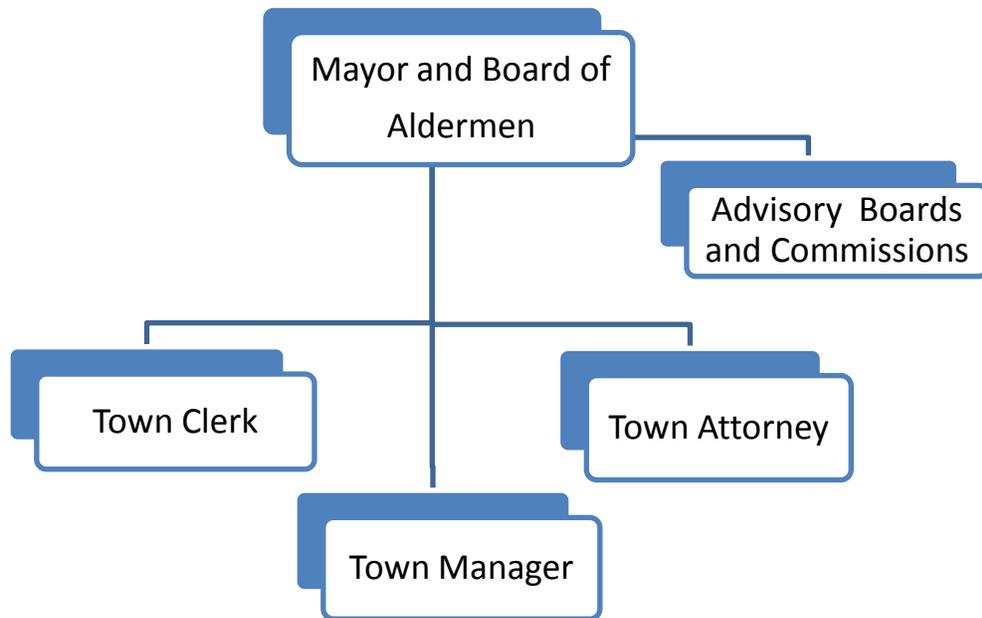


# MAYOR AND BOARD OF ALDERMEN

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## 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**

- Adoption of Development Agreement with Orange County 203 South Greensboro Street Project including Town Offices and the Orange County Southern Branch Library.
- Launched stormwater utility program.
- Continued work on Historic Rogers Road Infrastructure.
- Tree City USA for 32nd year.
- Held annual Arbor Day Observance.
- Maintained Silver Level Bicycle Friendly Community Status.
- Supported Police and Fire Departments’ radio upgrades that enhanced communications for emergency responders and reinforced intergovernmental emergency response and coordination.

**UPCOMING FISCAL YEAR OBJECTIVES**

- Continue to review downtown parking situation.
- Work to improve housing affordability and protection of existing neighborhoods.
- Establish stormwater rate structure.
- Support the continued design and building of the 203 South Greensboro Street Project.
- Conduct second Comprehensive Citizen Survey.

**BUDGET SUMMARY**

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	104,185	116,304	116,341	0.0%
<b>OPERATING</b>	278,930	252,100	240,600	-4.6%
<b>TOTAL</b>	<b>\$383,115</b>	<b>\$368,404</b>	<b>\$356,941</b>	<b>-3.1%</b>

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

Changes in operating cost are associated with the cost of elections from the prior year.

# **ADVISORY BOARDS AND COMMISSIONS**

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## **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**

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>OPERATING</b>	7,884	17,350	17,350	0.0%
<b>TOTAL</b>	<b>\$7,884</b>	<b>\$17,350</b>	<b>\$17,350</b>	<b>0.0%</b>

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

The Advisory Board and Commissions budget remains the same as the previous year.

