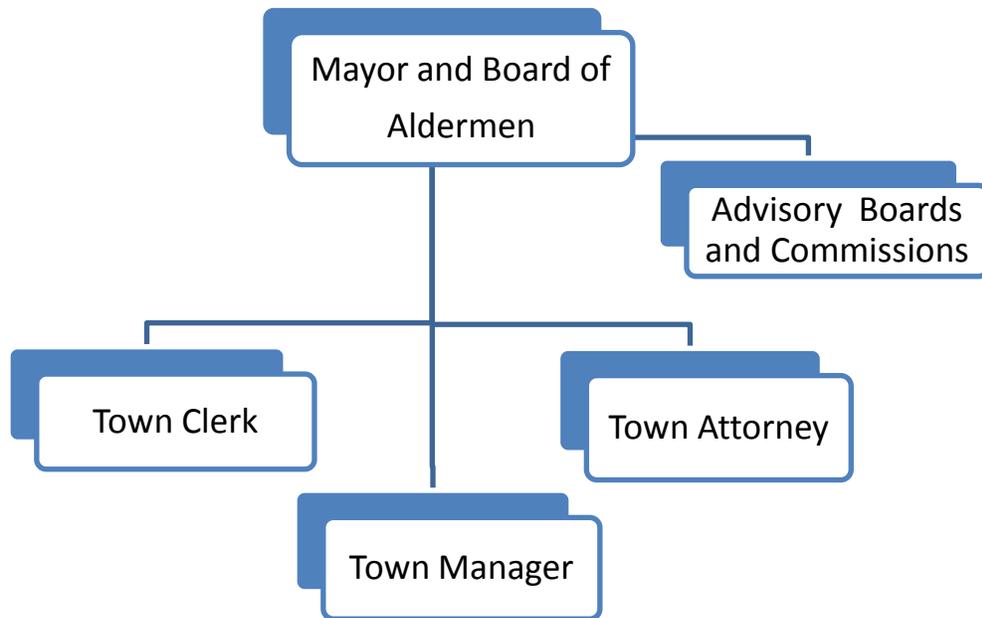


# MAYOR AND BOARD OF ALDERMEN

---



## PURPOSE

As elected officials within the framework of the council/manager form of town government, members of the Board of Aldermen make decisions and set policies to ensure the safety, health, attractiveness and social well-being of the community.

## GOALS

- Diversify revenue stream to maintain ethnic and economic diversity.
- Protect historic neighborhoods and maintain Carrboro's unique identity.
- Improve walkability and public transportation.
- Encourage development that is compact, dense, and appeals to diverse lifestyles and incomes.
- Enhance and sustain quality of life / place issues for everyone.

## SERVICES PROVIDED & ACTIVITIES

- Establishes annual goals for the organization.
- Reviews, reinforces, or alters public policies and long-range planning governing municipal operations and functions.
- Establishes priorities and funding limits through adoption of an annual budget.
- Grants or denies requests for conditional use permits.
- Responds to and communicates with citizens regarding their concerns, perspectives, and initiatives.
- Supervises work and responsibilities of Town Manager, Town Attorney, and Town Clerk.
- Makes appointments to and serves on committees and task forces.
- Participates in county and regional-wide planning and establishment of public policy.

## PREVIOUS YEAR ACCOMPLISHMENTS

- Received Standard and Poor upgrade to AAA ("triple A")
- Smith Level Road Project Completed
- Tree City USA for 30<sup>th</sup> year

- Held annual Arbor Day Observance
- Hybrid Solid Waste Truck secured by CFAT Grant Funds was put into use
- Continued work on Historic Rogers Road Infrastructure
- Maintained Silver Level Designation from the League of American Bicyclists
- MLK Park Master Plan Update Completed

**UPCOMING FISCAL YEAR OBJECTIVES**

- Review downtown parking situation.
- Encourage commercial development, especially local, “green collar”, and arts-related businesses, through zoning changes, the Revolving Loan Fund, the Local Living Economy Task Force, and other initiatives identified at the annual retreat.
- Work to improve housing affordability.

**BUDGET SUMMARY**

	<u>2014-15</u> <u>ACTUAL</u>	<u>2015-16</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>2016-17</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>PCT</u> <u>CHANGE</u>
PERSONNEL	93,031	90,560	101,027	11.6%
OPERATING	158,520	192,100	177,100	-7.8%
<b>TOTAL</b>	<b>\$251,552</b>	<b>\$282,660</b>	<b>\$278,127</b>	<b>-1.6%</b>

**CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

Changes in personnel are due to an increase in insurance costs. Changes in operating cost are associated with the cost for elections from the prior year.

# **ADVISORY BOARDS AND COMMISSIONS**

---

## **PURPOSE**

The Advisory Boards and Commissions advise the Board of Aldermen on issues and policy decisions as provided for in the Carrboro Town Code.

