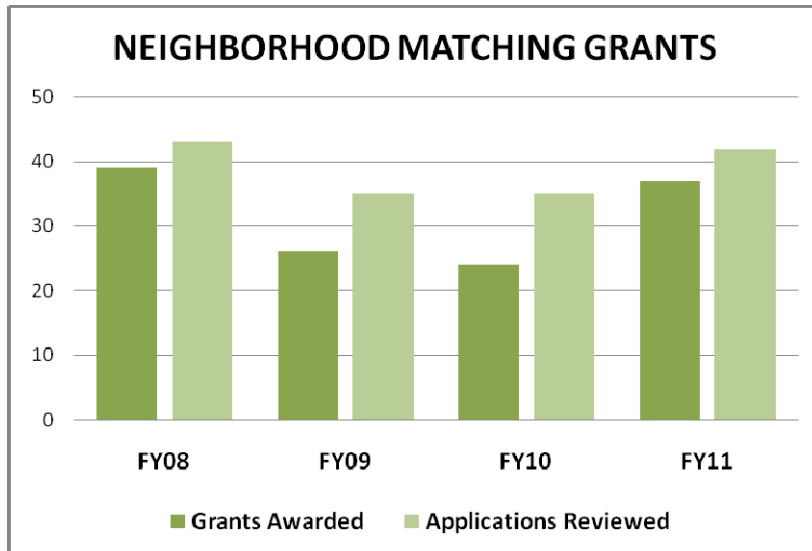
N&BS' key service trends include housing, nuisance and zoning inspections, affordable housing production, and neighborhood matching grants.

Code Enforcement - The number of combined housing and nuisance inspections have increased steadily over the years. However in FY11, Code Enforcement experienced a slight decline in housing code and nuisance compliances. A reduction in violations, and consequently compliances, is indicative of N&BS' goal of balancing enforcement with preventative measures by promoting greater citizen compliance with nuisance regulations. Increased citizen compliance reduces overall violations and the need to issue citations. The appearance of neighborhoods is also improved through proactive actions of the residents. In FY11, 2,893 houses were brought into code compliance and 48,033 properties into nuisance code compliance. In FY10, housing compliances came in at 3,005 and nuisance compliances were 48,782. Additionally, the number of zoning compliances decreased to 14,254 in FY11 compared to 15,949 for FY10.

Affordable Housing Production - A total of 988 affordable housing units were produced in FY11 which was a decrease of 184 units from the 1,172 housing units produced in FY10. This decrease was due to the reduction of resources for HouseCharlotte units. N&BS achieved 98.8 % of City Council's FY11 goal of 1,000 housing units produced.



Community & Commerce - Over the past three years, the Neighborhood Matching Grants program has experienced gradual decline in program participation. In FY11, several changes were made to the program, including an expansion of categories, the addition of a grant cycle and an online application in order to encourage more organizations to apply. Grant applications increased to 42 and contract approvals increased to 37.



IV. Balanced Scorecard and Performance Measures

Neighborhood & Business Services' Balanced Scorecard

N&BS' Balanced Scorecard (BSC) measures the KBU's progress toward achieving the City's corporate objectives and the KBU's strategy map objectives (*see appendix*). The BSC shows the organization's strategic objectives, measures and performance targets for FY12. The KBU's objectives include all of the City Council's Focus Area Plan objectives for both the Housing and Neighborhood Development and Economic Development committees. The two Focus Area plan objectives and the remainder of the Balanced Scorecard targets for N&BS have undergone dramatic changes from previous years. The new objectives focus on strategic outcomes rather than tactical outputs. Accordingly the new measures do not correlate well with measures from previous years. The KBU incentive targets are shown as well. The BSC for N&BS is highlighted on the next three pages.

