



**TOWN OF CHAPEL HILL**

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**To:** Town Council Members and Other Invitees to the Annual  
Town Planning Retreat  
**From:** Mayor Kevin C. Foy and Town Manager Roger L. Stancil  
**Date:** January 4, 2008  
**Subject:** Background Reading in Preparation for the Town Planning Retreat

The purpose of this notebook is to provide summary information for all of us to reflect on as we prepare for the annual Town Planning Retreat on January 11-13, 2008.

This advance preparation will facilitate the accomplishment of several objectives for the retreat:

- To assure that the Council has the best professional advice and perspective from the staff as the Council deliberates priorities for the coming year
- To enrich the staff's understanding of how the Council reaches its decision on those priorities
- To enhance our shared commitment to those priorities and how they will be met
- To lay the groundwork for a budget based on those priorities

As you read the notebook, we think you will see synergies between the Council's and the Staff's analysis of Success, Trends and Priorities, even though this data was collected independently.

The final design and agenda for the retreat will emerge directly out of the data contained herein. As you read this material, if you have questions or ideas about how best to make the retreat productive, please feel free either to contact one of us or to contact one of the members of the retreat design team:

Laurin Easthom  
Kevin C. Foy  
Butch Kisiah  
Flo Miller  
Roger L. Stancil

Thank you.

Kevin C. Foy

Roger L. Stancil

# TOWN OF CHAPEL HILL STRATEGIC PLANNING RETREAT

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**CHAPEL HILL, NORTH CAROLINA  
PREPARED FOR TOWN PLANNING RETREAT JANUARY 11-13, 2008**





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## **ACKNOWLEDGEMENTS**

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### **Mayor and Town Council**

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Kevin Foy, Mayor  
Jim Ward, Mayor pro tem  
Matt Czajkowski, Council Member  
Laurin Easthom, Council Member  
Sally Greene, Council Member  
Ed Harrison, Council Member  
Mark Kleinschmidt, Council Member  
Bill Strom, Council Member  
Bill Thorpe, Council Member

### **Town Manager**

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Roger L. Stancil, Town Manager

### **Senior Management Team**

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Bob Avery, Director, Information Technology  
Dwight Bassett, Economic Development Officer  
Loris Colclough, Interim Director, Finance  
J.B. Culpepper, Director, Planning  
Brian Curran, Police Chief  
Bruce Heflin, Assistant Town Manager  
Dan Jones, Fire Chief  
Ralph Karpinos, Town Attorney  
Butch Kisiah, Director, Parks and Recreation  
Catherine Lazorko, Public Information Officer  
Valerie Meicher, Director, Human Resource Development  
Flo Miller, Deputy Town Manager  
Lance Norris, Director, Inspections; Interim Director, Public Works  
Sabrina Oliver, Director, Communications and Public Affairs  
George Small, Director, Engineering  
Stephen Spade, Director, Transit  
Kathleen Thompson, Director, Chapel Hill Public Library  
Tina Vaughn, Director, Housing

# INTRODUCTION

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By Town Manager Roger L. Stancil

## Drawing the Thread: Putting the Puzzle Pieces Together

First, we celebrate our **Successes**. We learn from them, we scratch them off our list and move on. We also learn from those activities that are not yet successes so we can approach them differently.

Although history is not always an accurate predictor of the future, it is one we can see. So we identify **Trends** in our field that help us understand what is happening so we can design our work accordingly.

By removing successes, rethinking “less than successes”, reviewing the vision of the **Comprehensive Plan**, and projecting the future, we identify our **Priorities** for the coming year.

Combining those with the Council’s views, we establish our **Strategic Plan** for the coming year, including any forecasts for more long-range priorities.

We ask the community what they think, through public forums, **listening sessions** and/or surveys.

Through the budget process, staff provides increased information about priorities and Council makes decisions about the priorities by allocating resources through the **Budget**.

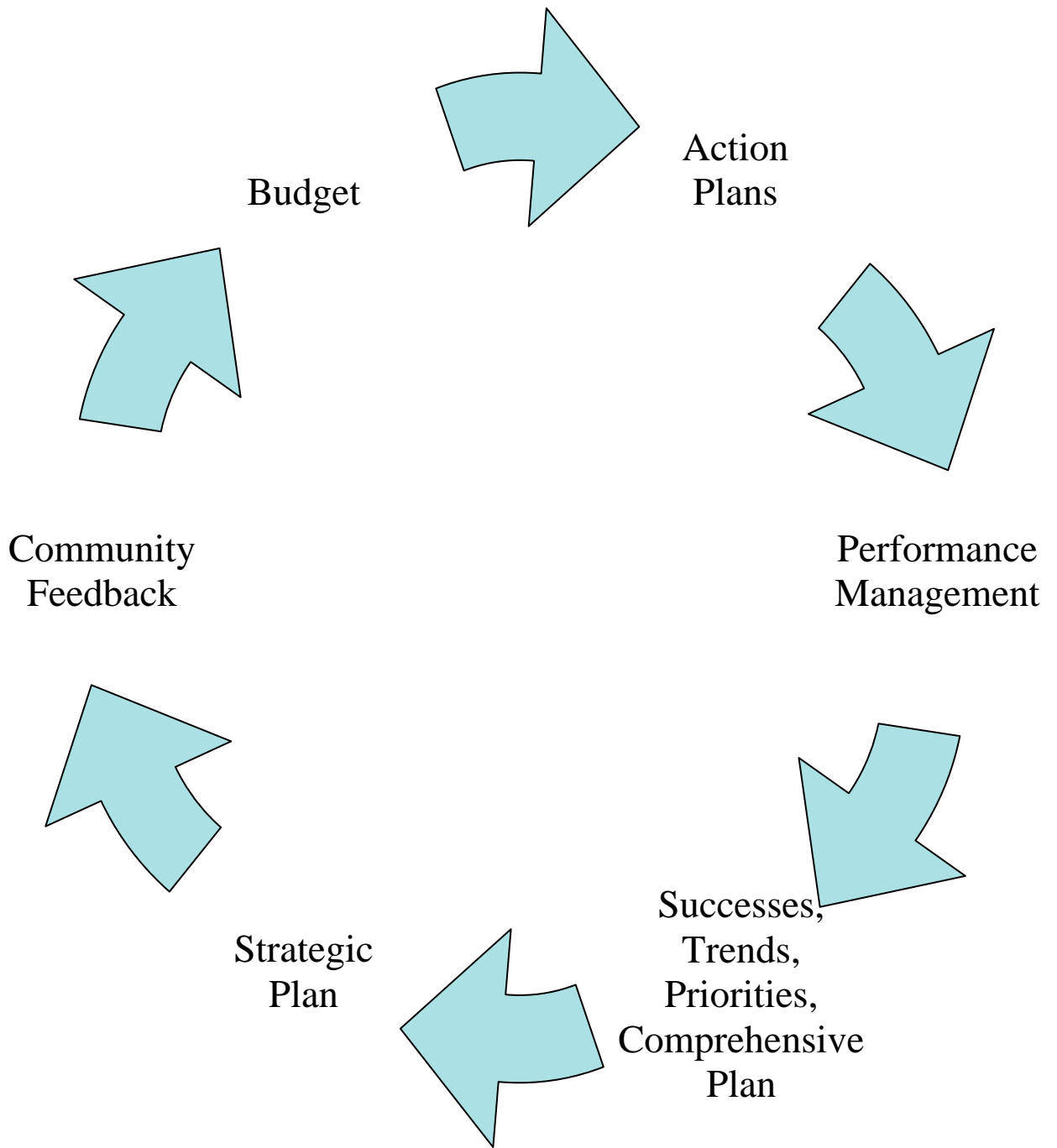
The Senior Management Team agrees on who is responsible for the priorities and establishes measures for defining success. When combined with the **Senior Management Team Values**, this action plan becomes the **Performance Management** plans for the Senior Management Team. The Senior Management Team then must take the priorities for which they are accountable and build a performance management system for their employees, based on accomplishments of the priorities and behavior in accomplishing them (what and how).

Through feedback and monitoring the measures of success (performance management discussions), we adjust our action behaviors and/or our assumptions about the priority and the action plan.

Then we celebrate our **Successes**....



## Drawing the Thread: Putting the Puzzle Pieces Together



## **Topic Areas of the Comprehensive Plan establish long range interests of the Town**

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### **Fiscal Conditions**

The Town is committed to enhancing its ability to provide services and manage its development through financial stability and fiscal planning.

### **University Relations**

The Town endeavors to provide an environment where the Town of Chapel Hill, UNC, and the UNC Health Care System can collaborate to maximize mutual benefits.

### **Regional Cooperation**

The Town engages in effective regional cooperation that promotes sustainable growth patterns, recognizing that economic development, land use, transportation, environmental, natural area linkages, and other planning issues transcend the boundaries of Chapel Hill.

### **Economy and Employment**

The Town works to increase employment opportunities for residents and satisfy local demand for commercial and retail services.

### **Housing**

The Town aims to increase the availability of well-designed, affordable, safe and sanitary housing for all citizens of Chapel Hill.

### **Land Use and Development**

The Town promotes orderly development and redevelopment to achieve appropriate and compatible use of land.

### **Environment**

The Town strives to identify, protect and preserve open spaces and critical natural areas and enhance the community's air quality and water resources.

### **Transportation**

The Town values the development of a balanced, multi-modal transportation system that will enhance mobility for all citizens, reduce automobile dependence, and preserve/enhance the character of Chapel Hill.

### **Community Facilities and Services**

The Town provides community facilities and services that meet the physical, social, and cultural needs of Chapel Hill's population.

### **Governance**

The Town makes every effort to maximize citizen participation so that Town government is representative of and responsive to the population; and to serve and govern the population in an honest, efficient, and equitable manner.

## SUCCESSSES

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In preparation for the Council Retreat, department heads listed the successes for their departments from July 1, 2006, through December 2007. They shared why they thought each item was a success. This section advances our goal of shared understanding of the connection between the activities of the Town and the Council's strategic direction.

Successful organizations take the time to publish their accomplishments and make the time to celebrate success. These successes shared by department heads tell the story of an effective organization, linking work with strategic objectives.

Sharing achievements also allows us to mark some things off our to do list. As we plan for the future, it is often difficult to remember where we have been. This section of our planning discussion lays some of the groundwork for where we go from here.

### **Successes Identified by Council Members**

- DEDI under contract with RAM
- Capital Project progress: Streetscape, Library, Community Center, Aquatic Center, Southern Park, Streetscape, Sidewalk construction, Bike infrastructure and Greenways
- Progress on Environmental Initiatives: CRed, Green Fleets, Air Quality Inventory, Conservation Easements, Legislative power for energy and transit
- Management Transition
- Continued progress in transition efforts by the Manager and implementation of continuous improvement model
- No Tax increase
- Hiring Economic Development Officer and his function coming on-line-redevelopment focus downtown and in existing commercial areas
- Affordable housing strategy continues
- Approach to Homelessness
- IT downtown hotspots and planning process for fiber optic network
- Chapel Hill Transit- new equipment and improved management
- Successful TOC move

- Internship program is running successfully
- Keeping weekly pay schedules for those employees who so desired it
- Reinstated a wrongfully terminated employee
- Achieving the first conservation easement on Town-owned lands
- Moving ahead with the Downtown Economic Development initiative towards getting the project built
- Making significant progress on the Long Range Transit Plan, and starting to break new ground on the Short Range Transit Plan
- Adoption of the county's 10-Year Plan to End Chronic Homelessness and the beginning of implementation of the plan, including Project Homeless Connect and Real Change from Spare Change.
- Inclusionary zoning task force and nearing completion of draft ordinance.
- Historic preservation easement on old library building,
- Conservation easement on Morgan Creek Preserve.
- Lot 5 project, particularly the architectural review phase and the design of the public space and the inclusion of affordable housing.
- Council's partnership with the Town Manager - his transition, his restructuring of staff resources, culture shift (staff integration of council goals, diversification of leadership from within).
- Affirmation of value provided by citizen involvement: Carolina North, Northern Area, Fordham Safety, and many others
- 90+ acres of Town land protected by conservation easement/management
- Northwest planning process.
- Gaining of legislative authority for voter-owned elections, and to provide energy
- Efficiency incentives.
- Approval of new downtown projects
- Town Operations Center Ribbon Cutting
- Improved Citizen-Government interface – Granicus, online job applications

## Successes Identified by Senior Management Team

### Communications and Public Affairs Successes

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1. **Successful transition into reorganization.** CaPA was the first of the Manager's departmental reorganizations. Its members have formed a cohesive team that works well together, and utilizes the creative talents of each member. All team members have made significant contributions to the reorganization effort, particularly by undertaking additional responsibilities. This Department was directed to take on a number of new tasks, and has done so with no new staff members
2. **Improved Web Site.** CaPA has worked since July to increase the number of news stories with accompanying art or photos on the web site. Many of the banners have been updated. The "Current Issues" section has been expanded. Action agendas, outlining Council actions, are now available to the public the day after a meeting, and draft agendas are now posted weeks in advance.



3. **Communications Assistance to All Departments.** CaPA offers communications support (media relations, advertising, news writing, graphic design, publications, web content) for all departments, programs and Council initiatives. Examples of this assistance are numerous, including TOC Dedication, program guide for Parks and Recreation, and the Good Neighbor Program. Web representatives from each department (Web Stewards) have been organized, and CaPA is currently training these stewards.

4. **Improved Council Agenda Packet Process.** As a result of the Agenda Processes Review (which is still underway), the agenda packet process has improved significantly. By reincorporating a step in the existing procedure, staff members gained two weeks of additional time to prepare memoranda for upcoming meetings. Council packets are being delivered by mid-afternoon, and no later than early evening, a tremendous improvement over the former 9 or 10 p.m. delivery. Also, no items are delivered to Council (with the exception of "additional materials" on the night of the meeting) after the final packet has been delivered. Council members reported that it is confusing to receive additional information after the final packet is received. (Also, all additional materials received for agenda items will be added to the web).

5. **Accessible and Responsive Government.** The Granicus software that was introduced in October 2006 continues to bring Council meetings to the public via the web, with online on-demand video streaming of Council meetings. We are experiencing increased “hits” from citizens accessing this feature. Because Council meeting information is readily available, the number of citizen telephone inquiries and staff inquiries following meetings has been reduced significantly. We also seldom make DVD copies or set meetings for replay viewing because these requests are infrequent.
6. **Emergency Communications.** Communications to the public during emergencies was advanced in December 2007 with the launching of CodeRED, a high-speed emergency telephone notification service. CaPA was involved, along with Fire and Police departments, with the implementation of this system. In addition, CaPA helped gather a group of communicators from jurisdictions across the county (Communicators Work Group) in July 2007 for an emergency scenario. Communicators then produced the following new tools: A Checklist of Communications Readiness Activities, Guide to Writing an Emergency News Release and Joint News Release about Emergency Preparedness.

## Economic Development Successes

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### Completed draft Economic Development Strategy and Plan.

**Beginning to build relations with developers and the community** in general to facilitate the positive interaction between the Town and developments.

**Worked with potential developers** to identify opportunities for redevelopments and create conversation points between Town staff and the development community.

## Engineering Successes

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1. **Completed Year One Work Program of Stormwater Management Master Plan.** Developed Year Two Work Program for implementation in 2008. Development and implementation of a master plan was a key directive from the Council when the fee-based Stormwater Management Utility was established.
2. **Traffic Signal System Upgrade.** Negotiated with State to reschedule funding for roadway improvement projects to enable traffic signal system upgrade project to begin design in 2007. Current traffic signal system is obsolete and high-maintenance. New system will be

upgraded with fiber optic communication linkage also enabling the Town to install a parallel local communication system to interconnect public facilities.

3. **Hazard Mitigation Grant from FEMA.** Secured time extension for \$2.3 million hazard mitigation grant from FEMA for buyout of properties in the Camelot Village Condominium Development that are subject to flooding. The buy-out process for this grant involves a large number of non-resident owners. This has resulted in a lengthy process for securing agreements to participate, appraisals, negotiating with owners, and processing numerous grant requirements. We decided to request a time extension to allow us more time to see if we can successfully purchase at least some of the property we had identified and thereby reduce potential flood losses in that area of Town.
4. **Traffic Signal Improvements.** Completed installation of traffic signal improvements at several intersections including Franklin/Church; Rosemary/Columbia, Eubanks/Millhouse; Martin Luther King Jr./Northfield; Fordham/Willow; Fordham/Estes; U.S. 15-501/Dogwoods Acres, and received approval for installation of a new traffic signal at Weaver Dairy/Sunrise. Traffic signal improvements allow us to maximize the efficiency and safety of our roadway system. Such improvements also reduce air pollution by effectively managing traffic.
5. **Bolin Creek Watershed Study.** Completed the first phase of the Bolin Creek Watershed Study funded by the Clean Water management Trust Fund. Impaired segments of Bolin Creek have been identified and we are in the process of securing funding to perform a mitigation project on one or more of these stream segments.
6. **Draft Jordan Lake Pollution Control Standards.** Participated in the development of draft Jordan Lake pollution control standards and provided comprehensive feedback to the state on its first draft of the Jordan Lake rules. Our continued participation is critical to help ensure that the final rules are physically and fiscally practical, and that they can achieve the desired objectives of protecting Jordan Lake water quality.
7. **Countywide Addressing Database.** Completed comprehensive countywide addressing database in conjunction with Orange County E911 and Land Records Office. This work involved close communication and cooperation with Orange County and other local governments to complete a multi-year project that ties street



addresses to every property parcel in the county. This project was particularly important to E911 for emergency response.

8. **Aerial Photography.** Served as lead agency in developing and contracting for updated aerial photography for Chapel Hill and Orange County. The new orthophotography will be flown in the winter of 2008 and will include oblique photography that is expected to be helpful to emergency service providers when responding to calls. The orthophotography is used extensively by Engineering and Planning for land use analysis, design, stream determinations, etc.

## Finance Successes

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1. **GFOA Awards for Annual Budget and Comprehensive Annual Financial Report.** The Town met legal requirements of preparation of the Annual Budget and Comprehensive Annual Financial Report and received the highest recognition for achievement for providing timely and accurate information about its fiscal condition and compliance with laws, regulations and grantor requirements to the Town Council, management, and public.
2. **Improvements to Financial Accounting and Reporting System and new server.** An existing Town objective to replace the current financial system to increase stability, accuracy and efficiency of financial information and reports was recognized as not immediately feasible and improvements have been made to increase the utilization, reliability and efficiency of the existing system including migration to a larger capacity server. Continued improvements regarding utilization of the current system are planned.
3. **Implemented the new state-mandated State and Local Government Retirement Reporting System (ORBIT) and State 401K Audit – 2007.** The Town is frequently required to institute mechanisms for intergovernmental coordination and cooperation, which requires timely attention to the needs of other governmental units. These efforts reflect the Town's commitment to strict and public accountability for all expenditures and revenues.
4. **Implemented the State Controller mandated security requirements enabling on-line registration and payment of parks and recreation services.** The Town must increase its reliance on electronic processes by the public, businesses, and governmental agencies to conduct transactions, which will translate into greater utilization and customer service through a steadily increasing and wider range of online capabilities and services
5. **Maintained the Town's AAA credit rating and issued \$1.87 million Installment Payment Agreement for vehicle replacement purchase.** The Town of Chapel





Hill is one of the smallest communities to be rated in the highest rating category. As a result of this, the Town received very competitive bids for a 7-year Installment Payment Agreement for vehicle replacements, which was accepted at an interest rate of 3.6 percent.

