



CHARLOTTE.

Strategic Operating Plan

FY2010



Charlotte-Mecklenburg
Planning Department

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Transmittal Memo

DATE: July 30, 2009

TO: Ruffin Hall
Budget Director

FROM: Debra D. Campbell
Planning Director

SUBJECT: FY2010 Strategic Operating Plan

The vision of the Charlotte-Mecklenburg Planning Department is to be an innovative and effective public planning agency helping to create one of the most vibrant, well planned and livable urban communities in the country. We are pleased to submit our FY2010 Strategic Operating Plan (SOP) which demonstrates our commitment to achieving this vision. As you know, due to some fairly aggressive cost savings and budget reduction measures implemented by the City Manager, a number of our projects and initiatives scheduled for start-up and/or completion in FY09 were put off or significantly slowed down. In FY09, we had planned to complete a department wide reorganization that, to date, is only partially complete. We also stopped almost all of our contractual work. These actions resulted in a budget savings of \$943,190, of which, the majority of the savings occurred in salaries and benefits from vacant positions, contracts, and travel/training. These positions include:

(2) Associate Planners, (1) Principal Planner, (1) Office Assistant V, (1) Assistant Planning Director, (1) Plan Review Engineer and, (1) Program Manager. Eliminating and/or significantly reducing training, travel, conferences and placing a hold on contractual workers also contributed to FY2009 budgetary savings.



Our FY2010 Strategic Operating Plan was developed recognizing that we are operating in extremely uncertain times. The department, however, is committed to continuing to effectively deliver quality planning services. As such, our SOP reflects a redeployment of resources from subdivision and zoning activity to long range and strategic planning services and on updating and revising our Zoning Ordinance. Revising the ordinance is key to helping us implement adopted land use and urban design policies, transit oriented development and other land use/transportation integration efforts (i.e. Transportation Action Plan, Urban Street Design Guidelines, and Pedestrian Policies). But most importantly the revisions are being done for our customers with the goal of making this regulatory document easier to read, ensure ordinances meet spirit and intent of land use and urban design policies and generally make it more user friendly. Staff's goal will also be to update the standards to reflect current and desired practices such as green, eco-friendly and sustainable design and development. In FY2010 we will also be reexamining all of our regulatory processes, investigating opportunities for digital submittals and other changes to enhance efficiency and productivity and reduce the overall review time and costs of these processes.

Our revised FY2010 budget is \$5,009,276 and there are no service level change requests included in this submittal.

If you have further questions or need additional information, please contact Steve Patterson at extension 68308 or me at 62671.

c Phyllis Heath
Sandra Stewart
Garet Johnson
Laura Harmon
Cheryl Neely
Steve Patterson





I. Executive Summary

A. Introduction

Established in 1954, by an Interlocal Cooperative Agreement between the City and County, the Charlotte-Mecklenburg Planning Department is a joint City-County agency providing planning services for the City of Charlotte and the unincorporated areas of Mecklenburg County. This Key Business Unit (KBU), which works with a 14-member appointed Planning Commission, also serves as a departmental resource for City and County government. In 2003, the City and County amended the Interlocal Agreement to make the Charlotte-Mecklenburg Planning Key Business Unit a City Department governed by the personnel, budgeting, work program and financial reporting requirements as all other City Key Businesses.



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

- **coordinating the zoning, zoning administration, and subdivision review processes;**
- **guiding growth and enhancing design of the city and county;**
- **revitalizing and enhancing neighborhoods, business areas and corridors; and**
- **planning for the development of the Center City and other major activity centers.**

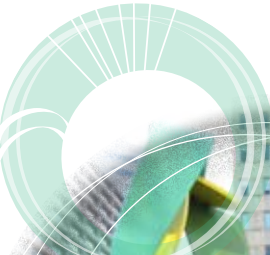
A summary of the agency's budget and positions is as follows:

Resource Needs				
	FY2008 Actual	FY2009 Actual	FY2010 Budget	FY2011 Projected Budget
Budget	\$4,647,616	\$4,798,570	\$5,009,276	\$5,212,990
Positions	63	63	63	63



B. Vision

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



Vision

C. Mission

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



Mission



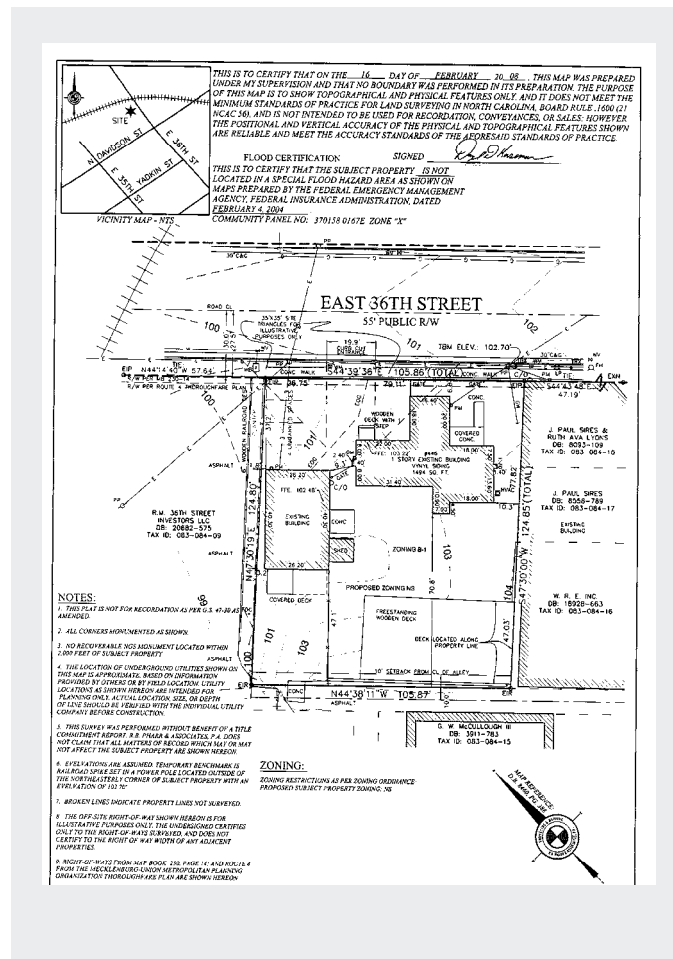


D. Needs and challenges

During the current economic downturn, the department will be challenged with maintaining a highly skilled workforce and with continuing to provide quality services. We are seeking to accomplish this without any service level changes. Staff in the development division are being reassigned to work on projects in other divisions. The slow down in development activity gives staff the opportunity to holistically reexamine and in some cases totally rewrite planning policies and ordinances. Essentially, Planning will be focused on “catching up” on some much needed projects including an overall assessment of Planning and development review processes focusing on enhancing our ability to meet customer service expectations. To effectively accomplish this, the KBU will need to address the following issues:

1. Development Activity

In spite of the economic uncertainty in the development community, the Planning Department will continue to provide quality services. To accomplish this we must maintain a highly skilled staff. We are fortunate to have staff that are highly educated and can work on a variety of projects throughout the organization. Retaining our highly skilled and competent staff is also critical to prevent any delay in services when the economy does improve. Having adequate resources to allow us to redeploy staff from development activity to more long range planning efforts will be a significant challenge. The reorganization of the Zoning Ordinance is a major undertaking for FY2010. Highly skilled staff will lead this “overdue” effort to update development regulations for our community.





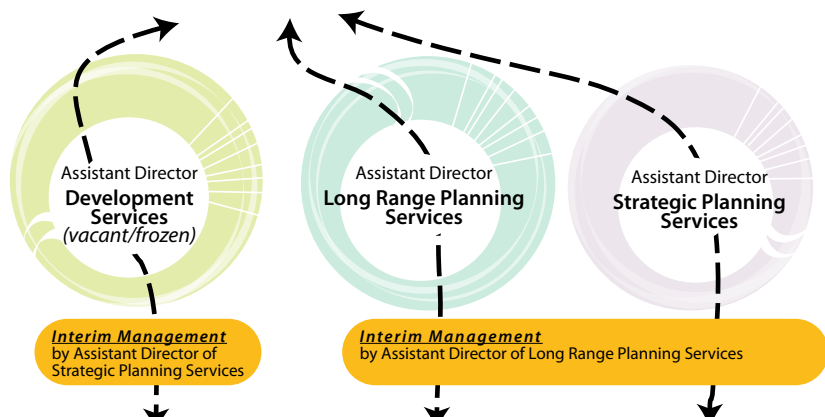
2. Integration of Technology into Business Processes

Planning would like to better integrate technology into our business processes. One goal is to pursue digital submittals whereby developers provide their plans digitally and they are then reviewed and approved digitally. Benefits to the developer include their avoidance of direct trips to the Government Center or paying a courier to make trips for them. While the technology appears to be available, there are considerable coordination and financial barriers to overcome. The Planning Department anticipates playing a major role in this effort which is being coordinated by the City Engineering and Property Management Department. Preliminary work has also been done to develop a disaster recovery plan whereby many of Planning's historic files would be converted to a digital medium. This would provide a backup for files and allow for easier searches by not having to physically locate a hard copy of a rezoning or subdivision plan when it is needed. Another goal is to better incorporate ACCELA software into Planning Department processes and employ more Geographic Information System tools as they are developed.