Corporate Objective	KBU Initiative	Measure	Prior Year Actual	Lead or Lag	Performance Data			Comments/Explanation (to be completed at mid-year and year-end reporting)	
					Target	YTD	Status		
Serve the Customer	C2) Strengthen Neighborhoods	Redefine the Quality of Life Study to more accurately reflect the City's neighborhood conditions.	1. Completion of the 2012 Quality of Life Study	New Measure	Lag	100%			H&ND Focus Area Plan
		Continue implementation of the 10-Year Plan to End and Prevent Homelessness	2. Create strategic priorities/work plan beyond government that can be endorsed by the community	New Measure	Lead	100%			
		Develop and recommend policies that will assist with increasing the supply of affordable housing	3. Develop and revise policies	New Measure	Lead	See Measure Validation page			H&ND Focus Area Plan
		Improve the overall quality of life in the community	4. Reduce the Appearance and Housing Code Index by 10% by reducing the number of repeat offenders and through education. (Incentive Target)	New Measure	Outcome	See Measure Validation page			
	C3) Promote Economic Development	Strengthen opportunities for public and private partnerships to encourage the integration of education, recreation, employment and housing resources in identified redevelopment areas.	5. Achieve a leverage ratio within the corridors of 1:10 for business corridor funds.	New Measure	Lag	1:10			H&ND Focus Area Plan
		Help grow small businesses in our community	6. Implement Small Business Strategic Plan	New Measure	Lead	100%			ED Focus Area Plan

FY12 STRATEGIC OPERATING PLAN

Corporate Objective		KBU Initiative	Measure	Prior Year Actual	Lead or Lag	Performance Data			Comments/Explanation (to be completed at mid-year and year-end reporting)
						Target	YTD	Status	
			7. Review the SBO task force recommendation related to SBE informal goal setting (including its relationship to Federal DBE reporting requirements) and an evaluation of combining formal and informal opportunities	New Measure		5%			ED Focus Area Plan
Manage Resources	R1) Invest in Infrastructure	Create healthy and vibrant neighborhoods by improving and implementing quality physical infrastructure	8. Complete ninety percent of voter approved bond (Neighborhood Infrastructure and Business Corridor) projects on schedule or as forecasted	New Measure	Lag	90%			H&ND Focus Area Plan
	R2) Expand Tax Base & Revenues	Continue to focus on job and tax base growth in business corridors	9. Revise and implement the City's Business Corridor Strategy	New Measure	Lead	100%			ED Focus Area Plan
		Work with regional ED partners to grow businesses in the targeted industry sectors of energy & environment, finance, manufacturing, health care, defense, motorsports, tourism and film.	10. Design and implement a strategy to introduce local businesses into supplier relationships with large and mid-size businesses	New Measure	Lead	100%			ED Focus Area Plan
			11. Work with tourism partners to develop a plan to grow amateur sports in the Charlotte Region	New Measure	Lead	See Measure Validation page			
Run the Business	B2) Enhance Customer Service	Provide clear, consistent and effective communications to internal and external audiences	12. Create and adhere to departmental communications policy	New Measure	Lead	100%			
		Develop a system to gather internal/external customer	13. Develop a system to evaluate customer	New Measure	Lead	100%			

FY12 STRATEGIC OPERATING PLAN

Corporate Objective		KBU Initiative	Measure	Prior Year Actual	Lead or Lag	Performance Data			Comments/Explanation (to be completed at mid-year and year-end reporting)
						Target	YTD	Status	
		feedback to evaluate our present state of customer service	service by Jan 1, gather data by April 1 and develop recommendations by the end of the year						
		Deliver Comprehensive Citizen Service	14. Create and implement a new comprehensive citizen service model that moves services closer to the customer, where measurable success becomes dependent upon the integration of the collective services as well as focused collaboration with other City departments, the County, private and nonprofit organizations.	New Measure	Lead	100%			
Develop Employees	E2) Recruit & Retain Skilled Employees	We will own our work using critical thinking in an innovative and collaborative environment.	15. Develop and begin implementing a recognition program to reward and recognize employees/teams exhibiting critical thinking, innovation and collaboration to support an intentional culture. (Incentive Target)	New Measure	Lead	100%			
	E3) Promote Learning & Growth	Achieve KBU Wellness Program Goals	16. Employees receiving City benefits maintain the healthy exemption status. (Incentive Target)	New Measure	Lag	75%			
		Achieve KBU Wellness Program Goals	17. Participate in a City sponsored or individually developed wellness activity.	New Measure	Lag	75%			