6. **Began review and updating of Financial Policies and Procedures.** The Travel Procedure Handbook has been updated and related changes are being completed in the procurement card and accounts payable procedures. Financial policies and procedures are an integral part of the Town system of internal controls. The Town Council and all employees are responsible for internal controls. One of the most important changes being incorporated in the revisions of financial policies and procedures is the recognition of the principal responsibility for internal control procedures with department heads.

## Fire Successes



1. **Completed the hiring, training and operational assignment of 12 new positions created by the Town Council and funded by the SAFER Act grant.** This includes promotion of three new Lieutenants for company officers and reassignment of three existing Captains to perform Assistant Fire Marshal duties on 24-hour shift. A 16-week fire academy conducted in cooperation with Carrboro was conducted this summer allowing us to recruit and train a higher percentage of minorities. This change in staffing levels has exponentially improved delivery of fire protection services to the entire community by increasing effectiveness and efficiency of fire company actions. The change will also result in improved code enforcement and life safety monitoring.
2. **Expanded a computer software data management system to track incident reports, departmental workload and service demand;** implemented commercial database (Fire House) in 2005 that allows us to build a comprehensive record of service demand, response and workload. During 2007 we expanded the use of this system and trained employees for improved data capture. We are now studying implementation of improved access from the field with this database as part of the Council's priority on technology with RHJ Associates.
3. **Placed new aerial truck (Tower-73) into service for the Community;** maintains proper standard of equipment for delivery of fire protection and also meets fiscal responsibility for taxpayer resources. Placing this unit into service aids in maintaining our Insurance Services



Organization rating of three for the community.

4. **Implemented the first phase of a career development program for the Department in FY 07-08.** The program creates a path from new hire firefighter to Master firefighter or Fire Equipment Operator based on achievement benchmarks. We also implemented a process of a two-step company officer career track whereby new promotees to company officer from the competitive process are initially Lieutenants and then they will follow an achievement based career track to Captain. We promoted the first three Lieutenants this year as a result of the competitive process for promotion.
5. **Continued participation in the regional USAR Partnership with Raleigh, Cary and Durham.** The Urban Search and Rescue (USAR) team developed as a partnership with the cities of Raleigh, Durham and Cary has provided resources and training to the Chapel Hill Fire department that we likely would not otherwise be able to afford. In the past year we have received State of NC provided equipment in the form of a ¾ ton USAR service truck, a rescue boat with motor and trailer, swiftwater rescue equipment, a Polaris Ranger all-terrain utility vehicle for special events, radios, portable computer, infrared search equipment and other small tools. Chapel Hill Fire personnel also received training in use of high technology search equipment, structural collapse rescue techniques and swiftwater rescue.
6. **Develop and Implement Automatic Mutual Aid Agreement with Durham city Fire Department.** When Durham completed construction of Fire Station 16 on Old Farrington Road on the west side of I-40 it created an opportunity for both Chapel Hill and Durham to benefit from a closer fire mutual aid agreement. This agreement was executed and implemented this year enabling Chapel Hill to use Durham E-16 in the areas on the east side of Town including Meadowmont and for Durham to use CHFD E-32 in Durham jurisdiction along the NC-54 corridor including Falconbridge. This agreement has had the operational effect of giving Chapel Hill an additional engine company at times.
7. **Implementation of Code Red public emergency information system.** A partnership between Chapel Hill, Carrboro and OWASA formed and contracted with Code Red to provide emergency public notification capability through mass telephone messaging. This system allows us to send critical information directly to our residents and businesses either Town-wide or in a designated geographical area during a major emergency or potential hazard. The system was activated in November 2007 and a test message delivered on December 6, 2007.



## Housing Successes

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1. **Applicant Screening.** The criminal background screening process has continued to be successful. The screening process has almost eliminated the selection of applicants for public housing occupancy who have criminal records that include arrests for violent crimes or illegal drug activity.
2. **Recertification of Public Housing Eligibility.** Annual recertification of eligibility for public housing tenancy and residents' income were completed for all leaseholders every 12 months as required by the US Department of Housing and Urban Development.
3. **Resident Services.** The Department of Housing provides space for Chapel Hill Training and Outreach Project, Inc. at Airport Gardens, South Estes Drive and Trinity Court public housing neighborhoods where they operate Family Resource Centers. Because of the Family Resource Centers and a \$248,240 three-year grant from HUD, the Housing Department in partnership with Chapel Hill Training Outreach Project, Inc, we are able to provide residents of public housing opportunities to participate in programs and services that will help them achieve economic independence. Programs and services are provided in the following areas:
  - a. Life-Skills Training
  - b. Literacy/GED/ Educational Advancement
  - c. Financial Literacy
  - d. Vocational Training
  - e. Job Readiness/Career Planning and Job Placement/Retention
  - f. Homeownership Preparation/Planning
4. **North Columbia Street Apartment Renovations.** On November 7, 2007 the Council awarded a contract in the amount of \$1,284,359 for comprehensive renovations in the 11 apartments at the North Columbia Street neighborhood. The renovations will begin in January 2008. Renovations will include general standardization of building components, electrical, plumbing, HVAC upgrades and overall beautification of the neighborhood.
5. **Merged Maintenance Division with Public Works.** The maintenance division has been merged with the building maintenance division of the Public Works Department. All maintenance staff now is located in the Town Operations Center.
6. **Re-organized Maintenance Division.** The maintenance division was re-organized in July 2007 to comply with HUD's new project –based accounting and asset management budgeting model. The 336 public housing units are grouped into two projects with a separate budget for each project. The maintenance staff has been organized into two groups and assigned to either Project 1 or Project 2. All costs, including personnel, are charged specifically by project.

7. **Energy Conservation.** Appliances in the public housing units are being replaced with Energy Star rated appliances. Also, light bulbs in the public housing units have been replaced with energy efficient florescent bulbs. These energy conservation measures have had a positive effect on energy consumption.

## **Human Resource Development Successes**

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### **1. Recruitment**

- a. Developed and implemented an on-line application and improved the process. Hiring managers now access applications through a shared drive rather than receiving faxed or printed applications from HRD.
- b. Filled difficult -to-fill positions, including Sustainability Planner, Economic Development Officer, Human Resource Development Director, Police Chief, Payroll Coordinator and Planners.
- c. Successful implementation of the undergraduate internship program.
- d. Planned and implemented background check process for Parks and Recreation temporary positions for the more than 200 seasonal positions hired during summer 2007.

### **2. Benefit Plan Improvements and Communication**

- a. Health insurance projected increases were reduced from the projected renewal of 42 percent quote from United Health to 8 percent after switching to Blue Cross Blue Shield of North Carolina.
- b. Health insurance open enrollment was completed on-line for most employees, saving time and paper.
- c. Wellness program improvements.

### **3. Participation increased at Lunch and Learns from an initial 10 participants to an average 53 at each session.**

### **4. Opened fitness center at Transit to all Town employees.**

### **5. Partnership with Go! Chapel Hill Active Living By design.**

- a. Published articles in employee newsletter highlighting benefits information.
- b. Bid for new EAP vendor to be completed by 12/31/07.



### **6. Regulatory Compliance**

- a. Completed I-9 project to ensure and implemented new I-9 process to comply with Federal requirements.
- b. Completed FLSA determination project and input data in MUNIS to comply with Federal regulatory requirements.

- c. In collaboration with Finance, implemented new state mandated State and Local Government Retirement Reporting System (ORBIT) and complete State 401 K Audit.
7. **Training and Development**
    - a. Developed, piloted and evaluated Respect Program in Transit.
    - b. Cross training of HRD staff commenced to improve service to employees via the Partner Model (Benefit questions and changes, wellness, hiring, employee relation issues and policy questions).
  8. **Alignment of Human Resource Development Department with Town Service Department**
    - a. Reorganize department staff from a vertical specialist model to a HRD Partner Model. Departments now have one contact in HRD. The HRD Partner is the point person for all services: recruitment, benefits, employee relations, training and development, career advancements, management concerns and consulting.

## **Information Technology Successes**


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1. **Continued high state of system reliability.** Infrastructure support for data computing and transmission to support Town business services continues to provide high levels of system operational reliability. Data center operations and data transmission services have provided near continuous (99 percent+) uptime throughout the year.
2. **Integration of the Town Operations center voice and data systems with existing Town systems.** Voice and data systems were activated immediately upon turnover of the Town Operation Center facilities for Town use. Voice systems were integrated with the Town Hall systems to provide enhanced voice services for the site. Data systems continue to be integrated with Town systems to provide backup or failover capability for data and voice systems.
3. **Implementation of community broadband initiatives.** Initial foundations for broadband initiatives were developed through the Connectivity Working Group and implemented in the form of a pilot project for Wi-Fi hotspots in the downtown business district of Chapel Hill. Initial design work for a Town-wide fiber optic backbone to support municipal and community broadband connectivity needs has also commenced.
4. **Implementation of online data services for Geographic Information Systems.** The data resources for Town Geographic Information Systems have been consolidated into an online data center server that provides access to up-to-date data for all departments. A web portal will provide access to data, initially for Town staff and in 2008 for citizens. Coordination with Orange County has led to electronic sharing of data resources to ensure timely updating of Town and county geographic data.

5. **Implementation of municipal technologies.** A number of joint departmental technology projects were completed. These include: 1) network, data services, and security requirements were established to meet the Payment Card Industry Data Security Standards to begin credit card processing for the Parks and Recreation activity registration program. The registration system software and server was upgraded as well, 2) an online employment application processing was implemented for the Human Resources and Development Department, 3) the MUNIS systems server was replaced (Finance), 4) a new Fuel Management System installed (Public Works and Transit), 5) a Passenger Counting System was implemented (Transit), 6) the Library and the Parks and Recreation web sites were migrated to new servers, and 7) the Stormwater and Community Center voice and data services were upgraded.

## Inspections Successes

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1. **Demolition of Burned Structure.** The Inspections Department completed enforcement measures necessary to ensure the demolition of the remains of the burnt single-family house structure located at 215 Nunn Lane in the Northside Neighborhood District. From January 29th through the resolution on November 27, 2007, the staff of the Inspections Department worked with the heirs of the property in an effort to repair or demolish the structure. As part of the resolution, Town Council enacted an ordinance on September 10th that authorized the demolition of the structure using grant funds for the revitalization of the neighborhood and the placement of a lien on the property for the cost. The required permits were obtained and the demolition was completed by the heirs of the property owner. This action not only resolved the code violations but it helped to protect the physical and social fabric of the neighborhood from deterioration.
2. **Non-Accessory Parking Enforcement.** The Inspections Department has diligently continued enforcement of the Land Use Management Ordinance for the zoning code violations caused by non-accessory parking in the yards of the residential property at 100 Chase Avenue. Recently, the Orange County Superior Court ruled in favor of the Town. The ruling further restricted parking to no more than a total of five vehicles and awarded the penalties accrued for 273 days beginning April 24, 2006. The Inspections Department is currently working with other departments to cease the continuing activity with reasonable means available.
3. **Private Property Complaints.** The Inspections Department continues to enforce private property ordinances at owner occupied and rental properties to comply with the Housing Code and the permitting necessary to ensure that the properties meet the

Town's minimum standards. In the past year the Inspections Department addressed and resolved 169 complaint files regarding private property.

## Library Successes

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1. **Library Expansion Project.** Assisted in development of a conceptual floorplan design to maximize square footage use and minimize on-going operations costs. Provided staff support to assist in the Library Building Committee's timely completion of its charge. The Special Use Permit was submitted by Corley Redfoot Zack, Inc. Staff maintained up-to-date progress reports on the Town Hall and Library webpages to keep citizens informed.
2. **Collection Development Project.** Selected 3,300 items for the collection, exceeding Phase I's projected goal by 1,900 items. Joined the North Carolina Digital Library to provide new 24/7 service of downloadable videos, music, best-selling audio books, and eBooks.
3. **Technology Planning.** Began using Google Analytics to analyze how, and how often, patrons are using the Library webpage. The website averages 400 visits per day. Added NCLive e-materials to the Library's catalog to make them more accessible to patrons.
4. **50th Anniversary Celebration.** The Council supported a partnership with the Library Friends and Foundation to develop and implement a special year-long celebration in honor of the Library's 50th anniversary. Obtained approval to use \$22,000 from library gift funds to cover expenses, including part-time staff to coordinate the event. Began drafting a marketing plan, including identification of goals intended to guide event activities throughout the year. Finalized a theme and logo for the event.
5. **"9300 Books Now" Campaign.** Received a grant of \$50,000 from the Chapel Hill Public Library Foundation toward its \$250,000 commitment for the Library's 4-year collection development project, included in the Town's adopted Capital Improvements Program.

## Parks and Recreation Successes

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1. **The Fan Branch Trail** is currently being extended from its current terminus to a new southern point a Dogwood Acres Drive.



2. **Completed work on the Booker Creek Linear Park greenway** which extends the Booker Creek Trail south to Fordham Boulevard and allows pedestrian interconnectivity between several shopping centers.
3. **Detailed design** is nearing completion for the Morgan Creek Trail.
4. **A concept plan for Phase 3 of the Bolin Creek Trail was adopted.** Detailed design and easement acquisition has started.
5. **The concept plan process was started for the Dry Creek Trail.**
6. **Working within the framework of the Land Use Management Ordinance** we have made progress toward new trails in the north and west portions of the Town.
7. **Completed the renovation of the Chapel Hill Community Center.**
8. **Began construction of the Homestead Aquatic Center.**
9. **Began construction of the Southern Community Park.**
10. **Completed the replacement of the Cedar Falls and Hargraves Community Center Playgrounds.**
11. **Completed the Booker Creek Linear Park Greenway.**
12. **Restrooms were winterized in Homestead and Umstead Parks.**
13. **Major renovation projects were completed in Homestead Park and on the Battle Branch Trail.**
14. **Received proposals from firms interested in developing a comprehensive assessment of the Town's outdoor recreation facilities and park area.**
15. **Negotiating with a firm to conduct a comprehensive assessment of the Town's outdoor lighting infrastructure.**



16. **Reorganized the recreation program development aspects** of the department placing greater responsibility on the Community Center and Hargraves Center to plan and administer their own recreation programs for the benefit of the Town and the surrounding neighborhood.
17. **Renovation of Tanyard Branch Trail.**




18. **Parks and Recreation Departmental goals** on this issue included working with the Greenways Commission to further the development of greenway trails in the Town, and work with information technologies to develop a GIS based mapping system of all trail systems in Town. During the period of January 1, 2007 to December 1, 2007, the Department has been successful in its efforts to address this theme by accomplishing the following:
  - a. All owners of 11 tracts of property needed for the Bolin Creek Trail have agreed to allow the Town access for the purpose of surveying and design. Negotiations for permanent acquisition will begin as soon as exact required dimensions are known.
  - b. Working within the framework of the Land Use Management Ordinance we have identified critical greenway easements needed for the Town's proposed North Trail.
  - c. Working within the framework of the Land Use Management Ordinance a property owner on Eubanks Road has agreed to build the first segment of the future Horace Williams Trail and provide a needed Greenway Easement.
  - d. The concept plan for the Bolin Creek Trail, adopted by the Council in 2007, was changed to provide a more direct greenway access to the future Carolina North campus.
  - e. The staff continues to monitor the University's planning efforts related to Carolina North and how a greenway system would best serve the campus.
  - f. Staff is working directly with the Town of Carrboro to help implement their new Greenway Commission and assure that the two systems will be effectively coordinated.

## **Planning Successes**

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1. **Development Review Process.** The Planning Department has successfully managed a high volume of development applications.
2. **Amendments to Land Use Management Ordinance.** The Department successfully guided the following amendments through the review process this past year:
  - a. Creation of the Town Center-3 zoning district was enacted February 2007
  - b. Mixed Use-Village zoning district was adjusted in February 2007
  - c. Mixed Use-OI-1 zoning district was adjusted in April 2007
  - d. New bicycle and vehicular parking standards enacted in June 2007
  - e. Planning Board composition was adjusted in June 2007
  - f. Interim changes to the tree ordinance were enacted in June 2007
  - g. Neighborhood Conservation District process was revised in October 2007
3. **Northern Area Task Force and Temporary Moratorium.** The Department provided staff support to the Northern Area Task Force and assisted the Council with enactment of a temporary development moratorium. The Northern Area Task Force provided its report to the Council on September 24, 2007.

4. **Rogers Road Small Area Plan.** We have provided staff support to the Rogers Road Small Area Plan Task Force and coordinated with Carrboro and Orange County staff on related efforts undertaken by both jurisdictions. The interim report of the working group was provided to the Council in June.
5. **Carbon Reduction Program.** We have provided staff support to the Council's Sustainability, Energy and the Environment (SEE) Committee. The Town has pledged to reduce community-wide carbon pollution. The Town agreed to a specific set of interim reduction goals for municipal operations and are working on interim community-wide goals. Town staff is reviewing municipal operations to identify opportunities for reducing carbon emissions, and we continue to work with Orange County staff and ICLEI toward the development of the County-wide Greenhouse Gas Emissions Reduction Strategy. We collaborated with the Carolina Environmental Program to assist us in monitoring and updating carbon emissions data.
6. **Sidewalk Construction Program.** We have administered the implementation of the Council's sidewalk construction program using Chapel Hill bond money and State and federal funds.
7. **NC 86 Pedestrian Safety Implementation Study.** We are coordinating with NCDOT to implement the adopted recommendations of the NC 86 Pedestrian Safety Implementation Study. We are continuing to identify and secure additional funding for this project.
8. **Active Living By Design Initiatives.** We continue to implement the recommendations of the various neighborhood mobility studies and secure funds from the North Carolina Safe Routes to School program.
9. **Transportation Management Plans.** We updated our database of Transportation Management Plan sites and have initiated the 2007 Survey.
10. **Long Range Transit Study.** We continue to manage the consultant, prepare the Study, and provide support to the project Policy Committee which oversees the effort.
11. **Regional Transportation Planning.** Planning Department staff supported work of the Durham-Chapel Hill-Carrboro Metropolitan Planning Organization (MPO) to begin the development of the 2035 Regional Plan and participated in various regional initiatives, including the Strategic Transit Advisory Committee, Seamless Transit project and the Durham-Chapel Hill-Orange County work group.