# GOVERNANCE SUPPORT

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## PURPOSE

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

## BUDGET SUMMARY

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>OPERATING</b>	518,025	743,124	643,067	-13.5%
<b>TOTAL</b>	<b>\$518,025</b>	<b>\$743,124</b>	<b>\$643,067</b>	<b>-13.5%</b>

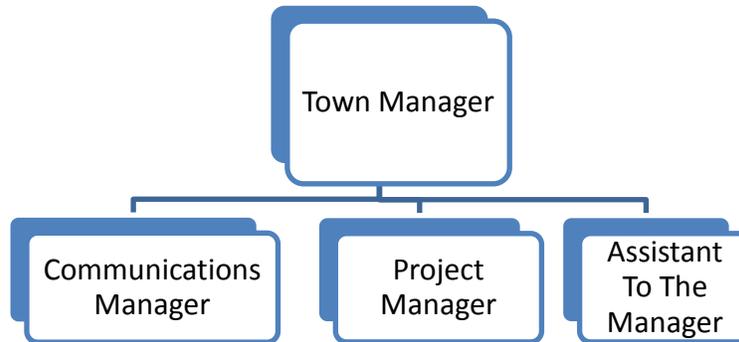
## CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

The decrease in operating is due to moving funds from the Human Services Grant Program to the Affordable Housing Fund.

# TOWN MANAGER

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**4 FTE**



## **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.
- To communicate Town policy, decisions, and activities clearly and efficiently, as well as promoting and marketing all town related functions to the general public.

## **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**

- Establishment of Communications Plan and hiring of Communications Manager.
- Renovation of Town Commons
- Completed Planning process for 203 South Greensboro
- Solid Waste Study
- Town Facilities Planning

**UPCOMING FISCAL YEAR OBJECTIVES**

- Implement Communications Plan
- Social Equality and Inclusion Initiatives
- Government Advanced Racial Equity Training
- Organizational and Employee Development
- Town Financial Sustainability

**BUDGET SUMMARY**

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	348,414	344,410	441,272	28.1%
<b>OPERATING</b>	58,244	48,989	63,041	28.7%
<b>CAPITAL OUTLAY</b>	0	0	7,345	N/A
<b>TOTAL</b>	<b>\$406,658</b>	<b>\$393,399</b>	<b>\$511,658</b>	<b>30.1%</b>

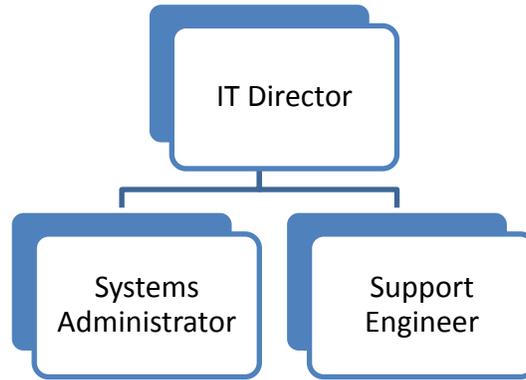
**CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

The Town Manager’s budget increased due to personnel changes and increases in training, advertising and equipment.

# INFORMATION TECHNOLOGY

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**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.
- Maintain, upgrade and expand the Town's public free Wi-Fi to [www.townofcarrboro.net](http://www.townofcarrboro.net).
- Maintain, upgrade and expand Town wide data and telecommunications physical plant of copper, fiber optics and wireless.

#### **PREVIOUS YEAR ACCOMPLISHMENTS**

- Continued 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.
- Created partnership with Chapel Hill Carrboro City Schools to interconnect school campuses located in Carrboro with fiber optic cabling. CHCCS will build out to and leverage existing Town of Carrboro owned fiber-optic infrastructure to greatly reduce the construction costs of the interconnectivity.

