



CHARLOTTE.

# Strategic Operating Plan

FY 2009

*Integrating Budget and  
Performance Management*

**Charlotte-Mecklenburg  
Planning Department**







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Final FY 2009*

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*I. Executive Summary*

*Strategic Operating Plan  
Final FY 2009*





## **I. Executive Summary**

### *A. Transmittal Memo*

DATE: July 30, 2008

TO: Ruffin Hall  
Budget Director

FROM: Debra D. Campbell  
Planning Director

SUBJECT: FY2009 Strategic Operating Plan

The vision of the Charlotte-Mecklenburg Planning Department is to be an innovative and effective public planning agency helping to create one of the most vibrant, well planned and livable urban communities in the country. We are pleased to submit the Planning Department's FY2009 Strategic Operating Plan that demonstrates our commitment to achieving this vision. The SOP represents the strategic direction for the agency over the next several years and documents the agency's linkages to the City's Corporate Scorecard and our budget submittals.

As noted in the key issues and challenges section of the SOP, "Reorganization" is one of the greatest challenges facing the department. Our department is moving from a structure in which nine program managers report to the director to one in which three assistant directors will perform that function. The designation of Assistant Directors for (1) Development Services, (2) Long Range Planning Services and (3) Strategic Planning Services should enhance customer service, reduce bottlenecks for projects, create professional development opportunities, clarify decision making authority and responsibility for both internal and external customers.

"Workload and demand for services" continues to be an issue for the Department. This is because other departments often develop initiatives that are not on Planning's work program. City Council also requests special research to respond to high profile issues. The reorganization anticipates and responds to this issue by assigning these types of initiatives to a specific division to manage and track resources and workloads.



## *I. Executive Summary*

Planning would also like to better “integrate technology into business processes”. Our long-term goal is development of a digital submittal process whereby developers submit their plans digitally and have them reviewed and approved digitally. The current permitting process improvements initiative should be a step in this direction. Other Planning Department efforts involve improving the efficiency of reporting in-house data and developing GIS tools to incorporate into our work processes. We would also like to digitize many of our files to provide backup to paper copies and for the efficiency of finding them quickly for our customers who may come in and ask to see a file that is currently stored off site.

While changing our organization structure, controlling workload and better integrating technology into our department are listed as goals for FY2009, the job of changing our development practices, trends and patterns that have been in place for decades will be a slow and challenging process. The Planning Department is committed to this long term vision of making Charlotte one of the most vibrant, well planned and livable urban communities in the country.

The adopted Planning budget for FY08 was \$5,247,082 and for FY09 \$5,620,386. We had an FY08 service level change request of \$203,777 and \$223,859 in FY09. The bulk of the request is to address departmental staffing issues.

If you have questions, please contact Steve Patterson at (704) 336-8308 or me at (704) 336-2671.

c Phyllis Heath  
Sandra Stewart  
Cheryl Neely



I. Executive Summary

B. Introduction

Established in 1954, the Charlotte-Mecklenburg Planning Department is a joint City-County agency providing planning services for the City of Charlotte and the unincorporated areas of Mecklenburg County. This Key Business Unit (KBU), which works with a 14-member appointed Planning Commission, also serves as a departmental resource for City and County government. An Inter-local Cooperative Agreement between the City and County spells out the conditions and procedures under which the Planning Department operates.

The Planning Department’s current 63-member staff primarily focuses on:

- *guiding growth and enhancing design of the city and county;*
- *revitalization and enhancement of neighborhoods, business areas, and transit corridors; and*
- *planning and development of the Center City and other major centers.*

A summary of the agency’s budget and positions is as follows:

Summary of Planning Department Resource Needs

	FY2006 Actual	FY2007 Actual	FY2008 Adopted	FY2009 Adopted
<b>Budget</b>	\$4,204,596	\$4,348,804	\$5,247,082	\$5,620,386
<b>Positions</b>	63	63	63	63





## I. Executive Summary

### C. Vision Statement



*The Charlotte-Mecklenburg Planning Department will be an innovative and effective public planning agency helping to create one of the most vibrant, well planned and livable urban communities in the country.*

### D. Mission Statement

*We provide integrated planning services that promote sustainable growth to improve our community's quality of life.*





## E. Key issues and challenges to be addressed

Providing effective and innovative planning services while absorbing an ever increasing work load will continue to be a major challenge for our department. With current staff stretched to capacity, Planning has examined its current structure and is reorganizing itself to provide improved ways to address a community which is transitioning to a more diverse, mixed/multi-use community. Also, staff needs to be increasingly familiar with a variety of different technologies and software for project review and tracking. In particular the KBU will be most challenged to address the following issues over the next several years.

### 1. Reorganization

The Planning Department Leadership Team had many discussions about the best way to reorganize our efforts to meet current and future workload demands. Key issues that needed to be addressed with the organization include:

1. Too broad a span of control for Director and Managers
2. Timeliness of products being produced
3. Program area lines of responsibilities blurred
4. Customers confused as to who is truly authorized to make decisions
5. No clear Number 2 position after the Director, and
6. Lack of communication among program areas.

It was believed that these issues could best be addressed by creating three Assistant Director positions covering: (1) Developmental Services, (2) Long Range Planning Services and (3) Strategic Planning Services. Implementation of this plan begins August 1, 2008 with recruitment and any job reclassifications to be completed by June 2009.

### 2. Workload and Demand for Services

The Planning Department has an ambitious multi-faceted work program. Many of our initiatives involve interdepartmental efforts. In turn, other KBU's also rely heavily on Planning staff involvement in their initiatives. It is becoming increasingly difficult to manage and prioritize the numerous interdepartmental initiatives, Council Priority and Focus Area efforts and meet the BSC and work program objectives. The



reorganization attempts to respond to this issue by making one division principally responsible for managing and tracking staff resources and workloads devoted to these collaborative efforts.