3. Department Reorganization

The Planning Department initiated a reorganization plan in early FY2009 to consolidate nine program areas into three divisions: Development Services, Long Range Planning Services and Strategic Planning Services. Due to budget uncertainties coupled with a hiring freeze, we were unable to complete the reorganization. Several of our key management positions, such as the Assistant Director of Development Services and the Program Manager for Rezoning Services have not been filled. Both of these positions primarily interact with Council at Rezoning Hearings and serve as the primary contact for our regulatory processes. This challenge was temporarily addressed by assigning the Assistant Director of Strategic Planning Services to cover the Development Services duties and combining the Strategic Planning Services Division with Long Range Planning Services.





E. Organization Chart







II. Strategy and Planning

A. Accomplishments

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

Strengthen Neighborhoods



Station Area Plans: Working with an interdepartmental team, Planning staff completed and Council adopted Station Area Plans for all the stations along the LYNX Blue Line light rail corridor this year. A new area plan template was designed for consistency of information, formatting and ease of reading for our customers. The division of work was reengineered and staff from other program areas were reassigned to this project to work on specific tasks. New Bern was the first plan adopted by Council in July 2008 and the Sharon Road & I-485 plan was the final of the six plans covering the eight stations, adopted in May 2009. (The goal was six.)

Neighborhood Organization List: Staff converted the Neighborhood Organization list to a GIS format which allows for easier data management, access to information by geographic area and reduction of mailing errors as part of the rezoning notification process. (The goal was to complete conversion.)



Safeguarding the Environment

Implementation of GDP Phase II Environment: Strategies were initiated to address six of the fifteen General Development Environment policies. (The goal was five.)

Residential Location: Fifty-six percent of all new housing units and seventy-two percent of new multi-family units located within Centers and Corridors. (The goals were forty percent and seventy percent respectively.)

Business Location: Ninety-eight percent of all new office square footage was located within Centers and Corridors. (The goal was seventy-five percent.)





Develop Collaborative Solutions

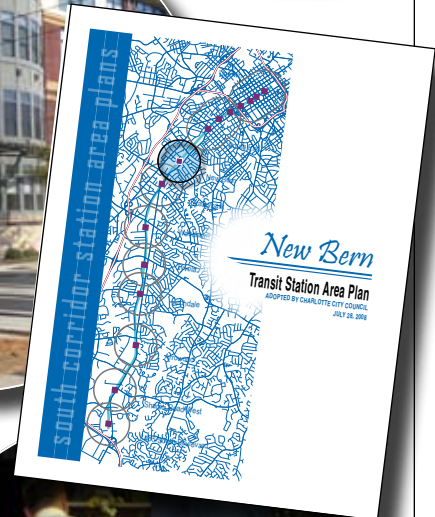
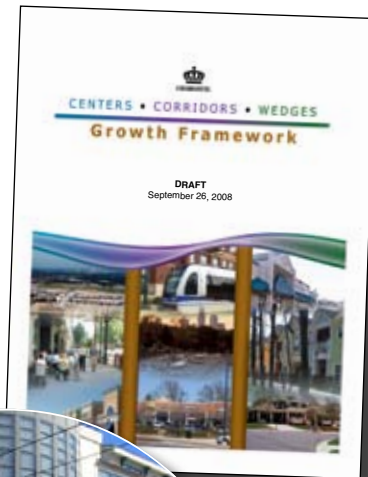
Area Plan Review: An inventory of area plans was completed and provided to City Council.

Permitting Process Improvements: Planning worked with E&PM, CDOT and the Subdivision Steering Committee to improve the quality of subdivision submittals and to begin receiving site plans in a digital format. In addition, staff collaborated in developing a plan review conflict resolution process.

Increase in the Amount of Transit Supportive Development: Transit Oriented Development (TOD) rezonings were approved at five station areas along the South Transit Corridor. (The goal was three station areas.)

Centers, Corridors and Wedges Growth Framework: Draft text is complete. Policy adoption is expected in FY2010.

Implementation of Area Plan Capital Projects: Plan projects were initiated in four areas: Bryant Park, NoDa (North Davidson), Thomasboro/Hoskins, and Northlake. (The goal was two projects.)



Enhance Customer Service

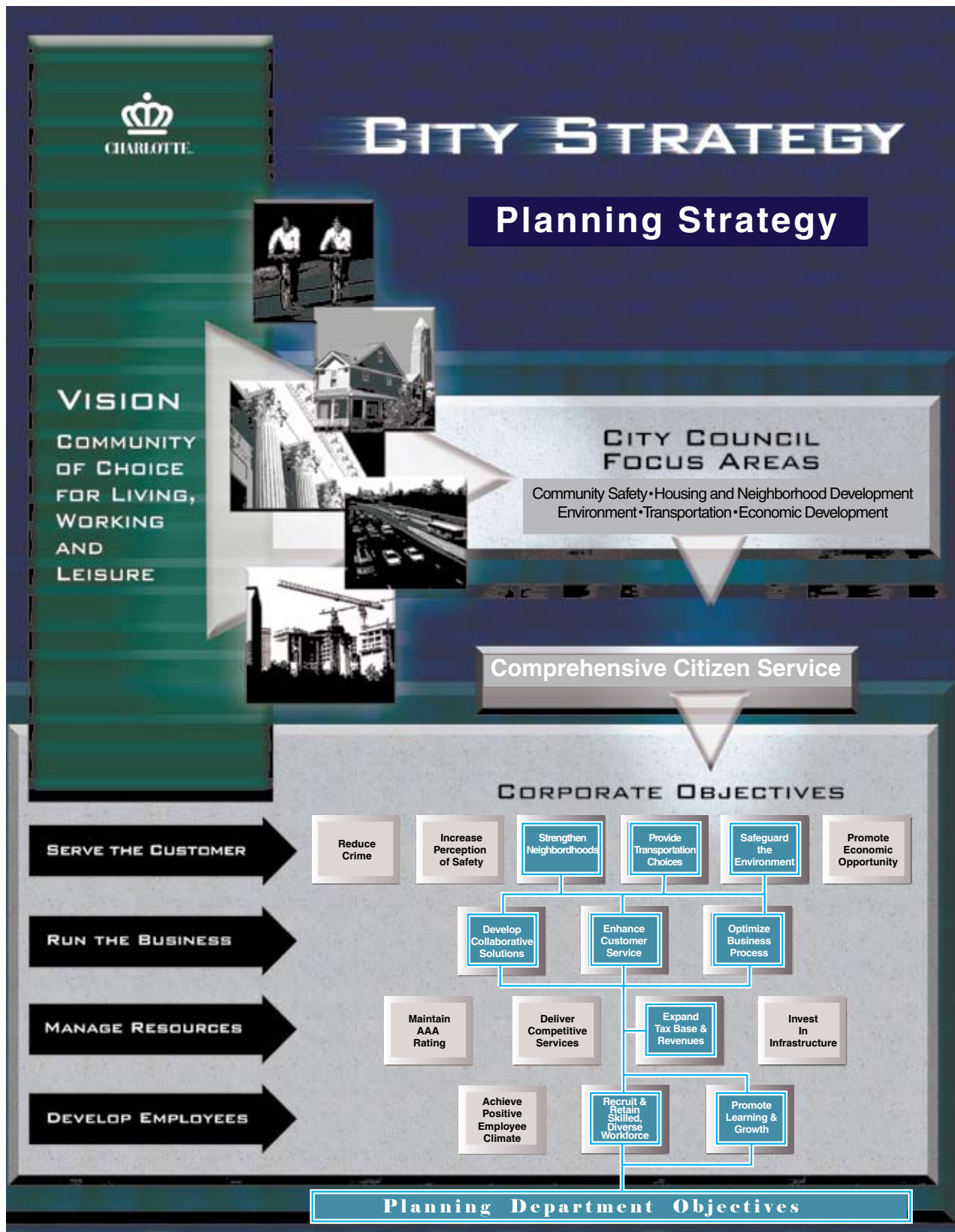
Subdivision Plan Review: Ninety percent of plans were reviewed within 20 days. (The goal was ninety percent.)

Customer Service Rating: Achieved a rating of 4.33 out of 5 based upon customer comments. (The goal was 4.0.)



Expand Tax Base & Revenues

Annexation: Planning staff coordinated the annexation of seven areas into the City in June 2009. This added 11.1 square miles, 18,000 people and \$1.5 billion in real property tax value to the City.





