

Town of Hillsborough Planning Retreat
Saturday, January 27, 2007, 9:00 a.m. - 4:30 p.m.
Holiday Inn Express, Hillsborough, NC

Attendance

Board members: Mayor Tom Stevens; Commissioners Frances Dancey, Eric Hallman, Michael Gering, Evelyn Lloyd, and Brian Lowen.

Staff: Eric Peterson, Town Manager; Demetric Potts, Assistant Manager; Greg Siler, Finance Director; Margaret Hauth, Planning Department Director; Kenneth Keel, Public Works, Director; and xxxxx, Police Chief; and xxx Public Information Officer.

Facilitators: Donna Warner and Bill Rivenbark, UNC-CH School of Government

Retreat Summary

The board met to create a vision and mission for the Town; reaffirm its strategic focus areas; and identify objectives to pursue in order to achieve the vision and implement the Balanced Scorecard tool.

Creating a vision

What is your vision for the Town of Hillsborough? What does the Town you want to live in look like?

Our vision for Hillsborough is a prosperous town with a strong sense of community, filled with vitality and proud of its unique small town character and historic heritage.

Defining the purpose/mission

What is the role of Town government in making the vision happen?

We are stewards of the public trust who exist to make the vision for Hillsborough a reality. We manage and provide the infrastructure, resources and services that enhance the quality of life for the living beings and land within our Town.

Strategic focus areas

1. **Provide quality services.** (These include developing and maintaining the infrastructure; providing water, trash, fire, police services; well trained staff; equality and dependable services that are of a good value, relevant, well-managed, professional and sustainable.)
2. **Encourage and plan for economic development.** (This means bringing businesses to town that provide economic prosperity and high quality jobs for Hillsborough's citizens. The town serves as a catalyst for growth and development.)
3. **Plan and manage growth.** (The town will set policy, manage and regulate the growth of residential housing and transportation.)
4. **Provide safety.** (This includes crime prevention, conviction and enforcement. Citizens will be safe every day. Citizens can also expect safe water, fire, roads, sidewalks, and preparedness in times of emergencies.)
5. **Maintain and enhance the quality of life.** (Quality of life includes preserving the cultural, economic, social and demographic heritage; providing parks and recreation opportunities; greenways; transportation; affordable housing; sidewalks, environmental and erosion control; and cultural life. Value- added.)

BALANCED SCORECARD

The board is interested in using the Balanced Scorecard as a tool to plan, implement and measure the results of their initiatives. Using the Scorecard template, board members brainstormed actions to achieve the vision from four perspectives: serve the community; run the operations (manage the internal business); manage financial resources; and grow and develop staff. After brainstorming action items in each category, board members prioritized items they believed would best move the vision forward.

Balanced Scorecard Perspectives

Perspective 1: Serve the community

1. Preserve the Town's cultural and natural resources. Protect the environment
2. Improve communication with the public
3. Reduce crime
4. Enhance and expand recreation opportunities

Perspective 2: “Run the Operations”

1. Provide communication
2. Provide responsive and consistent services
3. Implement the vision
4. Provide efficient services
5. Maintain the infrastructure

Perspective 3: Manage finances and resources

1. Maintain fiscal strength
2. Maintain and improve infrastructure
3. Develop a long-term financial plan
4. Diversify revenue sources. Leverage outside funding opportunities

Perspective 4: Grow and develop employees

1. Provide training and information to:
 - a. governing and advisory boards
 - b. community-at-large
 - c. media
2. Create a skilled workforce. Focus on career development and succession planning
3. Enhance relationships with others involved in the governing process including other governments; non-profits and the private sector.
4. Develop employees to be technically competent and able to collaborate. Create a culture of stewardship