IV. Request for Resources

Summary of Requests

In order to implement this FY12 Strategic Operating Plan, N&BS has an approved operating budget of \$14,281,872. The FY12 base budget was increased by \$184,705. Differences from the FY11 approved budget included eliminating funding for 3 positions in Housing Services to outsource the House Charlotte function, providing funding for a permanent administrator for the 10- year Plan to prevent homelessness and eliminating the unexpendable reserve in Zoning. Offsetting revenues attributable to Code Enforcement are projected at \$677,000. Below are details on the approved FY11 and FY12 budgets.

Base Budgets

The KBU's base budgets are reflective of the guidelines presented by the Budget Office. The KBU's general fund and federal funds operating budget for FY12, along with the number of full time equivalent (FTE) positions including temporary positions is illustrated below:

Neighborhood & Business Services Base Budgets				
Source of Funds	FY11	FTE	FY12	FTE
General Fund	\$11,496,681	122.5	\$11,865,587	130
CDBG Fund	1,176,854	16	1,117,042	12
HOME Fund	85,762	3	64,382	1
Other	\$1,337,870	15.5	1,234,861	8
Total	\$14,097,167	157	\$14,281,872	151

Current Level Changes

N&BS continues to reorganize to align resources with business priorities. Consequently, changes that move resources from one center to another are not Changes to Current level. In addition to eliminating funding for three positions to outsource House Charlotte in FY11, N&BS also eliminated 5 positions in FY12 to absorb the vacancy rate and provide additional funding for graffiti abatement and costs associated with implementing non residential building code.

Service Level Changes

No Service Level Changes are requested in the FY12 budget.

Revenues

N&BS is forecasting General Fund Offsetting revenues of \$677,000 in FY12. (See Page 24 for details.)

Departmental Charges

A number of divisions in N&BS depend upon operating support outside of the General Fund. The forecasted departmental charges, which include contributions from the Capital Investment Program, total \$2,366,285 in FY12. (See Page 23for details.)

VI. Conclusion

In FY12, Neighborhood & Business Services will be responsible for addressing a number of community, neighborhood and organizational policy and operational issues. This Strategic Operating Plan addresses both external and internal challenges in response to budgetary changes and service delivery expectations of our customers and citizens. Demand for the KBU's services - code enforcement, housing, community & commerce and economic development - continues to grow. Without the necessary operating resources, the KBU cannot continue to meet service delivery demands.

Given the current economy, N&BS will need to maximize the City's resources and staff communications to revitalize the business corridors and coordinate investment within City neighborhoods. Public input and open communication with the community are crucial factors in the implementation of the KBUs strategic framework.

This Strategic Operating Plan reaffirms N&BS' commitment to the missions of the City and the KBU. The funding of this Strategic Operating Plan will assist N&BS in moving forward to creating healthy and vibrant neighborhoods and businesses, which will help improve Charlotte's overall quality of life.

VII. APPENDIX

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

No Service Level Changes are requested in FY12



Charges to Capital Investment Plan

**General Fund
Departmental Charges
FY2012**

	<u>FY12</u>
Community Development Block Grant	\$ 1,117,042
HOME Grant	\$ 64,382
Capital Projects Fund	\$ 1,097,688
Contribution from the Energy Block Grant	\$ 87,173
Total	\$ 2,366,285

Revenue Projections

General Fund Offsetting Revenues FY12

	<u>FY12 Projections</u>	
5305 Housing Code Violations	\$	27,000
5514 Underbrush/Debris Removal		400,000
5515 Demolition Clearing		120,000
5542 Vehicle Towing and Storage		90,000
5315 Zoning Enforcement Fees		40,000
Total	\$	677,000