12. **Neighborhood Conservation Districts.** Two Neighborhood Conservation Districts were established in the last year: The Mason Farm/Whitehead Circle Neighborhood Conservation District (effective June 11, 2007) and the Coker Hills Neighborhood Conservation District (to be effective January 1, 2008).
13. **Revitalization of the Northside and Pine Knolls Neighborhoods.** The Planning Department used Community Development funds to improve the Hargraves and Pine Knolls playgrounds.
14. **Northside Comprehensive Rehabilitation Program.** The Planning Department used Community Development funds to renovate three owner-occupied homes in the Northside neighborhood.
15. **Interdepartmental Coordination.** The Planning Department continued to lead the efforts of the interdepartmental Community Impact Team.
16. **CDBG Regulatory Success.** The Planning Department successfully met a federally mandated spending threshold so the Town can continue to receive federal Community Development Block Grant funding.
17. **Community Service Activities.** The Department provided Community Development funds for 28 youths from public housing communities to attend after school programs and provided Community Development funds to sponsor the Chapel Hill Police Department's Youth Work Program (35 youths worked in various Town Departments and local non profit organizations during the summer of 2007).
18. **Efforts to End Homelessness.** In March 2007, the Council adopted a 10-Year Plan to End Homelessness in Orange County. The Department served as lead organizer of Orange County's first ever Project Homeless Connect held at the Hargraves Center on October 25. More than 130 homeless clients were served during this one-day on-site service event.
19. **Affordable Housing Development.** The Planning Department has provided staff support to the Inclusionary Zoning Task Force. The Department also provided funds to Orange Community Housing and Land Trust from the Affordable Housing Fund and the Housing Loan Trust Fund to purchase four houses in the Culbreth Park neighborhood, and one Greenway condominium (Meadowmont). The Department provided funds to Orange Community Housing and Land Trust from the Affordable Housing Fund and Community Development funds to reduce the sales price of two Legion Road Townhomes and one Culbreth Park home.



## Police Successes

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1. **Good Neighbor Initiative.** The Community Services Unit worked with the UNC Dean of Students office and with Empowerment to distribute 400 packets to student rental units in existing residential neighborhoods.
2. **Teen Party Response Training.** The department is working with Dale Pratt Wilson's Coalition for Alcohol and Drug Free Teens to raise awareness of and mitigate the dangers of teen drinking. Ms. Pratt Wilson received a NHSTA grant to aid in this effort which pays for advertising as well as police overtime during planned enforcement operations.

3. **Halloween 2007.** We were the lead department as a part of a successful coalition of Town departments and outside agencies that planned and ran the 2007 Halloween event. More than 80,000 people came to Franklin Street that night. Several hundred Town employees, mutual aid fire and police, and other vendors participated.



4. **Implementation of Fixed Schedules.** This was an internal scheduling initiative which gives the officers an opportunity to work a fixed schedule rather than a rotating one. It is healthier for the officers and will improve morale and officer effectiveness overall.
5. **Downtown Staffing.** The department has filled out the Downtown Squad to where it is now fully staffed. Working the Central Business District are one Lieutenant, two Sergeants and 10 officers. The squad was created in response to requests for a dedicated group of officers to address many of the pressing concerns of the downtown area.



6. **Public Safety Group Meetings.** The Police Department has partnered with UNC Public Safety, the Chapel Hill Fire Department, Carrboro Police Department, Highway Patrol, and the Orange County Sheriff's Department have begun regular meetings to discuss common issues and to facilitate planning for emergency situations.
7. **Code Red.** We have been active in planning for and implementing a system where we can automatically, by phone, notify citizens of emergency situations that could affect them.

8. **Project Safe Neighborhoods.** We have been attending meetings and getting ready for inclusion in the PSN program. This program partners CHPD with the US Attorney's office as well as other agencies to address violent crime, especially in residential neighborhoods.
9. **Crime Analyst Position.** We created this position this year and hired a crime analyst. This has had the effect of providing different shifts of officers with relevant data that they use to focus their activity.
10. **Expanded ABC Enforcement.** We now have nine officers trained to enforce ABC violations. This increases our ability to police those locations that sell alcohol as a part of their business.
11. **Creation of the Public Information Officer Position.** We created a dedicated PIO position in order to have a consistent point of contact with local media. We deal with the news media every day and it is important to have a single point of contact. This provides for a consistent response to media outlets as well as for the development of relationships with the various media members. The Lieutenant in this position is also assigned various other administrative tasks.
12. **Latino Outreach.** The Latino Outreach Coordinator's position was originally grant funded. The department has kept the position as one of our sworn positions because we felt the need was that important. Run from the Community Services Unit, the Latino Outreach program advocates for a growing Latino population and educates members of that population on a variety of topics related to living in the United States.

## Public Works Successes

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1. **Successful on-site management of the Town Operations Center construction project,** including oversight of necessary change orders to maintain project within allocated budget.
2. **Successful coordination of Library Expansion project** design and permitting through the Special Use Permit application and review process. This will be the Town's first LEED certified project and reflects the Town's commitment to sustainable development
3. **Successful selection, contract negotiation, and staff support for**

**consultants** hired to revise the Downtown Streetscape Master Plan and the Town's tree protection regulations. The Downtown Streetscape Master Plan is being revised to creatively reflect changing downtown development objectives and enhance the livability of the Town center. Proposed revisions to the tree protection regulations reflect the Town's environmental goals as embodied in the Comprehensive Plan and the Town's commitment to sustainable development.

4. **Completed a total of 4,000 linear feet of sidewalk** during this period. Most of the new installed concrete sidewalk was in the Northside Community (Caldwell Street, Gomains Avenue and Sykes Street).
5. **With the acquisition of the Vac Truck we have been able to clear the backlogs** of existing large blockages in the Town's drainage infrastructures. We also have been able to respond more quickly to residential reports/requests without creating a long list.
6. **Completed largest leaf collection season** with a total of 853 loads collected.
7. **Successfully recruited and filled two major positions within the Streets program.** Filled the vacant Streets Crew leader position along with the Streets Inspector position.
8. **Sustainability division facilitated the transition of the department from the old PW site at 1099 Martin Luther King, Jr. Blvd. to the new TOC.** This included successfully procuring professional moving services for items from desks to drills.
9. **A condition assessment of Town facilities was completed.**
10. **Staff continues to provide project inspection/management for new construction and renovation projects** at the TOC, Homestead Aquatic Center, Community Center and some of the parks facilities.
11. **Projects to modify the restroom facilities at Homestead Park and Umstead Park** were completed allowing the parks facilities to remain open throughout the winter.
12. **Sustainability division continued to dedicate approximately 55 percent of resources to preventative maintenance efforts** throughout the Town, resulting in only 17 after-hours/emergency calls for the maintenance staff to date.
13. **Landscape division continues to update equipment through the fleet replacement program.** The latest addition has been a low emissions liquid propane mower which is also quieter than conventional mowing equipment.

14. **Landscape successfully completed an in-house replacement of the landscape at the Chapel Hill Community Center.** The landscape at this facility was an example of one which had out lived its useful lifetime.
15. **Landscape successfully prepared the grounds at all Public Housing facilities** for the October and November 2007 HUD Inspections.
16. **Solid Waste program continued reduction in residential MSW** (5.6 percent over previous 12 months); continued reduction in commercial MSW (7.5 percent over previous 12 months). We now accept 30-gallon yard waste brown paper bags for weekly collection. With the move to the TOC, we have reduced 300 miles driven per month by the entire Solid Waste fleet due to proximity to Orange County Landfill.



17. **Green Fleets Program** (excluding Transportation Department) continues to use B-20 bio-diesel; we have included an E-85 ethanol tank at the new Town Operations Center, as well as adding several hybrid electric vehicles to the Town's fleet. Since our last report, the Town has consumed 89,080 gallons of bio-diesel and sold 110,621 gallons to outside agencies. The Town has consumed

5,106 gallons of E-85 and sold 124 gallons to outside agencies. Our current fleet consists of 231 bio-diesel burning vehicles, 23 E-85 vehicles, 10 Compressed Natural Gas (CNG) vehicles and 7 Hybrid/Electric vehicles. The Town also has added a "first-of-its-kind" low polluting lawn mower that burns liquid propane. We anticipate adding more ethanol burning vehicles as the automotive manufacturers continue to provide the clean fuel option in more vehicles. Our 07-08 fleet purchase plan features 37 alternatively fueled vehicles consisting primarily of the options listed above.

18. Our GovDeals and final auction sales returned \$194,194 to the fleet replacement plan.

## Transit Successes

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1. **Receipt of 19 New Buses.** Chapel Hill Transit received 19 new buses as part of a five year fleet modernization program. The 19 vehicles will improve the Town's ability to provide high quality dependable service to the public. New vehicles also conserve energy, improve air quality and reduce the Town's carbon footprint.
2. **Passenger Amenities Program.** Chapel Hill Transit expanded and improved passenger amenities by adding new shelters, providing real time bus arrival information at four more locations and placing bus schedule information at every shelter (91).
3. **Improved Communication with Partners.** Chapel Hill Transit improved communications and relationships with its funding partners, Carrboro and UNC. Activities such as a more inclusive/open budget development process, monthly operations meetings, and cooperative efforts like The 5th Quarter have contributed to supporting the Comprehensive Plan through cooperative planning with UNC.
4. **Maintenance Efforts.** Chapel Hill Transit made several key improvements in Maintenance including:
  - a. Hiring three new mechanics.
  - b. Converting transmission from petroleum-based to synthetic lubricants.
  - c. Implementation of oil analysis program.
  - d. These efforts resulted in Chapel Hill Transit maintaining service levels during the summer when other area systems could not make daily pull outs.
5. **Green Fleet Activities.** Chapel Hill Transit undertook several activities to make the transit system more environmentally conscious. Activities include:
  - a. Purchase of three hybrid electric buses.
  - b. Conversion of fleet to ultra low sulfur diesel.
  - c. Conversion of transmission lubricants to synthetic.





6. **New Facility.** In June, Chapel Hill Transit moved to its new facility at the Town Operations Center. The construction of the new transit facility will enable Chapel Hill Transit to more effectively and efficiently maintain and operate transit vehicles and services.
  
7. **Staff Development.** People are our most valuable resource. Chapel Hill Transit placed an emphasis on staff development with a specific focus on improving skills of front line personnel. Activities included the following:
  - a. Using bus operators as instructors for new operators.
  - b. Introduction of an operators training program that provided 12 operators with training to become supervisors.
  - c. Conducted monthly training classes for mechanics in numerous areas of vehicle repairs and familiarization with new vehicles.

## TRENDS

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In preparation for the Council's Planning Retreat, Department Heads identified trends, from their professional perspective, which might affect the future of the Town. They considered possible consequences of those trends for the Town and their effect on the themes of the Comprehensive Plan. The identification of these trends is one way to inform the Council discussion about priorities.

The Town Manager organized the department-based trends in groups related to the categories that emerged from the 2007 Planning Retreat. Such a grouping shows the connection among the trends. The grouping also highlights connections across departmental lines.

### 1. Development Trends

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**INSP:** Decrease in non-residential construction activity (\$52 million (1999) to \$24 million (2007))

**INSP:** Decrease in residential construction activity (1998-2005, avg 400 units; 166 (06), 165 (07))

**PLN:** Transitioning to a Built-Out Community: (redevelopment pressure; pressure for development outside urban services area)

**PD:** The build-out of Carolina North

**ED:** Changes in Personal Income levels as a reflection of our diversity in incomes and population

**ED:** Changes in building permits, especially as it relates to non-residential development to reflect our efforts and initiatives in the non-residential/mixed-use area

**ED:** Changes in office market rates, occupancy and growth rate

**CaPA:** Community Identity

**ENG:** Increasing density of development and infill development

### 2. Services

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**LIB:** Library use continues to increase (Since 2000 up 18 percent)

**LIB:** The library will serve as "living room" of the community (staff time requirements)

**PLN:** Increased Emphasis on Public Health Issues (Boomers, children: more walkability)

**PW:** Increased focus on sustainability (increased design review)

**PW:** Revisions to the Town's tree protection regulations (increased enforcement)

**PW:** Increased interest in the downtown area (improvements; maintenance)

- PW:** Increased expectations and demand for higher service level relative to collection of loose leaves, snow removal and maintenance of Town's streets, drainage and sidewalk infrastructure. (increased cost, staffing)
- PW:** Continuing focus on general condition of Downtown
- FD:** Annual emergency service demand average increase is close to 10 percent (Increased density; traffic increases. Increasing size and frequency of special events)
- FD:** Increased First Responder responsibilities in other hazard prevention and response (Increased training and regulatory pressure)
- PR:** Increased concern about children's health
- PR:** High Density Development
- PR:** Loss of open space
- TRAN:** Service demand will continue to grow
- PD:** Crime rates in most categories are down but with a marked increase in residential break-ins, many occurring during daytime hours
- PD:** Policing in a high density, more urban environment
- PD:** Continuing partnership with OWASA
- PD:** Gang activity is generally trending upward
- ENG:** Increasing scrutiny by State and Federal regulators regarding water quality in our lakes and streams

### **3. Technology**

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- HRD:** Process and technological improvements in department
- IT:** Growth in Town technology systems and user requests for support require staff to meet the support demands
- IT:** Growth in mobile and remote computing by staff and citizens continues to accelerate
- IT:** Growth in the volume of electronic data stored and used by the Town for staff and citizens continues to accelerate
- PD:** Police work in general will continue to rely more on advances in technology
- CaPA:** Demand for e Gov
- CaPA:** Advancing Technologies at Council Meetings
- CaPA:** Cable Video Franchising
- CaPA:** Communication Technologies

### **4. Transportation**

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- PLN:** Use of Alternate Forms of Transportation Increasing (region SOV up; CH: transit riders up)
- TRAN:** Auto use and road construction needs will increase in the Triangle
- ED:** Changes in commuting patterns

## 5. Housing

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- PLN:** Housing Costs Rising (affordable housing pressure)
- PLN:** Complications of Providing Affordable Housing (aff hsg subsidy)

## 6. Revenues

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- FIN:** Slowing growth of major revenues (Property and Sales taxes)
- PLN:** Likely Decrease in CDBG Funding
- PW:** Reduction over the years in funding for street reconstruction (\$665,000 backlog: more miles (+28.5\$ in 12 years), higher cost (avg annual increase 19 percent)
- HSG:** Reduction in funding from HUD continues, and is expected to continue indefinitely
- PD:** Decrease in available grant funding for the police department
- ED:** Changes in sales tax base

## 7. Expenditures

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- FIN:** Fiscal Stress (Debt management for current and future borrowing)
- FIN:** Changes to the Review of and Reliance on Internal Controls (Need to increase controls)
- FIN:** Sustainability of Retired Healthcare Program
- PW:** Escalating construction costs
- PW:** Aging landscapes at Town facilities
- PW:** Increase in size and number of Town-owned facilities
- PW:** Increase in quantity and sophistication of fleet
- PW:** Increased costs to dispose municipal waste (collection down; tipping fee up: transfer station site cost)
- PW:** Increased costs related to fuels
- HRD:** Continued cost increases of employee health and retirement plans
- PR:** Aging Facilities
- TRAN:** Fuel Costs will continue to increase
- TRAN:** The age of the Chapel Hill Transit fleet will continue to grow toward the maximum recommended
- PD:** Fully staffed reduces lapsed salary savings
- PD:** Increase of special events
- ENG:** Increasing cost of construction materials and fuel

## 8. Staffing

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- PW:** Aging of our maintenance staff.
- PW:** Landscape maintenance at the new Town Operations Center

- FD:** Increasing demands on the time of employees who are military reservists (Staffing and overtime issues)
- HRD:** Growing concern about compensation, benefits and work/life balance and a need to focus on retention efforts
- HRD:** Staffing concerns and changes in department
- PD:** CHPD has a relatively young workforce

## Trends Identified by Senior Management Team

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### Communications and Public Affairs Trends

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1. **Demand for e Gov.** CaPA foresees the public demanding more advanced technology, particularly in regards to the Town's web site. The Granicus feature of online, on-demand streaming video has reduced the number of telephone and walk-in inquiries. However, with the current web product (Civic Plus) CaPA is limited to improvements that can be made to the site. The Town needs a web product that has the capability to be ever-changing to meet the needs of citizens.

2. **Advancing Technologies at Council Meetings.** Increasingly, staff and citizens alike are using powerpoint presentations, video, 3-D modeling and digital images to communicate information to the Council. CaPA has held training sessions to assist other department staff members in operating audio-visual equipment. The Information Technology Department is the contact for information regarding operation of this equipment.



3. **Cable Video Franchising.** The state took over the cable franchising business in 2007. This changes the administration requirements of the cable access channels, lowers the revenues collected, and increases our programming requirements.



4. **Communication Technologies** Much of our communication today relies on the web and e-mail. How can we become more creative and savvy in order to reach more of our citizens? Many in our community (including some Council members) are bloggers, and many others do not read newspapers.

5. **Community Identity.** In the Town Manager's Listening Sessions, forum participants raised the issue that there is a perception that Chapel Hill has become an elitist community. How does the Town define its identity, and how do we communicate this to residents? How do we reach more people and involve them in the life of the community? Do our residents understand and care about Town-wide issues (not only those affecting their neighborhoods)? Do we create new opportunities for our residents to work and play together?

## Economic Development Trends

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1. **Changes in sales tax base** as it relates to our retail sales and stability as a local government.
2. **Changes in commuting patterns**, as a reflection of our long-term ability to provide more jobs.
3. **Changes in Personal Income levels** as a reflection of our diversity in incomes and population.
4. **Changes in building permits**, especially as it relates to non-residential development to reflect our efforts and initiatives in the non-residential/mixed-use area.
6. **Changes in office market rates**, occupancy and growth rate, as a reflection of our increase in private jobs.

## Engineering Trends

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1. **Increasing scrutiny by State and Federal regulators regarding water quality in our lakes and streams.** This scrutiny will involve detailed review of the Town's compliance with its National Pollutant Discharge Elimination System (NPDES) permit requirements, establishment of standards for controlling pollutants entering Jordan Lake, and identification and mitigation of impaired streams and stream segments, all of which will result in fiscal and physical resource impacts on the Town. We have reasonably good data now on the fiscal and resource impacts associated with our NPDES Permit and on mitigation of impaired stream segments, and we are budgeting for the associated work. We will know more by the end of 2008 with regard to the impacts on the Town associated with the Jordan Lake requirements and standards once they are finalized.
2. **Increasing density of development and infill development.** We are seeing increasing impacts from dense and/or infill development throughout the Town. The Higher Density Work Group completed its work in late 2007, and will present its findings to the Council in early 2008. Some of the impacts of higher density development include: increasing number of vehicles per unit area, increasing problems of vehicle storage/parking, localized congestion and air pollution, and fewer opportunities for economical stormwater management and pollution control.

3. **Increasing cost of construction materials and fuel.** Some capital improvement projects will become fiscally impractical unless they are down-sized, phased and/or redesigned. The trend toward energy efficient “green” building creates additional construction costs, which may be prohibitive in some cases. The cost of providing many services increases along with fuel costs. The likely results of up-trending material and fuel costs include reduction in the number, scope and scale of capital improvement projects and general reduction in services.