#### **UPCOMING FISCAL YEAR OBJECTIVES**

- Complete 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.
- Complete work with Chapel Hill Carrboro City Schools to interconnect school campuses located in Carrboro with fiber optic cabling. CHCCS will build out to and leverage existing Town of Carrboro owned fiber-optic infrastructure to greatly reduce the construction costs of the interconnectivity. This will provide the school system with almost unlimited data and telecommunications bandwidth between many of their schools allowing CHCCS to keep pace with modern technology based learning initiatives.
- Install conduit along Rogers Road for future fiber optic cabling and connectivity to promote local broadband competition and promote serving the unserved and underserved.
- Implement new Police Officer body worn camera system for Patrol and Community Service Officers.
- Replace the Town's current phone system that serves all Town departments across all Town owned buildings.
- 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 various 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 with Google to bring Google Fiber to the Carrboro Community.
- Continue to work with AT&T to bring U-verse with AT&T GigaPower to the Carrboro Community.

**BOARD PRIORITIES**

IT supports all departments in their effort to meet board priorities & objectives. IT, as directed by the Town Manager, partners with local community organizations and other regional governmental bodies to leverage and share the Town’s existing technology and technological knowledge to assist the underserved or unserved in the community.

**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>FY2015-16 ACTUAL</b>	<b>FY2016-17 ACTUAL</b>	<b>FY2017-18 ESTIMATED</b>	<b>FY2018-19 PROJECTED</b>
# of Workstations Supported	180	184	192	192
# of Emergency Services Mobile Terminals Supported	50	50	52	52
Average Hours per Month of Unplanned Application Downtime During Business Hours	<1	<1	<1	<1
# Unsuccessful Backups per Month	0	0	0	0

**BUDGET SUMMARY**

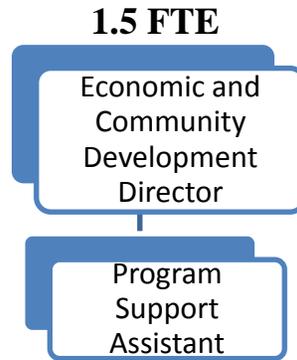
	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	270,210	269,791	279,250	3.5%
<b>OPERATING</b>	1,077,890	1,034,598	1,137,137	9.9%
<b>CAPITAL OUTLAY</b>	76,507	116,000	172,000	48.3%
<b>TOTAL</b>	<b>\$1,424,607</b>	<b>\$1,420,389</b>	<b>1,588,387</b>	<b>11.8%</b>

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

Operations increased due to the increase of annual software and hardware support contracts. Capital outlay increased with the replacement of Board Room recording equipment.

# ECONOMIC AND COMMUNITY DEVELOPMENT

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## 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

- Be a resource for developers and new or expanding businesses to facilitate location of vacant space, the project review process and project implementation.
- Administer the Revolving Loan Funds including the application processing and billing.
- Provide staffing and administrative support to the Economic Sustainability Commission.
- Provide staffing and administrative support to the Human Services Advisory Board.
- Provide staffing and administrative support to the Carrboro Tourism Development Authority.
- Provide staffing and administrative support to the Arts Committee.

- Be the liaison to the Carrboro Business Alliance.
- Serve on the Chapel Hill Orange County Visitor Bureau Board as Town staff liaison.
- Implement the action items of the Economic Sustainability Plan.
- Promote the Economic Development goals and strategies of the Town.
- 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**

- Completed the planning process and facilitated the adoption of a new Economic Sustainability Plan for the town.
- Facilitated execution of a lease with Main Street Partners that helped in moving forward approval of the new Hilton Garden Inn.
- Continued developing concept plan for Old 86 Light Manufacturing project.
- Continued to represent the Town on the Master Plan on Aging initiative.
- Worked with the CBA to increase capacity, and coordinate business events, including Christmas business promotion and CBA networking opportunities.
- Ran February For the Love of Carrboro campaign pairing businesses with non-profits to encourage partnerships within the community and grow brand awareness.
- Grew social media communications outreach For the Love of Carrboro Facebook page has 2794 followers (7.5% growth) and 966 Twitter followers (10% growth).
- Worked with Arts Committee to re-establish quarterly art exhibits at Town Hall.

#### **UPCOMING FISCAL YEAR OBJECTIVES**

- Begin identifying priorities and strategies for implementation of the Economic Sustainability Plan.
- Development of a Wayfinding Program.
- Identify short-term parking to facilitate construction of 203 South Greensboro Street.
- Work with the TDA to develop a website.
- Work to automate the Outside Agency Funding Application process and establish funding priorities.
- Work with planning staff on implementation of the downtown parking plan and facilitate shared parking strategy.
- 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.
- Continue outreach to entrepreneurs, encourage makers, and support freelance workers.

#### **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. Support entrepreneurs, makers and freelancers development, including services, infrastructure, and job development.
3. Support locally owned and operated businesses for a strong local economy.
4. Support the outside agency organizations that provide unmet human services for low-moderate income persons.

## PERFORMANCE MEASURES

	<b>FY2015-16 ACTUAL</b>	<b>FY2016-17 ACTUAL</b>	<b>FY 2017-18 ESTIMATED</b>	<b>FY 2018-19 PROJECTED</b>
Increase the Commercial Space Square Footage	1,991,786	1,930,820	2,020,820	2,050,548
Annual Savings on the EERLF	\$25,000	\$25,000	\$25,000	\$25,000
Funds Allocated to Non-profits	\$230,000	\$250,000	\$300,000	\$300,000
Number of Non-profits applying	53	53	55	56
Growth in the Commercial Tax Base of the Center Business District	\$147,132,039	\$148,387,889	\$149,574,992	161,373,500

## BUDGET SUMMARY

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	131,634	131,121	133,709	2.0%
<b>OPERATING</b>	104,310	122,349	114,910	-6.1%
<b>TOTAL</b>	<b>\$235,945</b>	<b>\$253,470</b>	<b>\$248,619</b>	<b>-1.9%</b>

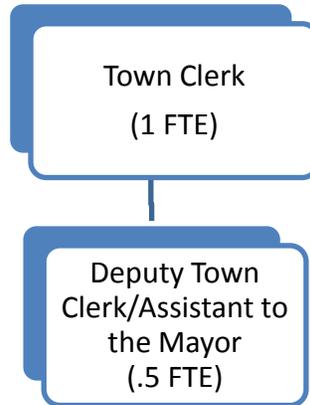
## CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

The change in the Personnel budget is due to increased insurance costs. Operating expenses decreased in contract services.

# TOWN CLERK

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**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**

- Continued North Carolina Certified Municipal Clerk Designation
- Increased training 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.
- Prepared agendas and minutes for 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 65% to 67%.
- 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>FY2015-16 ACTUAL</b>	<b>FY2016-17 ACTUAL</b>	<b>FY2017-18 ACTUAL</b>	<b>FY2018-19 PROJECTED</b>
# of Town Contracts on file with the Town Clerk	2,025	2,125	2,250	2,350
# of Board of Aldermen Minutes Prepared by Town Clerk	42	42	42	42
# Employee Hours Spent Electronically Indexing Contracts	120	120	120	120
# of Town Contracts Electronically Indexed	1,890	1,920	1,990	2,100
Employee Hours Per Set of Aldermen Minutes Prepared	2.0	2.0	2.0	2.0

## BUDGET SUMMARY

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	115,519	116,071	124,531	7.3%
<b>OPERATING</b>	16,024	18,900	38,450	103.4%
<b>TOTAL</b>	<b>\$131,543</b>	<b>\$134,971</b>	<b>\$162,981</b>	<b>20.8%</b>

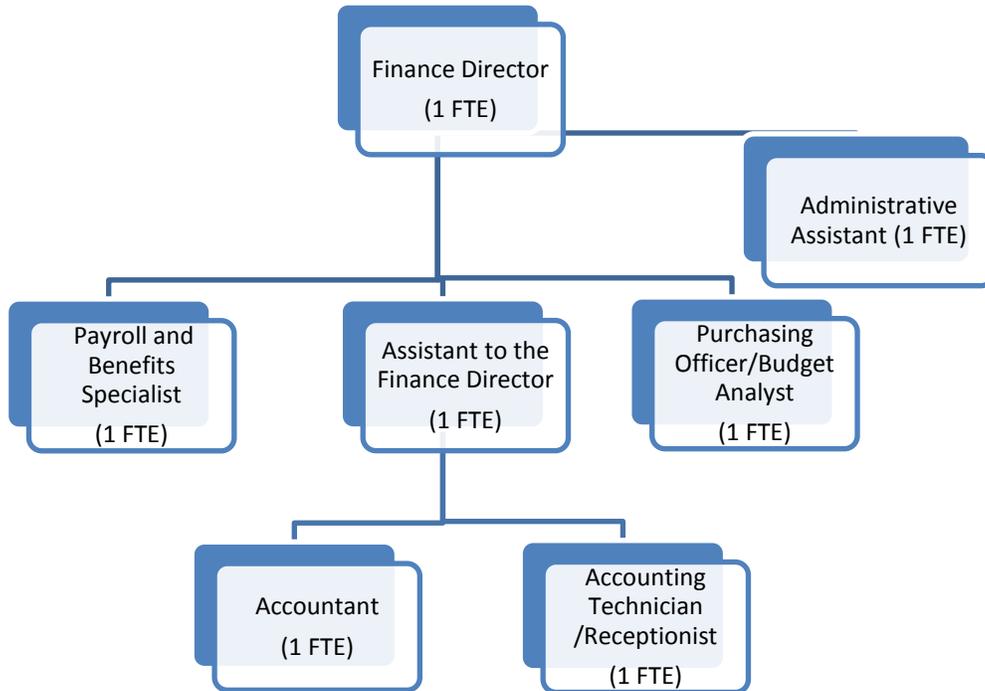
### CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

Personnel change is due to increase cost of insurance. Operating costs increase due to Citizen Survey costs.

# FINANCE

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**7.0 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 (i.e. - 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, 2017 with no audit findings.
- 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.
- Successful sale of surplus property.
- Initiated fuel card program.
- Established a Storm Water Utility Enterprise Fund.

## **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.
- Financing of 203 South Greensboro Street.

## **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>FY2015-16 ACTUAL</b>	<b>FY2016-17 ACTUAL</b>	<b>FY2017-18 ESTIMATED</b>	<b>FY2018-19 PROJECTED</b>
Process Bi-Weekly Payroll for Town Employees	26	26	26	26
Number of Invoices Processed Annually	5,684	5,901	6,500	6,500
Number of Purchase Orders Issued Annually	425	329	350	350
Number of Contracts Issued Annually	NA	74	120	130
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	(5.14%)	(7.60%)	(5.00%)	(5.00%)
Actual Revenues at year-end are within +/-5% of Original Budget	5.14%	0.17%	5.00%	5.00%

**BUDGET SUMMARY**

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	493,683	514,243	577,539	12.3%
<b>OPERATING</b>	495,183	562,672	570,102	1.3%
<b>TOTAL</b>	<b>\$988,866</b>	<b>\$1,076,915</b>	<b>\$1,147,641</b>	<b>6.6%</b>

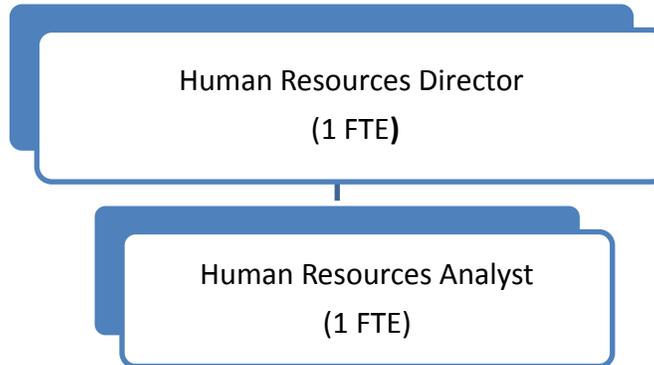
**CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET**

The change in Personnel is due to personnel changes and insurance cost increase. Operating costs increased due to conference and training increases.