Neighborhood & Business Services Operating Budget
FY12

<u>Division</u>	<u>Cost Center</u>	<u>Total</u>	<u>CDBG</u>	<u>CIP</u>	<u>Home</u>	<u>General Funds</u>	<u>User Fees</u>	<u>Mecklenburg County</u>	<u>Energy Grant</u>	<u>Foundation of the Carolinas</u>	<u>Total</u>
FY12:											
Small Business Development	10501	554,633				554,633					554,633
Business Services	11600	1,395,549				1,395,549					1,395,549
Key Business Executive	90050	1,033,830	77,769	179,500		776,561					1,033,830
Business Support	90051	1,386,103	77,769	179,500		1,128,834					1,386,103
Code Enforcement	90056	4,893,953		60,000		4,833,953					4,893,953
Community & Commerce	90058	2,095,917				2,008,744			87,173		2,095,917
Belmont Center	90063	170,431				170,431					170,431
Wilmore Community Center	90069	32,630				32,630					32,630
Housing Services	90027	1,843,897	961,504	678,688	64,382	89,323		30,000		20,000	1,843,897
Zoning	90074	874,929					874,929				874,929
Subtotal		14,281,872	1,117,042	1,097,688	64,382	10,990,658	874,929	30,000	87,173	20,000	14,281,872

Balanced Scorecard Measures Formulas

Measures	Formulas
1. Completion of the 2012 Quality of Life	Complete redesign of the report
2. Create strategic priorities/work plan beyond government that can be endorsed by the community	1) Community Outreach:& Engagement – Completion of Communications Toolbox 2) Development& Service Integration – Commit funds to the Hawthorne Rehabilitation Project 3) Research & Evaluation – Creation of a Community Data mart
3. Develop and revise policies	Assisted multi-family housing at transit stations, impact of regulatory ordinances on affordable housing, and Incentive based housing.
4 Reduce the Appearance and Housing Code Indexes by 10% by reducing the number of repeat offenders and through education	Number of units brought into code compliance verses number of code violations cited within reporting period and carried over from previous reporting year
5 Achieve a leverage ratio within the corridors of 1:10 for business corridor funds.	Calculate public dollars leveraged against private funds invested
6 Implement Small Business Strategic Plan (ED FAP Measure)	100% of initiatives underway; 50% complete
7 Review the SBO Task Force recommendation related to SBE informal goal setting (including its relationship to Federal DBE reporting requirements) and an evaluation of combining formal and informal opportunities (ED FAP Measure)	Meet the combined informal and formal goal of 5%.
8 Complete 90% of voter approved bond neighborhood infrastructure and business corridor projects on schedule or as forecasted (H&ND FAP Measure)	Belmont Plan – Gateways, Lincoln Heights, York/CAMA NIP
9 Revise and implement the City's Business Corridor Strategy (ED FAP Measure)	Adopt a new Business Corridor Strategy and implement 50% of recommendations including an examination of the five priority corridors
10 Design and implement a strategy to introduce local businesses into supplier relationships with large and mid-size businesses (ED FAP Measure)	Establish the methodology for measuring the dollar value of goods and services sourced locally rather than from outside the region
11 Work with tourism partners to develop a plan to grow amateur sports in the Charlotte Region	Develop a new public-private model for adding amateur sports facilities in the region.
12 Create and adhere to departmental communications policy	See Measure Validation page
13 Develop a system to gather internal/external customer feedback to evaluate the present state of customer service.	Develop a system to evaluate customer service by Jan 1, gather data by April 1 and develop recommendations by the end of the year



14 Create and implement new comprehensive citizen service model	Completion of citizen service model & collaboration efforts of City's internal departments & external agencies, private sector and partners
15 Develop and implement employee/team recognition program	Number of employee(s)/teams submitted
16. 75% of employees receiving City benefits for healthy exemption status	Percent of employees receiving healthy exemption status
17. Participate in City sponsored/individually developed wellness activity	Percent of employees participating in City sponsored/individual wellness activity