## **SERVICES PROVIDED & ACTIVITIES**

- Review and make comments to the Board of Aldermen on proposed policies, plans and ordinances.
- Make recommendations to the Board of Aldermen as to the need for policies and ordinances.

## **BUDGET SUMMARY**

	<u>2014-15</u> <u>ACTUAL</u>	<u>2015-16</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>2016-17</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>PCT</u> <u>CHANGE</u>
OPERATING	6,628	17,050	17,850	4.7%
<b>TOTAL</b>	<b>\$6,628</b>	<b>\$17,050</b>	<b>\$17,850</b>	<b>4.7%</b>

## **CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

The Advisory Board and Commissions budget is increased slightly with the addition of the Youth Advisory Board.

# GOVERNANCE SUPPORT

---

## PURPOSE

This budget supports local and regional agencies providing community services or information vital to the execution of Board of Aldermen priorities.

## BUDGET SUMMARY

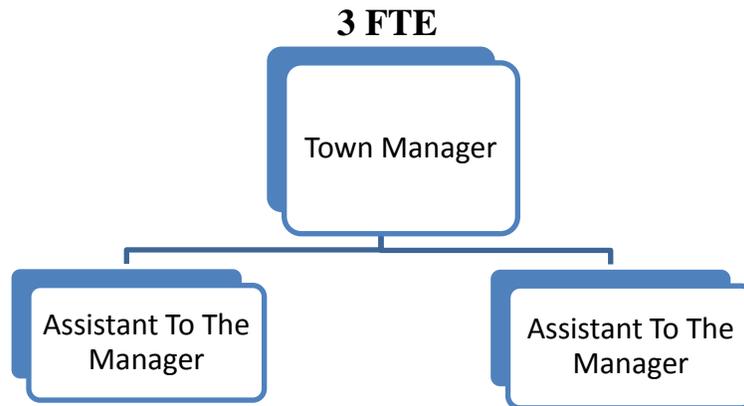
	<u>2014-15</u> <u>ACTUAL</u>	<u>FY 2015-16</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>2016-17</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>PCT</u> <u>CHANGE</u>
OPERATING	518,516	554,856	650,815	17.3%
<b>TOTAL</b>	<b>\$518,516</b>	<b>\$554,856</b>	<b>\$650,815</b>	<b>17.3%</b>

## CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

The increase in operating is due to increases in the Human Services Grant Program, Empowerment, Economic Development Incentive, and Orange County Housing.

# TOWN MANAGER

---



## PURPOSE

The Town Manager serves as primary advisor to, and implements the policies of, the Mayor and Board of Aldermen. The Town Manager communicates these policies to residents and staff, and effectively organizes and manages town staff and resources to respond to the community and residents' needs.

## GOALS

- To lead an organization that functions well internally and implements Board policies in a timely, effective, efficient, and friendly manner.
- To give well-informed, helpful advice to the Board on policy options and other matters.
- To facilitate effective Board action through the presentation of clear, concise agendas.
- To adhere to the professional code of ethics and always work towards the long-term best interests of the Town.
- To ensure staff satisfaction and retention.

## SERVICES PROVIDED & ACTIVITIES

- Provides general guidance and support to town departments in achieving town-wide goals and objectives.
- Seeks capital improvement strategies to meet the needs of the town and organization.
- Studies, develops, and implements policy and program recommendations at the direction of the Board of Aldermen.
- Provides support for the Board of Aldermen.
- Represents the town's interests on local, regional, and state-wide bodies dealing with issues important to Carrboro.
- Conducts and facilitates public communication with the Mayor and Board of Aldermen, residents, employees, and other users of town services.

## PREVIOUS YEAR ACCOMPLISHMENTS

- Received Tree City USA designation for 30<sup>th</sup> Year
- Received GFOA Distinguished Budget Presentation
- Received GFOA Award for Excellence in Financial Reporting

## UPCOMING FISCAL YEAR OBJECTIVES

- Look for ways to continue providing quality services in ways that minimize the impact on the property tax rate.
- Focus on Board's economic development initiatives.

## BUDGET SUMMARY

	<u>2014-15</u> <u>ACTUAL</u>	<u>2015-16</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>2016-17</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>PCT</u> <u>CHANGE</u>
PERSONNEL	321,687	315,435	336,198	6.6%
OPERATING	12,474	43,570	86,645	98.9%
<b>TOTAL</b>	<b>\$334,161</b>	<b>\$359,005</b>	<b>\$422,843</b>	<b>17.8%</b>

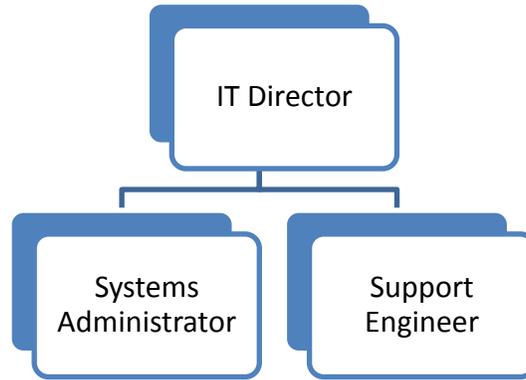
## CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

The Town Manager's budget increased due to the addition of consultant services for a citizen survey and climate action plan.