# HUMAN RESOURCES

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**2 FTE**



## **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.
- Continue providing Diversity Training to Management Team and all Town employees.
- 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.
- Participate in the Club Nova Education Program for people in our community who strive to overcome the challenges of mental illness.

## **SERVICES PROVIDED & ACTIVITIES**

- Provides Organizational Development assistance to Town Manager and Management Team.
- Acts as liaison for all payroll issues and questions between Finance and all employees.
- 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, processes applications, background/drug screens, job offers, etc.
- Participates in final interviews for all positions.

- 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 benefit and salary surveys.
- Completes benefit and salary surveys requested by outside organizations.
- Provides staff development training to management and employees.
- Assists departments with personnel and employee relations issues.
- Provides reference information for former employees.
- Provides information for employment verification.
- 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**

- Performed comprehensive Salary Survey – implemented salary increases by department as appropriate
- Developed and implemented Paid Parental Leave Policy
- Implemented Town’s first automated Applicant Tracking System
- Implemented online, one-click Application System, connected to largest national job ad website
- Health Insurance Loss Ratio lower than expected; did not increase.
- Changed Flexible Spending Account process to allow employees to carry over unspent funds
- Coordinated Groundwater Workshop offered through OAR for residents and employees
- Employee Spring Picnic and Wellness Event (Physical Activities)
- Hosted Medicare Education Workshop for retirees
- Provided onsite Flu Shot Clinic for Employees
- Conducted new employee orientation sessions and benefits enrollment seminars
- Employee Holiday Party
- Recognized and Rewarded Employee Service Milestones
- Conducted Coaching and Counseling Sessions for Department Directors, Supervisors, and Employees
- Attend monthly Area HR Meetings; host once a year

**UPCOMING FISCAL YEAR OBJECTIVES**

- Provide education about the real cost of benefits, in dollars, to the Town
- Create Wellness Culture – employees take better care of their mental and physical health
- 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
- Provide Training and Development for Department Directors and Supervisors that will enhance their leadership, operations management, and employee development skills.
- Provide Computer Skills training for employees

**BOARD PRIORITIES**

Enhance quality of life/place issues for everyone.

**OBJECTIVES**

1. Provide wellness education opportunities.

**PERFORMANCE MEASURES**

	<b>FY2015-16 ACTUAL</b>	<b>FY2016-17 ACTUAL</b>	<b>FY 2017-18 ESTIMATED</b>	<b>FY2018-19 PROJECTED</b>
Positions Filled	8 F/T	32FT & PT	22 FT & 33 PT	TBD
Employee Appreciation Events and Rewards	4	4	4	8
Trainings, Orientations and other Information Sessions	28	34	55	20
Wellness Events *	3	12	16	2
Individual Wellness Sessions, Referrals, Interventions *	24	12	155	12
Safety Trainings, Events, and Internal Safety Audits *	5	16	60	24
New Policies/Procedures/ Programs Revised or Developed *	*	4	2	1
HR Staff - Trainings *	*	4	6	4

\* These Performance Measures created FY 2015-16.

## BUDGET SUMMARY

	<b>FY 2016-17 ACTUAL</b>	<b>FY 2017-18 ADOPTED BUDGET</b>	<b>FY 2018-19 ADOPTED BUDGET</b>	<b>PCT CHANGE</b>
<b>PERSONNEL</b>	411,554	538,617	484,382	-10.1%
<b>OPERATING</b>	68,004	85,850	76,600	-10.8%
<b>TOTAL</b>	<b>\$479,558</b>	<b>\$624,467</b>	<b>\$560,982</b>	<b>-10.2%</b>

### CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET

The decrease in personnel is due to the decrease in part-time salaries. Operations decreased with the decrease in contract services.