<i>Neighborhood & Business Services</i>		
1. Redesign 2012 Quality of Life (QoL) Study (Housing & Neighborhood Development Focus Area Plan)		
Corporate Objective: (C2) Strengthen Neighborhoods		
KBU Initiative: Redefine the Quality of Life Study to more accurately reflect the City's neighborhood conditions.		
Measure: Completion of the 2012 Quality of Life		
Units of Measure: Complete redesign	Frequency of Update: Monthly	
Measurement Intent:		
Measurement Formula: Complete redesign of the report		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Tom Warshauer		
Target Setting Responsibility: Patrick Mumford/ Tom Warshauer	Accountability for Meeting Target: Tom Warshauer	Tracking/Reporting Responsibility: Tom Warshauer
Notes/Assumptions:		



Neighborhood & Business Services		
2. Create strategic priorities/work plan endorsed by community		
Corporate Objective: (C2) Strengthen Neighborhoods		
KBU Initiative: Continue implementation of the 10-Year Plan to End & Prevent Homelessness		
Measure: Create strategic priorities/work plan beyond government that can be endorsed by the community		
Units of Measure: Create strategic priorities/work plan	Frequency of Update: Monthly	
Measurement Intent:		
Measurement Formula: 1) Community Outreach:& Engagement – Completion of Communications Toolbox 2) Development & Service Integration – Commit funds to the Hawthorne Rehabilitation Project 3) Research & Evaluation – Creation of a Community Data mart		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Pam Wideman		
Target Setting Responsibility: Patrick Mumford Pam Wideman	Accountability for Meeting Target: Pam Wideman	Tracking/Reporting Responsibility: Mary Gaertner
Notes/Assumptions:		

Neighborhood & Business Services		
3. Develop & revise policies to increase affordable housing (Housing and Neighborhood Development Focus Area Plan)		
Corporate Objective: (C2) Strengthen Neighborhoods		
KBU Initiative: Develop & recommend policies that will assist with increasing the supply of affordable housing		
Measure: Develop & revise policies to increase affordable housing		
Units of Measure: Policies presented to the Housing and Neighborhood Development Committee for consideration	Frequency of Update: Monthly	
Measurement Intent: Ensure effective housing policies to increase the number of affordable housing units		
Measurement Formula: Assisted multi-family housing at transit stations, impact of regulatory ordinances on affordable housing, and incentive based housing.		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Pam Wideman		
Target Setting Responsibility: Patrick Mumford Pam Wideman	Accountability for Meeting Target: Pam Wideman	Tracking/Reporting Responsibility: Mary Gaertner
Notes/Assumptions:		



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Neighborhood & Business Services		
4. Reduce appearance & Housing Code Index		
Corporate Objective: (C2) Strengthen Neighborhoods		
KBU Initiative: Improve the overall quality of life in the community		
Measure: Reduce the Appearance and Housing Code Indexes by 10% by reducing the number of repeat offenders and through education		
Units of Measure: Monthly production report	Frequency of Update: Monthly	
Measurement Intent: To ensure safe and healthy housing conditions in communities		
Measurement Formula: Number of units brought into code compliance verses number of code violations cited within reporting period and carried over from previous reporting year		
Data Elements and Sources: Tracked in Code Information Management System		
Source For and Approach to Setting Targets: Historical compliance data		
Data Contact: Walter Abernathy		
Target Setting Responsibility: Patrick Mumford Walter Abernathy	Accountability for Meeting Target: Code Enforcement Division	Tracking/Reporting Responsibility: Walter Abernathy

Neighborhood & Business Services		
5. Achieve a leverage ratio within the corridors of 1:10 for business corridor funds. (Housing and Neighborhood Development Focus Area Plan)		
Corporate Objective: (C3) Promote Economic Opportunity		
KBU Initiative: Strengthen opportunities for public and private partnerships to encourage the integration of education, recreation, employment and housing resources in identified redevelopment areas.		
Measure: Achieve leverage ratio of 1:10 for business corridor funds		
Units of Measure: Track funds leveraged	Frequency of Update: Quarterly	
Measurement Intent:		
Measurement Formula: Calculate public dollars leveraged against private funds invested		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Peter Zeiler		
Target Setting Responsibility: Patrick Mumford Brad Richardson	Accountability for Meeting Target: Brad Richardson	Tracking/Reporting Responsibility: Brad Richardson
Notes/Assumptions:		