Addendum

A. Notes from vision discussion

1. Strong sense of community. Walk-able and connected. Continuity of downtown core and other hubs. Citizens identify first with the Town of Hillsborough and then their individual neighborhood second.
2. Vibrant with energy and vitality. A "happening" place to live and work. Enhanced social life in the community. Neighborhood and faith-based events. Alive, living, growing and evolving. Future oriented. Historic. Recognized as a national treasure.
3. Small town character and charm. Distinct identity. Authentic. Quirky with a patina or richness (wabi) and imperfections that creates an aesthetic value over time (sabi). A place to visit - a destination. Bike trails, parks. Part of an experience. Recognized icons – town clock and Riverwalk. Signage indicating important historical events.
4. Environmentally conscious – sustainable development, "green", buildings and space built to a human scale.
5. Strong economy – with locally owned businesses. Prosperous. Economically diverse – not one big employer; opportunities for all ages and income levels. Businesses involved in tourism. Part of the small town charm. Place to live and visit
6. Safe
7. Involved citizens
8. Housing and transportation options for the elderly
9. Strong ties and relationships with county, state and federal government. Connected to county

Notes from vision brainstorming exercise. (The following are offered in no order of priority or preference).

Values

1. Friendly
2. Strong sense of community, identity, historic heritage
3. Opportunities and hope for young people
4. Friendly downtown
5. Values its history
6. Family entertainment establishments. Many places to party

Diversity

1. Diversity seen in public places and events
2. Unity
3. Culturally diverse
4. Diverse housing styles
5. Diverse population – age, ethnic, economic, culture, social

6. Since I have lived here all my life, I would like to be able to recognize my town if I were to go on a trip around the world and come back in 15 years. We need careful and planned change, sensibly done.

Economic prosperity

1. Community that is a great place to live and work. Complete – no need to go outside for needs.
2. Good paying jobs. Well-employed. A community that attracts businesses that employ local residents. Financially secure. Reasonable taxes. Capacity to invest for future X and L assets.
3. Economically vital with many small and medium businesses. Locally owned businesses. Balanced tax burden.
4. Good schools
5. Affordable services. Affordable housing and living wage.
6. Continuity. Sense of place from I-40 to US 70. Different districts but unified sense of the Town. Vibrant core areas such as downtown and west Hillsborough.
7. Vibrant center for business and culture.
8. Cohesive style that is not "cookie cutter". Key places that identify the town, old and new such as the Colonial Inn and Speedway.

Walk able community

1. Walk able community with a purpose. Sidewalk and trails for transportation. Not just for the sake of sidewalks. Community connected by sidewalks. Citizens can walk from any place in town to any place in town.
2. Connected greenways and parks. People gathering in parks.
3. Not sprawling.
4. Children walk and bike to places in town (school and recreation)
5. Connected neighborhoods with pedestrian, transportation and social interaction.
6. Free flowing traffic.

Environmentally aware

1. Buildings, places are to human scale and designed for people to live, work and play
2. Historic and green
3. Sustainable, "green" development
4. Clean
5. Value the environment

Arts and culture

1. Neighborhoods, districts, places that distinctive features and qualities
2. Cultural area
3. Art and arts oriented.

Governmental services

1. A local government that provides competitive and efficient services.
Predictable services and processes.
2. Quality service
3. Solid infrastructure
4. Responsive to change

Vision summary (Mayor Stevens)

1. Community
2. Character (small town)
3. Heritage (diverse history, culture and environment)
4. Filled with vitality (alive, a place where people live and work together)
5. Prosperous (everyone is prosperous)

2. Notes from mission discussion

The purpose of the Town is to:

1. Create policy - determine how we are going to govern
2. Manage resources
3. Establish infrastructure to support the vision
4. Provide resources and services
5. Regulate
6. Communicate the vision

Create policy

1. Help the community choose its future. Respond to citizen needs and concerns in a thoughtful, fair, effective and financially responsible manner.
2. Prioritize the goals of the vision. Sponsor events that are part of the vision. Make the elements of the vision such as walk ability and safety priorities. Publicize the vision. Articulate the vision.
3. Serve as a convener and a catalyst. Encourage public dialogue and debate. Ensure availability to all citizens to participate and have a voice in government. Share information and make it accessible.
4. Provide direction
5. Define land use
6. Provide excellent planning
7. Continue to enlist community's help in making the town safer (Community Watch)
8. Work and connect with other county, state and federal governments.

Provide resources and services

1. Provide resources and funds as needed
2. Build and maintain the infrastructure for commerce and transit
3. Serve as stewards of the community. Provide money, manage public assets (parks and streets)
4. Coordinate resources
5. Fund public aspects of the vision

6. Prepare and respond to community emergencies
7. Provide public safety
8. Offer quality services. Give value for service provided with good customer service
9. Technology
10. Equip and train staff.
11. Remain focused on the vision. See the vision. Be the vision. Preserve and promote the vision. Refer to the vision with each decision. Hire and keep quality employees that will work towards the vision. Ensure staff is aware and promoting the vision.

Regulate

1. Encourage private approaches. Recruit businesses that will provide good jobs.
2. Require percentage of affordable housing
3. Create regulations and policies that support the vision/don't create regulations that inhibit or prohibit the vision.
4. Be innovative – willing to take risks and test assumptions.

Create a strong sense of community

1. Active and involved citizens. Aware. Participate in the community.
2. Community gathering places. Vibrant with official and informal events.
3. Ample recreation opportunities
4. Wabi (patina) and sabi (flaws that add character)

Ensure safety

1. Become the safest small community in the country
2. Provide a safe environment. Low crime. Safe communities that are active and involved. A place where people take pride in their neighborhood and Hillsborough.

Future items and issues to consider:

1. Maintain rural buffer
2. Create revenue sources to pay for the impact of development on the community

Detail of Balanced Scorecard Perspective Discussion

Perspective 1: Serve the Community		
No.	Action Item	Votes
1	Reduce crime	4
2	Improve perception of personal safety	3
3	Decrease speeding in neighborhoods (bikes and cars)	
4	Improve communication with the public <ul style="list-style-type: none"> • Citizens should feel they have access to information and are listened to • Communication is responsive and consistent 	5
5	Provide opportunities for citizens to participate in their community and government	1
6	Improve perception of services Provide processes and services that are predictable and have defined expectations Provide "right" menu of services	2
7	Provide convenient services	1
8	Enhance home ownership and housing opportunities	1
9	Enhance walk-ability and connectivity in and among neighborhoods	2
10	Enhance and expand recreation opportunities	3
11	Preserve the Town's cultural and natural resources <ul style="list-style-type: none"> • Protect the environment 	6
12	Encourage community involvement	1
13	Foster job growth <ul style="list-style-type: none"> • Provide opportunities for retail growth • Promote local business ownership 	1

Perspective 2: "Run the Business"		
<i>No.</i>	<i>Action item</i>	<i>Votes</i>
1	Provide communication <ul style="list-style-type: none"> • Intradepartmental communication 	4
2	Provide responsive and consistent services	3
3	Be technically excellent	2
4	Meet citizen expectations of services	
5	Ensure effective support staff	4
6	Reduce liability claims	
7	Plan for the organization	2
8	Collaborate	2
9	Forecast	2
10	Gain feedback from employees	
11	Implement the vision	3
12	Prepare for emergencies	1 3
13	Provide efficient services	3
14	Innovate	
15	Maintain the infrastructure	3

Perspective 3: Manage resources		
<i>No.</i>	<i>Action item</i>	<i>Votes</i>
1	Minimize volatility of rate and fee increases on citizens	
2	Take a long term perspective on capital, infrastructure and human resources	1
3	Maintain fiscal strength	5
4	Deliver cost efficient services	1
5	Maintain and improve infrastructure	5
6	Develop a long term financial plan	4
7	Diversify revenues. Leverage outside funding opportunities.	3
8	Optimize debt position	

Perspective 4: Grow and Develop Employees

No.	Action item	Votes
1	Provide training and information to: <ul style="list-style-type: none"> • governing and advisory boards • community-at-large • media 	6
2	Participate in regional/national learning experiences	
3	Promote citizen participation in government. Help others understand how government works.	
4	Develop employees to be technically competent and able to collaborate. Create a culture of stewardship	4
5	Enhance relationships with others involved in the governing process including: <ul style="list-style-type: none"> • other governments • non-profits • private sector 	4
6	Create a skilled and diverse workforce. Focus on career development and succession planning.	5
7	Seek public/private partnerships	
8	Develop relationships with contractors	
9	Enhance staffs' technology and human relations skills	
10	Lead and manage change. Serve as innovators	