B. Links to Corporate Strategy

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

Serve the **Customer**

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

Run the **Business**

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

Manage **Resources**

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

Develop **Employees**

The complex planning issues that face the community make it vitally important for the Planning Department to retain and hire competent staff. To maintain the level of knowledge, expertise and creativity needed to meet the workload and customer demands, constant development of staff talent is needed; therefore, employee training and development continues to be a high priority for the Planning Department. Although budget constraints have curtailed our external training and travel, we are using the skills and knowledge of staff to provide internal training.



C. Strategic Initiatives

The table below identifies the most significant initiatives the Planning Department will undertake in FY2010 and how they align with the City's corporate objectives and/or focus areas.

	KBU Initiative	Corporate Strategy
Serve the Customer	Promote quality growth and development by: - Developing area plans - Drafting text amendments to the Zoning Ordinance to implement community's vision	Corporate Objective: Strengthen Neighborhoods Focus Area: Economic Development
	Prioritize, design, construct and maintain convenient and efficient transportation facilities by: - Issuing guidelines and processes related to USDG in development review/rezoning process related to conflict resolution - Updating MUMPO 2035 Long Range Transportation Plan - Continuing planning for Northeast and North Corridors	Corporate Objective: Provide Transportation Choices Focus Area: Transportation
	Support environmental sustainability by: - Implementing the General Development Policies Environmental Chapter - Reinforcing rezoning decisions consistent with adopted plans and adopted environmentally sensitive site design policies	Corporate Objective: Safeguard the Environment Focus Area: Environment
Run the Business	Continue implementation of the Centers, Corridors and Wedges Growth Framework policy by: - Monitoring the percent of housing, office development and employment within Centers and Corridors - Implementing area plan capital projects - Adopting Centers, Corridors and Wedges document	Corporate Objective: Collaborative Solutions Focus Area: Transportation
	Improving permitting process by: - Improving the efficiency of plan review services - Incorporating ACCELA software into rezoning process - Supporting digital subdivision submittal process	Corporate Objective: Collaborative Solutions Focus Area: Economic Development
	Share the community vision by: - Presenting to various community and business organizations - Working with Planning Commission to implement their priority work program items	Corporate Objective: Collaborative Solutions Focus Area: Housing and Neighborhood Development
	Improve customer service levels by: Reorganizing and reformatting the Zoning Ordinance	Corporate Objective: Enhance Customer Service Focus Area: Economic Development & Housing and Neighborhood Development
	Optimize Business Process by: Implementing department reorganization	Corporate Objective: Optimize Business Process Focus Area: Economic Development





III. Service Delivery

A. Service Delivery

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

Core Service Area	Brief Description	Linkage to Balanced Scorecard
Development Services	Responsible for administration of current planning services. Responsibilities include: • Subdivision Administration • Zoning Services • Zoning Administration • Urban Design • Historic District In addition provides support for the Charlotte-Mecklenburg Planning Commission Zoning Committee, Zoning Board of Adjustment, and Historic District Commission	Strengthen Neighborhoods Safeguard the Environment Develop Collaborative Solutions Promote Economic Opportunity Enhance Customer Service Optimize Business Processes
Long Range Planning Services	Coordinates collaborative and comprehensive long range land use and transportation planning services which include: • Land Use Planning • Mecklenburg-Union Metropolitan Planning Organization (MUMPO) • Research, Information and Technology • Communication/Public Outreach In addition provides support for MUMPO and Charlotte-Mecklenburg Planning Commission Planning Committee	Strengthen Neighborhoods Provide Transportation Choices Safeguard the Environment Promote Economic Opportunity Develop Collaborative Solutions Enhance Customer Service Optimize Business Processes Invest in Infrastructure
Strategic Planning Services	Responsible for Economic Development planning efforts in targeted areas including Center City, distressed business corridors, and transit corridors. Provides support to City and County budget offices and the development of Capital budgets along with implementation of adopted plans and policies. Services include: • Economic Development • Transit Planning Services • Capital Facilities • Plan Implementation • Council Focus Areas and Priorities • Developer Response	Strengthen Neighborhoods Provide Transportation Choices Promote Economic Opportunity Expand Tax Base and Revenues Invest in Infrastructure

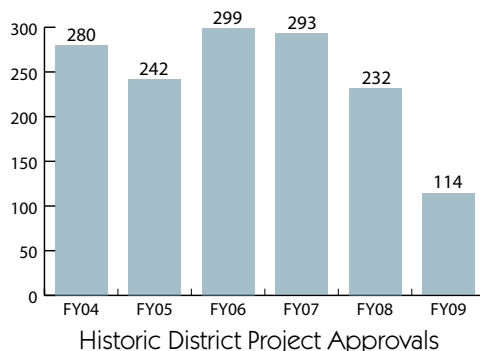
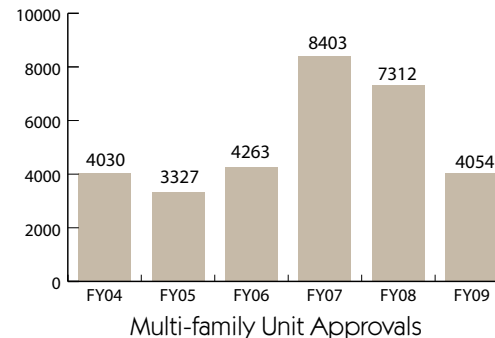
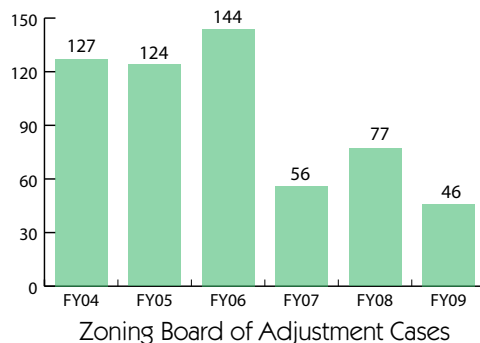
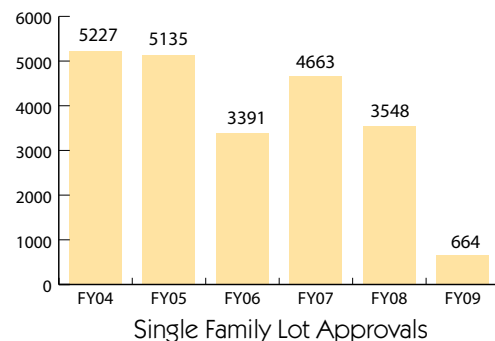
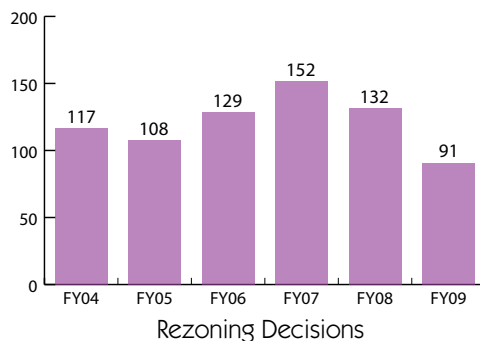


C. Service History and Trends

The slowdown in the national economy was felt locally and is reflected by a decrease in local development activity. The Planning Department primarily tracks the service history of the department's regulatory functions. Data for the number of rezoning decisions, Zoning Board of Adjustment cases, Historic District project approvals and subdivision activity are as follows:

During FY2009 there were 91 rezoning decisions. This figure falls below the 127 case average for the past five years. Zoning Board of Adjustment cases were decreased 40% from FY08 and the 46 cases for FY09 are far below the five year average of 106 cases. Historic District projects approvals for FY2009 (114) are also below the five year average 269 (including administrative approvals).

Development activity for single family lot and multi-family unit approvals was much lower than in previous years. The number of single family lot approvals (664) for FY2009 compares to an average of 4,393 over the past five years. Multi-family unit approvals (4,054) compare to a five year average of 5,467.







IV. Balanced Scorecard and Performance Measures

Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data Target Status YTD			Comments/Explanation
— Serve the Customer —							
Strengthen Neighborhoods C1 Promote quality growth and development that enhances the character, viability and integrity of Neighborhoods throughout Charlotte-Mecklenburg	(a) Number of draft area plans completed	0	Lead	6 draft area plans and/or amendments completed by June 2010			
	\$ (b) Number of draft text amendments developed to implement community's vision	NA	Lag	Draft 7 text amendments by June 2010			
Provide Transportation Choices C2 Prioritize, design, construct and maintain, convenient and efficient transportation facilities to improve safety, neighborhood livability, promote transportation choices and meet land use objective	* (a) Implement clear lines of authority to the Planning Director for determining the application of USDG in the development review/rezoning process	NA	Lead	Issue guide-lines and process for resolving issues related to the application of USDG in the development review/rezoning process by September 2009			
	* (b) Continue planning Northeast and North Corridors	NA	Lag	Provide support for Northeast and North Corridors planning, preliminary engineering, and DEIS through June 2010			

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Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data Target StatusYTD			Comments/Explanation
Safeguard the Environment C3 Support sustainability by making wise decisions regarding growth and development, recognizing the interrelationships between air quality, water resources, land preservation and energy and resource conservation	 (a) Implement GDP Phase II - Environment (four policies) 	6	Lag	Initiate strategies to address four additional General Development Policies – Environment and continue implementation of the strategies initiated in 2008			
	 (b) Percent of rezoning decisions consistent with adopted plans and/or staff recommendation	93.4	Lag	95% of rezoning decisions consistent with adopted plans and/or staff recommendation			
	 (c) Percent of rezoning decisions consistent with adopted environmentally sensitive site design policies	NA	Lag	80% of approved rezonings incorporate environmentally sensitive site design components as per the GDP – Environment			
— Run the Business —							
Develop Collaborative Solutions B1 Continue implementing Centers, Corridors and Wedges Growth Framework	 (a) Percent of residential developments located within Centers and Corridors	55.8 71.9	Lag	Minimum of 40% of all new housing unit permits and 70% of new multi-family unit permits in the city located within the Centers & Corridors			



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Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data Target Status YTD			Comments/Explanation
Develop Collaborative Solutions B1 Continue implementing Centers, Corridors and Wedges Growth Framework	 (b) Percent of office and employment located within Centers and Corridors	97.6 91.4	Lag	Minimum of 75% of new office development square footage and 75% of new employment occurring in the Centers & Corridors			
	 (c) Council approval of updated Centers, Corridors and Wedges Growth Framework	NA	Lead	Adoption of Centers, Corridors and Wedges Growth Framework by March 2010			
B2 Advocate Business Facilitation/Business Process Improvements	 (a) Average number of reviews on all land development permitting submissions	2.33	Lead	Complete Planning Department reviews within an average of 2.5 reviews for commercial subdivision projects by June 2010			
	(b) Support Engineering and Property Management in development of digital subdivision submittal process	NA	Lead	Involvement in 90% of joint digital submittal meetings			
B3 Share the community vision through increased public presentations	(a) Number of presentations made to various community and business organizations	79	Lead	By June 2010 complete: • 75 presentations • 2 Planning 101s Participate in: • Neighborhood Symposium • GIS day			
	(b) Work with Planning Commission to implement their priority work program items	NA	Lead	Number of projects identified and completed by June 30, 2010			

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Corporate Objective and KBU Initiative	Measure	Prior Yr Actual	Lead or Lag	Performance Data			Comments/ Explanation
	\$ Incentive Pay * Focus Area Initiative			Target Status	YTD		
Enhance Customer Service B4 Communicate land use and Transportation objectives as outlined in the Transportation Action Plan	 Implement a multifaceted multi-departmental communication and public outreach plan that explains the City's Transportation Plan and growth strategy	NA	Lead	Work with regional partners to update the MUMPO 2035 Long Range Transportation Plan by March 2010			
B5 Improve Customer Service levels	(a) Reorganization of Zoning Ordinance	NA	Lead	Complete draft of reorganized/reformatted Zoning Ordinance by June 2010			
	(b) Level of customer satisfaction	4.33	Lag	Achieve 4.0 overall rating in Customer Service (1-5 scale)			
B6 Shorten the time it takes for a customer to get a subdivision plan reviewed	Percent of subdivision plans reviewed within 20 days	90%	Lag	90% of plans reviewed within 20 days			
Optimize Business Process B7 Data management and development tracking	Create Development Services digital database	NA	Lead	Create a Geodatabase Strategy by December 2010			



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Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data Target StatusYTD			Comments/Explanation
Optimize Business Process B8 Apply shared technologies to improve service delivery	(a) Development and delivery of GIS tools	4	Lead	Develop, demonstrate and instruct Planning staff in the use of four GIS tools related to service delivery by June 2010			
	(b) Use of ACCELA for rezoning process	NA	Lead	Full implementation of ACCELA for the rezoning process by June 2010			
B9 Update Organizational Restructuring	Implement Department reorganization	N/A	Lead	Update plan for department reorganization by December 2009			
B10 Zoning Board of Adjustment workload reduction	Reduce number of cases	40%	Lead	Reduce number of cases, appeals and variances going to the ZBA by 5% from FY2009 case load			
— Manage Resources —							
Expand Tax Base and Revenues R1 Promote infill development/redevelopment in the Center City's distressed business districts and adjacent neighborhoods and transit stations	* Number of recommended new capital projects implemented in area plans.	4	Lead	Initiate two new area plan capital projects by June 2010			



Corporate Objective and KBU Initiative	Measure \$ Incentive Pay * Focus Area Initiative	Prior Yr Actual	Lead or Lag	Performance Data Target StatusYTD			Comments/Explanation
Expand Tax Base and Revenues R2 Continue Annexation Process	2011 Annexation Planning	NA	Lead	Identify annexation qualifying areas by June 2010			
R3 Support Census Complete Count Committee	Provide logistical support to Committee for 2010 Census	NA	Lead	Coordinate with Corporate Communications, committee members and local partners through June 2010			
— Develop Employees —							
Recruit and Retain a Skilled and Diverse Workforce E1 Provide appropriate training and development opportunities	Update and Implementation of Training Plan	NA	Lead	Develop an internal cross-training plan by December 2009 and implement 50% by June 2010			
Promote Learning and Growth E2 Provide appropriate wellness training	a) Support healthy nutrition	100%	Lead	Implement the Wellness Works Healthy Nutrition Guidelines for 50% of KBU sponsored events and meetings and employee initiated events			
	\$ (b) Support work-site environment objectives	88%	Lead	Incorporate a wellness minute at 75% of staff meetings - wellness education minute led and performed by staff			





V. Resource Allocation Summary

A. Service Level Change (SLC)

The total amount of Service Level Changes is \$0.

B. Change to Current Level (CCL)

The recommended current level changes are \$0.

C. Technology Requests

\$ 0

Base Budget:

The Charlotte-Mecklenburg Planning Department requests a total budget allocation of \$5,009,276 for FY2010.

Revenues:

Total revenues for Fiscal Year 2009 are estimated at \$335,440.

Departmental Charges:

Two divisions within Planning have support from three other KBUs. This support is tracked, monitored and charged via departmental charges. Three positions in Planning are funded by CATS with a charge back of \$205,148 in FY2010. Charges are made to the CIP for \$20,394 for a gap in CATS funding and a charge of \$148,691 for a gap in User Fee Revenue. Planning-MUMPO support has charges of \$100,000 to CDOT reimbursement from the Federal UPWP funds. Neighborhood and Business Services and Engineering and Property Management contribute \$118,001 to Planning's Zoning Administration Section.

Change to Current Level:

\$0

Service Level Change:

\$ 0



D. KBU Overview Page for Recommended Budget

Summary

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

- Coordinating the zoning, zoning administration and subdivision review processes
- Guiding growth and enhancing design of the city and county
- Revitalizing and enhancing of neighborhoods, business areas and transit corridors; and
- Planning for development of the Center City and other major activity centers.

Vital Statistics for FY09

- Reviewed 91 rezoning petitions
- Heard 46 ZBA cases
- Approved 114 HDC projects
- Approved 664 single family lots
- Approved 4,054 multi-family units

	FY09	FY10	FY11
Budget	\$5,620,386	\$5,009,276	\$5,212,990
Positions	63	63	63

Accomplishments

- All six South Corridor station area plans covering eight station areas were adopted.
- Met our targets for residential and non-residential development in Centers and Corridors.
- Transit Oriented Development (TOD) and Transit Supportive (TS) rezoning text amendments were adopted.
- Supported CATS in planning for North and Northeast transit corridors.
- Initiated four area plan capital projects.
- Strategies were initiated to address six of fifteen GDP Environment policies.
- The 2009 annexation process was successfully coordinated by Planning staff.
- Developed a plan review conflict resolution process.
- Reduced the number of Zoning Board of Adjustment cases by 40%.

Service Delivery Challenges

Development Activity During this era of economic uncertainty, the department will continue to provide quality services and make sure that we maintain highly skilled resources. Maintaining resources is also critical to prevent a decrease in services when the economy improves. The significant downturn in development activity is reflected in the number of occurrences of rezoning and subdivision submittals. While development activity is at a slower pace, staff will have opportunities to focus on priority projects which were either previously considered for contractual services or placed on hold due to heavy workloads. The reorganization of the Zoning Ordinance is an example of a major staff undertaking for FY2010.

Integration of Technology into Business Processes Planning would like to better integrate technology into its business processes. One goal is to pursue digital submittal whereby developers provide their plans digitally and they are then reviewed and approved digitally. Preliminary work has also been done to develop a disaster recovery plan whereby many of our historic files are converted to a digital medium. Incorporation of ACCELA software into the rezoning process and dissemination of geographic information tools are other technology goals.

Department Reorganization Planning is reorganizing and creating three Assistant Director positions covering: (1) Developmental Services, (2) Long Range Planning Services and (3) Strategic Planning Services. Implementation of this plan began August 1, 2008 with recruitment and any job reclassifications to be completed by June 2009. Budget shortfalls delayed this process and the department is operating under an interim management structure.

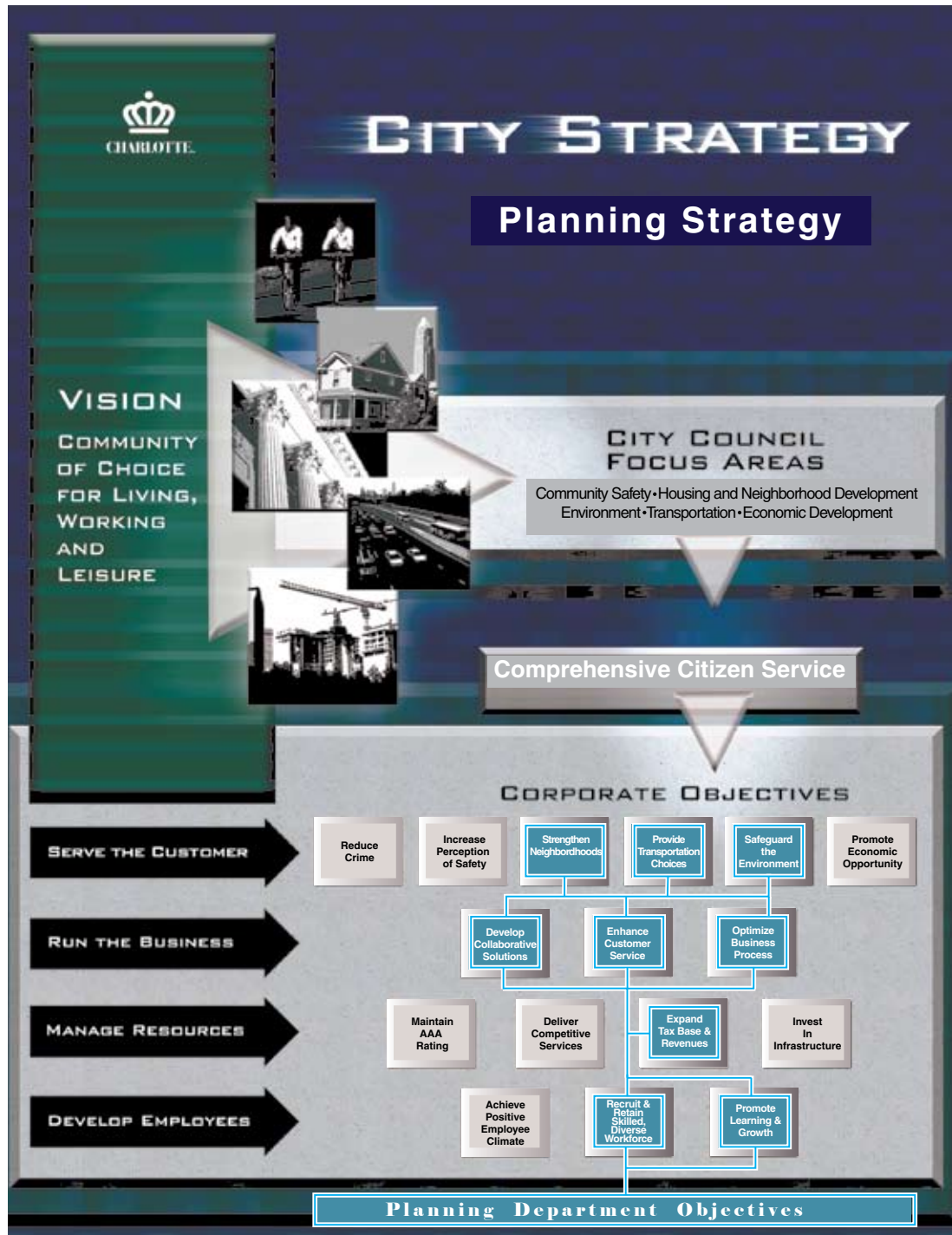






VI. Appendices

A. KBU Link to Corporate Scorecard





B. Service Level Change Summary

\$ 0



C. Service Level Change Pages from Budget System

none



D. Departmental Revenues Summary

Planning Department		
Regulatory Fees	FY09 Estimated Revenue	FY10 Estimated Revenue
REZONING:		
Rezoning (Single Family - by Right)	\$750	\$1,300
Rezoning (Single Family - Conditional)	\$2,100	\$1,800
Rezoning (Multi-Family - by Right)	\$0	\$500
Rezoning (Multi-Family - Conditional)	\$18,850	\$24,000
Rezoning (Other - by Right)	\$17,950	\$27,000
Rezoning (Other - Conditional)	\$83,625	\$105,000
Text Amendment	\$2,675	\$4,000
Administrative Site Plan Approval	\$7,965	\$5,600
Sign Flex Option	\$1,100	\$1,200
SUBDIVISION REVIEW:		
Single Family (Streets)	\$10,000	\$15,000
Non-Residential	\$9,050	\$10,000
Plan Revisions	\$36,320	\$27,000
Variances & Appeals	\$0	\$2,300
Plats, Regular	\$21,450	\$27,000
Plats, Revisions	\$29,610	\$36,000
Plats, Condo	\$5,625	\$7,000
Planned Multi-Family Review	\$22,825	\$25,000
URBAN PLAN REVIEW:		
Urban Plan Review:	\$34,300	\$34,000
ZONING ADMINISTRATION:		
Appeals (Residential)	\$600	\$500
Appeals (Non-Residential)	\$2,100	\$3,000
Variance (Residential)	\$7,620	\$7,000
Variance (Non-Residential)	\$18,975	\$24,000
Administrative Variance (Residential)	\$1,950	\$1,300
Administrative Variance (Non-Residential)	\$0	\$500
TOTAL	\$335,440	\$390,000



E. KBU Overview Page for Recommended Budget

Summary

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

- Coordinating the zoning, zoning administration and subdivision review processes
- Guiding growth and enhancing design of the city and county
- Revitalizing and enhancing of neighborhoods, business areas and transit corridors; and
- Planning for development of the Center City and other major activity centers.

Vital Statistics for FY09

- Reviewed 91 rezoning petitions
- Heard 46 ZBA cases
- Approved 114 HDC projects
- Approved 664 single family lots
- Approved 4,054 multi-family units

	FY09	FY10	FY11
Budget	\$5,620,386	\$5,009,276	\$5,212,990
Positions	63	63	63

Accomplishments

- All six South Corridor station area plans covering eight station areas were adopted.
- Met our targets for residential and non-residential development in Centers and Corridors.
- Transit Oriented Development (TOD) and Transit Supportive (TS) rezoning text amendments were adopted.
- Supported CATS in planning for North and Northeast transit corridors.
- Initiated four area plan capital projects.
- Strategies were initiated to address six of fifteen GDP Environment policies.
- The 2009 annexation process was successfully coordinated by Planning staff.
- Developed a plan review conflict resolution process.
- Reduced the number of Zoning Board of Adjustment cases by 40%.

Service Delivery Challenges

Development Activity During this era of economic uncertainty, the department will continue to provide quality services and make sure that we maintain highly skilled resources. Maintaining resources is also critical to prevent a decrease in services when the economy improves. The significant downturn in development activity is reflected in the number of occurrences of rezoning and subdivision submittals. While development activity is at a slower pace, staff will have opportunities to focus on priority projects which were either previously considered for contractual services or placed on hold due to heavy workloads. The reorganization of the Zoning Ordinance is an example of a major staff undertaking for FY2010.

Integration of Technology into Business Processes Planning would like to better integrate technology into its business processes. One goal is to pursue digital submittal whereby developers provide their plans digitally and they are then reviewed and approved digitally. Preliminary work has also been done to develop a disaster recovery plan whereby many of our historic files are converted to a digital medium. Incorporation of ACCELA software into the rezoning process and dissemination of geographic information tools are other technology goals.

Department Reorganization Planning is reorganizing and creating three Assistant Director positions covering: (1) Developmental Services, (2) Long Range Planning Services and (3) Strategic Planning Services. Implementation of this plan began August 1, 2008 with recruitment and any job reclassifications to be completed by June 2009. Budget shortfalls delayed this process and the department is operating under an interim management structure.



F. Measure Validation Forms

Planning Number of Draft Area Plans/Plan Amendments Completed

Corporate Objective:	Strengthen Neighborhoods
KBU Initiative:	Promote quality growth and development that enhances the character, viability and integrity of Neighborhoods throughout Charlotte-Mecklenburg.
Measure and Target:	Number of draft Area Plans (includes Pedscape-type plans) or draft Plan Amendments completed. Target is completion of six draft plans or plan amendments or any combination of either totalling six.
Units of Measure:	Number
Frequency of Update:	Annually - Fiscal Year
Measurement Intent:	Area planning strengthens neighborhoods by helping residents work together to: better understand the dynamics of growth and development, create a shared vision for the future of their community, and develop strategies to help realize that vision.
Measurement Formula:	Actual number of draft area plans or draft plan amendment documents completed between July 1, 2009 and June 30, 2010.
Data Elements and Sources:	Plans or plan amendment documents
Source For and Approach to Setting Targets:	Long range planning is a vital planning service provided to the community. Existing workloads and the complexity of planning process constrains our ability to complete more than six draft plans/draft plan amendments.
Data Contact:	Melony McCullough
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Melony McCullough
Notes/ Assumptions:	C1 (a)



Planning Text Amendments

Corporate Objective:	Strengthen Neighborhoods
KBU Initiative:	Promote quality growth and development that enhances the character, viability and integrity of Neighborhoods throughout Charlotte-Mecklenburg
Measure and Target:	Number of draft text amendments developed to implement community's vision. Target is to draft seven text amendments by June 30, 2010
Units of Measure:	Text amendment
Frequency of Update:	NA
Measurement Intent:	To continually update ordinances
Measurement Formula:	Completion of seven text amendments
Data Elements and Sources:	Text amendments
Source For and Approach to Setting Targets:	Planning Director and Leadership Team
Data Contact:	Sandra Montgomery
Target Setting Responsibility	Planning Director
Accountability for Meeting Target:	Planning Department Leadership Team
Tracking/ Reporting Responsibility:	Sandra Montgomery
Notes/ Assumptions:	C1 (b)

*Planning* Urban Street Design Guidelines

Corporate Objective:	Provide Transportation Choices
KBU Initiative: *	Prioritize, design, construct and maintain convenient and efficient transportation facilities to improve safety, neighborhood livability, promote transportation choices and meet land use objectives.
Measure and Target:	Implement clear lines of authority to the Planning Director for determining the application of USDG in the development review/rezoning process. Target is to issue guidelines and process for resolving issues by September 2009.
Units of Measure:	Completion of guidelines and procedures
Frequency of Update:	Not Applicable
Measurement Intent:	To ensure that decisions can be made promptly and that impasses among departments will not extend the decision making time frame.
Measurement Formula:	Development of guidelines and procedures by September 30, 2009.
Data Elements and Sources:	Urban Street Design Guidelines
Source For and Approach to Setting Targets:	Transportation Focus Area Initiative
Data Contact:	Cheryl Neely
Target Setting Responsibility	Transportation Cabinet
Accountability for Meeting Target:	Debra Campbell
Tracking/ Reporting Responsibility:	Cheryl Neely
Notes/ Assumptions:	C2 (a)



Planning Planning for Northeast and North Corridors

Corporate Objective:	Provide Transportation Choices
KBU Initiative: *	Prioritize, design, construct and maintain convenient and efficient transportation facilities to improve safety, neighborhood livability, promote transportation choices and meet land use objectives.
Measure and Target:	Support CATS in planning for Northeast and North corridors. Target is to continue support through June 2010.
Units of Measure:	NA
Frequency of Update:	Semi-annually
Measurement Intent:	Completion of the EIS and complementary land use components for each transit corridor is critical for implementation of the CATS system plan and the land use planning that are part of the City's integrated land use and transit planning initiative. This measure will be an indicator of progress for the City's transit and land use program..
Measurement Formula:	This is not applicable.
Data Elements and Sources:	Participation in meetings called by CATS to achieve goal and meeting required assignment deadlines.
Source For and Approach to Setting Targets:	Integrating land use and transit planning is a high priority for Council and Planning. We need to plan for future development that will be transit friendly in these areas.
Data Contact:	Kathy Cornett/Jonathan Wells
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Leadership Team
Tracking/ Reporting Responsibility:	Leadership Team
Notes/ Assumptions:	C2 (b)



Planning GDP Phase II - Environment

Corporate Objective:	Safeguard the Environment
KBU Initiative: *	Support sustainability by making wise decisions regarding growth and development, recognizing the interrelationships between air quality, water resources, land preservation and energy and resource conservation.
Measure and Target: \$	Implement GDP Phase II - Environment Initiate strategies to address 4 additional General Development Policies - Environment by June 2010 and continue implementation of the strategies initiated in 2008.
Units of Measure:	Fifteen recommended policies
Frequency of Update:	Mid-year and year end
Measurement Intent:	To help minimize the environmental impacts of future land use and land development activities
Measurement Formula:	Number of new* policies addressed in whole or in part. Note that one strategy may address multiple policies. * Strategies initiated in 2008 addressed Policies 1.a, 1.c, 2.c, 3.a, 3.b and 4.a.
Data Elements and Sources:	Land Use and development plans, practices and initiatives
Source For and Approach to Setting Targets:	Environmental Chapter of GDP
Data Contact:	Garet Johnson
Target Setting Responsibility	Environmental Cabinet
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Garet Johnson
Notes/ Assumptions:	C3 (a)



Planning Rezoning Consistent with Plans

Corporate Objective:	Safeguard the Environment
KBU Initiative: *	Support sustainability by making wise decisions regarding growth and development, recognizing the interrelationships between air quality, water resources, land preservation and energy and resource conservation.
Measure and Target:	Rezoning consistent with plans. Target is 95% of rezoning decisions consistent with the adopted plan and/or staff recommendation.
Units of Measure:	Number of Rezoning Petitions
Frequency of Update:	Mid-year and year end
Measurement Intent:	The number of decisions that are consistent with the land use recommendations reflects the Planning Department's growing need to continue to provide good information to elected officials in support of adopted plan policies.
Measurement Formula:	The number of rezoning cases for which final decisions have been made are examined to determine if they were consistent or inconsistent with the recommended land use.
Data Elements and Sources:	The data elements included in the measure are: The number of cases decided upon; if they were consistent or inconsistent with the land use recommendations and the City Council action.
Source For and Approach to Setting Targets:	The Planning Department's staff log that is maintained by the Land Development Program Area provides the information and data for this measure.
Data Contact:	Tammie Keplinger
Target Setting Responsibility	Environmental Cabinet
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Tammie Keplinger
Notes/ Assumptions:	C3 (b)

*Planning* Environmentally Sensitive Rezonings

Corporate Objective:	Safeguard the Environment
KBU Initiative: *	Support sustainability by making wise decisions regarding growth and development, recognizing the interrelationships between air quality, water resources, land preservation and energy and resource conservation.
Measure and Target:	Percent of rezoning decisions consistent with adopted environmentally sensitive design policies. Target is that 80 percent of approved rezonings incorporate environmentally sensitive site design components as per the GDP -Environment.
Units of Measure:	Approved Rezoning Decisions
Frequency of Update:	Mid-year and year end
Measurement Intent:	Support of Environmental sustainability
Measurement Formula:	Eighty percent of approved rezoning incorporate environmentally sensitive site design components.
Data Elements and Sources:	Land Use and development plans, practices and initiatives
Source For and Approach to Setting Targets:	Environmental Chapter of GDP
Data Contact:	Tammie Keplinger
Target Setting Responsibility	Environmental Cabinet
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Tammie Keplinger
Notes/ Assumptions:	C3 (c)



Planning Centers and Corridors - New Residential

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



Planning Centers and Corridors - Office Space/Employment

Corporate Objective:	Develop Collaborative Solutions
KBU Initiative: *	Continue implementation of Centers, Corridors and Wedges Growth Framework
Measure and Target:	Centers and Corridors. Target is to have a minimum of 75% of new office development square footage and 75% of new employment located within the area.
Units of Measure:	Square feet of new office space.
Frequency of Update:	Mid-year and year end
Measurement Intent:	To encourage most of our future higher intensity development to be located within areas where transportation infrastructure either already exists to support it or where improvements are planned and/or can be targeted to best support it.
Measurement Formula:	Total sq. ft. of new or additional office space within centers and corridors/total sq. ft. of new or additional office space within Charlotte's sphere > 75%; and number of new employees in centers and corridors/number of new employees in Charlotte's sphere > 75%.
Data Elements and Sources:	LUESA - Building permits, centers and corridors feature class, streets feature class, spheres of influence feature class, employment multipliers (source: City of Orlando).
Source For and Approach to Setting Targets:	Target was identified in the Transportation Action Plan, and subsequently in the Transportation Focus Area Plan and the Environmental Focus Area Plan.
Data Contact:	Ruchi Agarwal
Target Setting Responsibility	Transportation Cabinet, Environment Cabinet
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Ruchi Agarwal
Notes/ Assumptions:	B1 (b)



Planning Centers, Corridors and Wedges Growth Framework

Corporate Objective:	Develop Collaborative Solutions
KBU Initiative:	Continued Implementation of Centers, Corridors and Wedges Growth Framework
Measure and Target:	Update of Centers, Corridors and Wedges Growth Framework. Target is adoption by March 2010.
Units of Measure:	Adoption
Frequency of Update:	Mid-year and year end
Measurement Intent:	This measure is intended to be an indicator for progress toward the City's goal of integrating land use and transportation. In addition, it will signal the development of a refined approach to the Centers and Corridors policy.
Measurement Formula:	Adoption of revised centers, corridors and wedges.
Data Elements and Sources:	Current adopted policy
Source For and Approach to Setting Targets:	This task is part of the larger Transportation Action Plan process which is an adopted 2004 Council priority.
Data Contact:	Laura Harmon
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Planning, CDOT, and CATS
Tracking/ Reporting Responsibility:	Laura Harmon
Notes/ Assumptions:	B1 (c)

*Planning* Plan Review - Number of Reviews

Corporate Objective:	Develop Collaborative Solutions
KBU Initiative: 	Advocate Business Facilitation/Business Process Improvements
Measure and Target:	Improve efficiency of plan review. Target is to complete Planning Department commercial subdivision project reviews within an average of 2.5 review.
Units of Measure:	Commercial Subdivision Plan Review
Frequency of Update:	Mid-year and year end
Measurement Intent:	To insure that plan review time is minimized
Measurement Formula:	Complete Planning Department Commercial Subdivision plan reviews in an average of 2.5 reviews or less
Data Elements and Sources:	Commercial Subdivisions plans
Source For and Approach to Setting Targets:	Council Focus Area Initiative
Data Contact:	Linda Beverly
Target Setting Responsibility	Council and Engineering & Property Management Land Development Action Plan
Accountability for Meeting Target:	Engineering is lead - Planning is responsible for commercial subdivision plan review
Tracking/ Reporting Responsibility:	Shannon Frye
Notes/ Assumptions:	B2 (a)



Planning Digital Subdivision Submittal Process

Corporate Objective:	Develop Collaborative Solutions
KBU Initiative:	Advocate Business Facilitation/Business Process Improvements
Measure and Target:	Support Engineering and Property Management in development of digital subdivision submittal process. Target is to participate in ninety percent of joint digital submittal meetings.
Units of Measure:	Digital submittal meetings called by Engineering and Property Management or Planning staff to address the digital submittal process.
Frequency of Update:	Mid-year and year end
Measurement Intent:	To assure coordination of various departments in developing the digital submittal process.
Measurement Formula:	Planning must attend 90% of digital submittal meetings. (Number of digital submittal meetings X .90)
Data Elements and Sources:	Digital submittal meetings called by Engineering and Property Management or Planning Department.
Source For and Approach to Setting Targets:	Planning Department Development Services Division
Data Contact:	Josh Weaver/Brent Wilkinson
Target Setting Responsibility	Linda Beverly
Accountability for Meeting Target:	Planning Department
Tracking/ Reporting Responsibility:	Josh Weaver/Brent Wilkinson
Notes/ Assumptions:	B2 (b)

*Planning***Number of Presentations made to Community and Business Organizations**

Corporate Objective:	Develop Collaborative Solutions
KBU Initiative:	Share the community vision through increased public presentations.
Measure and Target:	Number of presentations made to Community and Business Organizations. Target is to make 75 presentations, hold 2 Planning 101 sessions, and participate in the Neighborhood Symposium and GIS Day activities.
Units of Measure:	Each presentation.
Frequency of Update:	Monthly update to Planning Commission
Measurement Intent:	The measure is intended to ensure that the Planning staff is sharing and communicating the planning vision, processes and issues with the community.
Measurement Formula:	One presentation equals one unit of measure.
Data Elements and Sources:	Individual staff members provide the date, audience, topic and presenter information.
Source For and Approach to Setting Targets:	Data are collected into a report that is included in the monthly Planning Commission Worksession Agenda Packet and which will be updated regularly.
Data Contact:	Zenia Duhaney
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Leadership Team
Tracking/ Reporting Responsibility:	Zenia Duhaney
Notes/ Assumptions:	B3 (a)



Planning Planning Commission Priority Work Program Items

Corporate Objective:	Develop Collaborative Solutions
KBU Initiative:	Share the community vision through increased public presentations
Measure and Target:	Implement Planning Commission work program items. Target is to implement the items identified by the Planning Commission and Planning Director.
Units of Measure:	Work program items
Frequency of Update:	Monthly update to Planning Commission
Measurement Intent:	The measure is intended to help coordinate Planning Commission activities with those of Planning staff.
Measurement Formula:	Completion of identified priority work program items.
Data Elements and Sources:	Work program items
Source For and Approach to Setting Targets:	Planning Director and Leadership Team
Data Contact:	Debra Campbell
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Leadership Team
Tracking/ Reporting Responsibility:	Cheryl Neely/Debra Campbell
Notes/ Assumptions:	B3 (b)

*Planning* MUMPO 2035 Long Range Transportation Plan

Corporate Objective:	Enhance Customer Service
KBU Initiative: *	Communicate land use and transportation objectives as outlined in the Transportation Action Plan
Measure and Target:	Implement a multifaceted multi-departmental communication and public outreach plan that explains the City's Transportation Plan and growth strategy. Target is to update the MUMPO 2035 Long Range Transportation Plan by March 2010.
Units of Measure:	Adoption of plan
Frequency of Update:	Every four years
Measurement Intent:	The intent is to ensure timely updating of the plan in order to maintain compliance with Federal metropolitan planning regulations
Measurement Formula:	Adoption of plan by March 2010
Data Elements and Sources:	Socioeconomic projections (Employment & Housing) to be developed by regional staff Future land use plans (regional staff) Future Year traffic volumes (CDOT)
Source For and Approach to Setting Targets:	The Federal government requires that MPOs classified as Transportation Management Areas develop a Long Range Transportation Plan.
Data Contact:	Bob Cook
Target Setting Responsibility	MPO/Leadership Team
Accountability for Meeting Target:	Planning, CDOT, CATS
Tracking/ Reporting Responsibility:	Bob Cook
Notes/ Assumptions:	B4



Planning Zoning Ordinance Reorganization

Corporate Objective:	Enhance Customer Service
KBU Initiative:	Improve Customer Service Levels
Measure and Target:	Reorganization of Zoning Ordinance. Target is to complete detailed outline of reorganized/reformatted Zoning Ordinance by January 2010
Units of Measure:	NA
Frequency of Update:	Year end
Measurement Intent:	To make the Zoning Ordinance more user friendly
Measurement Formula:	Completion of detailed outline of reorganized Zoning Ordinance by January 2010
Data Elements and Sources:	Existing Zoning Ordinance text
Source For and Approach to Setting Targets:	Planning Director & Planning Department Leadership Team
Data Contact:	Shannon Frye/Sandra Montgomery
Target Setting Responsibility	Planning Department Leadership Team
Accountability for Meeting Target:	Planning Department Leadership Team
Tracking/Reporting Responsibility:	Shannon Frye/Sandra Montgomery
Notes/Assumptions:	B5 (a)

*Planning* Customer Satisfaction (Survey)

Corporate Objective:	Enhance Customer Service
KBU Initiative:	Improve Customer Service Levels
Measure and Target:	Level of Customer Satisfaction (Survey). Target is 4.0 overall rating.
Units of Measure:	1-5 point scale
Frequency of Update:	Mid-year and year end
Measurement Intent:	1-5 point scale with "1" being low or extremely dissatisfied and "5" being high or extremely satisfied.
Measurement Formula:	Each unit of rating (1-5) is multiplied by the number of times that it is chosen by a respondent. The totals of all these calculations are added together and divided by the total number of respondents.
Data Elements and Sources:	Individual customer ratings
Source For and Approach to Setting Targets:	Ratings are extracted from Customer Comment Cards, and other customer service, presentation, meeting and study group surveys.
Data Contact:	Alice Jackson
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	All Planning Staff
Tracking/ Reporting Responsibility:	Alice Jackson
Notes/ Assumptions:	B5 (b)



Planning Shorten Review Times for New Subdivisions Plans

Corporate Objective:	Enhance Customer Service
KBU Initiative:	Shorten the time it takes for a customer to get a new subdivision plan reviewed
Measure and Target:	Percent of new subdivision plans reviewed within 20 days. Target is to review 90% of plans within 20 days. (This is a stretch target.)
Units of Measure:	New Subdivision Plans
Frequency of Update:	Mid-year and year end
Measurement Intent:	While the Charlotte Subdivision Ordinance allows a maximum of 30 days for the review of new subdivision plans, staff tries to provide a higher level of service to meet customers' demands for faster reviews which results in time and money savings to the customer.
Measurement Formula:	$[\# \text{ subdivision reviews done within 20 days} / \# \text{ subdivision reviews}] \times 100\%$
Data Elements and Sources:	ACCELA tracking system is used. The system is designed to measure and report review times on each project.
Source For and Approach to Setting Targets:	Desire to maintain enhanced level of customer service and to challenge staff to work smarter and more efficiently.
Data Contact:	Linda B. Beverly, Subdivision Administration Program Manager
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Subdivision Administration Program Area
Tracking/ Reporting Responsibility:	Shannon Frye
Notes/ Assumptions:	B6

*Planning* Data Management and Development Tracking

Corporate Objective:	Optimize Business Process
KBU Initiative:	Data Management and Development Tracking
Measure and Target:	Create a Development Services digital database. Target is to create a Geodatabase Strategy by December 2010
Units of Measure:	A strategy approved by the Assistant Director of Development Services and Planning Director
Frequency of Update:	NA
Measurement Intent:	To ensure that departmental files are maintained in a digital format to facilitate speed in accessing them, providing better customer service and backup for existing files.
Measurement Formula:	Development of a short written strategy which outlines the department's approach to creating the database
Data Elements and Sources:	Existing and newly created database files
Source For and Approach to Setting Targets:	Planning Department Leadership Team
Data Contact:	Richard Hobbs
Target Setting Responsibility	Laura Harmon
Accountability for Meeting Target:	Development Services Division
Tracking/ Reporting Responsibility:	Richard Hobbs
Notes/ Assumptions:	B7



Planning Geographic Information System (GIS) Tools

Corporate Objective:	Optimize Business Processes
KBU Initiative:	Apply shared technology to improve service delivery
Measure and Target:	Development and delivery of GIS tools. Target is to develop, demonstrate and instruct Planning staff in the use of four GIS tools related to service delivery by June 2010
Units of Measure:	Individual tools developed
Frequency of Update:	Mid-year and year end
Measurement Intent:	To improve efficiency of department by developing tools to assist staff in performing their jobs more quickly
Measurement Formula:	Develop four tools and demonstrate each to staff
Data Elements and Sources:	Four new tools which will be developed after conversations with staff members to determine their needs
Source For and Approach to Setting Targets:	Capital Facilities/GIS staff
Data Contact:	Capital Facilities/GIS staff
Target Setting Responsibility	Capital Facilities/GIS staff
Accountability for Meeting Target:	Jan Whitesell/Lori Quinn
Tracking/Reporting Responsibility:	Jan Whitesell/Lori Quinn
Notes/Assumptions:	B8 (a)

*Planning* Use of ACCELA for Rezoning Process

Corporate Objective:	Optimize Business Process
KBU Initiative:	Apply shared technologies to improve service delivery.
Measure and Target:	Use of ACCELA software for rezoning process. Target is to fully implement ACCELA software into the rezoning process by June 2010.
Units of Measure:	Rezoning Applications
Frequency of Update:	Mid-year and year end
Measurement Intent:	To encourage the department to use a common tracking process for rezoning cases.
Measurement Formula:	All active zoning cases tracked through ACCELA by June 2010.
Data Elements and Sources:	Rezoning Case Data
Source For and Approach to Setting Targets:	Planning Department Leadership Team. The Planning Department continues to integrate technology into business processes.
Data Contact:	Tammie Keplinger
Target Setting Responsibility	Planning Department Development Services Division
Accountability for Meeting Target:	Leadership Team
Tracking/ Reporting Responsibility:	Tammie Keplinger
Notes/ Assumptions:	B8 (b)



Planning Planning Department Reorganization

Corporate Objective:	Optimize Business Processes
KBU Initiative:	Update Organizational Restructuring
Measure and Target:	Implement department reorganization. Target is to update plan for department reorganization by December 31, 2010.
Units of Measure:	Number of positions to be recruited and reassigned
Frequency of Update:	Mid-year and year end
Measurement Intent:	To complete transition to new organizational structure.
Measurement Formula:	Identified number of positions to be recruited or reassigned equal to the number of new hires or reassigned employees.
Data Elements and Sources:	Planning staff positions
Source For and Approach to Setting Targets:	Planning Department Leadership team
Data Contact:	Sandra Stewart
Target Setting Responsibility	Planning Department Leadership Team
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Sandra Stewart
Notes/ Assumptions:	B9

*Planning* Zoning Board of Adjustment Cases

Corporate Objective:	Optimize Business Processes
KBU Initiative:	Zoning Board of Adjustment workload reduction
Measure and Target:	Reduce number of cases. Target is to reduce the number of cases, appeals and variances going to the Zoning Board of Adjustment by 5%.
Units of Measure:	Number of cases, appeals and variances going to ZBA
Frequency of Update:	Mid-year and year end
Measurement Intent:	To improve our processes and minimize the workload for Zoning Board of Adjustment members
Measurement Formula:	Five percent reduction in cases heard by the ZBA, FY09 cases heard was 46. Reduce the number of cases to 43.
Data Elements and Sources:	Minutes from ZBA meetings
Source For and Approach to Setting Targets:	Planning Director wants to improve process and reduce the burden of ZBA members
Data Contact:	Katrina Young
Target Setting Responsibility	Debra Campbell
Accountability for Meeting Target:	Katrina Young
Tracking/ Reporting Responsibility:	Sonda Kennedy
Notes/ Assumptions:	B10



Planning Capital Projects Implementation

Corporate Objective:	Expand Tax Base and Revenues
KBU Initiative: *	Promote infill development/redevelopment in the Center City's distressed business districts and adjacent neighborhoods and transit stations.
Measure and Target:	Number of recommended new capital projects implemented in area plans. Target is to initiate two new projects by June 2010.
Units of Measure:	Initiated projects
Frequency of Update:	Mid-year and year end
Measurement Intent:	To follow through on plan recommendations
Measurement Formula:	Two projects must be initiated
Data Elements and Sources:	Recommended projects from area plans
Source For and Approach to Setting Targets:	City Council approved funds to assist in area plan development by addressing plan recommendations
Data Contact:	Greg Burnham
Target Setting Responsibility	Economic Development and Planning
Accountability for Meeting Target:	Planning
Tracking/Reporting Responsibility:	Greg Burnham
Notes/Assumptions:	R1

*Planning* 2011 Annexation

Corporate Objective:	Expand Tax Base and Revenues
KBU Initiative:	Continue Annexation Process
Measure and Target:	2011 Annexation Planning. Target is to identify 2011 annexation areas by June 2010.
Units of Measure:	Annexation benchmarks
Frequency of Update:	Quarterly or as requested
Measurement Intent:	To ensure that the annexation process is advancing and that legal targets are being met.
Measurement Formula:	The identification of 2011 involuntary annexation areas by June 2010.
Data Elements and Sources:	Housing units, parcels, land use, non-residential development, land area, qualifying area boundary length
Source For and Approach to Setting Targets:	City Council policies related to North Carolina annexation statutes.
Data Contact:	Jonathan Wells
Target Setting Responsibility	City Council
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Jonathan Wells
Notes/ Assumptions:	R2



Planning 2010 Census Support

Corporate Objective:	Expand Tax Base and Revenues
KBU Initiative:	Support Census Complete Count Committee.
Measure and Target:	Provide logistical support to Committee for 2010 Census. Target is to coordinate with Corporate Communications, Committee members and local partners through June 2010.
Units of Measure:	NA
Frequency of Update:	Mid-year and year end
Measurement Intent:	To insure that Mecklenburg County citizens are counted as part of the 2010 Census thereby maximizing the receipt of federal dollars as well as assisting in the reapportionment process.
Measurement Formula:	NA
Data Elements and Sources:	Organizing meetings and assisting with tasks as identified by Committee members.
Source For and Approach to Setting Targets:	City Manager's Office
Data Contact:	Ruchi Agarwal
Target Setting Responsibility	Planning Department Director and Planning Leadership Team
Accountability for Meeting Target:	Planning Department
Tracking/ Reporting Responsibility:	Ruchi Agarwal
Notes/ Assumptions:	R3

*Planning* Training Plan

Corporate Objective:	Recruit and Retain a Skilled and Diverse Workforce
KBU Initiative:	Provide appropriate training and development opportunities
Measure and Target:	Update and implementation of Training Plan. Target is to develop an internal cross-training plan by December 2009 and implement 50% of plan by June 2010.
Units of Measure:	Training elements identified in Training Plan.
Frequency of Update:	Year end
Measurement Intent:	To encourage the department to provide necessary training to develop a staff with appropriate skills to fulfill its mission
Measurement Formula:	Assignment of training responsibilities and completion of 50% of plan.
Data Elements and Sources:	Group and individual training activities compared to training plan goals will be used for measurement
Source For and Approach to Setting Targets:	Planning Director
Data Contact:	Cheryl Neely
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Cheryl Neely
Notes/ Assumptions:	E1



Planning Support Healthy Nutrition

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



Planning Worksite Environment

Corporate Objective:	Promote Learning and Growth
KBU Initiative:	Provide appropriate wellness training
Measure and Target: 	Support worksite environment objectives. Target is to incorporate a wellness minute at 75% of monthly department staff meetings - a wellness education minute led and performed by staff9.
Units of Measure:	Staff meeting agendas will be used to track percentages
Frequency of Update:	Mid-year and year end
Measurement Intent:	Intent is to improve employee health and to decrease City's health care costs
Measurement Formula:	Calculate the percentage of staff meeting agendas that show a wellness minute
Data Elements and Sources:	Staff meeting agendas
Source For and Approach to Setting Targets:	Human Resources Department provided suggested targets. Planning Director and Leadership Team selected from the list
Data Contact:	Penny Cothran
Target Setting Responsibility	Leadership Team
Accountability for Meeting Target:	Planning
Tracking/ Reporting Responsibility:	Penny Cothran/Linda Keich
Notes/ Assumptions:	 (b)