<i>Neighborhood & Business Services</i>		
6. Implement Small Business Strategic Plan (Economic Development Focus Area Plan)		
Corporate Objective: (C3) Promote Economic Opportunity		
KBU Initiative: Help grow small businesses in our community		
Measure: Implementation of strategic plan		
Units of Measure: Implementation of strategic plan	Frequency of Update: Quarterly	
Measurement Intent:		
Measurement Formula: 100% of initiatives underway; 50% complete. The number of initiatives is 39.		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Gail Whitcomb		
Target Setting Responsibility: Patrick Mumford Brad Richardson	Accountability for Meeting Target: Brad Richardson	Tracking/Reporting Responsibility: Brad Richardson
Notes/Assumptions:		

Neighborhood & Business Services

7. Review the SBO Task Force recommendation related to SBE informal goal setting (including its relationship to Federal DBE reporting requirements) and an evaluation of combining formal and informal opportunities (Economic Development Focus Area Plan)

Corporate Objective: (C3) Promote Economic Opportunity

KBU Initiative: None

Measure: Review SBE goal setting formula

Units of Measure: Completion of review & relationship

Frequency of Update: Quarterly

Measurement Intent:

Measurement Formula: Meet the combined informal and formal goal of 5%

Data Elements and Sources: Compass and Financial records

Source For and Approach to Setting Targets:

Data Contact: Krystle Hampton

Target Setting Responsibility:
Patrick Mumford
Brad Richardson

Accountability for Meeting Target:
Brad Richardson

Tracking/Reporting Responsibility:
Brad Richardson

Notes/Assumptions:



Neighborhood & Business Services

**8. Complete 90% of voter approved bond neighborhood infrastructure and business corridor projects on schedule or as forecasted
(Housing and Neighborhood Development Focus Area Plan)**

Corporate Objective: (R1) Invest in Infrastructure

KBU Initiative: Create healthy & vibrant neighborhoods by improving and implementing quality physical infrastructure

Measure: Complete 90% of voter approved bond neighborhood infrastructure and business corridor projects on schedule or as forecasted

Units of Measure: Completed projects

Frequency of Update: Quarterly

Measurement Intent: To monitor & track completion and scope of physical infrastructure projects

Measurement Formula: Belmont Plan – Gateways, Lincoln Heights, York/CAMA NIP

Data Elements and Sources: Capital Improvement Program

Source For and Approach to Setting Targets: Neighborhood Improvement Bond Process

Data Contact: Carl Jarrett, Engineering

Target Setting Responsibility:
City Council Focus Area Plan

Accountability for Meeting Target:
Engineering/N&BS

Tracking/Reporting Responsibility:
Tom Warshauer

Neighborhood & Business Services		
9. Revise & implement the City's Business Corridor Strategy (Economic Development Focus Area Plan)		
Corporate Objective: (R2) Expand Tax Base & Revenues		
KBU Initiative: Continue to focus on economic activity & job growth in business corridors		
Measure: Revise & implement the City's Business Corridor Strategy		
Units of Measure: Complete strategy	Frequency of Update: Monthly	
Measurement Intent: To stay abreast of economic activity & job growth		
<p>Measurement Formula: Adopt a new Business Corridor Strategy and implement 50% of recommendations including an examination of the five priority corridors-- (North Tryon, Beatties Ford Road, Rozzelles Ferry Road, Wilkinson/Morehead and the Eastland area) along with the improvements planned for Independence Boulevard, which will include the following elements:</p> <ul style="list-style-type: none"> - Review of accomplishments - Review of current geography - Prioritization of goals, with a focus on image building for distressed corridors - Establishment of roles for the City and its partners - Workforce development, including training and employment for youth in adjacent neighborhoods - Input from business owners, community leaders and developers - Benchmarking of similar programs in peer cities 		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Peter Zeiler		
Target Setting Responsibility: Patrick Mumford Brad Richardson	Accountability for Meeting Target: Brad Richardson	Tracking/Reporting Responsibility: Brad Richardson
Notes/Assumptions:		