# INFORMATION TECHNOLOGY

---

**3 FTE**



## **PURPOSE**

To deliver technology-based solutions that are cost-effective and increase the effectiveness and efficiency of many Town services. To work with various external and community organizations, as directed by the Town Manager, to discover mutually beneficial relationships, sharing technology infrastructure, resources and strengths.

## **GOALS**

- To provide the technology to enhance the delivery of Town services and to increase the access to and the quality of vital government data.
- To partner with our customers to understand their business processes and needs and then identify activities that can be effectively streamlined through the application of technology in a manner that is cost-effective, convenient and satisfactory.
- To align technology to business processes throughout Town government.
- To increase business continuity and limit service interruption through the application of technology and infrastructure redundancy.
- To work with county, municipal, educational and other agencies to share, cooperatively build and leverage existing infrastructure.

## **SERVICES PROVIDED & ACTIVITIES**

- Create a Town wide Information Technology Budget and facilitate long term planning through the Capital Improvements Program.
- Provide technology support services for computer, voice and web presence to all departments.
- Provide technology project support and management for departments.
- Manage ongoing departmental application upgrade, patching and security. Manage ongoing operating system upgrades, patching and security.
- Maintain a replacement cycle for desktops and emergency services mobile computers through ongoing replacement cycles of aging inventory.
- Facilitate the collection, storage, security and integrity of electronic data while ensuring appropriate access.
- Provide, maintain and upgrade a reliable, scalable and secure infrastructure.
- Maintain reliable historical data backups for discrete data loss incidents and catastrophic events.

- Maintain, expand and upgrade Town wide phone system.
- Provide technology purchasing expertise to all departments.

### **PREVIOUS YEAR ACCOMPLISHMENTS**

- Completed joint effort by the Town of Carrboro and UNC at Chapel Hill to interconnect fiber optic infrastructure for the purpose of fiber and technical resources sharing.
- Completed connection to MCNC NCREN network getting access to much faster and less expensive internet connectivity.
- Completed integration of Police and Fire records management system with Orange County emergency services computer aided dispatch (CAD) system.
- Began to see NCNGN selected Carrboro non-profits receive seven year no cost 1 Gbps AT&T Gigapower connections.
- Began implementation of a software package to automate and manage land use planning and project review, regulatory management, inspections, code enforcement, citizen requests, asset management and work order management for the Planning Department.
- Began implementation of new records management system for Recreation and Parks Department which will include program registration and facilities booking as well as online registration and credit card processing.
- Continued working with Google Fiber and AT&T through NCNGN to bring more competition to the high speed broadband market in the triangle.
- Completed implementing a professional Standards (Internal Affairs) module for the Police Department.

### **UPCOMING FISCAL YEAR OBJECTIVES**

- Continue to work with Orange County, OWASA, UNC-Chapel Hill, Town of Chapel Hill and Chapel Hill-Carrboro City Schools to interconnect and expand fiber optic networks and share knowledge.
- Continue to work with national Gig.U and regional NCNGN initiatives. NCNGN is a regional effort by four leading Universities and six municipalities seeking to accelerate the deployment of ultra high-speed networks to their surrounding communities.
- Continue to work the Google to bring Google Fiber to the Carrboro Community.
- Continue to work the AT&T to bring U-verse with AT&T GigaPower to the Carrboro Community.
- Continue implementation of land use planning and project review software, regulatory management, inspections, code enforcement, citizen requests, asset management and work order management for the Planning Department.
- Continue implementation of Recreation and Parks new records management system.

### **BOARD PRIORITIES**

IT supports all departments in their effort to meet board priorities & objectives.

### **OBJECTIVES**

1. Identify activities that can be effectively streamlined through the application of technology in a manner that is cost-effective, convenient and satisfactory.
2. Increase access to and the quality of vital government data.
3. Provide the technology to enhance the delivery of town services.
4. Improve business continuity.
5. Maintain reliable historical data backups for discrete data loss incidents and catastrophic events.

**PERFORMANCE MEASURES**

	<b>FY2013-14 ACTUAL</b>	<b>FY2014-15 ACTUAL</b>	<b>FY2015-16 ESTIMATED</b>	<b>FY2016-17 PROJECTED</b>
# of Workstations Supported	175	175	180	180
# of Emergency Services Mobile Terminals Supported	48	48	50	50
Average Hours per Month of Unplanned Application Downtime During Business Hours	<1	<1	<1	<1
# Unsuccessful Backups per Month	2	0	0	0

**BUDGET SUMMARY**

	<u>2014-15 ACTUAL</u>	<u>2015-16 ADOPTED BUDGET</u>	<u>2016-17 ADOPTED BUDGET</u>	<u>PCT CHANGE</u>
<b>PERSONNEL</b>	268,789	266,671	275,494	3.3%
<b>OPERATING</b>	924,653	926,308	983,808	6.2%
<b>CAPITAL OUTLAY</b>	60,250	63,750	92,000	44.3%
<b>TOTAL</b>	<b>\$1,253,692</b>	<b>\$1,256,729</b>	<b>\$1,351,302</b>	<b>7.5%</b>

**CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

Operations increased due to addition of fiber-optics for various projects. Capital outlay increased with the replacement of servers and firewall.

# ECONOMIC AND COMMUNITY DEVELOPMENT

---



## PURPOSE

To support the creative economy, arts and culture; foster a business friendly and supportive environment that encourages local for-profit, social enterprises and non-profit businesses to expand in and new businesses to locate in Carrboro; increase awareness of Carrboro as a arts and entertainment destination; support the travel and tourism industry; and encourage light manufacturing enterprises.

## GOALS

- Diversify and expand the commercial tax base, to create more high paying jobs in town, and to promote the town's image as a place for businesses.
- Create synergy in the downtown through support for the arts and cultural events, promoting and supporting healthy lifestyles and creating a positive business environment for merchants and customers.
- Promote and support locally owned expanding and new start-up business with an emphasis on green and sustainable ventures.
- Seek to provide adequate parking in the downtown to support existing and potential businesses.
- Support the non-profit organizations that provide unmet human services for low-moderate income persons through the Human Services Grant program.
- Promote travel and tourism in Carrboro and raise awareness of Carrboro as a destination.
- Help establish the Carrboro Business Alliance as a self-supporting organization.
- Expand opportunities for Light Manufacturing in the manufacturing zoning districts.

## SERVICES PROVIDED & ACTIVITIES

- Work with all developers and new or expanding businesses to facilitate the project review process and project implementation.
- Administer the Revolving Business Loan Funds including the application processing and billing.
- Provide staffing to the Economic Sustainability Commission.
- Provide administrative support to the Human Services Advisory Board.
- Provide staffing and administrative support to the Carrboro Tourism Development Authority.
- Provide support to the Carrboro Business Alliance.
- Serve on the Chapel Hill Orange County Visitor Bureau Board as Town staff liaison.
- Serve on the Chamber of Commerce Economic and Public Policy Committee as Town staff liaison.
- Facilitate the implementation Local Living Economy Task Force Recommendations.
- Promote Carrboro through implementation of Town adopted branding.

- Provide business counseling and support to new and expanding businesses.
- Manage leases for town leased parking lots.

### **PREVIOUS YEAR ACCOMPLISHMENTS**

- Helped to re-establish the Sunday crafts market, now known as The Bazaar.
- Facilitated the sale of 110 East Main Street condo above ACME.
- Created a brochure to market the town’s Business Loan funds.
- Continued work to build capacity within the Carrboro Business Alliance.
- Worked with the CBA to coordinate several business events, including Carrboro Cheer and Feel the Love campaign.
- Supported the TDA in reviewing 14 applications for events awarding \$44,865.00 in sponsorships including 2 Cat’s Cradle concerts.
- Worked with Public Works to replace town signage with new signage.
- Business retention of 4 Carrboro based businesses including Furniture Lab, New Media Campaigns, Perch Co-working and Wax Poetic.
- For the Love of Carrboro Facebook page has 1972 followers (25% growth) and 687 Twitter followers (12% growth).

### **UPCOMING FISCAL YEAR OBJECTIVES**

- Complete the update of the Local Living Economy Task Force Recommendations and create a new Economic Development Plan.
- Continue marketing the Revolving Loan, the Energy Efficiency Revolving Loan Fund and the Carrboro Business Loan Fund.
- Work with planning staff to revise the program requirements for the EERLF.
- Work with the TDA in administration of the local occupancy tax and develop tools for measuring success.
- Work with the TDA to create a public arts/mural grant program.
- Work with planning staff on implementation of the downtown parking plan when completed.
- Explore second wave business development including services, infrastructure, and job development.
- Continue to support the Carrboro Business Alliance and work toward a self-sustaining organization.
- Work with Orange County Economic Development on bringing economic development incentives to Carrboro.
- Create a database of existing office/retail/commercial space and begin tracking vacancy rates.

### **BOARD PRIORITIES**

Diversify revenue stream to maintain ethnic and economic diversity.  
Enhance and sustain quality of life/place issues for everyone.

### **OBJECTIVES**

1. Diversify and expand the commercial tax base to create more high paying jobs in town and to promote the town’s image as a place for businesses.
2. Explore second wave business development, including services, infrastructure, and job development.
3. Increase the number of affordable energy efficient housing units.
4. Support the outside agency organizations that provide unmet human services for low-moderate income persons.

**PERFORMANCE MEASURES**

	<b>FY2013-14 ACTUAL</b>	<b>FY2014-15 ACTUAL</b>	<b>FY2015-16 ESTIMATED</b>	<b>FY 2016-17 PROJECTED</b>
Increase the Commercial Space Square Footage	1,681,632	1,961,786	1,991,786	2,031,000
Business Contacts/Counseling	12	50	60	60
Annual Savings on the EERLF	\$19,332	\$25,000	\$25,000	\$25,000
Funds Allocated to Non-profits	\$175,000	\$200,000	\$230,000	\$230,000
Number of Non-profits applying	48	52	53	53
Growth in the Commercial Tax Base of the Center Business District	\$124,545,821	\$144,046,246	\$146,591,496	\$150,989,241

**BUDGET SUMMARY**

	<u>2014-15 ACTUAL</u>	<u>2015-16 ADOPTED BUDGET</u>	<u>2016-17 ADOPTED BUDGET</u>	<u>PCT CHANGE</u>
<b>PERSONNEL</b>	124,748	123,575	128,790	4.2%
<b>OPERATING</b>	114,201	121,680	122,190	0.4%
<b>TOTAL</b>	<b>\$238,949</b>	<b>\$245,255</b>	<b>\$250,980</b>	<b>2.3%</b>

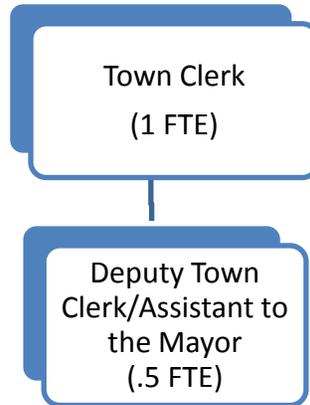
**CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

The change in the Economic and Community Development Personnel budget is due to increased insurance costs. The Operations budget increased slightly due to costs for the CD and Memorabilia Show.

# TOWN CLERK

---

**1.5 FTE**



## PURPOSE

Prepares Board of Aldermen meeting agendas and minutes and make them available to citizens and town staff; maintain official town documents; prepare and make available updates to the Town Code and provide support for the Mayor and Board of Aldermen.

## GOALS

- Serve the Board and the public by facilitating the production of meeting agendas and minutes in a clear, timely fashion.
- Provide complete, accurate, and error free minutes to the Board of Aldermen so they can be approved without amendments.
- Maintain and organize official town documents, including the Town Code and all Town Contracts, for the use of the Board, staff, and the public.
- Provide multiple public access points for all minutes and agendas.
- Increase the use of available technology in storage and retrieval of all town documents.

## SERVICES PROVIDED & ACTIVITIES

- Prepares minutes and agendas of Board of Aldermen meetings and makes these documents available electronically through the Town's website and stores the documents permanently.
- Posts video and audio of all Board of Aldermen meetings to the website.
- Maintains updated Town Code and posts on the town website.
- Maintains an accurate record of all ordinances approved by the Board of Aldermen.
- Prepares and distributes the monthly Calendar of Meetings.
- Prepares the Calendar of Agenda Items for review by the Town Manager.
- Maintains a roster of advisory boards and commissions and facilitates the application and appointment process.
- Plans the annual advisory board recognition dinner.
- Researches town records upon request.
- Indexes and stores all Town Contracts and/or agreements.
- Intergovernmental Affairs Liaison with State and Federal Delegates

**PREVIOUS YEAR ACCOMPLISHMENTS**

- Obtained North Carolina Certified Municipal Clerk Designation
- Began the process for International Institute of Municipal Clerks Master Municipal Clerks Designation
- Filed 100% of executed Town Contracts
- Posted 100% of the updates to the Town Code on the Town's website within one week of adoption.
- Attended 42 Board of Aldermen meetings.
- Prepared agendas and minutes for 42 Board of Aldermen meetings.

**UPCOMING FISCAL YEAR OBJECTIVES**

- To increase the number of electronically indexed contracts.
- Continue to seek Master Municipal Clerk Designation from the International Institute of Municipal Clerks.
- To continue scanning back-up files for pre-1982 Board of Aldermen's meetings and make them searchable on the town's website.
- To increase the number of scanned contracts from 50% to 65%.
- To continue using Granicus agenda, meeting, and minute management software.

**BOARD PRIORITIES**

Enhance and sustain quality of life/place issues for everyone.

**OBJECTIVES**

1. Index and store all Town contracts and/or agreements.
2. Prepare minutes and make available on the website.
3. Increase the number of scanned contracts.
4. Increase the number of electronically indexed contracts.
5. Continue Granicus agenda, meeting, and minute management software.

**PERFORMANCE MEASURES**

	<b>FY2013-14 ACTUAL</b>	<b>FY2014-15 ACTUAL</b>	<b>FY2015-16 ACTUAL</b>	<b>FY2016-17 PROJECTED</b>
# of Town Contracts on file with the Town Clerk	1,870	1,925	2,025	2,125
# of Board of Aldermen Minutes Prepared by Town Clerk	35	42	42	42
# Employee Hours Spent Electronically Indexing Contracts	120	120	120	120
# of Town Contracts Electronically Indexed	1,800	1,855	1890	1920
Employee Hours Per Set of Aldermen Minutes Prepared	2.5	2.0	2.0	2.0

## BUDGET SUMMARY

	<u>2014-15</u> <u>ACTUAL</u>	<u>2015-16</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>2016-17</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>PCT</u> <u>CHANGE</u>
PERSONNEL	110,159	110,616	114,072	3.1%
OPERATING	16,262	19,400	19,400	0.0%
<b>TOTAL</b>	<b>\$126,421</b>	<b>\$130,016</b>	<b>\$133,472</b>	<b>2.7%</b>

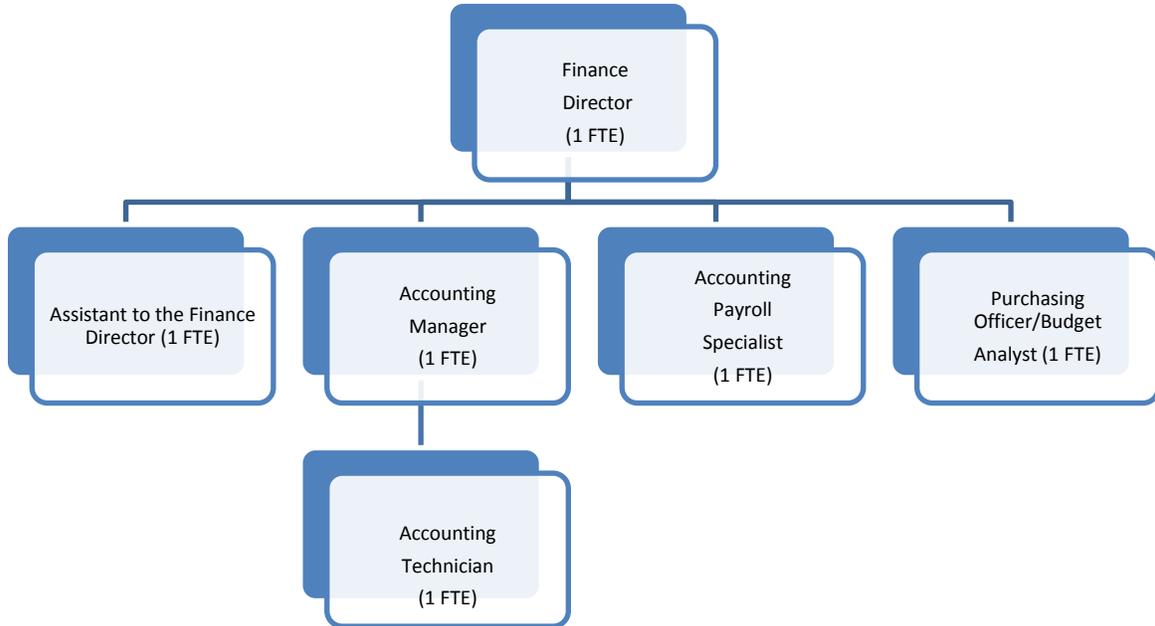
### CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

Personnel change is due to increase cost of insurance.

# FINANCE

---

**6.0 FTE**



## PURPOSE

To provide financial management support for the delivery of town-wide services through the administration of financial, budget, payroll, accounts payables, billing and collections, and project development through best business practices.

## SERVICES PROVIDED & ACTIVITIES

- Coordinate the annual independent audit and CAFR.
- Coordinate development of operating and capital budgets.
- Provide financial reporting as required by state and federal law.
- Process payroll and accounts payables.
- General Billing for various Town delivered services (ie. Dumpster, Retiree Health Insurance, etc.).
- Manage cash and investments to ensure sufficient cash is available to pay current obligations and that idle cash is invested in accordance with state law.
- Issue purchase orders for goods and services, solicit bids, manage procurement card program, and manage service contracts.
- Manage risk and insurance program, including claims management, general liability, police, and public officials, and auto/property liability.

## GOALS

- To strengthen financial accountability throughout the organization.
- To process and record all transactions accurately and timely.
- To make financial information available to decision makers on a regular and timely basis.
- To evaluate and implement strategies to utilize technology for increased operating efficiency, effectiveness, and cost savings.

## **PREVIOUS YEAR ACCOMPLISHMENTS**

- Completed successful audit for year ending June 30, 2015 with no audit findings.
- Revised travel and cell phone policies.
- Received Distinguished Budget Presentation Award from the Government Finance Officers Association.
- Received Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officers Association.
- Implemented on-line processing of accounts payable.
- Provided Department Heads access to review employee's leave accruals online.

## **UPCOMING FISCAL YEAR ACTIVITIES**

- Continue to increase knowledge among departments on the use of MUNIS financial system.
- Identify and develop on-line time and attendance system for payroll processing.
- Secure favorable financing for vehicles and equipment replacement.
- Continue to identify strategies for streamlining administrative processes.
- Review and update policies and procedures.
- Coordinate annual audit and prepare CAFR.
- File all required financial reports with state and/or federal agencies.
- Increase use of EFTs with vendors.

## **BOARD PRIORITIES**

The Finance Department supports all departments in their effort to meet board priorities & objectives.

## **OBJECTIVES**

1. Process and record all transactions accurately and in a timely manner.
2. Utilize technology to ensure best business practices are effective and efficient.
3. Insure Town's internal control system safeguards the Town's assets.
4. Ensure all grant and project ordinances are approved by the Board of Aldermen.
5. Ensure all transactions are completed and posted by the 5<sup>th</sup> working day of each month.
6. Monitor the Town's revenues and expenditures for compliance with the annual budget ordinance.
7. Complete development of annual operating and multi-year budgets by June 30.
8. Complete annual independent audit and prepare Comprehensive Annual Financial Report.

**PERFORMANCE MEASURES**

	<b>FY2013-14 ACTUAL</b>	<b>FY2014-15 ACTUAL</b>	<b>FY2015-16 ESTIMATED</b>	<b>FY2016-17 PROJECTED</b>
Process Bi-Weekly Payroll for Town Employees	26	26	26	26
Number of Invoices Processed Annually	6049	6933	6,933	5487
Number of Purchase Orders Issued Annually	476	525	500	500
Close Each Accounting Period by the 5 <sup>th</sup> of each Month	12	12	12	12
Produce and Distribute Monthly Financial Statement by the 10 <sup>th</sup> of each Month	100%	100%	100%	100%
Receive less than 2 audit findings & response comments by Independent Auditors Each Year	0	0	0	0
Expenditures at year-end are within +/-5% of the Original Budget	(6.4%)	(5.0%)	(4.1%)	(5.0%)
Actual Revenues at year-end are within +/-5% of Original Budget	6.4%	5.0%	4.1%	5.0%

**BUDGET SUMMARY**

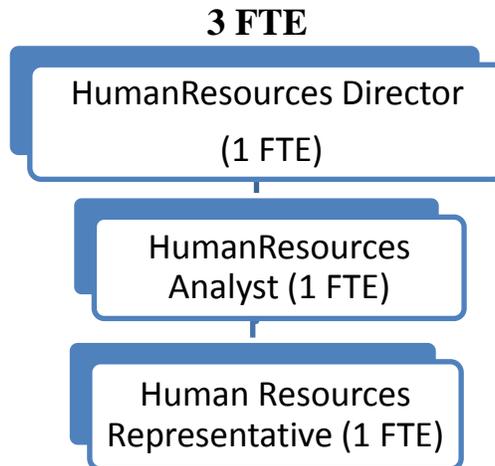
	<u>2014-145 ACTUAL</u>	<u>FY 2015-16 ADOPTED BUDGET</u>	<u>2016-17 ADOPTED BUDGET</u>	<u>PCT CHANGE</u>
<b>PERSONNEL</b>	528,753	545,318	500,124	-8.3%
<b>OPERATING</b>	488,482	535,179	562,672	5.1%
<b>TOTAL</b>	<b>\$1,017,235</b>	<b>\$1,080,497</b>	<b>\$1,062,796</b>	<b>-1.6%</b>

**CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

The change in Personnel is due to the transfer of one position to Human Resources. The increase in Operating is due to the addition of the vehicle tax and tags fees.

# HUMAN RESOURCES

---



## PURPOSE

Partner with the management team to recruit, hire, develop, and retain a highly qualified diverse staff dedicated to delivering exemplary customer service and to creating an atmosphere of positive employee relations that focuses on the health and well-being of all employees.

## GOALS

- Work with Manager and Management Team to maintain a fair, respectful, and effective work environment through Organizational Development work and initiatives, training, and communication.
- Research, review, and recommend competitive and cost-effective benefits.
- Research and review pay and position classification policies and programs that support the Board's goals for competitive, living wages that also provide employees with an affordable housing wage.
- Continue Wellness Education for employees in keeping with the Board's goal of enhancing quality of life for everyone.
- Provide a fair and equitable process for attracting applicants and retaining employees who have the education and experience commensurate with position requirements.

## SERVICES PROVIDED & ACTIVITIES

- Provides comprehensive Safety Program through Town-wide Safety Committee, training sessions, audits, accident investigations, etc.
- Responsible for Worker's Compensation administration and OSHA compliance and reporting
- Advertises vacant positions, receives and screens employment applications, assists departments with interview process, background checks, and verifies employment eligibility (E-Verify)
- Conducts new employee orientations, including benefits enrollment sessions and surveys
- Administers town provided and voluntary benefits, including counseling all employees on benefits plan(s) and options
- Coordinates administration of DOT substance abuse testing
- Coordinates administration of workers compensation benefits
- Coordinates administration of family medical leave (FMLA) benefits
- Coordinates employee assistance program (EAP) services
- Coordinates COBRA administration services

- Counsels supervisors and employees on performance issues
- Conducts and responds to salary surveys
- Provides staff development training to management and employees
- Assists departments with personnel and employee relations issues
- Administers and monitors the performance evaluation process
- Monitors third party vendor/consultant services to insure compliance with contractual performance standards, terms and conditions
- Keeps supervisors and department heads abreast of legislative changes and guidelines that affect personnel administration
- Maintains confidential personnel files in accordance with the General Statutes and completes reports according to state and federal regulations

### **PREVIOUS YEAR ACCOMPLISHMENTS**

- Health Insurance Loss Ratio is 67.7% - - lowest it has been in 4 years.
- Comprehensive Wellness Screenings for Town Employees through ECU
- Employee Spring Picnic and Wellness (Physical Activities) Event
- Conducted search for new Public Works Director – hired September 2015
- Assisted in search for new Fire Chief – hired September 2015
- Provided EEOC Training Workshops for Management Team and all Supervisors
- Revised entire Employee File System: new folder types (pocket) and shelf cabinet style
- Flu Shot Clinic for Employees (>60 participants)
- Conducted Information Sessions for all Town Employees: “How Insurance Works”
- Conducted new employee orientation sessions and benefits enrollment seminars
- Sponsored special session on Planning for Retirement
- Kick-Off of Go Pass, Public Transit Event
- Employee Holiday Party that also included small Wellness Component (physical activity)
- Recognized and Rewarded Employee Service Milestones
- Develop Comprehensive Safety Program, Team, and Quarterly, Department Audit Plan
- Conducted Coaching and Counseling Sessions for Department Directors
- Partnered with peers from surrounding cities/counties; attend monthly Area HR Meetings (host in turn)
- Assisted Manager with Organizational Development projects
- Conducted another segment of Supervision Training Program for Police Department
- Coordinated the 2016 Town of Carrboro Combined Giving Campaign
- Combine Better Together with Wellness Initiative, creating a Better Wellness Together Team
- Provided Classes for Employee in various Computer Software

### **UPCOMING FISCAL YEAR OBJECTIVES**

- Create ‘Safety Culture’ – every employee responsible for safety, every day
- Continue providing education for all employees in Diversity/Racial Sensitivity/Multiculturalism
- Partner with the Town’s benefits broker and insurance providers to seek ways to reduce town-provided and voluntary benefits costs while maintaining a comprehensive and competitive benefits package
- Continue with the 5-year Wellness Education Program

- Provide Training and Development for Department Directors and Supervisors that will enhance their leadership, operations management, and employee development skills.
- Wellness Sessions for Retirees
- Benefit Education Seminars for Employees and Retirees

**BOARD PRIORITIES**

Enhance quality of life/place issues for everyone.

**OBJECTIVES**

1. Provide wellness education opportunities.

**PERFORMANCE MEASURES**

	<b>FY2013-14 ACTUAL</b>	<b>FY2014-15 ACTUAL</b>	<b>FY2015-16 PROJECTED</b>	<b>FY 2016-17 PROJECTED</b>
Positions Filled	*	8 F/T	32 FT&PT as of 2/19/16	TBD
Employee Appreciation Events and Rewards	2	4	4	4
Trainings, Orientations and other Information Sessions	25	28	34	55
Wellness Events *	*	3	12	16
Individual Wellness Sessions, Referrals, Interventions *	*	24	12	155
Safety Trainings, Events, and Internal Safety Audits *	*	5	16	60
New Policies/Procedures/ Programs Revised or Developed *	*	*	4	2
HR Staff - Trainings *	*	*	4	6

\* These new Performance Measures created FY 2015-16.

## BUDGET SUMMARY

	<u>2014-15</u> <u>ACTUAL</u>	<u>2015-16</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>2016-17</u> <u>ADOPTED</u> <u>BUDGET</u>	<u>PCT</u> <u>CHANGE</u>
PERSONNEL	326,718	471,664	525,937	11.5%
OPERATING	80,284	72,930	98,350	34.9%
<b>TOTAL</b>	<b>\$407,003</b>	<b>\$544,594</b>	<b>\$624,287</b>	<b>14.6%</b>

### CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

The increase in personnel is due to the addition of a Human Resources Representative (transferred from Finance). Operations increased with the increase in training and the addition of the Safety Program.