## Finance Trends

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1. **Fiscal Stress.** Increasing debt service costs and long-term planning is needed to manage the Town’s growing debt service cost and maintain the Town’s highest credit rating. The Town has successfully issued the 1996 and a portion of the 2003 authorized general obligation bonds and completed the new Town Operations Center, which was financed with grants (\$19 million) and issuance of Certificates of Participation (\$26 million). Now Chapel Hill must prepare a debt management plan which provides for much higher debt service and enables completion of the remaining projects contemplated in the 2003 bond referendum.
2. **Slowing growth of major revenues.** The Town of Chapel Hill is faced with slowing growth of major revenues because of several factors, including property tax revenue as result of the lack of new construction of single-family housing (the majority of the Town’s tax base), and local sales tax revenue, which results from the combination of difficulties retaining existing viable commercial and retail merchants, attracting development of new retail areas, and competition from convenient new commercial developments outside of the Town’s boundaries.
3. **Changes to the Review of and Reliance on Internal Controls.** The Auditing Standards Board recently issued the Statement on Auditing Standards No. 112, Communicating Internal Control related Matters Identified in an Audit. The new auditing standards will materially impact the independent auditor’s performance of the Town’s annual audit, and will also increase Town staff efforts during the fiscal year and at fiscal year end. The new audit standard requires a significant increase in the review of internal controls and any material weaknesses will significantly affect the additional audit work to be performed by the auditors and cost to the Town. Internal control weaknesses will affect reliance on the Town’s financial information by major grantors for many of the Town’s programs.
4. **Sustainability of Retired Healthcare Program.** The Town of Chapel Hill must develop a deliberative process to ensure the sustainability of its retired health-care program and separation allowance for police officers, which are called “other post employment benefits” (OPEB). The process must take into account the needs of all stakeholders, commitments by the Town and the sustainability of the current and future funding requirements of the program. The Town must begin to fund its



unfunded liabilities related to these benefits rather than continue to defer future costs.

## Fire Trends



1. **The trends affecting the provision of fire protection and emergency services are many of the same growth trends affecting services delivery in other disciplines of the community.** Our statistical base is incomplete in that we only have about 36 months of comprehensive data (see data item above) for evaluation but our annual emergency service demand average increase is close to 10 percent. Increased density of

the community development and traffic increases fire protection demand in the form of alarm response, pre-planning and code enforcement. Increasing size and frequency of special events in the community also places additional demand on the Fire Department. Development of Carolina North will necessitate construction, equipping and staffing of a fire station in that complex.

2. **There is also a trend at all levels (local, state and federal) to increase responsibilities of First Responder agencies including Fire Departments** in other hazard prevention and response modes besides traditional fire and emergency medical. These include disaster, terrorism, environmental protection and public education, all resulting in increased workload and increased need for specialization and technical training. Combined with this trend is increased regulatory pressure from state and federal agencies on local emergency service organizations to meet training, safety, certification, preparedness, reporting and performance standards thus resulting in increased time and workload demands related to records documentation and training of employees.

3. **The final trend is that of increasing demands on the time of our employees who also serve as military reservists.** During the past several years we have experienced frequent and lengthy military activations that take full time employees away. This causes staffing difficulties for us and increases the need for overtime to meet staffing requirements. We currently employ seven full time individuals (8.3 percent of our operations force) who also serve in the military reserve or National Guard. Currently we have one Fire Captain deployed by the National Guard until at least November of 200; one Firefighter deployed by the National Guard until at least April of 2008, and a Battalion Chief deployed in December 2007 for at least six months in the Air Force reserve. We also recently



had a firefighter resign after being lured back into the active duty Army with a large cash bonus. We expect this trend to continue for at least a couple more years.

## Housing Trends

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**The trend of reduction in funding** from the U. S. Department of Housing and Urban Development continues, and is expected to continue indefinitely. With continued reductions, the Department of Housing will not be able to continue the current level of maintenance and services. The amount of federal subsidy and rental income will not be enough to cover basic operating cost.

In 2007-2008, \$176,000 was needed from the Town's general fund to cover operating costs.

New HUD rules require the Department of Housing to convert to a project-based and asset management agency and operate in a manner similar to a private rental housing agency. Funding reduction will make this a challenge. The following amounts show decreases in HUD funding over the past three years:



Year	HUD Funding
2005-2006	\$1,109,797
2006-2007	\$1,040,017
2007-2008	\$1,000,724

## Human Resource Development Trends

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- Continued cost increase of employee health and retirement plans.** The Government Accountability Office (GAO) in their Spring 2007 report confirms several trends in health benefits: fewer employers offering health benefits; higher share of out-of-pocket costs being paid by employees; more “mini-medical” plans, which have lower premiums but more limited coverage; retiree health coverage is shifting more costs to retirees or plans are being terminated; required participation in 401k savings plans. Since 2001, national trends of premiums for family health coverage have risen on average 78 percent; at the Town of Chapel Hill, family coverage premiums have increased from an average of \$606 to \$1031.64, an increase of 59 percent. Nationally, wellness programs are increasing rapidly and are seen as a positive means to help employees manage chronic conditions and diseases, costs, quality of care provided by hospitals, physicians and prescription drugs. At the Town of Chapel Hill, the first wellness program started in FY03-04

with a wellness fair and has expanded to now include financial incentives up to \$250 for attending programs and making lifestyle changes in pursuit of good health.

2. **Growing dissatisfaction with compensation, benefits and work/life balance and a need to focus on retention efforts.** According to the 2007 Emerging Workforce Study (Spherion Corporation), only 43 percent of workers are satisfied with their current jobs. Maintaining fair compensation and benefit programs are essential. However, the study indicates nearly all workers (96 percent) prefer jobs that allow them to think creatively and use innovative approaches. Employees believe they need help meeting family obligations via flextime, job sharing, telecommuting and other work life programs. And 37 percent of surveyed participants said they lacked the training needed to meet their career goals. These trends are also apparent in TOCH as employees seek more challenge and recognition as well as request alternative options to balance work and other priorities.
3. **Staffing concerns and changes.** In 2005, one in four employees was older than 50; by 2012 nearly one in three will be between 55 and 64. (AARP) At the Town of Chapel Hill, about 1 in 4 employees will be in the 55-64 year old bracket. The AARP reported that skill shortages are already apparent among health professionals, teachers and public administrators. Some of the strategies suggested to keep these employees working are to re-hire retirees in regular or temporary assignments, creating phased retirement programs, and focusing on ergonomic programs to reduce workers' compensation claims may help recruit and retain these valuable workers. In addition, a greater focus on more skills training of current staff and the development of future leaders to assume the future roles is greatly needed. Finally, methods to bring in more diverse talent with new skill sets are a priority focus.
4. **Process and technological improvements.** The department work is still largely focused on transactional and paper-based work. There is less focus on providing services to departments and working with them on strategic initiatives. In order to move in this direction, we will need to have a fully integrated HRIS system with the finance department. The Town is greatly behind in the use of technology to enhance efficiencies and effectiveness and save resources. Overall, the improvement in systems and technologies would increase the accuracy and speed of processing transactions and result in more effective and consistent workforce communications.

## Information Technology Trends

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1. **Growth in Town technology systems and associated user requests for support are outstripping the Information Technology Department's ability to meet the support demands.** Notable changes in the past year include: 1) twelve new or upgraded technology systems at the Town Operations Center, 2) a 30 percent increase in the number of user systems requiring specialized application support, 3) 100 percent growth in the number of users requiring remote computing support, 4)

100 percent growth in the number of telephones directly managed, 5) implementation of on-line credit card services that requires direct system monitoring and support seven days per week, and 6) significant growth in the amount of SPAM traffic requiring administrative support (15,000 to 20,000 messages per day). The result is a backlog of projects and support requests that cannot be met within a timely manner.

2. **Growth in mobile and remote computing by staff and citizens continues to accelerate.** The growth in the use and capabilities of cellular devices alone has doubled the number of support requests. The impact of the increased usage reaches other areas of the technology business model such as bandwidth, licensing, and security. Accurate modeling and prediction of the usage requirements is critical to ensuring that core Town systems can be structured to meet the demands.
3. **Growth in the volume of electronic data stored and used by the Town for staff and citizens continues to accelerate.** The volume of electronic documents and data stored by the Town has grown to a point that it is becoming increasingly difficult to provide the access, security, and, storage reliability to ensure staff and citizens have efficient and secure access to these documents. Improved database systems and improved data storage systems are needed. Implementation of continuity of service processes using interoperability between the data centers at Town Hall and the Town Operation Center is also needed.

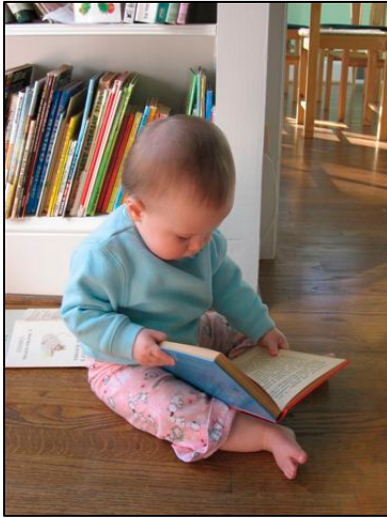
## Inspections Trends

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1. The amount of **non-residential construction activity**, measured in cost of permitted construction, increased from \$6.4 million in 1992 to a peak of \$52 million in 1999. The amount decreased markedly in 2004 to about \$2.4 million. In 2006, we saw a rebound to \$53 million mainly due to the construction of the Town Operations Center. In 2007, we saw non-residential construction fall to 24 million. It should be noted that a difference of just one or two large projects can account for significant increases or decreases in this statistic.
2. From FY 1998 until FY 2005 the pace of **residential development** in Chapel Hill was remarkably stable. In FY 2006 and FY 2007 the number of single family units authorized in Chapel Hill has stayed below the range of 200 per year to 166 in FY 2006 and 165 in FY 2007.
3. The Chapel Hill Comprehensive Plan, adopted in May 2000, and other plans contain specific policy statements on affordable housing. The Comprehensive Plan states that the Town as a general policy should encourage developers of developments with five or more units to provide 15 percent of the units at “prices affordable to low and moderate income households.” The Comprehensive Plan **affordable housing goal** could be adversely impacted if new residential construction continues to trend downward.

## Library Trends

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1. **Library use continues to increase.** Since 1999, the Hennen's American Public Libraries Rating (HAPLR) Index has ranked the Chapel Hill Public Library highest in the state, primarily due to extraordinary per capita use. Since 2000, Chapel Hill's overall circulation has increased by 18 percent. Children's circulation has increased by an amazing 39.5 percent. Despite Chapel Hill's emphasis on traditional library service and the availability of information and downloadable resources on the Internet Chapel Hill citizens continue to value and energetically use the library facility.
  
2. **Possible consequences:**
  - a. To maintain the current level of service in the future, new resources will be needed to meet the demand for traditional library services, specifically, books, staff and programs.
  
  - b. During construction, access to the library may be impeded or impossible for short periods of time. Staff will need to identify possible alternatives to maintain quality services and to keep citizens informed of service availability during this time.
  
  - c. The collection development project is a first step toward providing four items per capita. New resources will be needed to maintain the collection at this higher level.
  
2. **Patrons expect libraries to keep pace with new technology.** Patrons want libraries to provide them with access to information in new and changing formats, including downloadable music, audio books, Ebook best sellers and data base subscriptions. 24/7 access to reference services is increasingly common, as is use of personal phones to scan the library's catalog.

**Possible consequences:**

- a. The expansion floorplan will need to anticipate and provide for requirements of technology and for services not currently offered.
  
- b. The library should participate in NC Knows, a state-wide 24/7 library reference service.
  
- c. Existing resources may need to be shifted or added to accommodate new formats and types of access. New resources will also be needed to provide these formats.

3. **The library will service as a “commons” or “living room” of the community.** Library literature indicates that this is a national trend and the Town Council has expressed its interest in providing community space in the expanded library. The Library Master Plan also recommends increasing library-sponsored programming.

**Possible consequences:**

- a. The expansion floorplan should be as flexible as possible to accommodate a variety of uses by the community.
- b. The library currently provides only children’s programs. New resources will be needed if programming efforts are to increase.
- c. More staff time will be directed toward scheduling and coordinating needs of users of the community space. New resources or shifted resources will need to be considered to provide a quality level of service.

### **Parks and Recreation Trends**

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1. **Childhood Obesity:** Childhood obesity continues to plague North Carolina and Chapel Hill is not immune from this problem. North Carolina currently ranks 5th in the number of children who are obese and this trend is expected to continue. In Chapel Hill, contributing factors are the limited number of outdoor play spaces for active recreation and the inability of children to find active field space for structured (organized league) play and unstructured play.



2. **High Density Development:** As Chapel Hill moves towards greater high density development, the Town needs to provide more open space and passive recreation areas in closer proximity to this type of development to allow for the opportunity to find peace and quiet places to relieve stress. In addition, dog parks should be developed for pet owners in these developments.
3. **Loss of open space.** As the Town approaches its limits of development there are few remaining opportunities for acquisition of open space and park lands. Some significant tracts remain on the Town’s edge, but there is little remaining funding dedicated to the purchase of open space.
4. **Aging Facilities.** Many of the Town’s parks are now in excess of 30 years old and require major renovations. These mounting needs when coupled with recent escalations in the costs of construction and renovation will likely make it more difficult to keep pace with needed capital improvements.


## Planning Trends

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- 1. Transitioning to a Built-Out Community:** The urban services boundary is clearly defined and we have very little undeveloped land left. Redevelopment has begun to occur. Older commercial centers as well as residential developments are being targeted for redevelopment. We are noticing growth pressure for development outside the urban services area. We are seeing increased condominium conversion of older multi-family projects.
- 2. Use of Alternate Forms of Transportation Increasing:** Dependency in the region on single-occupancy automobile use is on the rise. At the same time, Chapel Hill is experiencing an increase in transit ridership. As parking becomes more limited on the UNC's main campus, we expect the use of alternate forms of transportation will continue to increase. Chapel Hill has an opportunity to continue to promote alternate forms of transportation including transit, biking, and walking. We have an opportunity to promote transit oriented development and development that is bicycle and pedestrian friendly.
- 3. Housing Costs Rising:** It is becoming more expensive to live in Chapel Hill. This trend will continue. The Town is preparing to move beyond the existing, more informal process of encouraging affordable housing.
- 4. Complications of Providing Affordable Housing:** The provision of affordable housing is becoming more complicated as our nearly built-out community transitions to higher density development. Increases in the cost of development (i.e. increased costs of land, materials) have resulted in a need for higher subsidy per unit to create affordable housing opportunities. Affordable housing as part of multi-family developments involves condominium fees which impact affordability. Long term maintenance is also an issue. Additional funds or mandates may be needed to continue to create affordable housing in Chapel Hill.
- 5. Likely Decrease in CDBG Funding:** A decrease in federal funding for Community Development programs would impact activities such as affordable housing programs, sewer connection assistance programs, and community service programs (Y after-school and Police Summer Youth program).
- 6. Increased Emphasis on Public Health Issues:** As the baby boomers age and health concerns associated with an over-weight population rise, we anticipate an increased emphasis on public health issues. Active lifestyles and walkable communities are important components to any solution. A higher density, urban lifestyle is complimentary.

## Police Trends


1. **Decrease in available grant funding for the department.** The Police Department has relied upon grant funding for support in a variety of endeavors, from federal equipment grants (for bullet proof vests and other items) to state and local grants (funding of Project Turnaround). These sources of funding have either been reduced or eliminated. As a result, we will have to either do without these goods or services or find a way to pay for them using existing resources.
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2. While crime rates in most categories are down, the department has seen a marked increase in **residential break-ins**, many occurring during daytime hours. This can have a negative impact on citizen perceptions of safety in their neighborhoods. The department intends to use our crime analyst to detect patterns in these crimes and help supervisors direct patrols in order to counteract this trend.
  3. CHPD has a relatively **young workforce** which requires ongoing training in order to maintain proficiency and provide quality service to the Town. The current training budget is not adequate to meet this need.
  4. There is a trend toward policing in a high density, **more urban environment**. Business and residential areas, especially in and around the Central Business District, will become more mixed. The department believes that this will change the expectations of the citizens who live in these areas and that they will expect more police visibility and shorter response times.
  5. A **continuing partnership with OWASA** may extend into the future, as the condition of drought may become the norm. Depending on Council action, CHPD may become more involved in enforcing water restriction violations.
  6. In years past, the department has relied upon lapsed salary savings to help pay for **departmental overtime** as well as to supplement Project Turnaround salaries. If the department remains fully staffed, or nearly so as is the case now, the trend will be away from relying upon this source of funding for these needs.
  7. **Gang activity** is generally trending upward. Police will continue parent and school education efforts and to track known and suspected gang activity. The department will also maintain close relationships with other jurisdictions from which gang activity tends to spread to our Town.



8. Police work in general will continue to **rely more on advances in technology** in order to adequately enforce laws and investigate crimes. There will be a need to allocate resources to the Technical Services Unit as our technology acquisitions will require maintenance and upkeep.
9. There has been a definite trend in the **increase of special events** in Town that require police planning. This has an effect on the overtime picture as many of these events require the use of off-duty officers.
10. The **build-out of Carolina North** will have a dramatic effect on the Northern part of Town. There will be increased traffic volume, increased calls for service, and a very real need to work even closer with UNC-Public Safety to address these issues.

## Public Works Trends

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1. **Increased focus on sustainability** will result in more comprehensive design review requirements for both private and public projects. During the design and approval process for Town projects this focus will likely also lead to increased initial construction costs that may be offset by long term energy savings. The use of LEED certified professionals to commission the Library Expansion and potentially other future Town projects will assist staff in monitoring our success in meeting the sustainability objectives included in the Comprehensive Plan.
2. Potential revisions to the Town's **tree protection regulations** may necessitate new permitting requirements involving staff review of currently unregulated activities. We monitor the number of plans reviewed for consistency with the Town's tree protection and landscape related regulations and anticipate that these potential changes could significantly increase the number of plans reviewed by staff.
3. Increased interest in the downtown area likely will result from the significantly changing development patterns in that area. This will likely result in the need for an **increase in the pace of Streetscape improvements** and the associated staff resources needed to manage these improvement projects. Available bond funds are monitored as these improvements are undertaken and an increase in the use of these funds is anticipated.
4. The availability of funds could be cost effectively utilized to **make selective street improvements** beyond that allowed for in a defined project budget within or outside the organization. Projects could include realignment of a section of roadway/intersection to make it safer for both motorist and pedestrians, add

pavement width to help accommodate bicyclists, or perform other important roadway infrastructure projects for which funding is not readily available.

5. Reduction over the years in **funding for street reconstruction** has resulted in a backlog of unfunded projects totaling over \$665,000.
6. **Streets maintained by the division have increased by 28.5 percent** (or about 36 center miles) over past 12 years. During this period there have been significant increases in the cost to resurface streets, with an annual average increase of over 19 percent over the past several years.
7. The lack of available funds has limited our capacity to undertake such cost-effective improvements for street reconstruction. It would be desirable in the long-term to accumulate a fund balance in this account to undertake the larger projects. At present we would need over \$100,000 annually to effectively **repair the deteriorating roads**.
8. **Increased expectations and demand for higher service level** relative to collection of loose leaves, snow removal and maintenance of Town's streets, drainage and sidewalk infrastructure.
9. The **drought and the associated water use restrictions** present the division with numerous challenges for operations. Specifically, we are faced with issues relative to pressure washing facilities for maintenance, hygiene and vandalism remediation. We have utilized non-potable water from our well at the TOC; however, this option has both time and cost implications depending on the location where the water is needed. Additionally, the restrictions on the use of potable water will have a serious impact on our management of the Town's swimming pools at the Community Center, the AD Clark complex at Hargraves Center and at the new Homestead Aquatic Center. Here at the TOC we have in excess of 80,000 gallons of storage for captured rain water from the roofs which serves such needs as toilet flushing and vehicle washing. However, we have not had sufficient rain to keep the tanks full.
11. **Escalating construction costs** will continue to be an issue that faces the Town. While the increases in construction costs have slowed in comparison to the last three years, it is still forecast to be in excess of 4 percent for the year. This steady increase continues to erode our capital project program.
12. Another trend, where Chapel Hill is a micro-cosom of the larger US picture, is the **aging of our maintenance staff**. While we can boast of having "seasoned" professionals (average age is +40 years old) the supply of suitable candidates for replacing retirees is limited at best. In the long term, the Town will be faced with difficult recruitments and much competition for good candidates.

13. **Continuing focus on general condition of Downtown.** There will continue to be a focus on improving conditions of cleanliness and general appearance of the Downtown. This trend will continue to require an increased presence in the Downtown of the Landscape division requiring additional efforts to provide a higher level of service in the Downtown. Additional resources of personnel and equipment will be required to meet these rising expectations.
14. **Aging landscapes at Town facilities.** Landscapes at most Town facilities are aging beyond their intended functional life cycle. These landscapes are no longer maintenance friendly and provide challenges to routine maintenance efforts. A needs study should be done to evaluate the condition of the aging landscapes so that updated landscapes can be installed on a schedule based on the priorities of the study. The landscape at the Chapel Hill Community Center was a perfect example of such a landscape. The scheduled replacements could be done over a period of time and could be funded as a Capital Improvement Project. These landscape replacements would allow for both efficiency and safety issues as they are related to maintaining Town facilities.
15. **Increase in size and number of Town owned facilities.** The additional number of Town owned facilities requiring landscape maintenance will continue to challenge the Landscape division. As new parks, facilities within existing parks and new facilities are added, resources to maintain these areas will have to be looked at as part of the cost of the project.
16. **The addition of the landscape maintenance at the new Town Operations Center** will have a large impact on the Landscape division's work load. The landscape at the new Town Operations Center will total 82 acres of various type of maintainable area. This will consist of lawn mowing, shrub pruning, plant bed mulching, litter pick up and trail maintenance. The addition of Southern Community Park will also have an impact on work load. The park will be a total of 42 acres consisting of three full sized soccer fields, a dog park, basketball courts, and a roller hockey court. Additional resources of labor and equipment will be required to adequately maintain these new additions to the work load.
17. **Increase in quantity and sophistication of fleet** including increased maintenance demands on fire apparatus, 2007 new diesel engines emissions requirements and police vehicles.
18. **Increased costs to dispose municipal waste** currently \$47 per ton. New state law will increase by \$2, 1 July 2008. (Cost: an additional \$40,000). Conversely, reductions in MSW collections through the first five months of this FY have accumulated a \$51,000 surplus in landfill tip fees. This reduction is in part due to increased recycling and in part to the economic downturn. We foresee the reduction to drop a little more, then stabilized by the end of FY08/09.

19. **Potential increase in solid waste collection cost** related to future site of the Orange County Transfer Station.
20. **Increased costs related to fuels** this past FY have erased the mileage reductions seen by the Solid Waste Fleet. Fuel cost have absorbed 43 percent of the Solid Waste fuel budget through the first five months. This is account is currently \$1400 over budget.
21. **Increase in quantity and sophistication of the fleet** has revealed the need to increase our competency with relevance to technology and software. With so many automobiles now relying solely on computer diagnosis, it is imperative that we continue to equip ourselves with the proper technological support required to repair and maintain said vehicles. Our commitment to reducing our carbon emissions goes well beyond the purchasing aspect. If we are to truly advance towards our goals, it should be in all phases of fleet maintenance.
22. **Fleet Purchasing Challenges.** The process for purchasing fleet has become increasingly stagnant. Over the last three years, a negative trend has emerged of purchasing vehicles later and later in the fiscal year. Take the current fiscal year for example. Although we have had the fleet replacement plan ready for several months, it will not go to council until January at the earliest. After that a loan package must be put together and then approved. This timeframe becomes systematically dysfunctional because it does not allow enough time to purchase current year model vehicles. In other words, we must wait until fall of the next fiscal year and purchase vehicles that are no longer what we budgeted for. During this time we allow for old cars to become older and run the risk of having higher repair costs. Statistically, after vehicles reach the 60k mile mark, their repair costs double. These are only a few of the factors that contribute to the need for reversing this trend.

## Transit Trends



1. **Fuel Costs will continue to increase.** Higher diesel fuel costs will impact the Chapel Hill Transit Budget. High prices at the pump will create additional demand for transit service.
2. **The age of the Chapel Hill Transit fleet will continue to grow toward the maximum recommended.** National standards recommend that transit fleet age not exceed seven years. If no new buses are purchased in the next two years, the Chapel Hill fleet age will approach 10 years. Higher

fleet age increases maintenance cost and reduces service dependability.

3. **Service demand will continue to grow.** In recent public forums there have been requests for the following services:

- a. Rogers Road
- b. Weaver Dairy Extension
- c. Evening service
- d. Saturday and Sunday services

Growth of the weekday service and annexation of surrounding neighborhoods has created an expectation for improved services.

4. **Auto use and road construction needs will increase in the Triangle.** At the same time funds available for highway and transit projects will become more difficult to secure.

# PRIORITIES

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## Priorities Grouped by Categories of 2007 Planning Retreat

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In this section, the Town Manager organized priorities into the categories identified in the 2007 Planning Retreat. Each priority was proposed by a member of the Council or the Senior Management Team. They are identified by their source.

### 1. Steward the Organizational Culture Change

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- PLN:** Challenge the staff to develop new and innovative approaches to the way we function
- PW:** Successfully complete the departmental reorganization plan and the creation of the new Sustainability Department
- PW:** Implement the manager's roadmap that will create a Sustainability Department, including recruitment of a new director and the melding of components of the Sustainability team
- PW:** Further development of staff training program--Training is an ongoing process. The training program should be challenging and innovative at both the supervisor and groundskeeper levels
- HRD:** Automation and Process Improvement
- HRD:** Employee Development
- HRD:** Employee Relations and Communication
- IT:** Establish a capability to effectively plan and manage the integration of municipal (vocational) technology systems with Town-wide (enterprise) systems
- CaPA:** Citizen Survey
- FIN:** Implement Organizational Realignment to provide better coordination of business and financial management services and enterprise technology services
- FIN:** Implement Goal-Objective-oriented Annual Budget planning and development
- FIN:** Centralize and improve business management services
- TC:** Continue progress in transition efforts by the Manager and implementation of continuous improvement model
- TC:** Begin Strategic Plan Process
- TC:** Finding our voice- NEW Communications approach and enhanced Public Relations (taking it to the people)

### 2. Champion Downtown

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- ED:** Identify and facilitate a downtown mixed-use project
- TC:** Economic Development – next steps for a dynamic time in downtown, old shopping centers, and between"

- TC:** Provide clear directive to police to enforce existing loitering and panhandling statutes
- TC:** Begin planning for a significant increase in parking facilities on an accelerated timetable
- TC:** Put in place plan for permanent relocation of Kidzu (or other children/family anchor) in CH downtown
- TC:** Improve lighting significantly
- TC:** Set deadline for homeless center to move
- TC:** Address safety concerns

### **3. Plan Ahead for Carolina North**

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- ENG:** Allocate staff resources as necessary to thoroughly review and comment on proposals for development of the Horace Williams Property (i.e. Carolina North).
- TC:** Carolina North proposal
- TC:** Help Carolina North be an overwhelmingly positive addition to the community fabric of Chapel Hill in the eyes of Chapel Hill and beyond, in the eyes of Chapel Hill citizens and the University leadership

### **4. Continue Focus on Land Use and Development**

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- PLN:** Comprehensive Plan Update and Amendments
- PLN:** Implementation of Comprehensive Plan
- PW:** Successfully complete the Streetscape Master Plan revision process, including endorsement by the Council and inclusion in the Town's Comprehensive Plan"
- PW:** Successfully complete revisions to the Town's tree protection regulations, including approval of additional staff resources as deemed necessary to implement these revised regulations"
- ED:** Small area planning process and initialize a plan
- ED:** Identify and facilitate a one non-downtown redevelopment project
- ENG:** Maintain scheduled development of the Stormwater Management Program Master Plan
- ENG:** Continue providing a strong presence on the multi-jurisdictional working group considering physical and fiscal impacts of pollution standards (Total Maximum Daily Loads/TMDLs) proposed by the State for Jordan Lake
- TC:** Strategic Plan/Comprehensive Plan Tweak- How to develop our Town positively; (knowing what our strengths and capacities are)
- TC:** Achieving the first conservation easement on Town-owned lands
- TC:** Achieving an inclusionary zoning ordinance
- TC:** Hiring Economic Development Officer and his function coming on-line-redevelopment focus downtown and in existing commercial areas
- TC:** Affordable housing strategy continues
- TC:** Affordable Housing – rescue OCLT and get more units
- TC:** Solidifying regional and local planning cooperation with Durham County and City, refining it with Carrboro and Orange County, and starting it with Chatham County- especially on anything related to transportation problems"

- TC:** Adopting the Stormwater Master Plan and implementing projects
- TC:** Completion of inclusionary zoning ordinance and adoption of it
- TC:** Further revisions to the tree ordinance
- TC:** Visioning” process and revisions to comprehensive plan
- TC:** Continued highlighting of historic preservation issues especially as an element of sustainability
- TC:** Set clear metrics to measure the status and progress of the economic development effort. Specifically a semiannual report as to what businesses have moved in and out of Chapel Hill and the net increase or decrease in jobs and non property tax revenue as well as the net increase or decrease in available commercial square footage and the increase or decrease in occupancy
- TC:** Conduct exit interviews with all businesses leaving Chapel Hill such as Smith Breeden
- TC:** Create an outreach program with a clearly defined target list of Chapel Hill businesses to ensure they stay in Chapel Hill
- TC:** In conjunction with the Chamber set a defined target list of companies that we may be able to attract to Chapel Hill
- TC:** Look at empirical data for current mixed use developments such as Meadowmont and Southern Village and measure the current status (such as the number of residents who actually live and work in the neighborhood and how the retail businesses are doing and who they are serving)
- TC:** Implement a model to forecast the incremental cost of services required as a result of additional residential development and the extent to which additional commercial development would be required to offset those costs. (My understanding is that these types of models are readily available and are currently used by many municipalities and counties)
- TC:** Create a clearly defined timetable for the development approval process
- TC:** Examine creative ways to improve the efficiency of the process and to make it more collaborative
- TC:** Establish a set of metrics based on the clearly defined approval timetable to compare actual results to the defined timetable and evaluate what causes any variance
- TC:** Develop a clear vision for the Northern Area including an economic model for the impact of additional residential development on services costs as compared to the need for offsetting commercial revenue Complete Rogers Road Small Area Planning
- TC:** Complete IZ ordinance
- TC:** Follow-through on Town Mgr’s focus on improving development approval process
- TC:** Fine tune/coordinate existing and new strategies which address affordable housing
- TC:** Continue conservation easement/management efforts on select Town property
- TC:** Development of (and institutionalize) short and long-term strategic planning to begin fulfilling Town’s 2050 carbon reduction commitments
- TC:** Work to better define our interest in future development along transit corridors.



## **5. Maintain and Improve Community Facilities and Services**

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### **A. Services**

**LIB:** Maintain Current Service Levels while under construction

**LIB:** 50th Anniversary Celebration

**LIB:** Collection Development Project

**PW:** Additionally, we wish to evaluate and deploy an ever increasing amount of green/sustainable technology both in new projects and as retrofits in existing facilities. Identification of such opportunities and development of both managerial and technical expertise to oversee this effort are crucial

**PW:** Revise solid waste program 1) to continue improved safety and efficiency in collection, including consideration of Pay As You Throw option for residential and automated residential service; and 2) to support more efficient yard debris collection and storm water issues, we need to containerize all yard debris. Any surplus in landfill tip fees could be utilized to buy yard debris containers to sell to residents for cost

**TRAN:** Develop a consensus regarding transit growth among funding partners and establish a plan to sustain the growth

**TRAN:** Improve public information and marketing

**PD:** The future of Project Turnaround

**CaPA:** Chapel Hill TV18

**CaPA:** Citizen Newsletter

**TC:** Direct the Transportation Board to work with Chatham County on their transit needs with a subsequent report to public transit committee and/or the council; similar efforts could be made with Orange County

**TC:** Continue to support and recognize the special challenges to Orange County Land Trust

**TC:** Implementing the CH Transit Master Plan

**TC:** Parks and Recreation

**TC:** Study the EZ-Rider service for budgetary considerations to make it smoother and more useful

**TC:** Progress on Environmental Initiatives: CRed, Green Fleets, Air Quality Inventory, Conservation Easements, Legislative power for energy and transit

**TC:** Clear- and simultaneous- progress on issues related to homelessness to some degree: the 10-year plan; a new location for the men's shelter; public concern about panhandling

**TC:** Continued work on homelessness, especially hiring a qualified program coordinator, also work on men's shelter location

**TC:** Determine the number of Chapel Hill residents who are 65 and older

**TC:** Establish a citizen advisory board on elderly services

**TC:** Specifically examine transportation needs of the elderly and the extent to which they are currently met by Chapel Hill Transportation

**TC:** Create Voter-Owned election plan for 2009 cycle

**TC:** Bus/transit system – short and long-term strategic planning for funding (and system) enhancements, tied to overall support/plan for multimodal transportation systems.

## **B. Technology**

**LIB:** Technology Planning

**PW:** Implement integrated Work Order Management and call center programs; essential that a system tie in with the Town's financial management system. While effort will transcend Public Works, such system is vital to successful linking of drainage maintenance service here with the Town's overall stormwater management system

**FD:** Transition to operational use of 800 MHz VIPER radio system as daily response communications system

**FD:** Development and Implementation of Improved Wireless Technology for Fire Department Field Access

**IT:** Establish a level of technology support for the Town Operations Center site that meets the needs of departments and provides effective utilization of the site data center

**IT:** Improve the management of electronic data systems security

**ED:** Web presence for ED, Publicity and marketing for our initiatives

**CaPA:** Off-Site Storage for Documents

**CaPA:** Audio of Selected Board/Commission Meetings

**ENG:** Allocate staff resources as necessary to ensure thorough project design and construction oversight for upgrading and replacing the Town's computerized traffic signal system.

**TC:** Continue efforts at upgrading our internal and external technology: More ability to perform transactions on the web; Find or fund a help desk/support (tech)

**TC:** Continue supporting staff for delivering the meeting's agenda all in one delivery for the next meeting

**TC:** IT downtown hotspots and planning process for fiber optic network

## **C. Human Resources**

**INSP:** Create a multi-disciplinary plan review process (add position of plan reviewer)

**INSP:** Enhance enforcement of the Town Code of Ordinance and the Land Use Management Ordinance (add code enforcement officer)

**INSP:** Ensure the communication of the laws to all property owners and citizen

**PLN:** Invest in employees

**PW:** Furtherance of career development goals and objectives within certain job classes

**PW:** Further development of the Landscape division to maintain community facilities more efficiently and with improved safety--Additional personnel and equipment resources will be required to accomplish the future development of the division

**PW:** Sustainable utilization of the Fleet Maintenance/Warehouse (add position)

**FD:** Improvement of the overall Emergency Preparedness of the Town of Chapel Hill through the creation of an Emergency Manager position

**HRD:** Benefits

**TRAN:** Continue staff development efforts to improve employee skills and performance and establish opportunities to create a welcoming work environment

**PD:** Training needs

**ENG:** Reclassify Engineering Technicians to reflect the increased complexity and breadth of knowledge required for work in their associated responsibility areas

**TC:** Filling the code enforcement officer position

**D. Facilities**

**LIB:** Library Expansion Project

**PW:** Successfully complete final design, permitting and construction contract negotiations for the Library Expansion project

**PW:** More resurfacing funds for traditional resurfacing would help reduce the life cycle of the Town's street infrastructure from 20 years to at least 15 years

**PW:** Completion of Town's drainage infrastructure inventory on catch basin inlets and outfalls. This will enhance our knowledge of much needed repairs and also replacement of old deteriorating catch basins and stormwater systems

**PW:** Continued improved pavement maintenance practices such as crack pouring and various types of seal coats. These practices give cost effective alternatives to extend and maintain service life of the Town's roadways

**HSG:** Continue the comprehensive public housing renovation program by completing renovation work in the 11 North Columbia Street apartments

**PR:** Provide for maintenance and repair of the battle park greenway

**PR:** Better meet the need for additional outdoor field space by installing artificial turf on the soccer fields at Homestead Park in cooperation with local youth soccer organizations

**PR:** Develop a comprehensive maintenance management plan for parks, greenways, open space and beautification areas that includes the establishment of maintenance standards and levels of care to be given to each facility type and specific location

**PR:** Provide for adequate programming space and a new department administrative headquarters

**PD:** Maintenance and Repair

**TC:** Continue work on our green power program as at fire station 1

**TC:** Capital Project progress: Streetscape, Library, Community Center, Aquatic Center, Southern Park, Streetscape, Sidewalk construction, Bike infrastructure and Greenways

**TC:** Green Infrastructure: CRed, open space, parks, Greenways, clean air and water, bikes, sidewalks, energy management and consumption...(ready willing and able to thrive in the uncertain future)

**TC:** Move men's homeless shelter

## **E. Vehicles And Equipment**

- FD:** Improvement of the fire apparatus fleet maintenance program by the addition of an extra fire pumper for spare/reserve purposes
- TRAN:** Improve the maintenance, dependability and condition of the Chapel Hill Transit fleet
- IT:** Provide a vehicle for technology support
- PD:** Fleet Increase

## **6. Improve the Town's Fiscal Condition**

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- PLN:** Efficient use of available resources (including state/federal program funding)
- FD:** A legislative priority must be to revisit the issue of State Funding for fire protection of state owned properties
- HSG:** Continue the process of converting to the project-based budget and asset management budgeting model
- HSG:** Continue to investigate opportunities to collect outstanding balances from former tenants
- PR:** Develop alternative funding sources and innovative funding strategies to help meet the growing demand for parks, open space and recreation programming
- TRAN:** Insure proper and efficient use of Town and partner resources
- PD:** Overtime budget
- ED:** Complete and work toward adoption of Economic Development Strategy and Plan
- FIN:** Develop and implement Debt Management Plan
- FIN:** Improve and strengthen Internal Control
- FIN:** Improve Capital Improvement Program budgeting and Capital Formation Plans
- FIN:** Ensure the sustainability of its retired health-care program called another post-employment benefit (OPEB).
- FIN:** Improvements to Housing Financial and Operational Management
- TC:** Address budget of library with Orange County (annual funding)
- TC:** Discuss the budget implications of raising the transportation tax portion to cover needs as well as repeated requests for service
- TC:** Understanding our Budget – what can we really afford? Debt capacity?
- TC:** Zero tax increase budget
- TC:** Continuation of (and put in place) economic development strategic plan

## **Priorities Identified by Council Members (and Grouped)**

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### **Organized by Planning Retreat Priorities identified December 14, 2007**

#### **1. Steward the Organizational Culture Change**

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- Continue Strategic Plan Process
- Finding our voice – NEW Communications approach and enhanced Public Relations (taking it to the people)
- Creating new Strategic Plan

#### **2. Champion Downtown**

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- Economic Development – next steps for a dynamic time in downtown, old shopping centers
- Provide clear directive to police to enforce existing loitering and panhandling statutes
- Begin planning for a significant increase in parking facilities on an accelerated timetable
- Improve lighting significantly
- Set deadline for homeless center to move
- Continued Downtown economic development work
- Put in place plan for permanent relocation of Kidzu (or other children/family anchor) in CH downtown

#### **3. Plan Ahead for Carolina North**

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- Carolina North proposal

#### **4. Continue Focus on Land Use and Development**

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- Strategic Plan/Comprehensive Plan Tweak- How to develop our Town positively; (knowing what our strengths and capacities are)
- Achieving the first conservation easement on Town-owned lands
- Achieving an inclusionary zoning ordinance
- Hiring Economic Development Officer and his function coming on-line-redevelopment focus downtown and in existing commercial areas
- Affordable housing strategy continues – rescue OCLT and get more units

- Solidifying regional and local planning cooperation with Durham County and City, refining it with Carrboro and Orange County, and starting it with Chatham County- especially on anything related to transportation problems
- Adopting the Stormwater Master Plan and implementing projects
- Further revisions to the tree ordinance
- Visioning process and revisions to comprehensive plan
- Continued highlighting of historic preservation issues especially as an element of sustainability
- Set clear metrics to measure the status and progress of the economic development effort. Specifically a semiannual report as to what businesses have moved in and out of Chapel Hill and the net increase or decrease in jobs and non property tax revenue as well as the net increase or decrease in available commercial square footage and the increase or decrease in occupancy
- Conduct exit interviews with all businesses leaving Chapel Hill such as Smith Breeden
- Create an outreach program with a clearly defined target list of Chapel Hill businesses to ensure they stay in Chapel Hill
- In conjunction with the Chamber set a defined target list of companies that we may be able to attract to Chapel Hill
- Look at empirical data for current mixed use developments such as Meadowmont and Southern Village and measure the current status (such as the number of residents who actually live and work in the neighborhood and how the retail businesses are doing and who they are serving)
- Implement a model to forecast the incremental cost of services required as a result of additional residential development and the extent to which additional commercial development would be required to offset those costs. (Understanding is that these types of models are readily available and are currently used by many municipalities and counties)
- Create a clearly defined timetable for the development approval process
- Examine creative ways to improve the efficiency of the process and to make it more collaborative
- Establish a set of metrics based on the clearly defined approval timetable to compare actual results to the defined timetable and evaluate what causes any variance
- Develop a clear vision for the Northern Area including an economic model for the impact of additional residential development on services costs as compared to the need for offsetting commercial revenue (see above comments on model)
- Complete Rogers Road Small Area Planning
- Work to better define our interest in future development along identified transit corridors
- Development of (and institutionalize) short and long term strategic planning to begin fulfilling Town's 2050 carbon reduction commitments
- Continue conservation easement/management efforts on select Town property
- Follow-through on Town Manager's focus on improving development approval process

## **5. Maintain and Improve Community Facilities and Services**

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### **A. Services**

- Direct the Transportation Board to work with Chatham County on their transit needs with a subsequent report to public transit committee and/or the council; similar efforts could be made with Orange County
- Continue to support and recognize the special challenges to Orange County Land Trust
- Implementing the CH Transit Master Plan
- Parks and Recreation
- Study the EZ-Rider service for budgetary considerations to make it smoother and more useful
- Progress on Environmental Initiatives: CRed, Green Fleets, Air Quality Inventory, Conservation Easements, Legislative power for energy and transit
- Clear- and simultaneous- progress on issues related to homelessness to some degree: the 10-year plan; a new location for the men's shelter; public concern about panhandling
- Continued work on homelessness, especially hiring a qualified program coordinator, also work on men's shelter location
- Determine the number of Chapel Hill residents who are 65 and older
- Establish a citizen advisory board on elderly services
- Specifically examine transportation needs of the elderly and the extent to which they are currently met by Chapel Hill Transportation
- Create Voter-Owned election plan for 2009 election cycle
- Strengthen CH Parks and Recreation facilities and programs
- Bus/transit system – short and long-term strategic planning for funding (and system) enhancements, tied to overall support/plan for multimodal transportation systems

### **B. Technology**

- Continue efforts at upgrading our internal and external technology: More ability to perform transactions on the web. Find or fund a help desk/support (tech)
- Continue supporting staff for delivering the meeting's agenda all in one delivery for the next meeting
- IT downtown hotspots and planning process for fiber optic network

### **C. Human Resources**

- Filling the code enforcement officer position

### **D. Facilities**

- Continue work on our green power program as at Fire Station 1

- Capital Project progress: Streetscape, Library, Community Center, Aquatic Center, Southern Park, Streetscape, Sidewalk construction, Bike infrastructure and Greenways
- Green Infrastructure: CRed, open space, parks, Greenways, clean air and water, bikes, sidewalks, energy management and consumption...(ready willing and able to thrive in the uncertain future)
- Move men's homeless shelter

**E. Vehicles And Equipment**

**6. Improve the Town's Fiscal Condition**

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- Address budget of library with Orange County (annual funding)
- Discuss the budget implications of raising the transportation tax portion to cover needs as well as repeated requests for service
- Understanding our Budget – what can we really afford
- Zero tax increase budget
- Finalizing and begin implementing Econ Development Plan
- Continuation of (and put in place) economic development strategic plan



## Priorities Identified by Council Members

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- Parks and Recreation and open space
- Men's Homeless Shelter
- Strategic Plan
- Filling the code enforcement officer position
- Continue efforts at upgrading our internal and external technology
- More ability to perform transactions on the web
- Find or fund a help desk/support (tech)
- Continue work on our green power program as at Fire Station 1
- Direct the Transportation Board to work with Chatham County on their transit needs with a subsequent report to public transit committee and/or the council; similar efforts could be made with Orange County
- Continue supporting staff for delivering the meeting's agenda all in one delivery for the next meeting
- Study the EZ-Rider service for budgetary considerations to make it smoother and more useful
- Address budget of library with Orange County (annual funding)
- Discuss the budget implications of raising the transportation tax portion to cover needs as well as repeated requests for service
- Continue to support and recognize the special challenges to Orange County Land Trust  
Carolina North proposal
- Strategic Plan/Comprehensive Plan Tweak- How to develop our Town positively; (knowing what our strengths and capacities are)
- Finding our voice- NEW Communications approach and enhanced Public Relations (taking it to the people)
- Green Infrastructure: CRed, open space, parks, Greenways, clean air and water, bikes, sidewalks, energy management and consumption...(ready willing and able to thrive in the uncertain future)
- Implementing the CH Transit Master Plan
- Understanding our Budget – what can we really afford
- Affordable Housing – rescue OCLT and get more units
- Economic Development – next steps for a dynamic time in downtown, old shopping centers, and between
- No individual budgetary priorities - Council will address issues requiring budget allocation as they are presented
- Achieving complete streets: dealing with high-priority bike and ped safety problems Fordham and Martin Luther King Jr. Blvd. crossings, missing links in critical sidewalks, chokepoints in bike routes
- Solidifying regional and local planning cooperation with Durham County and City, refining it with Carrboro and Orange County, and starting it with Chatham County- especially on anything related to transportation problems
- Adopting the Stormwater Master Plan and implementing projects

- Clear and simultaneous progress on issues related to homelessness to some degree: the 10-year plan; a new location for the men's shelter; public concern about panhandling
- Achieving an inclusionary zoning ordinance
- Continued work on homelessness, especially hiring a qualified program coordinator, also work on men's shelter location.
- Completion of inclusionary zoning ordinance and adoption of it.
- Further revisions to the tree ordinance.
- Visioning process and revisions to comprehensive plan.
- Continued highlighting of historic preservation issues especially as an element of sustainability.
- Downtown: Provide clear directive to police to enforce existing loitering and panhandling statutes. Begin planning for a significant increase in parking facilities on an accelerated timetable. Improve lighting significantly. Set deadline for homeless center to move. Address safety concerns.
- Economic Development: Set clear metrics to measure the status and progress of the economic development effort. Specifically a semiannual report as to what businesses have moved in and out of Chapel Hill and the net increase or decrease in jobs and non property tax revenue as well as the net increase or decrease in available commercial square footage and the increase or decrease in occupancy. Conduct exit interviews with all businesses leaving Chapel Hill such as Smith Breeden. Create an outreach program with a clearly defined target list of Chapel Hill businesses to ensure they stay in Chapel Hill. In conjunction with the Chamber set a defined target list of companies that we may be able to attract to Chapel Hill.
- Examine the underlying premises of mixed use and transit oriented development: Look at empirical data for current mixed use developments such as Meadowmont and Southern Village and measure the current status (such as the number of residents who actually live and work in the neighborhood and how the retail businesses are doing and who they are serving). Implement a model to forecast the incremental cost of services required as a result of additional residential development and the extent to which additional commercial development would be required to offset those costs.
- Development Approval Process: Create a clearly defined timetable for the development approval process. Examine creative ways to improve the efficiency of the process and to make it more collaborative. Establish a set of metrics based on the clearly defined approval timetable to compare actual results to the defined timetable and evaluate what causes any variance. Develop a clear vision for the Northern Area including an economic model for the impact of additional residential development on services costs as compared to the need for offsetting commercial revenue.
- Elderly Services: Determine the number of Chapel Hill residents who are 65 and older. Establish a citizen advisory board on elderly services. Specifically examine transportation needs of the elderly and the extent to which they are currently met by Chapel Hill Transit.

- Bus/transit system - short & long-term strategic planning for funding (and system) enhancements, tied to overall support/plan for multimodal transportation systems.
- Development of (and institutionalize) short & long-term strategic planning to begin fulfilling Town's 2050 carbon reduction commitments
- Successfully relocate IFC men's shelter and kitchen facilities
- Put in place plan for permanent relocation of Kidzu (or other children/family anchor) in Chapel Hill downtown
- Continuation of (and put in place) economic development strategic plan
- Continue conservation easement/management efforts on select Town property
- Help Carolina North be an overwhelmingly positive addition to the community fabric of Chapel Hill and beyond, in the eyes of Chapel Hill citizens and the University leadership
- Strengthen CH Parks and Recreation facilities and programs
- Fine tune/coordinate existing and new strategies which address affordable housing
- Follow-through on Town Manager's focus to improve development approval process
- Complete Rogers Road Small Area Planning
- Create Voter-Owned election plan for 2009 election cycle
- Creating new Strategic Plan
- Finalizing and begin implementing Economic Development Plan
- Continued downtown economic development work
- Work to better define our interest in future development along identified transit corridors
- Zero tax increase budget

## Priorities Identified by Senior Management Team

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### Communications and Public Affairs Priorities

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1. Citizen Survey – CaPA proposes to develop surveys to poll citizens on key issues confronting the community and on overall satisfaction with Town services. In addition to gauging citizen satisfaction with overall services, CaPA would like to measure citizen satisfaction with Town communications/outreach and understand preferences for two-way communication.
2. Chapel Hill TV18 – CaPA proposes to improve the amount and quality of programming and information available on government access Cable Channel 18. The Town would benefit from a fulltime videographer to manage the government cable television channel and maintain the Council Chamber’s AV equipment. Valued in the hundreds of thousands of dollars, this equipment oversight and operation falls to numerous people who are somewhat tutored on handling but who are not professionals in this particular area. We rely on various outside freelancers for this service. A staff videographer would help the Town better utilize a valuable communications resource.
3. Citizen Newsletter – CaPA proposes a biannual newsletter for distribution to Chapel Hill households that would offer all citizens regular, convenient access to timely information on a range of Town services and projects. The stories featured would be comprehensive, explaining government actions by putting them in context to show history, values, themes, overarching goals, etc. In many cases, these same stories could be marketed to regional and national media markets.
4. Off-Site Storage for Documents – CaPA is custodian for the Town’s important documents. At this time these documents are stored in our archives room. This room is not fireproof and therefore not safe for storage of these documents, especially the very old minute books. We are proposing that these documents be scanned, with the originals being archived in a safe off-site location. This will provide safe storage for the documents and free up space in the archives room for other administrative functions. After these documents are scanned, a database would be developed to allow easy access to this information by the public and staff.
5. Audio of Selected Board/Commission Meetings – The Granicus MobileEncoder Module would allow annotation of meetings at locations other than Council chambers. No video of the meeting would be available, but there would be audio linked to the meeting documents, in the same way the video is linking to the agenda packet. This would be useful for other departments and boards and commissions to use during meetings, such as the Planning Board, Board of Adjustment, etc. The audio of these meetings could be uploaded to the website for

public use. We would also like to explore Town facilities where meetings could be videotaped. There are also other Granicus applications that could be looked at annually in the future.

## **Economic Development Priorities**

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**1. Complete and work toward adoption of Economic Development Strategy and Plan.**

*Measure:* Economic Development proposes this as number one because it will help in defining the items we work to accomplish and it helps define what economic development means to Chapel Hill.

**2. Small area planning process and initialize a plan.**

Identify areas where there are creative development opportunities, Encourage desirable forms of non-residential development. 8.3 Promote orderly development and redevelopment to achieve appropriate and compatible use of land. 8A-1. Encourage development of selected “opportunity areas” to achieve Comprehensive Plan objectives. 8A-2. Encourage mixed-use development forms. 8C. Small Area Planning. 8C-1. Prepare and adopt small area plans to implement Comprehensive Plan concepts.)

*Measure:* This is defined as number 2 because it can help in creating a vision for redevelopment areas and encourage appropriate development through visioning/planning.

**3. Identify and facilitate a one non-downtown redevelopment project.**

Identify areas where there are creative development opportunities, encourage desirable forms of non-residential development. 8.3 Promote orderly developments and redevelopment to achieve appropriate and compatible use of land. 8A-1. Encourage development of selected “opportunity areas” to achieve Comprehensive Plan objectives. (See item 4)

**4. Identify and facilitate a downtown mixed-use project.**

Identify areas where there are creative development opportunities, encourage desirable forms of non-residential development. 3C Downtown Enhancement. 8.3 Promote orderly development and redevelopment to achieve appropriate and compatible use of land. 8A-2. Encourage mixed-use development forms.) (3&4)

*Measure:* This can show the results of our efforts in the redevelopment/ economic development initiatives and also shows the public concrete examples of our success.

**5. Web presence for ED, Publicity and marketing for our initiatives.**  
(6.0 Employment and Economy)

**Measure:** Marketing is a key component of our long-term desires to create an environment that encourages positive development that reinforces the chief components of Chapel Hill. This can also lead to increased interest in our office and mixed-use markets for developments.

## Engineering Priorities

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- 1. Maintain scheduled development of the Stormwater Management Program Master Plan.** Because of the increasing emphasis on stormwater runoff quality, it is imperative that we promptly identify what the Program needs to accomplish and when. The Program Master Plan provides a roadmap and schedule for the efficient and effective allocation of resources necessary to meet the requirements and objectives identified in the Plan. The Plan also provides a means to develop data necessary to justify and quantify utility fee increases that we believe will be necessary to support the Program as we envision it in future years.
- 2. Allocate staff resources as necessary to ensure thorough project design and construction oversight for upgrading and replacing the Town's computerized traffic signal system.** Project design began in late 2007 and will continue through 2008. Town professional staff will be working closely with the NCDOT and the system design consultant to ensure that the Town gets the system and components that it wants and needs to properly manage traffic in, through, and around Chapel Hill and Carrboro in the future. Close coordination and involvement with the Town's IT Department will be necessary to ensure that the project includes fiber-optic communication capabilities desired by the Town for purposes other than those specific to the traffic signal system. Project construction could begin in mid-2009.
- 3. Allocate staff resources as necessary to thoroughly review and comment on proposals for development of the Horace Williams Property (i.e. Carolina North).** Carolina North will be the most significant individual land development project in the Town's history. We will allocate professional staff resources as necessary to ensure that proposed development is innovative, sustainable, efficient, and effective in meeting the Town's development standards and community goals while achieving the University's objectives for development of its property.
- 4. Continue providing a strong presence on the multi-jurisdictional working group considering physical and fiscal impacts of pollution standards (Total Maximum Daily Loads/TMDLs) proposed by the State for Jordan Lake.** Standards and rules that have been drafted by the State were deemed to be physically and fiscally impractical by staff of Chapel Hill and most other stakeholder agencies and jurisdictions. Town staff professionals provided comprehensive comments and questions to the State regarding the draft rules. We

expect that considerable more work will be needed in 2008 to craft standards and rules that can be accomplished on a reasonable schedule and within the fiscal capability of the affected jurisdictions.

5. **Reclassify Engineering Technicians to reflect the increased complexity and breadth of knowledge required for work in their associated responsibility areas.** To accomplish the necessary work, technicians must understand, apply and utilize environmental science techniques, sophisticated computer technology/software/equipment, materials science, and construction law. In early 2007, we prepared comprehensive new job descriptions, developed career progression series, and proposed new position classifications for these positions. Although no action was taken by the Town this past year, we believe that it is imperative that these positions be evaluated immediately to acknowledge and reward these employees for the increasing volume and sophistication of work and responsibilities associated with their positions. Retention and recruitment will become a serious problem if the Town does not act on this matter.

## **Finance Priorities**

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1. **Develop and implement Debt Management Plan that provides designated resources for the annual payment of debt service, identifies debt capacity, and increases the Town's opportunities for service delivery improvements.** The Town's annual debt service cost has more than doubled in the last four fiscal-years, which has severely depressed available resources necessary to sustain the Town's ability to provide reliable and effective services to the community. It is imperative that the Town improve its fiscal planning and capital formation program in such a manner that does not negatively impact its ability to deliver appropriate levels of routine services.
2. **Implement Organizational Realignment to provide better coordination of business and financial management services and enterprise technology services to the Town Council, management and public.** Currently financial management staff is insufficient to perform adequate and accurate financial services for the Town. The division is under stress, which is often exhibited by high staff turn-over and excessive unpaid overtime by exempt professional staff. The realignment plan identifies additional staff required for effective financial management services and improvements to the Town's fiscal condition.
3. **Improve and strengthen Internal Control to recognize new requirements over financial reporting and compliance of laws and regulations.** The Auditing Standards Board recently issued Statement on Auditing Standards No. 112, Communicating Internal Control related Matters Identified in an Audit will have an impact on performance of the Town's annual audit and materially increase staff efforts during the fiscal year and at fiscal year end. The Government Finance Officers' Association has issued recommendations to minimize the negative effects resulting from implementation of SAS No. 112 that

calls for improving and maintaining a sound financial reporting system by the following:

1. utilizing sufficient financial staff to minimize the possibility of material auditor-initiated audit adjustments;
2. incorporating an anti-fraud monitoring program and methods to monitor adherence to administrative procedures; and
3. maintaining adequate staff to prepare financial statements without assistance by independent auditors.

The SAS 112 requirements will increase the auditing and review requirements and material internal control deficiencies will impose potential negative effects on the auditor's ability to rely on the financial accounting records as a basis for forming an unqualified opinion on the fairness and reliability of the Town's financial information.

- 4. Implement Goal-Objective-oriented Annual Budget planning and development in conjunction with improvements to employee performance system by Human Resources and Development.** The annual budget should document the goals and service objectives for each of the Town's units and provide meaningful performance measurement indicators and benchmarks. This can be tailored to the improvements in the employee performance system so that performance objectives are accumulated by service area and identified in the budgeting process.
- 5. Improve Capital Improvement Program budgeting and Capital Formation Plans. In the current Capital Improvement Program budget** there is only about \$600 thousand, net of debt payments on previously issued financing for capital improvements, to fund maintenance of existing facilities and new capital projects. Funding for the CIP budget is primarily made up of a transfer from the General Fund. Consequently, CIP funding is usually last in allocation of scarce resources.

Projects included in the CIP budget after the current fiscal year are unrealistic because future funding has not been identified and therefore the unfunded items amount to a "wish list" for future consideration. As a result, projects that eventually are funded in the CIP budget have had to wait for years before adequate funds are made available. In addition, the CIP budget has become a debt service fund for previously issued financing for capital improvements. One significant improvement will be accomplished when the items in the CIP for the current fiscal year and all successive fiscal years have identified sources of funding and meet the Town's priorities. Another significant improvement will be accounting for all debt service in the Debt Service Fund.

- 6. Centralize and improve business management services to enable Town departments to increase efficiency and effectiveness of service delivery that the units provide to the community.** By centralizing some of the business and financial procedures within the Business Management Department, staff in other



departments will be able to increase their time and effectiveness in performing service delivery responsibilities. This will result in Town-wide improvement in efficiency and effectiveness and result in better service to Town citizens.

7. **The Town of Chapel Hill must ensure the sustainability of its retired health-care program called an “other post-employment benefit” (OPEB).** In addition to finding a way to increase funding for current and unfunded liability costs of the program, the Town may consider the following possibilities of enhancing the sustainability of its commitment to past and present Town employees:
  - a. implement healthcare cost containment measures; i.e., place Medicare eligible staff and retirees on a separate Medicare Supplement Plan;
  - b. review vesting rules and make changes for non-vested and future employees;
  - c. establish eligibility rules that avoid including retirees, dependents, and spouses who are otherwise insured;
  - d. implement a cost containment measure, such as capping the annual cost to a manageable maximum level. This level should be set at an amount that is not expected to be reached immediately, but will stop the actuarial cost projections at 8 percent to 12 percent each year from being carried out beyond the cap amount.

These changes will assist the Town in control future costs and the annual funds that must be designated for this purpose. In addition, as the unfunded liabilities are funded, investment income will become an important part of the annual funding considerations. (Comprehensive Plan 12.2 – Fiscal Condition, and 14.2 – Fiscal Management and Public Accountability)

8. **Improvements to Housing Financial and Operational Management** – Recent changes of the United States Department of Housing and Urban Development (HUD) require new project-based funding, budgeting, accounting, management and performance assessment on the operations of public housing by the Town of Chapel Hill. The new requirements will increase the efforts required by Town staff to ensure continuation of an adequate funding stream, sufficient expenditure tracking and appropriate management and performance measures.

## **Fire Priorities**

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1. **Transition to operational use of 800 MHz VIPER radio system as daily response communications system.** This is a continuation project from last year. We have portable radios ready that were purchased with Federal grant funds and Town CIP funds approved for mobile 800 MHz radios in the current budget. We are waiting on Orange County to install dispatch consoles before we can transition. Their new revised target date is June 2008. Our radio warranties are already expiring due to delays by Orange County. This will address Section 11 for improved services and Section 12 for fiscal responsibility.

- 2. Development and Implementation of Improved Wireless Technology for Fire Department Field Access.** As part of the Council and Manager's priority to use technology to improve delivery of services the fire department is working with RHJ Associates Consulting firm to make fire and emergency related databases accessible from the field during emergency responses thus increasing vital information available to responders relative to GIS and fire based software. This will include computer terminals in fire trucks and readily updated information on streets, occupancies, infrastructure and hazard information. Needs for fulfillment of this objective include acquisition of a stand alone fire server or space sharing on the police server, 12 to 14 mobile data terminals and transmission hardware, and a full or part-time information technology position to manage the fire software and hardware. There is also potential here for creation and sharing of a public safety IT section. This data base also has applications and value for Engineering, Police, Public Works, Building Inspections and Planning.
- 3. A legislative priority must be to revisit the issue of State Funding for fire protection of state owned properties.** We succeeded in achieving an \$800,000 increase in the total state fund for FY 06-07 and Chapel Hill's share was \$214,000, increasing our revenue to \$1,063,000 from the fund. Three years ago we were given assurances that the fund would be increased incrementally over a period of years and we must renew our efforts to insure that trend continues. With Council's authorization we are once again prepared to launch a major lobby effort by affected municipalities statewide to seek another fund increase. Our local legislative delegation advised us to pass the 2007 session and then try again for FY 08-09. State Representative Verla Insko recently advised me that we should again meet with the Governor's Budget Director and she offered to facilitate that meeting. This is clearly a Section 12, fiscal responsibility goal.
- 4. Improvement of the overall Emergency Preparedness of the ToCH through the creation of an Emergency Manager position.** As the Town has grown and become more dense and high profile the risk and need for emergency preparedness has also become more complex. This could be a civilian or fire officer position (suggested grade 43) responsible for comprehensive ToCH Disaster & Emergency Operations Plans, Emergency Operations Center management, FEMA liaison and record keeping, planning assistance for all Town Departments, grant writing, emergency resource inventories, employee emergency training, FEMA regulatory compliance, special event plans, risk assessments and coordination of disaster recovery plans and operations. The pending retirement of Randy Ballard in Public Works may make this more important since he has been the FEMA reimbursement specialist for all past incidents.
- 5. Improvement of the fire apparatus fleet maintenance program by the addition of an extra fire pumper for spare/reserve purposes.** One of the greatest impediments to efficient and consistent delivery of emergency services

currently is the ongoing maintenance and repair of fire trucks in a timely fashion. We currently suffer frequent and lengthy breakdowns of our first line apparatus due to lack of preventative maintenance. A primary reason for this is lack of good quality and dependable spare apparatus. Both of our spare apparatus are 18+ years old and are not dependable for service. This causes us to pressure Public Works to return front line units quickly reducing maintenance opportunities. One potential cost saving approach to this issue may be to purchase a late-model; excellent condition used pumper from another Fire Department.

## Housing Priorities

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1. Continue the process of converting to the project-based budget and asset management budgeting model.
2. Continue to investigate opportunities to collect outstanding balances from former tenants.
3. Continue the comprehensive public housing renovation program by completing renovation work in the 11 North Columbia Street apartments.

## Human Resource Development Priorities

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1. **Automation and Process Improvement.** With the alignment of the HRD department with Town departments, the need for applications and systems that support providing better services is critical. We need to automate the recruitment and hiring process, monitor benefit, wage, workers' comp costs, electronically collect and track time and track the skills, performance and reasons why employees leave. Through an intranet website, employees could independently complete transactions and get information they need immediately. As requests for a variety of training increase, delivery could be very effective via e-learning technology. Time formerly used to complete transactions could be better used to serve our departments and develop our employees.
2. **Benefits.** With the trend in rising costs of benefits for current and retired employees, we want to balance that with the need to provide competitive benefits and safety nets. In collaboration with the Business Management Department, we will review current utilization of benefits (Health, Workers' Compensation, Retirement), obtain the best premiums for the services and ensure plans are fiscally sustainable.
3. **Employee Development.** An assessment of development needs in each department should be completed and priorities established. Employees want to know what is expected of them, have the tools and training to do what is expected and have an opportunity to grow and advance. Development must start from employees first day on the job and supervisors' must be trained to manage and develop their people. Enhancements of the training and skills tracking database

will allow us to identify talent within the organization that can be used in new ways and career development opportunities for employees.

- 4. Employee Relations and Communication.** A key factor in employee satisfaction and retention is the opportunity to achieve results, grow and be recognized. The foundational structure needed for this to occur is an effective and fair performance management system. With a process to set goals and expectations, provide ongoing feedback and development opportunities, and a two-way, objective evaluation, employees better understand what they are to do and how they are doing. A pilot of a new process and format for evaluations will be conducted in Public Works and we will use lessons learned there to implement new performance management across the Town. Additionally, we will inventory all policies and procedures, recommend a direction and communication changes to all employees.

## Information Technology Priorities

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- 1. Establish a level of technology support for the Town Operations Center site that meets the needs of departments and provides effective utilization of the site data center.** Although the current Information Technology Department staffing is based on a model that supports a single computing center at Town Hall, the Town Operations Center includes a computer center designed to provide voice, data, video and security services for the entire site including the Public Works and Transit Departments. This center includes systems for security and surveillance that previously have not been operated or maintained by the Town. The Information Department is attempting to meet the site support requirements through daily site visits by current staff members and through contract services. The travel time adds to the time allocation necessary to support the new site. Although essential services are being supported, the impact of the new site is a growing backlog of tasks and delays in meeting the support needs of the Public Works and Transit Departments as well as other Town departments. Additionally, the computer center at the Town Operations Center is designed to integrate with other Town systems and, because this facility includes some technical features that assure continued operations in the event of loss of power that are superior to those available at Town Hall, it is designed to provide backup support for a number of Town systems and services. Implementation of this capability cannot be achieved without regular on-site support by a member of the Information Technology Department.
- 2. Improve the management of electronic data systems security.** Introduction of new systems, such as the Parks and Recreation RecTrac System for online registration and payment, also introduce new and more restrictive security requirements for Town computing systems. At the same time, the growth in the sophistication and number of malicious attacks on electronic systems world-wide is requiring extensive efforts by organizations to ensure continuity of operations. One effect of this on the Town is the effort to filter and evaluate daily the 20, 000

SPAM messages directed at Town users. The Town does not have any staff member who is trained or is able to devote the considerable work time necessary to stay abreast of trends and to analyze and manage the security systems employed by the Town. Establishing a dedicated capability to perform these tasks is essential to maintaining the continuity of Town electronic systems operations.

3. **Establish a capability to effectively plan and manage the integration of municipal (vocational) technology systems with Town-wide (enterprise) systems.** One of the key proposals of the Technology Assessment is that departments take a more direct ownership of their technology systems and the Town hire a business analyst to work with the departments to analyze business processes and develop methodologies for integrating these municipal programs. With the near term transition of the Information Technology Department into a division of the new Business Services Department, acquiring the capability to conduct systems analysis, planning and management would be of great benefit.
4. **Provide a vehicle for technology support.** – Technology support is provided to all departments by the Information Technology Department. Trips to the department sites for routine user support and system maintenance, park and ride lots for maintenance of security equipment, and other locations such as Wi-Fi hotspots, is typically done using personal vehicles. Although one Town vehicle is available at Town Hall for shared use by all departments, it is not suitable for hauling some equipment and is not always available when emergent needs arise. Use of personal vehicles for such work places a potential liability risk on the individual and the Town. Direct or shared access to a vehicle suitable for the department's use is needed to provide timely response to routine and emergent support and maintenance requirements.

## **Inspections Priorities**

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1. **Create a multi-disciplinary plan review process.** The Chapel Hill Inspections Department is well suited for the type of construction we have historically seen; residential and small commercial projects. However, we lack sufficient resources to handle complex commercial projects such as large high-rises proposed to be built in the downtown area. Currently, commercial plan review is limited to improvements to existing structures and smaller scale projects. The larger projects are far more complex and require adequate staff resources to examine the plans and specifications.

The FY 08-09 Inspections Department budget request will include a request for a plan reviewer certified in multiple trades whose primary role would be the review of residential and complex commercial constructions documents.

2. **Enhance enforcement of the Town Code of Ordinance and the Land Use Management Ordinance.** The Inspections Department will face a challenge in the coming years of enforcing specialized zoning regulations such as

Neighborhood Conservation Districts Ordinances while continuing the enforcement of the Land Use Management Ordinance and the Town Code of Ordinances with one code enforcement officer.

The FY 08-09 Inspections Department budget request will include a code enforcement officer whose primary role would be the enforcement of the Town Code and the Land Use Management Ordinance.

- 3. Ensure the communication of the laws to all property owners and citizen.** The Inspections Department is facing the challenge of enforcing specialized zoning regulations such as Neighborhood Conservation Districts Ordinances while continuing the enforcement of the Land Use Management Ordinance and the Town Code of Ordinances with one code enforcement officer.

In an effort to consistently enforce Town ordinances and procedures and to provide the citizens with courteous and timely attention to their requests for information and assistance the department is designing a two-part placard-type notification to be posted at properties that are visited in response to citizen complaints. These notices will better communicate when the property was visited, the type of code that is allegedly being violated; therefore, giving the occupant the opportunity to correct it immediately. The notice will be in a format to provide the department with a copy for the file to ensure accurate documentation of enforcement actions.

## Library Priorities

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- 1. Library Expansion Project.** In 2003, citizens approved a \$16.23 million bond to expand the existing facility. The Town's objective is to construct a sustainable and efficient 65,000 square foot library facility by 2010. The Library will provide staff support to the design team and Town staff during the Special Use Permit application process; provide updates to the Library Building Committee and the public; provide balanced information as needed to the Council, Committee and designers; identify budget impacts for library service over the next four years.
- 2. Maintain Current Service Levels.** At times during library expansion construction, access to the library by the public may be impeded or precluded by activities on site. The Library will develop alternatives for on- and off-site operations to minimize service impacts for the public; with the Library Board, develop surveys to identify user and non-user profiles to facilitate future services and outreach.
- 3. 50th Anniversary Celebration.** In 2008, the Friends of the Chapel Hill Public Library, the Chapel Hill Public Library Foundation and the Town will partner to celebrate the Library's 50th anniversary. This event should celebrate the reader; increase awareness of the long-term needs of the Library; publicize the expansion project; recognize the library's partners and identifying new ones; showcase the



*Enriching Our Community by Helping Our Library Collections Grow*

## **2008 Foundation Goals**

1. Responsible management of trust accounts

Maintaining the tradition of managing the trust accounts responsibly and ethically, while delivering above average returns.

2. Increase the Foundation's donor base to build the Foundation's endowment fund

2008 is the second year in the five-year *Ensuring Excellence Campaign* (\$2.5 million needed to be raised to purchase 86,000 books and other materials when the library expansion is completed). Next years plan concentrates on expanding the Foundation's donor base to build the endowment fund.

3. Celebrating the Library's 50<sup>th</sup> Anniversary

Support the town in the Library's 50<sup>th</sup> celebration, co-branding all Foundation activities with the Library 50<sup>th</sup> Anniversary. Finish the fund-raising year with a charity event for 500+ donors in the barn at Ferrington, resulting in significant publicity for the Town and Library, as well as achieving the Foundation's goal of expanding to a more diverse donor base.

history of the library in the context of growth and change in Chapel Hill; promote awareness of the need for private support to complement the public budget.

4. **Technology Planning.** Objectives will be to (1) review the technology goals of the Library Master Plan and explore possibility of hiring a consultant to update the Technology Program component of the Library Master Plan, (2) develop schedule for installation of a radio frequency identification system, based on the construction management company's timeline, (3) introduce NC Knows 24/7 reference service, (4) integrate up-to-date technology services into the expanded library design, and (5) identify cost-effective technologies and vendors to maximize patrons' electronic access to library resources during construction
5. **Collection Development Project.** The Library Master Plan recommends that the Library provide a 4-items-per-capita collection to patrons on opening day in 2010. The Library will implement the second of a four-year project to expand the current collection from 2.6 to 4 materials per capita by 2011; encourage financial support from local non-governmental partners, including the Chapel Hill Public Library Foundation, the Friends of the Chapel Hill Public Library and other private sources, to fund this project.

## **Parks and Recreation Priorities**

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1. **Provide for maintenance and repair of the Battle Park Greenway.** Specifically funding for the replacement of bridges and boardwalks along with reconstruction of some trail sections to improve accessibility and safety.
2. **Better meet the need for additional outdoor field space by installing artificial turf on the soccer fields at Homestead Park in cooperation with local youth soccer organizations.** Although the two soccer fields at homestead Park are not regulation in size, they do serve as adequately sized practice and scrimmage fields. By increasing the amount of use on each field and allowing this use on a year round basis will not only help to meet the growing demand for field space, but will serve as a pilot program to analyze the costs and benefits of installing artificial turf on additional Town owned fields.
3. **Develop a comprehensive maintenance management plan for parks, greenways, open space and beautification areas that includes the establishment of maintenance standards and levels of care to be given to each facility type and specific location.** Utilize the outdoor property condition assessment to determine current needs for maintenance, repair and renovation. Provide for an understanding of the requirements to maintain a particular park, greenway, open space or beautification area at specified levels of care and attention. Determine the costs associated with providing these different levels of care by location. Determine the opportunities for the use of re-claimed non-potable water for irrigation purposes and provide for more drought resistant plant materials and turf.



4. **Develop alternative funding sources and innovative funding strategies to help meet the growing demand for parks, open space and recreation programming.** A greater emphasis on developing sponsorship opportunities. Provide budget incentives for increasing recreation programming by reinvesting revenue from recreation program fees and athletic league fees directly back into these program areas through a small grant program that would supplement the operating budget.
5. **Provide for adequate programming space and a new department administrative headquarters.** Design and build a new multi-use building that would provide class room and studio space for the arts with office and conference space for the administration of the Parks and Recreation Department.

## Planning Priorities

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1. **Comprehensive Plan Update and Amendments** (upcoming efforts anticipated to include update of the Comprehensive Plan, amendment to add a Rogers Road Small Area Plan, amendment to add the Northern Area Task Force Report and closure of the moratorium in the northern area, amendment to add the Long Range Transit Plan)
2. **Implementation of Comprehensive Plan** (efforts include development review/permitting, amendment to the Land Use Management Ordinance, regional transportation planning, development of capability to monitor cumulative impact of development and visioning tools, housing/community development efforts, and Carolina North solutions, for example)

Regarding amendment to the Land Use Management Ordinance, we will seek Council guidance to determine the most significant text amendments for the immediate future from the active list below:

1. Inclusionary Zoning Ordinance (Consultant hired, work underway)
2. Expanding our higher density and transit oriented development district provisions (work underway on higher density residential zones, expected to move forward in the spring. Funding requested to hire a consultant to assist with transit oriented development district provisions.)
3. Strengthening the tree protection regulations (received authorization to hire consultant for more extensive changes to regulations)
4. Enacting the legislation allowing the Town to accept payments in lieu of transportation infrastructure improvements for new development projects (status report to Council expect early in the year).
5. Incorporating "Dark Sky" lighting provisions (Planning Board initiative)
6. Reduction in Planned Development-Housing minimum land area requirement (Public Hearing scheduled for February 18)
7. Change gravel to impervious (built-upon) area on north side of Town

8. Energy bonus incentives (recent legislation)
  9. Consider changes to Ordinance and Code to allow chickens in residential neighborhoods
  10. Cellular Tower provisions (respond to recent legislative changes – staff investigation underway)
3. **Invest in employees.**
  4. **Efficient use of available resources** (including state/federal program funding).
  5. **Challenge the staff to develop new and innovative approaches to the way we function.**

### **Police Priorities**

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1. **The future of Project Turnaround. Project Turnaround is a program run from the Police Department as an intervention for first conviction drug offenders.** It has been in existence since 1993. It serves adult and juvenile populations (currently there are approximately 325 clients in the program). The program is designed to have three employees serve the adult clients and two serve the juvenile clients. Funding for the program comes from assorted grants and from client fees – both uncertain sources of revenue. Two of the employees have resigned this year and we have been unable to fill their positions because the grant funding has been inadequate to pay for those positions. In the past, we have used lapsed salary funds to make up for this shortfall, a practice we have employed this year to help pay for the remaining juvenile counselor's position. However, as we are nearly fully staffed, those funds are very limited. We need to gauge the Town's commitment to the program to discern if we are going to try to continue the program as it is intended to be run, or reduce services to reflect a decrease in staffing levels. The decrease in funding primarily affects the juvenile program.
2. **Overtime budget.** The overtime budget for the department does not reflect staffing needs for the increased number of special events that we plan and staff with off duty officers. This includes uncertain, but fairly regularly occurring, events such as the men's NCAA basketball tournament. The play in game to make it to the Final Four and any subsequent games require a planning process approaching that of the Halloween event. Additionally, although the Apple Chill event has been cancelled, it has been replaced with several other Parks and Recreation events which require off duty officer participation. In addition, there is little flexibility in the overtime budget to allow for special departmental needs projects such B&E stakeouts, which are normally staffed with off duty officers.
3. **Maintenance and Repair.** This applies to the Headquarters building as well as to equipment that we either issue to officers or install in vehicles. We have greatly increased the number of laptop computers with associated air cards, camera systems, RADAR systems and citation printers in the police cars in the last couple

of years. These items have associated maintenance costs that are growing at a rate faster than our M&R budget. The HQ building, of course, is getting older and has ongoing maintenance needs (especially plumbing) that need to be addressed. This would also be a good time to begin exploring the future need for a new Headquarters building.

4. **Fleet Increase.** As staffing has increased, the size of our vehicle fleet has remained relatively static. We have worked agreements in the past with Public Works to hold over vehicles past their normal service life in order to meet the vehicle needs of employees. We would like the Town to consider officially increasing the size of our fleet in order to meet the needs of employees.
5. **Training needs.** Combining a relatively new workforce with the reality that policing has grown increasingly technical over the last several years leads one to conclude that ongoing training of police officers is necessary and desirable in order to meet state standards and to achieve and maintain competency in the technical areas of their jobs.

### **Public Works Priorities**

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1. **Successfully complete the departmental reorganization plan and the creation of the new Sustainability Department.**
2. **Successfully complete final design, permitting and construction contract negotiations for the Library Expansion project.**
3. **Successfully complete the Streetscape Master Plan revision process, including endorsement by the Council and inclusion in the Town's Comprehensive Plan.**
4. **Successfully complete revisions to the Town's tree protection regulations, including approval of additional staff resources as deemed necessary to implement these revised regulations.**
5. **Furtherance of career development goals and objectives within certain job classes.**
6. **More resurfacing funds for traditional resurfacing would help reduce the life cycle of the Towns street infrastructure from 20 years to at least 15 years.**
7. **Completion of Town's drainage infrastructure inventory on catch basin inlets and outfalls. This will enhance our knowledge of much needed repairs and also replacement of old deteriorating catch basins and stormwater systems.**

8. **Continued improved pavement maintenance practices such as crack pouring and various types of seal coats. These practices give cost effective alternatives to extend and maintain service life of the Town's roadways.**
9. **Implement integrated Work Order Management and call center programs; essential that a system tie in with the Town's financial management system.** While effort will transcend Public Works, such system is vital to successful linking of drainage maintenance service here with the Town's overall stormwater management system.
10. **Divisional priorities for the future essentially focus around the issue(s) of sustainability.** First and foremost for us is the actual implementation of the manager's roadmap that will move this division into an entirely new department. Attendant to this will be our recruitment of a new director and the melding of the division with the other components of the "Sustainability" team.
11. **Additionally, we wish to evaluate and deploy an ever increasing amount of "green/sustainable" technology both in new projects and as retrofits in existing facilities.** Identification of such opportunities and development of both managerial and technical expertise to oversee this effort are crucial.
12. **Further development of the Landscape division to maintain community facilities more efficiently and with improved safety--**Additional personnel and equipment resources will be required to accomplish the future development of the division.
13. **Further development of staff training program--**Training is an ongoing process. The training program should be challenging and innovative at both the supervisor and groundskeeper levels.
14. **Revise solid waste program** 1) to continue improved safety and efficiency in collection, including consideration of "Pay As You Throw" option for residential and automated residential service; and 2) to support more efficient yard debris collection and storm water issues, we need to containerize all yard debris. Any surplus in landfill tip fees could be utilized to buy yard debris containers to sell to residents for cost.
15. **Sustainable utilization of the Fleet Maintenance/Warehouse.** Prior to arriving at the Town Operations Center, we envisioned a central parts and receiving division for the entire Town. We would warehouse and distribute bulk items such as office products, chemicals for the fire department, computers for IT and a host of other items. In order to continue with this idea, we will need an additional person to coordinate the shipping and receiving aspect.

## Transit Priorities

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1. **Develop a consensus regarding transit growth among funding partners and establish a plan to sustain the growth.**

**The Town is completing work on a Long Range Transit Plan.** This plan will establish a vision of the transit system in 2030 and how it will impact the community. Since Transit Oriented Development will be a cornerstone of future Chapel Hill growth, it is critical to ensure a vibrant transit system. The funding partners (Chapel Hill, Carrboro and UNC) must come to agreement on key transit priorities.

**The Town should position the transit system to meet future demands by undertaking the following:**

1. Identify stages of transit development necessary to achieve 2030 goals
2. Develop a 3-5 year short range transit plan that will impact budget development with an emphasis on the early stages of Carolina North
3. Explore opportunities for regional cooperation and coordination
4. Conduct an assessment of EZ Rider services and develop a three year service improvement plan.
5. Develop a financial plan including sources of funding to sustain the necessary growth in the transit system.
6. Establish criteria to guide service performance evaluation
7. Clarify the roles and responsibilities of the Transportation Board and the Public Transit Committee

2. **Improve the maintenance, dependability and condition of the Chapel Hill Transit fleet.**

The Town of Chapel Hill and its partners have invested over \$27 million in its bus fleet. A modern, properly maintained bus fleet is essential to assure proper use of Town resources and quality service to the public. The recent purchase of 19 buses was a major improvement in the fleet. However, if the programmed replacement of 26 more buses does not occur in the next two years, service will deteriorate quickly. The following activities are critical to maintain the fleet.

1. Secure funding to purchase 26 replacement buses
2. Develop and support a long term fleet vehicle replacement plan
3. Secure funding to replace aging EZ Rider vehicles
4. Approve one additional maintenance employee to maintain electronic equipment on buses
5. Continue training to expand maintenance skills of maintenance staff.

**3. Improve public information and marketing.**

Demographic surveys indicate that 39 percent of the riders on Chapel Hill Transit each year are new. In order to sustain ridership growth, it is important to have adequate and accessible public information. An active and ongoing effort to educate and motivate the public to use transit is an important staff activity. The following activities should be undertaken in FY 2008 / 09:

1. Design a transit web page that takes advantage of recent technology and is user friendly.
2. Develop individual route schedules to replace the route guide making production of information more cost effective.
3. Work collaboratively with triangle transit systems to improve system coordination, connectivity and access to information.

**4. Insure proper and efficient use of Town and partner resources.**

In 2007 Chapel Hill Transit made significant advance in the introduction of technology to better manage the system. Automated passenger counters, scheduling and run cutting software, and mobile data terminals improve system management and performance measurement. Also, staff is now in place to conduct performance evaluation and short range planning.

In 2008 staff should focus on a comprehensive evaluation of the system with a goal to improve system performance. To be successful the following needs to take place:

1. The partners need to establish performance evaluation criteria
2. Staff should analyze the system in accordance with the evaluation criteria.
3. Periodic performance measurements should occur during the year.
4. The Town should examine the EZ Rider service performance and identify opportunities for regional cooperation.

**5. Continue staff development efforts to improve employee skills and performance and establish opportunities to create a welcoming work environment.**

Chapel Hill Transit has a responsibility to insure that employees have proper training to perform their jobs effectively. Staff development and training is a critical component to provide effective and responsive transit service. Chapel Hill Transit should continue and expand training efforts.

## **Priorities Identified by Boards and Commissions**

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### **Chapel Hill Parks and Recreation Commission**

1. Funding to fix safety issues.
2. Personnel and equipment for landscape/park maintenance needs.
3. Repair and maintenance funding.
4. Arts and recreation program facility that also serves as a headquarter for the Parks and Recreation Department Administration.

### **Chapel Hill Historic District Commission**

1. Reduce the fees for “Certificates of Appropriateness”.

### **Chapel Hill Public Arts Commission**

1. Implement with appropriate funding the provisions of the Chapel Hill Public Art Contextual Plan as may be approved by the Town Council.
2. Sustain and improve the Municipal Percent-for-Art program.
3. Catalog and maintain the permanent public art collection.
4. Sustain the current public art programming.
5. Develop public outreach and education.
6. Improve the scope and impact of current public art programs.

### **Library Board of Trustees**

1. Maintain essential library service during the construction of the library expansion.
2. Enhance communication and educational outreach.
3. Update the Chapel Hill Library’s Information Technology Plan which expires this year.
4. Service the Collection development effectively.
5. Retain library staff and support them during transition.

### **Greenways Commission**

1. Provide at least \$80,000 for the Greenways program in the annual Capital Improvements Program.
2. Sell on schedule the 2003 Greenways Bonds currently scheduled for sale in 2008 and 2009.

### **Chapel Hill Human Services Advisory Board**

Continue to recommend allocations to those agencies that can effectively address:

- a. At-risk youth programs.
- b. Mental health services.
- c. Self-sufficiency programs.
- d. Programs that are aligned with the efforts to address homelessness.
- e. Programs focused on the Chapel Hill-Carrboro public housing communities.

### **Chapel Hill Community Design Commission**

1. Fund additional Town Planning Staff &/or Consultants to facilitate a Town wide citizen led Neighborhood Small Area Plan.
2. Purchase modeling software & hire/train Town staff to develop a Town wide 3D computer model.
3. Mass Transit Advocacy.

### **Planning Board**

#### Goals:

1. Begin revision of Chapel Hill Comprehensive Plan, including development of TOD guidelines.
2. Complete revision of the Chapel Hill Tree Ordinance.
3. Work on pending or new NCD applications.
4. Consider revision of the ordinance specifying the minimum size for a project to require a SUP application.
5. Consider revision of the current process for review of duplex applications.

#### Budget Requests:

1. Hire a consultant to develop guidelines and remedies for failure to deliver on projects proposing LEED certification and other sustainability designs.
2. Develop a workshop for Town advisory boards on current trends in progressive urban planning and transit resources.
3. Accelerate sidewalk connections throughout Town.

### **Chapel Hill Downtown Partnership**

1. Basic Needs.
2. Business Retention.
3. Diversification of Downtown.
4. Business Recruitment.
5. Strategic Planning and Implementation for downtown.

### **Public Housing Advisory Board**

1. Allocate funds to cover the Housing Department's anticipated 2008-2009 budget shortfall.
2. Ensure that public housing stock (336 units) remains available to those most in need of subsidized housing options.
3. Waive the Housing Department's recycling, storm water, and dumpster fees and its annual contribution to the Town Operations Center to help alleviate the pressure to seek higher income tenants and to allow those funds to be directed towards the operating budget.
4. Investigate the Housing Department owning a property to manage for profit.
5. Allocate \$45,000 for a resident services staff position.
6. Continue to prioritize community oriented policing and ensure an adequate and visible police presence in the housing communities.



## **Priorities Identified by Orange Community Housing & Land Trust**

1. Implementing the property management program
2. Substantially increasing marketing efforts

## **FEEDBACK FROM THE COMMUNITY**

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### **Manager's Listening Sessions**

Between February and June of 2007, Town Manager Roger L. Stancil arranged a series of listening sessions with various groups in the community, each having interests in common. Those groups included the clergy, the Chapel Hill Downtown Partnership, the NAACP, neighborhood activists, Town boards and commission chairs, small business owners, developers, and affordable housing organizations.

Jim Huegerich of the Chapel Hill Police Department facilitated the sessions, and Carol Abernethy of the Town Manager's Office kept notes of the sessions. Serving as conveners for various interests groups were Jim Pike and Mitch Simpson for Clergy, Fred Battle for the NAACP, Mike Collins for Neighborhood, Anita Badrock and Aaron Nelson for Business Groups, Loryn Clark for Affordable Housing, and Tom Tucker and Liz Parham for Downtown.

The discussion centered on three questions:

- What is the Town doing well?
- What are the opportunities for improvement?
- What advice would you give a new Town Manager?

Participants agreed that no individual comments would be attributed and that a summary of the total comments would be published. The summary of comments is contained in this report.



## What Is the Town Doing Well?

### 1. Basic services excellent

- Bus service very good and FREE
- Public works efficient
- Police handling of large events
- Police & public works recovery efforts after large events
- Police – w/social work component on cutting edge
- Police tactful, diplomatic, efficient
- Feeling of safety because of good police/fire response times
- Celebrations allowed but well controlled
- Employees professional & committed
- Employees responsible & helpful
- Crisis/catastrophe handling excellent by all staff

### 2. Town Council & staff approachable and seek citizen input

- Council meeting process for public hearings good
- Elected & staff officials seek input from citizens
- Accessibility good
- Council listens to all citizens
- Staff is responsive to citizen requests
- High baseline of communications compared to other communities
- Processes are transparent
- Employees have a culture of civility
- Departments having development responsibilities willing to listen and respond with clarity

### 3. Progressive technology

- Videostreaming good
- Technological progress good

### 4. Commitment to affordable housing

- Awareness & focus on affordable housing
- Commitment to push for retention & development of affordable housing

### 5. Commitment to environmental protection

- Progressive leadership re: environmental & ped/bike issues
- Green building sophistication
- Walkability

**Action:** First do no harm; Reinforce actions and behaviors that produce these results; Work to maintain competitive salaries, benefits and working conditions to attract and retain good employees; Increase recognition and appreciation of multi-cultural aspects of community in organization and processes.

## What Does the Town Need to Improve?

### 1. Improve development process

- Permitting process is slow and costly (*i.e., delays = increased construction costs for owner and lost tax revenues for the Town*)
- Need staff trained & knowledgeable about new types of development, e.g. vertical
- Planning staff should be more creative (*i.e., less rigid, with goal for helping applicant*)
- More P.R. toward developers
- Sometimes “not worth the effort”
- Duplex guidelines need review

**Action:** Council created Economic Development Office position (EDO). Working to identify current development expectations with limitations of LUMO, participating in the development review process to help identify process improvements, initiating on-going dialogue with participants in the development process, working with Council to define strategy, reviewing Comprehensive Plan in light of current conditions.

### 2. Change perception & reality of Chapel Hill as elitist

- Livability/affordable housing for those employed in Chapel Hill
- Perception of no-growth & elitist
- Cost of living here out of control

**Action:** Economic Development Officer working to increase commercial tax base and reduce burden on residential taxpayers. Working toward a Housing and Community Development Department to view affordable housing as a system and facilitate coordinated planning and effort.

### 3. Provide more public information

- Development project information needs to be available to citizens quicker, esp. for those most impacted
- How to start a business in Chapel Hill? Need information & process to encourage
- More outreach to citizens re:opportunities for involvement should be posted at library, public buildings, in/on buses
- Better inform citizens on environmental issues
- More information to citizen explaining bond process with clarity – e.g., bonds are not “free”
- Town should identify neighborhoods and keep updated records of HOAs – good way to distribute info to citizens through Neighborhood Watch & HOAs
- Website should be more neighborhood friendly

**Action:** Created Communications and Public Affairs Department to coordinate and provide oversight to interface with the public.

### 4. Appearance of community

- Better public housing maintenance
- Shorten time for leasing vacant stores and buildings-
- Downtown cleanliness and appearance
- Council influence with building owners

**Action:** Public Works employee position dedicated to downtown; renovating public housing neighborhoods across Town.

### 5. Think “Big Picture”

- Prioritize Council meeting agendas to focus on larger issues and lessen time spent on minor ones
- Council needs to “sell” Downtown to outsiders & residents as a “destination”
- Better planning to shorten time between issuance of bonds & spending the bond \$\$
- Continue to push for better walkability, green building, truly affordable housing
- Expand commercial tax base to lessen tax burden on homeowners

**Action:** Strategic Planning with Council and senior management, implemented through budget, reinforced by organizational development.

## What Advice Would You Give to New Manager?

### 1. Development

- Development Czar (overseer) position needed
- More strategic planning instead of tactical planning
- Streamline Boards & Commissions review process – fewer boards should be involved in development process and should communicate with each other
- Recommit to Comprehensive Plan
- Suggest economic impact studies for change/new ordinances & regulations
- Look at Meadowmont & Southern Village as models for northern area
- Include green building in affordable housing
- A Town Center is needed – green space for citizens to gather
- Provide incentives to draw businesses to CH (especially downtown)
- Partner with UNC in development issues
- More joint efforts of county and other local governments to encourage economic development in Orange County
- Limit bid requests so that local businesses get preference

Ideas to be considered and addressed in defining Economic Development Strategy for Chapel Hill.

### 2. Town employees

- More staffing and more staff accountability including deadlines
- Cross-training in order to offer service when a particular employee is out of office
- Continue intentional awareness of racial sensitivity from elected officials & staff
- Parking Services Enforcement – change in attitude of staff
- Consider a joint bike/ped staff person for Chapel Hill, Carrboro, Orange County

Ideas to be addressed in leadership development model and in cross-functional planning and implementation of Town priorities; multi-cultural training integrated into leadership development model

### 3. Cultural resources

- Offer socially conscious alternatives to street fairs
- Percent for Art should be pooled to allow more flexibility in locations

Moving to an organizational entity that coordinates Quality of Life activities by Town (Art, Parks and Recreation, Library) and develops activities that meet this community's interests

### 4. Police

- Work on West End panhandling & drug dealing - very serious
- Proactively address potential gang activity

With new police chief we will assess our policing activities and priorities

### 5. Council

- Council should be more involved in joint jurisdictional funding requests
- Council load unmanageable – it should empower boards and staff for more efficient process

Can be addressed through strategic planning process and longer term budget planning as implementation of strategic plan

### 6. Miscellaneous

- Continue the Listening Sessions for the Town Manager, perhaps annually
- Improve technology for Inspections
- Support private fundraising for programs, e.g. donor recognition
- Maintain historic areas, e.g. grit sidewalks
- Expand bus service hours, esp. nights