<i>Neighborhood & Business Services</i>		
10. Design & implement strategy to introduce local businesses into supplier relationships with larger & mid-size businesses (Economic Development Focus Area Plan)		
Corporate Objective: (R2) Expand Tax Base & Revenues		
KBU Initiative: Work with regional ED partners to grow businesses in the targeted industry sectors of energy & environment, finance, manufacturing, health care, defense, motorsports, tourism and film.		
Measure: Complete & implement strategy to 1) inventory local products/services and 2) introduce local businesses to supplier relationships		
Units of Measure: Complete strategy to maintain inventory	Frequency of Update: Monthly	
Measurement Intent: To increase supplier relationships between large and small businesses.		
Measurement Formula: Establish the methodology for measuring the dollar value of goods and services sourced locally rather than from outside the region. Establish database and initiate 10 connections between suppliers and other businesses.		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Dennis Marstall		
Target Setting Responsibility: Patrick Mumford Brad Richardson	Accountability for Meeting Target: Brad Richardson	Tracking/Reporting Responsibility: Brad Richardson

<i>Neighborhood & Business Services</i>		
11. Develop plan to grow amateur sports in Charlotte region		
Corporate Objective: (R2) Expand Tax Base & Revenues		
KBU Initiative: Work with regional ED partners to grow businesses in the targeted industry sectors of energy & environment, finance, manufacturing, health care, defense, motorsports, tourism and film.		
Measure: Develop model to identify and increase amateur sports		
Units of Measure: Complete model		Frequency of Update: Monthly
Measurement Intent:		
Measurement Formula: Develop a new public-private model for adding amateur sports facilities in the region.		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Brad Richardson		
Target Setting Responsibility: Patrick Mumford Brad Richardson	Accountability for Meeting Target: Brad Richardson	Tracking/Reporting Responsibility: Brad Richardson



<i>Neighborhood & Business Services</i>		
12. Create & adhere to departmental communications policy		
Corporate Objective: (B2) Enhance Customer Service		
KBU Initiative: Provide clear, consistent & effective communications to internal & external audiences		
Measure: Create and adhere to departmental communications policy		
Units of Measure: Complete policy by October 1 and develop education and testing mechanism for employee understanding	Frequency of Update: Monthly	
Measurement Intent: To ensure clear, consistent & effective communications to internal & external audiences which moves the department closer to meeting its goals		
Measurement Formula: Completion of policy and understanding from employees		
Data Elements and Sources: Written policy, education campaign and testing mechanism		
Source For and Approach to Setting Targets:		
Data Contact: Jamie Banks		
Target Setting Responsibility: Patrick Mumford Jamie Banks	Accountability for Meeting Target: Jamie Banks	Tracking/Reporting Responsibility: Jamie Banks
Notes/Assumptions: Testing component to reflect 75% of overall employees understand the policy		

<i>Neighborhood & Business Services</i>		
13. Develop a system to gather internal/external customer feedback to evaluate our present state of customer service		
Corporate Objective: (B2) Enhance Customer Service		
KBU Initiative: Develop a system to gather internal/external customer feedback to evaluate our present state of customer service. Develop & implement recommendations to improve department wide customer service.		
Measure: Develop a system to evaluate customer service by Jan 1, gather data by April 1 and develop recommendations by the end of the year		
Units of Measure:	Frequency of Update: Monthly	
Measurement Intent: To identify and provide efficient, effective & friendly customer service		
Measurement Formula: Develop a system to evaluate customer service by Jan 1, gather data by April 1 and develop recommendations by the end of the year		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Jamie Banks		
Target Setting Responsibility: Patrick Mumford Jamie Banks Steve Allen	Accountability for Meeting Target: Jamie Banks Steve Allen	Tracking/Reporting Responsibility: Steve Allen
Notes/Assumptions:		