### 3. Integration of Technology into Business Processes

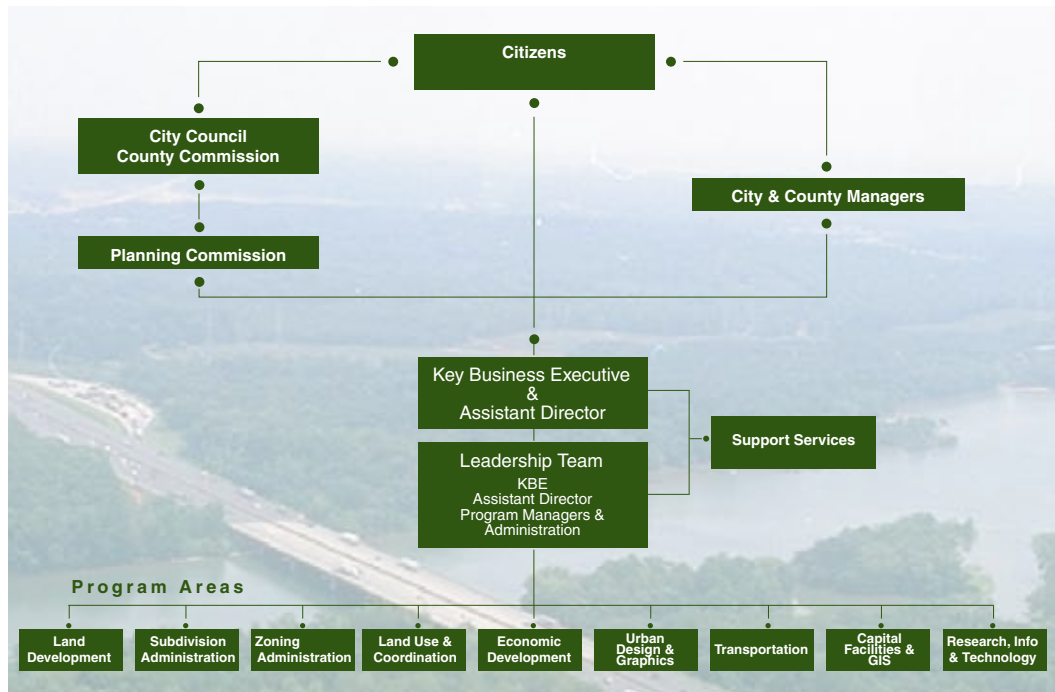
Planning would like to better integrate technology into our business processes. One goal is to pursue digital submittal whereby developers provide their plans digitally and they are then reviewed and approved digitally. Benefits to the developer include their avoidance of direct trips to the Government Center or paying a courier to make trips for them. While the technology appears to be available, there are some coordination and financial barriers to overcome. We would also like to improve in-house data reporting by making single family, multi-family and mixed-use approvals easier to track. Another goal is to employ more GIS tools to improve in-house processes. Preliminary work has also been done to develop a disaster recovery plan whereby many of our historic files would be converted to a digital medium. This would provide a backup for the files and allow for easier searches by not having to physically locate a hard copy of a rezoning or subdivision plan when needed.



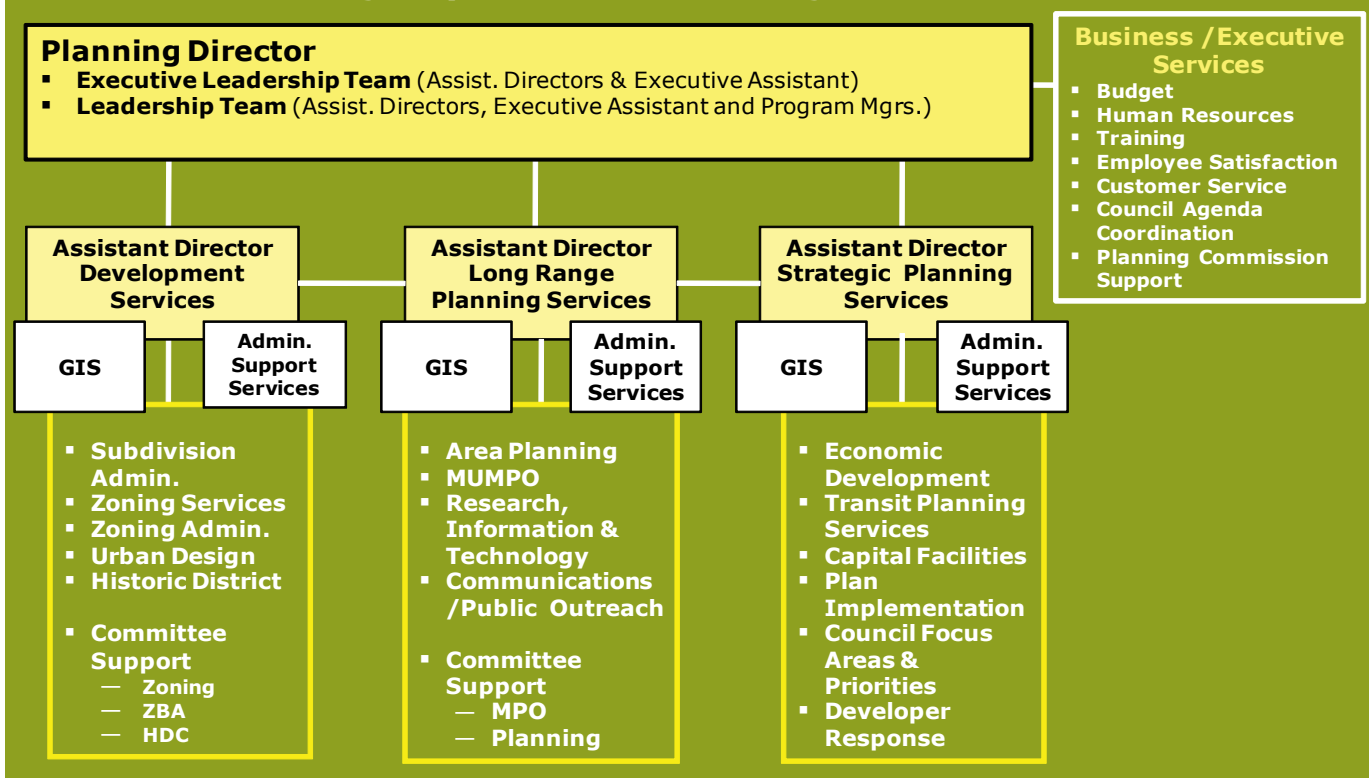
## I. Executive Summary

### F. Organization Chart

The Planning Department's previous Organization Chart is shown to the RIGHT. The new Organization Chart for FY09 is shown BELOW.



### Planning Department FY09 Organization Chart





## II. Strategy and Planning

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## II. Strategy and Planning

### A. Accomplishments

The Planning Department had much success over the past year. Notable accomplishments include the following:

### *Strengthen Neighborhoods*



**Completion of Area Plans:** The Norhlake Area Plan and Brevard Street Plan were completed.

**Rezoning Consistent with Adopted Plans:** Ninety-two percent of City Council rezoning decisions were consistent with adopted plans. (Goal is ninety percent.)

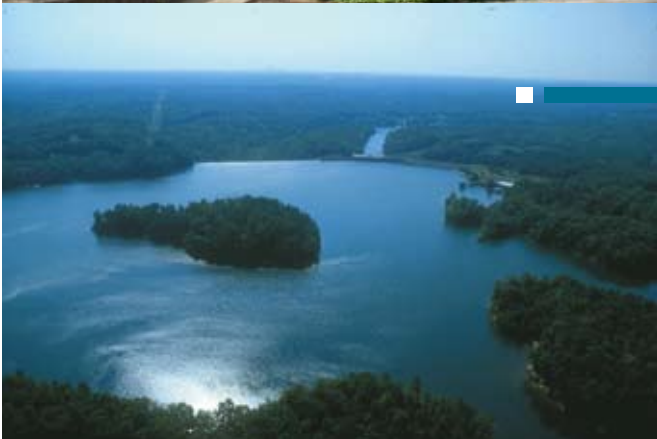
**Text Amendments:** Text amendment changes were adopted and included institutional uses in residential areas.



### *Safeguarding the Environment*

**Policies Developed to Protect the Environment as part of GDP Phase II:** City Council adopted the Environmental Chapter of the General Development Policies in November 2007.

**Environmental Inventory:** On November 13, 2007 the Environmental Cabinet approved a strategy to conduct an Environmental Features Inventory.





### Develop Collaborative Solutions

**Area Plan Review:** An inventory of area plans was completed and provided to City Council.

**Infrastructure:** City Council adopted the Infrastructure General Development Policies on November 26, 2007.

**Centers and Corridors:** Ninety-nine percent of new office square footage located within the Centers and Corridors area. (Goal is seventy-five percent.) Fifty-four percent of newly permitted housing units also located there. (Goal is forty percent.)

**Permitting Process Improvements:** Planning worked with E&PM, CDOT and the Subdivision Steering Committee to develop the "Subdivision Gateway Checklist" to improve the quality of subdivision submittals. Staff also collaborated in developing the "One Stop Permitting Center".

**Increase in the Amount of Transit Supportive Development:** Twenty-two TOD Rezoning were approved at five station areas.

**Annexation:** 2009 annexation planning is on schedule.

### Enhance Customer Service

**Subdivision Plan Review:** Ninety-one percent of plans were reviewed within 20 days.

**Customer Service Rating:** Achieved a rating of 4.36 out of 5 based upon customer comments.





II. Strategy and Planning

B. Links to Corporate Strategy

The Planning Department directly or indirectly serves all four of the City of Charlotte's Corporate Scorecard Objectives. The KBU's greatest impact, however, is on the Scorecard's *Serve the Customer* and *Run the Business* strategies. The following describes some of the key linkages between the services and initiatives of the Planning Department and the City's Corporate Objectives.

A chart showing the linkages is shown in Appendix A.

*The Customer perspective -*

Serve the **Customer**

Customer service is regarded as the Planning Department's highest priority. As such, the KBU's goal is to operate in a manner that exceeds customer expectations on each contact, whether in person, by telephone, email or through written materials.



*The internal process perspective -*

Run the **Business**

Partnerships are our approach...is one of the Planning Department's four guiding principles. Getting things done through collaboration is central to the work of the department. Collaboration regularly occurs with other City KBUs and with county and town governments in the region, local non-profits, neighborhood groups and regional and state agencies.







*The financial perspective -*

## Manage **Resources**

The Planning Department is a good steward of public resources, operating with the goal of using resources in an efficient and strategic manner to deliver quality planning services.



*The learning and growth perspective -*

## Develop **Employees**

The complex planning issues that face the community make it vitally important for the Planning Department to retain and hire competent staff. To maintain the level of knowledge, expertise and creativity needed to meet the workload and customer demands, constant development of staff talent is needed; therefore, employee training and development continues to be a high priority for the Planning Department.





II. Strategy and Planning

C. Strategic Initiatives

The table below identifies the most significant initiatives the Planning Department will undertake in FY09 and how they align with the City's corporate objectives and/or focus areas.

	<i>KBU Initiative</i>	<i>Corporate Strategy</i>
Serve the Customer	<p><b>Promote quality growth and development</b> by:</p> <ul style="list-style-type: none"> <li>Developing new area plans</li> <li>Drafting Zoning Ordinance text amendments that enhance quality of neighborhoods</li> </ul>	<p><b>Corporate Objective:</b> Strengthen Neighborhoods</p> <p><b>Focus Area:</b> Housing and Neighborhood Development</p>
	<p><b>Support environmental sustainability</b> by:</p> <ul style="list-style-type: none"> <li>Initiating the strategies to implement the General Development Policies Environmental Chapter</li> <li>Reinforcing zoning decisions that are consistent with adopted plans</li> </ul>	<p><b>Corporate Objective:</b> Safeguard the Environment</p> <p><b>Focus Area:</b> Environment</p>
Run the Business	<p><b>Continue development and implementation of the Centers and Corridors policy</b> by</p> <ul style="list-style-type: none"> <li>Adoption of Centers, Corridors and Wedges growth framework</li> <li>Increasing the percent of total housing and multi-family housing</li> <li>Filing TOD and TS zoning amendments</li> </ul>	<p><b>Corporate Objective:</b> Collaborative Solutions</p> <p><b>Focus Area:</b> Transportation</p>
	<p><b>Prioritize, design, construct and maintain convenient and efficient transportation facilities</b> that improve safety, livability and transportation by:</p> <ul style="list-style-type: none"> <li>Adoption of station area plans for the South Corridor</li> <li>Continue planning for North and Northeast Corridors</li> </ul>	<p><b>Corporate Objective:</b> Collaborative Solutions</p> <p><b>Focus Area:</b> Transportation</p>
	<p><b>Permitting process improvements:</b></p> <ul style="list-style-type: none"> <li>Improving the efficiency of plan review</li> <li>Implementing a conflict resolution procedure</li> </ul>	<p><b>Corporate Objective:</b> Collaborative Solutions</p> <p><b>Focus Area:</b> Economic Development</p>
	<p><b>Area Plan Implementation:</b></p> <ul style="list-style-type: none"> <li>Implementation of Capital Projects &amp; GDP Infrastructure</li> </ul>	<p><b>Corporate Objective:</b> Collaborative Solutions</p> <p><b>Focus Area:</b> Economic Development</p>
	<p><b>Optimize Business Processes</b></p> <ul style="list-style-type: none"> <li>Departmental reorganization</li> </ul>	<p><b>Corporate Objective:</b> Collaborative Solutions</p> <p><b>Focus Area:</b> Economic Development</p>
Manage Resources	<p><b>Continue annexation process</b></p> <ul style="list-style-type: none"> <li>Planning for FY2009 annexation</li> </ul>	<p><b>Corporate Objective:</b> Expand Tax Base &amp; Rev</p> <p><b>Focus Area:</b> Economic Development</p>
Develop Employees	<p><b>Provide appropriate training and development opportunities</b> by:</p> <ul style="list-style-type: none"> <li>Updating and implementing the department's training plan</li> </ul>	<p><b>Corporate Objective:</b> Recruit &amp; Retain Skilled Diverse Workforce</p> <p><b>Focus Area:</b> Economic Development</p>



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*III. Service Delivery*

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### III. Service Delivery

#### A. Service Delivery

Planning Department core service areas are outlined in the following chart:

<i>Core Service Area</i>	<i>Brief Description</i>	<i>Linkage to Balanced Scorecard</i>
Development Services	<p>Responsible for administration of current planning services. Responsibilities include:</p> <ul style="list-style-type: none"> <li>• Subdivision Administration</li> <li>• Zoning Services</li> <li>• Zoning Administration</li> <li>• Urban Design</li> <li>• Historic District</li> </ul> <p>In addition provides support for the CMPC Zoning Committee, Zoning Board of Adjustment, and Historic District Commission</p>	<p>Strengthen Neighborhoods Safeguard the Environment Develop Collaborative Solutions Promote Economic Opportunity</p>
Long Range Planning Services	<p>Coordinates collaborative and comprehensive long range land use and transportation planning services which include:</p> <ul style="list-style-type: none"> <li>• Area Planning</li> <li>• MUMPO</li> <li>• Research, Information and Technology</li> <li>• Communication/Public Outreach</li> </ul> <p>In addition provides support for MPO and CMPC Planning Committee</p>	<p>Strengthen Neighborhoods Provide Transportation Choices Safeguard the Environment Promote Economic Opportunity Develop Collaborative Solutions Enhance Customer Service Optimize Business Processes Invest in Infrastructure</p>
Strategic Planning Services	<p>Responsible for Economic Development planning efforts in targeted areas including Center City, distressed business corridors, and transit corridors. Provides support to City and County budget offices and the development of Capital budgets along with implementation of adopted plans and policies. Services include:</p> <ul style="list-style-type: none"> <li>• Economic Development</li> <li>• Transit Planning Services</li> <li>• Capital Facilities</li> <li>• Plan Implementation</li> <li>• Council Focus Areas and Priorities</li> <li>• Developer Response</li> </ul>	<p>Strengthen Neighborhoods Provide Transportation Choices Promote Economic Opportunity Expand Tax Base and Revenues Invest in Infrastructure</p>



## B. Service Delivery Summary

### Summary

The Charlotte-Mecklenburg Planning Department works with a 14-member appointed Planning Commission and serves as a departmental resource for City and County government by providing planning services. We focus on:

- Guiding growth and enhancing design of the city and county;
- Revitalization and enhancement of neighborhoods, business areas and transit corridors; and
- Planning and development of the Center City and other major centers.

### Vital Statistics for FY08

- Reviewed 132 rezoning petitions
- Heard 77 ZBA cases
- Approved 232 HDC projects
- Approved 3,548 single family lots
- Approved 7,312 multi-family units

	FY07	FY08	FY09
Budget	\$4,348,804	\$5,247,082	\$5,620,386
Positions	63	63	63

### Accomplishments for FY08

- Northlake and Brevard Street Plans were adopted
- An inventory of area plans was completed and provided to City Council
- As part of the General Development Policy Phase II, City Council adopted the Environmental and Infrastructure GDP
- Participated in development of "Subdivision Gateway Checklist", Accela and "One Stop Permitting Center".
- 2009 annexation planning is on schedule

## Service Delivery Challenges

### Reorganization

The Planning Department is reorganizing and creating three Assistant Director positions covering: (1) Developmental Services, (2) Long Range Planning Services and (3) Strategic Planning Services. Implementation of this plan begins August 1, 2008 with recruitment and any job reclassifications to be completed by June 2009.

### Workload and Demand for Services

It is becoming increasingly difficult to manage and prioritize the numerous interdepartmental initiatives, Council Priority and Focus Area efforts and meet the BSC and work program objectives. The reorganization attempts to respond to the issue by making one division principally responsible for managing and tracking staff resources and workloads devoted to these efforts.

### Integration of Technology into Business Processes

Planning would like to better integrate technology into our business processes. One goal is to pursue digital submittal whereby developers provide their plan digitally and they are then reviewed and approved digitally. Preliminary work has also been done to develop a disaster recovery plan whereby many of our historic files would be converted to a digital medium.



### C. Service History and Trends

The Planning Department tracks the service history of the number of rezoning petitions, Zoning Administration cases, Historic District project approvals, and single family/multi-family approvals for lots and units. All measures showed a decrease in activity for FY08.

**Rezoning Petitions:** The number of petitions decreased to FY06 levels after climbing to 152 cases in FY07. These petitions continue to become more complex in terms of size and types of petitions. The majority of petitions were conditional which requires more staff involvement.

**Zoning Administration Cases:** The Planning Department has been working to reduce the number of cases heard by the Zoning Board of Adjustment. In FY08, however, the number of cases increased above the level for FY07. The BSC has a goal to reduce the number of FY09 cases by five percent.

**Historic District Project Approvals:** Historic District project approvals (232 cases) indicate a decrease from the previous four years, but is near the FY05 level.

**Single family lot approvals:** Lot approvals are on the decline reaching their second lowest level (3,548 units) in the past five years. Much of the market appears to have shifted to multi-family housing.

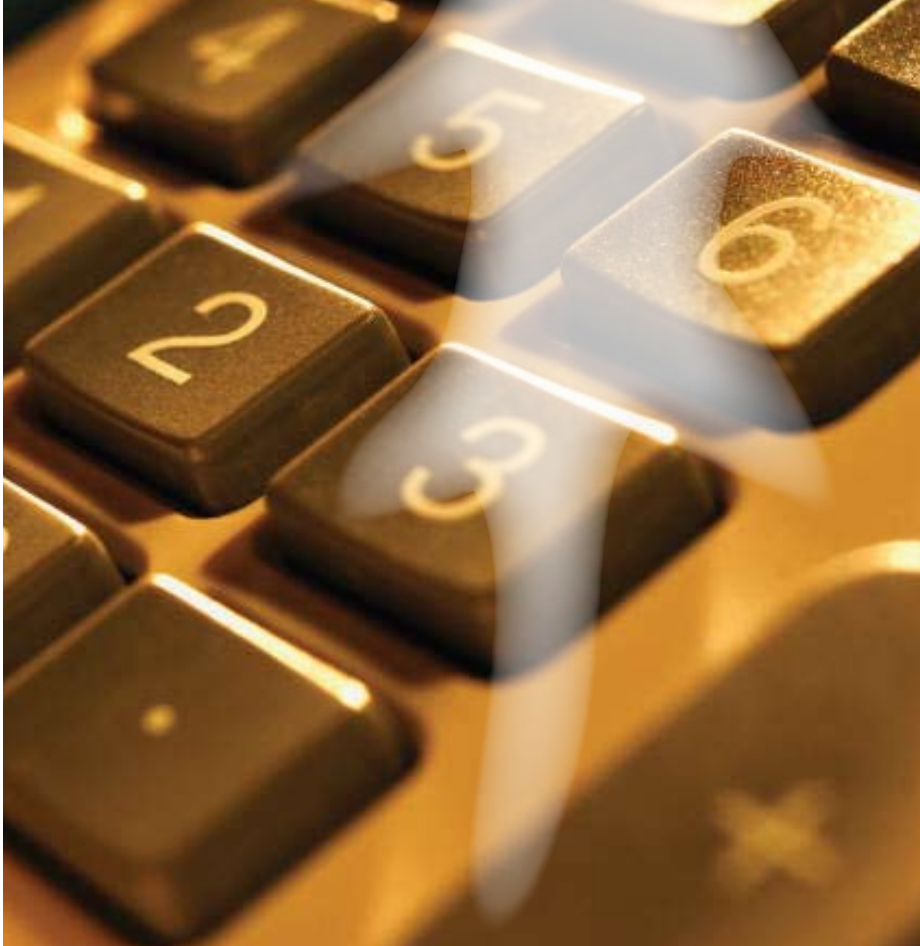
**Multi-family unit approvals:** This category peaked in FY07 with the approval of large projects in the Center City and beyond. FY08 approval levels declined somewhat, but were still in lofty territory, with 7,312 new units.

### Land Development Activities

ACTIVITY	FY04	FY05	FY06	FY07	FY08
Rezoning Petitions	117	108	129	152	132
Zoning Admin. Cases	127	124	144	56	77
Historic District Project Approvals	280	242	299	293	232
Single Family (SF) Lot Approvals	5,227 (SF) Lots	5,135 (SF) Lots	3,391 (SF) Lots	4,663 (SF) Lots	3,548 (SF) Lots
Multi-Family (MF) Unit Approvals	4,030 (MF) Units	3,327 (MF) Units	4,263 (MF) Units	8,403 (MF) Units	7,312 (MF) Units



*IV. Balanced Scorecard*



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## IV. Balanced Scorecard and Performance Measures

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<b>● Serve the Customer</b>							
<b>Strengthen Neighborhoods</b> <b>C1</b> Promote quality growth and development that enhances the character, viability and integrity of Neighborhoods throughout Charlotte-Mecklenburg	(a) Number of draft area plans completed	2	Lead	2 draft area plans and/or amendments completed by June 2009			
	(b) Develop residential design standards for single family housing to ensure high quality neighborhoods	NA	Lead	Complete stakeholder input process by June 2009			
	(c) Refine the Neighborhood Organization Contact List	NA	Lead	Convert Neighborhood Organization Contact List data management to a GIS format by June 2009			
<b>Safeguard the Environment</b> <b>C2</b> Support sustainability by making wise decisions regarding growth and development, recognizing the inter-relationships between air quality, water resources, land preservation and energy and resource conservation	* (a) Implement GDP Phase II - Environment	NA	Lag	Initiate strategies to address 5 of the 15 General Development Environmental Policies by June 2009			
	* (b) Percent of rezoning decisions consistent with adopted plan recommendations	92.1	Lag	95% of rezoning decisions consistent with adopted plans and/or staff recommendations			





IV. Balanced Scorecard

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<b>Run the Business</b>							
<p><b>Develop Collaborative Solutions</b></p> <p><b>B1</b></p> <p>Share the community vision through increased public presentations</p>	Number of presentations made to various community and business organizations	108	Lead	<p>By June 2009 complete:</p> <ul style="list-style-type: none"> <li>• 75 presentations</li> <li>• 2 Planning 101s</li> </ul> <p>Participate in:</p> <ul style="list-style-type: none"> <li>• Neighborhood Symposium</li> <li>• GIS day</li> </ul>			
<p><b>B2</b></p> <p>Continue implementation of Centers and Corridors Policy</p>	(a) Increase in the amount of transit-supportive development	5	Lag	Application of TOD Zoning and/or Transit Supportive Zoning at 3 station areas by June 2009			
	<p>\$</p> <p>*</p> <p>(b) Council approval of updated Centers, Corridors, and Wedges growth framework</p>	NA	Lead	Adoption of Centers, Corridors and Wedges growth framework by March 2009			
	<p>*</p> <p>(c) Percent of new residential development locating within Centers and Corridors</p>	53.8 67.7	Lag	Minimum of 40% of all new housing units and 70% of multi-family units located within Centers & Corridors			



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## IV. Balanced Scorecard

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<i>continuation</i> <b>B2</b> Continue implementation of Centers and Corridors Policy	* (d) Percent of office and employment locating within Centers and Corridors	98.7 94.8	Lag	Minimum of 75% of new office development square footage and 75% of new employment located within Centers & Corridors			
	\$ (e) Complete changes to TOD and TS zoning districts	NA	Lead	Text amendments with changes to TOD and TS filed by October 2008			
<b>B3</b> Collaborate with local and regional partners on land use and transportation planning to promote long-term sustainability	Develop a congestion management process	NA	Lead	Process adopted by MPO by May 2009			
<b>B4</b> Permitting process improvements	* (a) Improve efficiency of plan review	NA	Lead	Complete Planning Department reviews within an average of 2.5 reviews for commercial subdivision projects by June 2009			



IV. Balanced Scorecard

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<p><i>continuation</i></p> <p><b>B4</b></p> <p>Permitting process improvements</p>	(b) Conflict Resolution Process for plan review	NA	Lead	Implement a process for staff to quickly resolve plan review conflict issues by December 2008			
<p><b>B5</b></p> <p>Prioritize, design, construct and maintain, convenient and efficient transportation facilities to improve safety, neighborhood livability, promote transportation choices and meet land use objective</p>	(a) Adoption of station area plans in the South Corridor	0	Lag	All South Corridor plan documents adopted by June 2009			
	(b) Continue planning for North and Northeast Corridors	NA	Lag	Provide support for preliminary engineering for the North Corridor Commuter Rail Line and support for Northeast Corridor DEIS through June 2009			
<p><b>B6</b></p> <p>Area Plan Implementation</p>	* Implementation of capital projects recommended in area plans	3	Lead	Initiate two new area plan capital projects by June 2009			



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## IV. Balanced Scorecard

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<b>Enhance Customer Service</b> <b>B7</b> Improve Customer Service levels	(a) Readability of Zoning Ordinance	NA	Lead	Complete consultant review process for reorganizing the Zoning Ordinance by June 2009			
	(b) Level of customer satisfaction	4.36	Lag	Achieve 4.0 overall rating in Customer Service (1-5 scale)			
<b>B8</b> Shorten the time it takes for a customer to get a subdivision plan reviewed	Percent of subdivision plans reviewed within 20 days	91%	Lag	90% of plans reviewed within 20 days			
<b>Optimize Business Process</b> <b>B9</b> Implement departmental reorganization	\$ Change in organizational structure	NA	Lead	Complete necessary recruitment and any staff reassignment by June 2009			
<b>B10</b> Data management and development tracking	Meet stated technology goals	NA	Lead	Goals and time lines <ul style="list-style-type: none"> <li>• Develop Planning Department document scanning strategy by June 2009</li> <li>• Develop Planning Department digital submittal strategy for Rezoning and Subdivisions by June 2009</li> </ul>			



IV. Balanced Scorecard

Corporate Objective and KBU Initiative	Measure ☞ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<b>B11</b> Apply shared technologies to improve service delivery	Development and Delivery of GIS tools	NA	Lead	Develop, demonstrate and instruct Planning staff in the use of four GIS tools related to service delivery by June 2009			
<b>B12</b> Zoning Board of Adjustment workload reduction	Reduce number of cases	NA	Lead	Reduce number of cases, appeals and variances going to the ZBA by 5%			
<b>● Manage Resources</b>							
<b>Expand Tax Base and Revenues</b> <b>R1</b> Continue Annexation Process	2009 Annexation Planning	NA	Lead	Complete technical steps necessary to implement the Annexation Process by June 2009			



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## IV. Balanced Scorecard

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data			Comments/Explanation
				Target	YTD	Status	
<b>Develop Employees</b>							
<b>Recruit and Retain a Skilled and Diverse Workforce</b> <b>E1</b> Provide appropriate training and development opportunities	Update and Implementation of Training Plan	NA	Lead	Implement 75% of Training Plan by June 2009			
<b>Promote Learning and Growth</b> <b>E2</b> Provide appropriate wellness training	\$ a) Support healthy nutrition	100%	Lead	Implement the Wellness Works Healthy Nutrition Guidelines for 50% of KBU sponsored events and meetings and employee initiated events			
	\$ (b) Support worksite environment objectives	78%	Lead	Incorporate a wellness minute at 75% of staff meetings - a wellness education minute led and performed by staff			

V. Request for Resources

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## V. Request for Resources

### **Base Budget:**

The Charlotte-Mecklenburg Planning Department requests a total budget allocation of \$5,606,693 for FY2009.

### **Change to Current Level:**

The recommended current level changes are \$359,611.

### **Service Level Changes:**

The total amount of Service Level Changes is \$223,859.

### **Revenues:**

Total revenues for Fiscal Year 2008 are estimated at \$521,300.

### **Departmental Charges:**

Two divisions within Planning have support from two other KBUs. This support is tracked, monitored and charged via departmental charges. Planning-MUMPO support has charges of \$100,000 to CDOT reimbursement from the Federal UPWP funds. Neighborhood Development and Engineering and Property Management contribute \$91,976 and \$16,231, respectively, to Planning's Zoning Administrative Section. Three positions in Planning are funded by CATS with a charge back of \$227,135 in FY2009. The Planning Department requested and Council approved that the proposed lost CATS funding of \$191,618 for two Principal Planner positions be replaced with a service level increase of the same amount.

### **Change to Current Level:**

\$359,611 is primarily in changes from personal services.

### **Service Level Change:**

Two Principal Planner positions	\$191,618
Planning Department's Accela cost	\$ 32,241
TOTAL	\$223,859





*VI. Appendices*

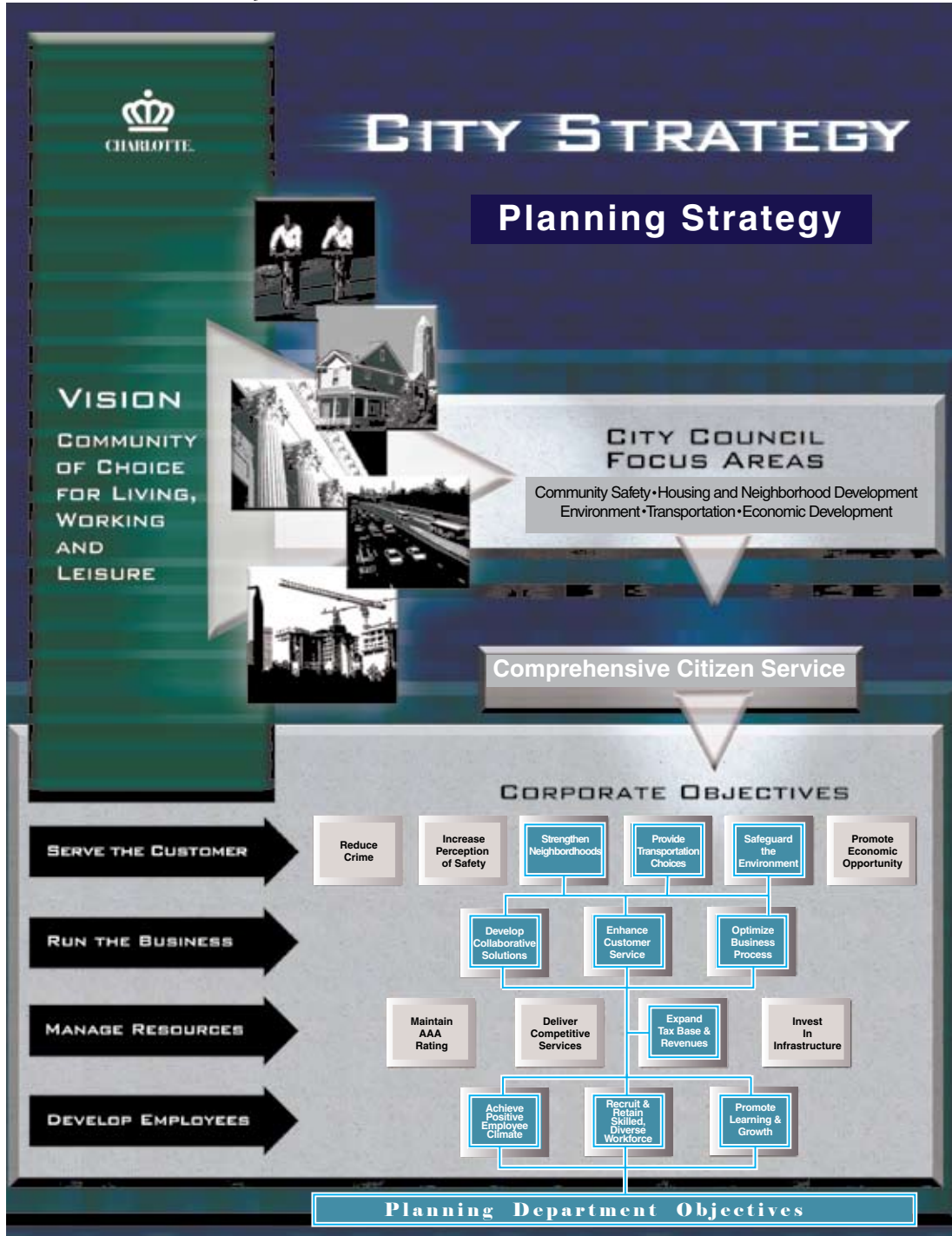
*Strategic Operating Plan  
Final FY 2009*





## VI. Appendices

### A. KBU Link to Corporate Scorecard





## *B. Service Level Change Summary*

### **Service Level Change:**

Two Principal Planner positions	\$191,618
Planning Department's Accela cost	<u>\$ 32,241</u>
TOTAL	\$223,859







**FY08 & FY09 Estimated Revenue**

	<b>FY08 Estimated Revenue</b>	<b>FY09 Estimated Revenue</b>
<b>Regulatory Fees</b>		
<b>Rezoning: By Right</b>		
Single Family	\$5,000	\$4,000
Multi Family	\$3,000	\$2,000
Other	\$20,000	\$30,000
<b>Rezoning: Conditional</b>		
Single Family	\$18,000	\$15,000
Multi Family	\$55,000	\$40,000
Other	\$155,000	\$180,000
Text Amendment	\$2,000	\$1,000
Amend. Site Plan Approval	\$14,000	\$5,000
Sign Flex Option	\$2,500	\$1,000
<b>Subdivision Review:</b>		
Single Family (Streets)	\$48,000	\$50,000
Non-Residential	\$5,500	\$6,000
Plan Revisions	\$30,000	\$35,000
Variances & Appeals	\$2,300	\$2,300
Plats, Regular	\$36,000	\$30,000
Plats, Revisions	\$28,000	\$25,000
Plats, Condo	\$6,000	\$3,000
Planned Multi-Family Review	\$25,000	\$40,000
<b>Urban Plan Review:</b>		
Urban Plan Review:	\$55,000	\$70,000
<b>Zoning Administration:</b>		
Appeals (Residential)	\$500	\$1,000
Appeals (Non-Residential)	\$500	\$10,000
Administrative Variance	\$2,000	\$15,000
Variance (Residential)	\$4,000	\$6,000
Variance (Non-Residential)	\$4,000	\$9,000
<b>TOTAL</b>	<b>\$521,300</b>	<b>\$580,300</b>




*Planning* GDP Phase II - Environment

<b>Corporate Objective:</b>	Safeguard the Environment
<b>KBU Initiative:</b> *	Support sustainability by making wise decisions regarding growth and development, recognizing the interrelationships between air quality, water resources, land preservation and energy and resource conservation.
<b>Measure and Target:</b>	Implement GDP Phase II - Environment Initiate strategies to address 5 of the 15 General Development Environmental Policies by June 2009
<b>Units of Measure:</b>	Fifteen recommended policies
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	To help minimize the environmental impacts of future land use and land development activities
<b>Measurement Formula:</b>	Number of policies addressed in whole or in part. Note that one strategy may address multiple policies.
<b>Data Elements and Sources:</b>	Land Use and development plans, practices and initiatives
<b>Source For and Approach to Setting Targets:</b>	Environmental Chapter of GDP
<b>Data Contact:</b>	Garet Johnson
<b>Target Setting Responsibility</b>	Environmental Cabinet
<b>Accountability for Meeting Target:</b>	Planning
<b>Tracking/ Reporting Responsibility:</b>	Garet Johnson
<b>Notes/ Assumptions:</b>	C2 (a)



*Planning*

Rezoning Consistent with Plans

<b>Corporate Objective:</b>	Safeguard the Environment
<b>KBU Initiative:</b>	Support sustainability by making wise decisions regarding growth and development, recognizing the interrelationships between air quality, water resources, land preservation and energy and resource conservation.
<b>Measure and Target:</b>	Rezoning consistent with plans. Target is 95% of rezoning decisions consistent with the adopted plan and/or staff recommendation.
<b>Units of Measure:</b>	Number of Rezoning Petitions
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	The number of decisions that are consistent with the land use recommendations reflects the Planning Commission's growing need to continue to provide good information to elected officials in support of adopted plan policies.
<b>Measurement Formula:</b>	The number of rezoning cases for which final decisions have been made are examined to determine if they were consistent or inconsistent with the recommended land use.
<b>Data Elements and Sources:</b>	The data elements included in the measure are: The number of cases decided upon; if they were consistent or inconsistent with the land use recommendations and the City Council action.
<b>Source For and Approach to Setting Targets:</b>	The Planning Department's staff log that is maintained by the Land Development Program Area provides the information and data for this measure.
<b>Data Contact:</b>	Tammie Keplinger
<b>Target Setting Responsibility:</b>	Environmental Cabinet
<b>Accountability for Meeting Target:</b>	Planning
<b>Tracking/ Reporting Responsibility:</b>	Tammie Keplinger
<b>Notes/ Assumptions:</b>	 (b)





*Planning* Centers and Corridors - Growth Framework

<b>Corporate Objective:</b>	Develop Collaborative Solutions
<b>KBU Initiative:</b> *	Continue implementation of Centers and Corridors Policy
<b>Measure and Target:</b> \$	Update of Centers, Corridors and Wedges Growth Framework. Target is adoption by March 2009.
<b>Units of Measure:</b>	Adoption
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	This measure is intended to be an indicator for progress toward the City's goal of integrating land use and transportation. In addition, it will signal the development of a refined approach to the Centers and Corridors policy.
<b>Measurement Formula:</b>	Adoption of revised centers, corridors and wedges.
<b>Data Elements and Sources:</b>	Current adopted policy
<b>Source For and Approach to Setting Targets:</b>	This task is part of the larger Transportation Action Plan process which is an adopted 2004 Council priority.
<b>Data Contact:</b>	Laura Harmon
<b>Target Setting Responsibility</b>	Leadership Team
<b>Accountability for Meeting Target:</b>	Planning Leadership Team, CDOT, and CATS
<b>Tracking/ Reporting Responsibility:</b>	Leadership Team
<b>Notes/ Assumptions:</b>	B2 (b)



Planning Centers and Corridors - New Residential

<b>Corporate Objective:</b>	Develop Collaborative Solutions/Safeguard the Environment
<b>KBU Initiative:</b>	Continue implementation of Centers and Corridors Policy
<b>Measure and Target:</b>	Centers and Corridors. Target is to have a minimum of 40% of all new housing units and 70% of multi-family units to locate in the area.
<b>Units of Measure:</b>	Housing units from building permit file.
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	To encourage most of our future higher intensity development to be located within areas where transportation infrastructure either already exists to support it or where improvements are planned and/or can be targeted to best support it.
<b>Measurement Formula:</b>	Number of new housing units within centers and corridors/number of new housing units within Charlotte's sphere > 40%; Number of new multi-family housing units within centers and corridors/number of new multi-family housing units within Charlotte's sphere > 70%.
<b>Data Elements and Sources:</b>	LUESA - Building permits, centers and corridors feature class, streets feature class, spheres of influence feature class.
<b>Source For and Approach to Setting Targets:</b>	Target was identified in the Transportation Action Plan, and subsequently in the Transportation Focus Area Plan.
<b>Data Contact:</b>	Ruchi Agarwal
<b>Target Setting Responsibility</b>	Transportation Cabinet, Environment Cabinet
<b>Accountability for Meeting Target:</b>	Planning
<b>Tracking/ Reporting Responsibility:</b>	Ruchi Agarwal
<b>Notes/ Assumptions:</b>	<b>B2</b> (c)



*Planning* Centers and Corridors - Office Space

<b>Corporate Objective:</b>	Develop Collaborative Solutions/Safeguard the Environment
<b>KBU Initiative:</b>	Continue implementation of Centers and Corridors Policy
<b>Measure and Target:</b>	Centers and Corridors. Target is to have a minimum of 75% of new office development square footage and 75% of new employment located within the area.
<b>Units of Measure:</b>	Square feet of new office space.
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	To encourage most of our future higher intensity development to be located within areas where transportation infrastructure either already exists to support it or where improvements are planned and/or can be targeted to best support it.
<b>Measurement Formula:</b>	Total sq. ft. of new or additional office space within centers and corridors/total sq. ft. of new or additional office space within Charlotte's sphere > 75%; and number of new employees in centers and corridors/number of new employees in Charlotte's sphere > 75%.
<b>Data Elements and Sources:</b>	LUESA - Building permits, centers and corridors feature class, streets feature class, spheres of influence feature class, employment multipliers (source: City of Orlando).
<b>Source For and Approach to Setting Targets:</b>	Target was identified in the Transportation Action Plan, and subsequently in the Transportation Focus Area Plan.
<b>Data Contact:</b>	Ruchi Agarwal
<b>Target Setting Responsibility</b>	Transportation Cabinet, Environment Cabinet
<b>Accountability for Meeting Target:</b>	Planning
<b>Tracking/ Reporting Responsibility:</b>	Ruchi Agarwal
<b>Notes/ Assumptions:</b>	<b>B2</b> (d)



*Planning* Changes to TOD and TS Zoning Districts

<b>Corporate Objective:</b>	Develop Collaborative Solutions
<b>KBU Initiative:</b>	Continue implementation of Centers and Corridors Policy
<b>Measure and Target:</b>	Changes to TOD and TS zoning districts. Target is to draft text amendments with changes to TOD and TS zoning districts by October 2008
<b>Units of Measure:</b>	Completed draft text amendments
<b>Frequency of Update:</b>	Annual
<b>Measurement Intent:</b>	To indicate progress in moving improvements to zoning districts that are important for urban development.
<b>Measurement Formula:</b>	Completion of draft of updated districts
<b>Data Elements and Sources:</b>	Current districts
<b>Source For and Approach to Setting Targets:</b>	Based on Council direction.
<b>Data Contact:</b>	John Howard
<b>Target Setting Responsibility</b>	Planning Leadership Team
<b>Accountability for Meeting Target:</b>	Planning Policy Work Group
<b>Tracking/ Reporting Responsibility:</b>	Sandy Montgomery
<b>Notes/ Assumptions:</b>	<b>B2</b> (e)



*Planning* Plan Review - Number of Reviews

<b>Corporate Objective:</b>	Develop Collaborative Solutions
<b>KBU Initiative:</b> *	Permitting Process Improvements
<b>Measure and Target:</b>	Improve efficiency of plan review. Target is to support Engineering & Property Management Land Development Process Action Plan
<b>Units of Measure:</b>	Commercial Subdivision Plan Review
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	To insure that plan review time is minimized
<b>Measurement Formula:</b>	Complete Planning Department Commercial Subdivision plan reviews in an average of 2.5 reviews or less
<b>Data Elements and Sources:</b>	Commercial Subdivisions plans
<b>Source For and Approach to Setting Targets:</b>	Council Focus Area Initiative
<b>Data Contact:</b>	Linda Beverly
<b>Target Setting Responsibility</b>	Council and Engineering & Property Management Land Development Action Plan
<b>Accountability for Meeting Target:</b>	Engineering is lead - Planning is responsible for commercial subdivision plan review
<b>Tracking/ Reporting Responsibility:</b>	Shannon Frye
<b>Notes/ Assumptions:</b>	<b>B4</b> (a)



*Planning* Capital Projects Implementation

<b>Corporate Objective:</b>	Develop Collaborative Solutions
<b>KBU Initiative:</b> *	Area plan implementation
<b>Measure and Target:</b>	Implementation of Capital Projects recommended in area plans. Target is to initiate two new projects by June 2009
<b>Units of Measure:</b>	Initiated projects
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	To follow through on plan recommendations
<b>Measurement Formula:</b>	Two plans must be initiated
<b>Data Elements and Sources:</b>	Recommended projects from area plans
<b>Source For and Approach to Setting Targets:</b>	City Council approved funds to assist in area plan development by addressing plan recommendations
<b>Data Contact:</b>	Greg Burnham
<b>Target Setting Responsibility</b>	Economic Development and Planning
<b>Accountability for Meeting Target:</b>	Planning Department
<b>Tracking/ Reporting Responsibility:</b>	Greg Burnham
<b>Notes/ Assumptions:</b>	B6



*Planning* Planning Department Reorganization

<b>Corporate Objective:</b>	Optimize Business Processes
<b>KBU Initiative:</b>	Implement departmental reorganization
<b>Measure and Target:</b>	Change in organizational structure. Target is to complete necessary recruitment and staff reassignment by June 2009.
<b>Units of Measure:</b>	Number of positions to be recruited and reassigned
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	To complete transition to new organizational structure.
<b>Measurement Formula:</b>	Identified number of positions to be recruited or reassigned equal to the number of new hires or reassigned employees.
<b>Data Elements and Sources:</b>	Planning staff positions
<b>Source For and Approach to Setting Targets:</b>	Planning Department Leadership team.
<b>Data Contact:</b>	Sandra Stewart
<b>Target Setting Responsibility</b>	Planning Department Leadership Team
<b>Accountability for Meeting Target:</b>	Planning Director and Assistant Directors
<b>Tracking/ Reporting Responsibility:</b>	Sandra Stewart
<b>Notes/ Assumptions:</b>	<b>B9</b>



Planning Support Healthy Nutrition

<b>Corporate Objective:</b>	Promote Learning and Growth
<b>KBU Initiative:</b>	Provide appropriate wellness training
<b>Measure and Target:</b>	Support healthy nutrition. Target is to implement wellness works healthy nutrition guidelines for 50% of KBU sponsored events and meetings and employee initiated events
<b>Units of Measure:</b>	Number of events with food
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	Intent is to improve employee health and decrease City's health care payments
<b>Measurement Formula:</b>	Number of events with healthy food alternatives divided by total number of events with food. Percent should be great than 50.
<b>Data Elements and Sources:</b>	A meeting log will be established to track progress
<b>Source For and Approach to Setting Targets:</b>	Human Resources Department provided suggested targets. Planning Director and Leadership Team selected from the list
<b>Data Contact:</b>	Penny Cothran
<b>Target Setting Responsibility</b>	Leadership Team
<b>Accountability for Meeting Target:</b>	Leadership Team, Wellness Coordinator, and Individual employees
<b>Tracking/ Reporting Responsibility:</b>	Penny Cothran/Linda Keich
<b>Notes/ Assumptions:</b>	E2 (a)





*Planning* Worksite Environment

<b>Corporate Objective:</b>	Promote Learning and Growth
<b>KBU Initiative:</b>	Provide appropriate wellness training
<b>Measure and Target:</b>	Support worksite environment objectives. Target is to incorporate a wellness minute at 75% of monthly department staff meetings - a wellness education minute led and performed by staff
<b>Units of Measure:</b>	Staff meeting agendas will be used to track percentages
<b>Frequency of Update:</b>	Mid-year and year end
<b>Measurement Intent:</b>	Intent is to improve employee health and to decrease City's health care costs
<b>Measurement Formula:</b>	Calculate the percentage of staff meeting agendas that show a wellness minute
<b>Data Elements and Sources:</b>	Staff meeting agendas
<b>Source For and Approach to Setting Targets:</b>	Human Resources Department provided suggested targets. Planning Director and Leadership Team selected from the list
<b>Data Contact:</b>	Penny Cothran
<b>Target Setting Responsibility</b>	Leadership Team
<b>Accountability for Meeting Target:</b>	Leadership Team, Wellness Coordinator, and Individual employees
<b>Tracking/ Reporting Responsibility:</b>	Penny Cothran/Linda Keich
<b>Notes/ Assumptions:</b>	E2 (b)

