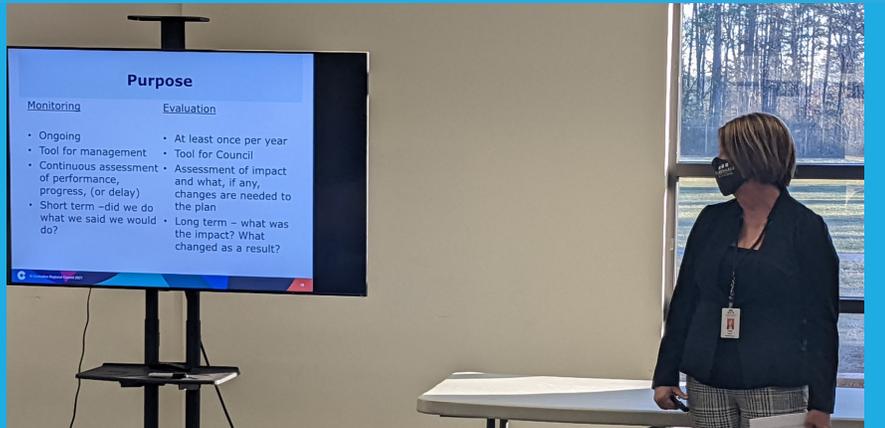
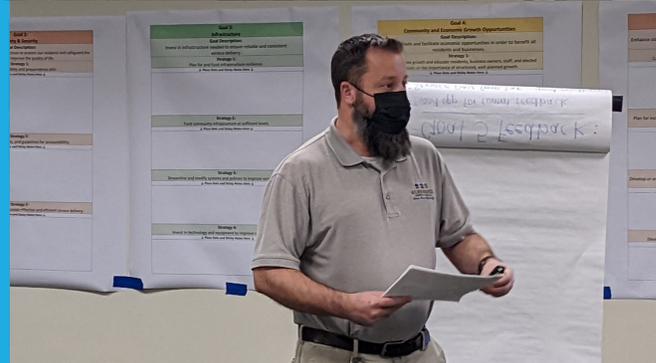
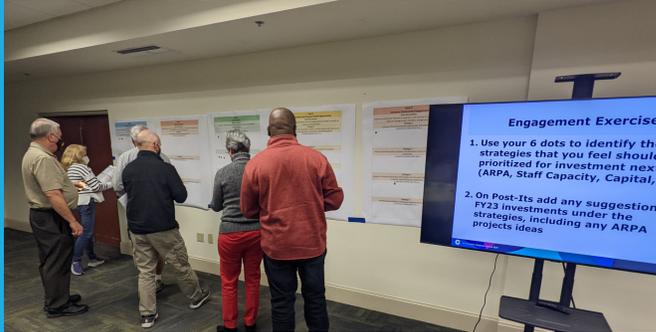
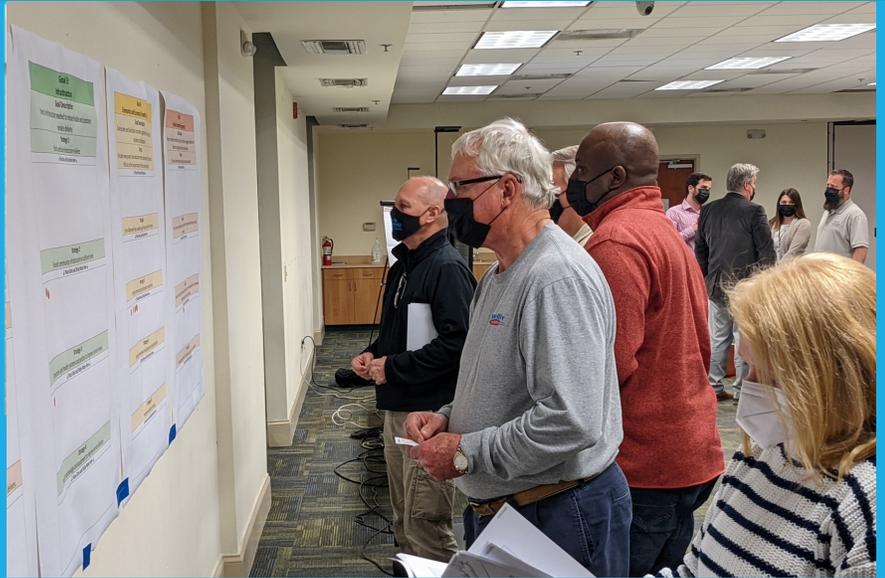
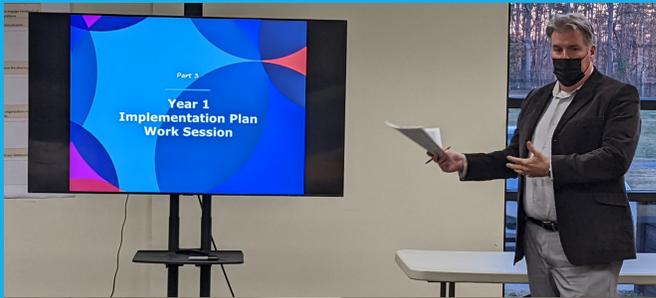




ALBEMARLE

NORTH CAROLINA
Water, Air, Land, Opportunity.

Strategic Plan FY23-FY26



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CENTRALINA
REGIONAL COUNCIL

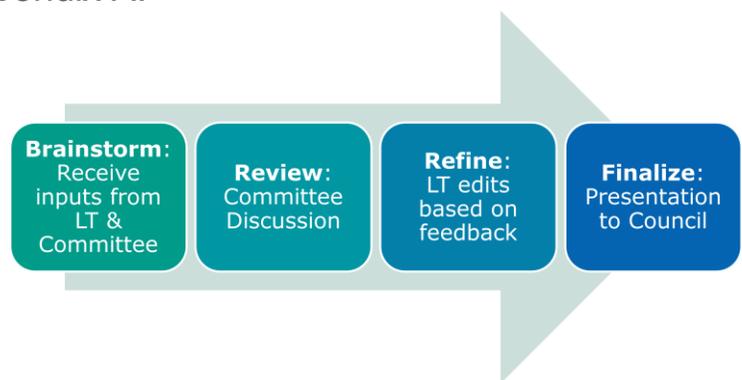
THE PLANNING PROCESS

From 2020 to 2022, the Centralina Regional Council supported the Council, Administration and staff of the City of Albemarle in developing a three-year strategic plan. Through this engagement the City of Albemarle accomplished the following:

- Enhanced its annual budget development process to support strategic objectives and reflect citizen input (2020-2022);
- Implemented a citizen’s survey to receive feedback from stakeholders on city priorities and community needs (2021);
- Established a framework for the strategic plan: a city vision, mission and set of core values (2021);
- Set three-year goals and corresponding strategies to realize the vision (2022);
- Established a year one implementation plan for FY2023 (2022); and
- Developed a strategic plan evaluation and monitoring framework (2022).

Centralina designed the strategic planning process to build on the initial steps completed in 2020. The Council and Administration team thoughtfully progressed through the strategic planning process at a pace that felt comfortable, productive and ensured participation from stakeholders. Moreover, it should be noted that the vast majority of the process was conducted during the COVID-19 global pandemic. The collective City investment of time, resources and staff capacity to develop this plan during the pandemic is especially commendable given the demands that the public health response placed on local government officials and elected leaders. The Council’s leadership throughout the process ensured that the plan reflected their priorities and their commitment to engaging management and experts in the Administration in the development of the plan. A full list of meetings and Steering Committee members are outlined in Appendix A.¹

The graphic to the right illustrates the sequential flow of steps used to develop the plan’s goals, strategies and FY23 implementation tactics. The initial brainstorm stage drew on inputs from the Steering Committee and Administration’s Leadership Team.



Centralina then compiled inputs and led a discussion with the Steering Committee to identify recommendations to share to the Leadership Team for discussion. The Leadership Team reviewed and refined the recommendations in preparation for discussion with Council. The Council reviewed, refined and ultimately endorsed the plan’s goals, strategies and FY 23 implementation tactics.

¹ The full list of meetings and engagements related to the process are outlined in Appendix A

STRATEGIC PLAN COMPONENTS

The City of Albemarle Strategic Plan has the following components

- Foundation:
 - Vision: What we aspire to be in the future. Communicates the long-term vision for the city that the Council and administration are working towards.
 - Mission: Why we exist. Communicates what the Council and administration do to support the vision and why it matters.
 - Core Values: How we will behave and act in executing the mission and in pursuit of the vision. Defines organizational culture. Must be lived, practiced and assessed.
- The Details or “Guts” of a Plan:
 - Goals: Specific goals to achieve the vision, which are typically broad and relevant for a 3-4 year period. Goals are multi-departmental and can be achieved in many different ways.
 - Strategies: Strategies describe the specific mechanisms or components that help to achieve a goal. They may be multi-year and relate to specific actions by a department or group of departments.
 - Tactics: Tactics represent the annual action steps, projects, programs or investments that implement the strategies. Tactics do vary year over year and are department specific. Tactics are documented in an annual implementation plan that also informs budget preparation.
- Evaluation & Monitoring Approach:
 - Performance Measures or KPIs: Quantitative measures that help monitor implementation progress in terms of tactics, strategies, goals achieved or in progress.
 - Impact Measures: Qualitative or quantitative measures that are tracked and measured to demonstrate the overall impact of the City’s strategic plan.
 - Monitoring and evaluation plan to track progress towards implementation and overall impact of the strategic plan towards achieving the vision and goals. An approach to evaluating the plan will help to create a framework for assessing when changes are needed.

STRATEGIC PLAN FOUNDATION



Our Vision

Albemarle will be a place where all people can develop their potential, bringing neighbors together to support a connected community rich in water, air, land and opportunity.

Our Mission

The mission of the City of Albemarle is to provide our citizens with a vibrant quality of life based on sound management, transparency and good stewardship of resources.

Our Core Values

- **Ethics:** We honor the public's trust by displaying the highest standards of honesty, integrity and accountability.
- **Leadership:** We are servant leaders who prioritize the well-being of those in our community.
- **Vision:** Our planning and decisions reflect the thriving community we aspire to be.

THREE YEAR GOALS & STRATEGIES

Organizational Capacity

Invest in our workforce to enhance city operations and efficiency to better serve the community.

1. Fund additional resources and services to support anticipated growth.
2. Develop ongoing feedback and evaluation processes that incentivize continuous improvement and providing excellent levels of service.
3. Provide ongoing training and development to all staff.

Safety & Security

Enhance resources and improve practices to protect our residents and safeguard the city in order to improve quality of life.

1. Develop public safety and preparedness plan.
2. Review resources, policies, and guideline for accountability.
3. Utilize data and technology to increase effective and efficient service delivery.

Infrastructure

Invest in infrastructure needed to ensure reliable and consistent service delivery.

1. Plan for and fund infrastructure resilience.
2. Fund community infrastructure at sufficient levels.
3. Streamline and modify systems and policies to improve service levels.
4. Invest in technology and equipment to improve service delivery.

Community & Economic Growth Opportunities

Guide growth and facilitate economic opportunities in order to benefit all residents and businesses.

1. Anticipate new growth and educate residents, business owners, staff, and elected officials on the importance of structured, well-planned growth
2. Ensure Albemarle has a wide range of housing options for everyone.
3. Diversify community and economic investments.
4. Prioritize Downtown revitalization and beautification.
5. Improve workforce training.

Inclusive Community Engagement

Enhance community amenities, programs, and services to engage residents of different backgrounds, lifestyles, and generations.

1. Cultivate effective community relationships and communication.
2. Plan for inclusive services, programs, and amenities to enhance the diversity of our community.
3. Develop or enhance partnerships with private and non-profit organizations to leverage combined resources for our community.
4. Develop opportunities for continuous feedback from our community.

The FY23 Implementation Plan contains the specific tactics that the City will pursue to achieve the Strategic Plan Goals and Strategies in year one. Each year the implementation plan will be developed and finalized in parallel to the budget process.

MONITORING & EVALUATION

Monitoring Approach

To provide oversight on Strategic Plan implementation, the City will use the following approach to monitoring over the three-year period. Monitoring is a tool for management and will be used by the City Manager to continually assess department progress towards the plan tactics, strategy and ultimately goal completion. The main question assessed in monitoring is: did we do what we said we would do?

Monitoring Responsibilities: Ongoing throughout the year

- Staff: track and report progress; share successes with management
- Manager: manage performance; share updates with Council and Public
- Council: provide guidance to Manager; share progress with Public

Monitoring Steps

1. Departments track and collect data on the following:

- a. Implementation Progress of FY Tactics: #Completed; #In Progress; #Not Started
- b. Impact Measures: collect data on established impact measures assigned to them.

2. Department reports to Manager on a monthly basis. The following is included in monthly Departmental reports:

- a. Number of FY Tactics Completed; In Progress; Not Started.
- b. "Success story" or "challenge"- short narrative to describe tactic progress.
- c. Quantitative report on impact measures metrics for reporting month and compared to prior month.

3. Manager and Directors use monthly progress reports for staff engagement and performance management.

4. Manager provides quarterly report to Council including:

- a. Number of FY Tactics Completed; In Progress; Not Started by reporting quarter.
- b. "Success story"- short narrative to describe tactic progress or completion Recommend one per goal.
- c. Quantitative report on performance metrics for reporting quarter and compared to prior quarter.
- d. As needed, narrative on any guidance sought, decision points or challenges related to FY tactics implementation.

Evaluation Plan

A strategic plan evaluation is conducted on an annual basis to assess the cumulative impact of the plan on the City and identify what, if any, changes need to be made to respond to changing conditions. The evaluation is a tool for the Council and is an important component to establishing transparency and trust with the Public. An evaluation can also identify success stories and challenges to be overcome during implementation. The main questions to be assessed in plan evaluation are: What was the impact of the plan? What has changed in the City because of the plan?

Evaluation Responsibilities: Annually

- Department Directors: assess progress, impacts; identify challenges
- Manager: prepare & submit annual strategic plan evaluation for Council; recommend changes as needed
- Strategic Plan Working Group: review recommended changes
- Council: evaluate plan progress; recommend & approve changes

In the first implementation year of the Strategic Plan, the City will collect data on a set of initial impact measures (shown below) to be used for the evaluation. As noted above, Department Directors will regularly collect data on these indicators and submit to the Manager on a monthly basis as part of the monitoring approach (pending frequency of data availability).

Organizational Capacity	<ul style="list-style-type: none">• Turnover rate,• Number of training hours
Safety & Security	<ul style="list-style-type: none">• Accidents in the workplace;• Amount invested in safety and security infrastructure and practices.
Infrastructure	<ul style="list-style-type: none">• Amount of time city infrastructure is offline
Community and Economic Growth	<ul style="list-style-type: none">• Building permit trends• Amount of investment from businesses
Inclusive Community Engagement	<ul style="list-style-type: none">• Followers on social media channels• Number of in-person community engagement touch points/events.

After the initial round of data collection in year one, the City may augment these impact measures with additional qualitative and/or quantitative data points.

Evaluation process includes the following steps:

1. Mid-Year Assessment

- a. The Strategic Plan Working Group will meet prior to the budget development process (typically December-January) to review monitoring reports and assess conditions that may trigger a change to the plan. The group would determine if any changes to the Strategic Plan Goals or Strategies should be recommended to the Manager. They would also recommend guidance to the Manager on forthcoming fiscal year implementation plan development (tactics).
- b. Manager reviews Working Group recommendations and submits report to Council with recommendations on any changes to the Strategic Plan goals or strategies; as well as, recommended approach for FY implementation plan development (tactics).
- c. Council reviews the Manager's recommendations and makes a determination prior to the start of the budget process.

2. End of Fiscal Year Assessment

- a. The Strategic Plan Working Group will meet at the end of the fiscal year to produce an evaluation of FY Implementation Plan success and accomplishments for Council and external communication.
- b. Manager reviews Working Group findings and submits an Evaluation Report to Council.
- c. Council reviews the Evaluation Report and determines if any changes to the Strategic Plan should be made since the mid-year progress report.
- d. City shares the Evaluation Report with the public.

APPENDIX A:

The table below outlines the numerous meetings that City leaders took part in over the last several years to develop the strategic plan. It does not reflect the countless hours of additional work the City Manager and Department Directors undertook to develop the core content of the plan, prepare for Council work sessions and engage with their staffs. It should be noted that the City collectively invested the time, resources and staff capacity to develop this plan during the COVID-19 global pandemic. This dedication to the shaping of the future of the City of Albemarle is especially noteworthy given the demands that the public health response placed on local government officials and elected leaders.

November 19 & 20, 2019	Work Session with Council – Budget Retreat
February 11, 2020	Work Session with Council – Budget Retreat
July 15, 2020	Leadership Team Retreat
October 28, 2020	Leadership Team Retreat
October – December 2020	Community Survey
November 9 & 10, 2020	Work Session with Council – Vision, Mission, Values
January 21, 2021	Leadership Team Retreat
February 8 & 9 2021	Work Session with Council - Vision, Mission, Values, Budget Priorities
August 8, 2021	Strategic Plan Kick-Off Meeting with City Manager
August 23, 2021	Strategic Plan Kick Off with Steering Committee
October 12, 2021	Steering Committee Meeting – Goal Setting
October 28, 2021	Leadership Team Meeting – Goal Setting

November 4, 2021	Work Session with Council – Goal Endorsement
November 30, 2021	Steering Committee Meeting – Strategy Development
December 1, 2021	Leadership Team Meeting -- Strategy Development
December 9, 2021	Leadership Team Meeting – Strategy Development, Monitoring & Evaluation
December 13, 2021	Work Session with Council – Strategy Endorsement
January 20, 2021	Leadership Team Meeting – FY23 Implementation Plan Development
January 26, 2022	Work Session with Council -FY 23 Implementation Plan Endorsement

Steering Committee Members

- Mayor Pro Tem Martha Sue Hall
- Councilmember Chris Whitley
- Michael Ferris, City Manager
- Lisa Kiser, Parks & Recreation Director
- Jason Bollhorst, Police Chief
- Pierre Brewton, Fire Chief
- Dana Chaney, Human Resources Director
- Keith Tunnell, Economic Development Director
- Jacob Weavil, Finance Director