<i>Neighborhood & Business Services</i>		
14. Create & implement new comprehensive citizen service model		
Corporate Objective: (B2) Enhance Customer Service		
KBU Initiative: Deliver Comprehensive Citizen Service		
Measure: Create & implement new comprehensive citizen service model that moves services closer to the customer, where measurable success becomes dependent upon the integration of the collective services as well as focused collaboration with other City departments, the County, private & nonprofit organizations.		
Units of Measure: Develop and begin implementation of citizen service model		Frequency of Update: Quarterly
Measurement Intent: To create comprehensive model for delivery of customer service		
Measurement Formula: Completion of citizen service model & collaboration efforts of City's internal departments & external agencies, private sector and partners		
Data Elements and Sources:		
Source For and Approach to Setting Targets:		
Data Contact: Tom Warshauer		
Target Setting Responsibility: Patrick Mumford Tom Warshauer Pam, Wideman	Accountability for Meeting Target: Tom Warshauer Pam Wideman	Tracking/Reporting Responsibility: Tom Warshauer
Notes/Assumptions:		

Neighborhood & Business Services		
15. Develop & implement recognition/reward program for employees/teams		
Corporate Objective: (E2) Recruit & Retain Skilled Employees		
KBU Initiative: We will own our work using critical thinking in an innovative & collaborative environment.		
Measure: Develop & begin implementing a recognition program to reward and recognize employees/teams exhibiting critical thinking, innovation and collaboration to support an intentional culture.		
Units of Measure: Employee(s)/teams recognized and/or rewarded		Frequency of Update: Monthly
Measurement Intent: To encourage employees to support intentional culture		
Measurement Formula: Number of employee(s)/teams submitted		
Data Elements and Sources: All KBU employees		
Source For and Approach to Setting Targets: Nominations submitted, reviewed & approved by N&BS Partners		
Data Contact:		
Target Setting Responsibility: N&BS Partners	Accountability for Meeting Target: Each Division	Tracking/Reporting Responsibility:
Notes/Assumptions:		



Neighborhood & Business Services

16. Percent of employees receiving City benefits maintain the healthy exemption status

Corporate Objective: (E3) Promote Learning & Growth

KBU Initiative: Achieve KBU Wellness Program Goals

Measure: 75% of employees receiving City benefits maintain the healthy exemption status

Units of Measure: Number of employees maintaining healthy exempt status	Frequency of Update: Semi-annual
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Measurement Intent: Encourage employees to adopt and maintain healthier lifestyles

Measurement Formula: Percent of employees receiving healthy exemption status

Data Elements and Sources: Wellness Center database

Source For and Approach to Setting Targets: Goal for promoting wellness within KBU

Data Contact: Susanne Skellham

Target Setting Responsibility: N&BS Partners	Accountability for Meeting Target: Each Division	Tracking/Reporting Responsibility: Susanne Skellham
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Notes/Assumptions:

Neighborhood & Business Services

17. Employees participating in City sponsored or individually developed wellness activity

Corporate Objective: (E3) Promote Learning & Growth

KBU Initiative: Achieve KBU Wellness Program Goals

Measure: 75% of employees participating in City sponsored or individually developed wellness activity

Units of Measure: Number of activities participating in

Frequency of Update: Quarterly

Measurement Intent: Encourage employees to adopt healthier lifestyles

Measurement Formula: Percent of employees participating in City sponsored/individual wellness activity

Data Elements and Sources: Wellness Center database tracking & self reporting

Source For and Approach to Setting Targets: Goal for promoting wellness with the KBU

Data Contact: Susanne Skellham

Target Setting Responsibility:
N&BS Partners

Accountability for Meeting Target:
Each Division

Tracking/Reporting Responsibility:
Susanne Skellham

Notes/Assumptions:

