



Morrisville

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To: Council Members

From: Erin L. Hudson, Strategic Performance Manager

Date: October 22, 2024

Re: Connect Morrisville Strategic Plan Progress Update

RECAP

Morrisville's first Strategic Plan was adopted in April 2018, containing new Mission and Vision statements, four Core Values, six Goals, 27 Objectives, 32 Initiatives, and 29 Outcome Measures. The plan was adopted with an understanding that it would serve the Town and community for approximately five years (through 2023) before revision may be needed. It is important to note that strategic plans do not "expire" but some items may become outdated or lose relevancy quicker than others. The level of detail contained in our original plan may have contributed to some plan elements requiring refreshing in a shorter span of time than the plan originally estimated.

In Fall 2020, staff began identifying plan elements that may be outdated or lacked relevance, and Council authorized staff to pursue review/revision of plan Objectives, Initiatives, and Outcome Measures. Though COVID-19 presented challenges at that time, staff worked together, community members provided great feedback, and a refreshed Connect Morrisville Strategic Plan was adopted by Town Council July 13, 2021. The revised plan was 'bookmarked' to span three fiscal years, covering July 2021 to June 2024, with the knowledge that staff would be preparing the next review/revision process in spring/summer 2024.

**Update
approved July
2021 for FY 22 to
FY24**

Community engagement, staff outreach, and Council feedback on plan elements

Maintained mission and vision statements, core values, and goal areas

Streamlined overall plan by about 40% to 17 objectives, 17 initiatives, 20 outcome measures

Comprehensive design including introduction, references, glossary

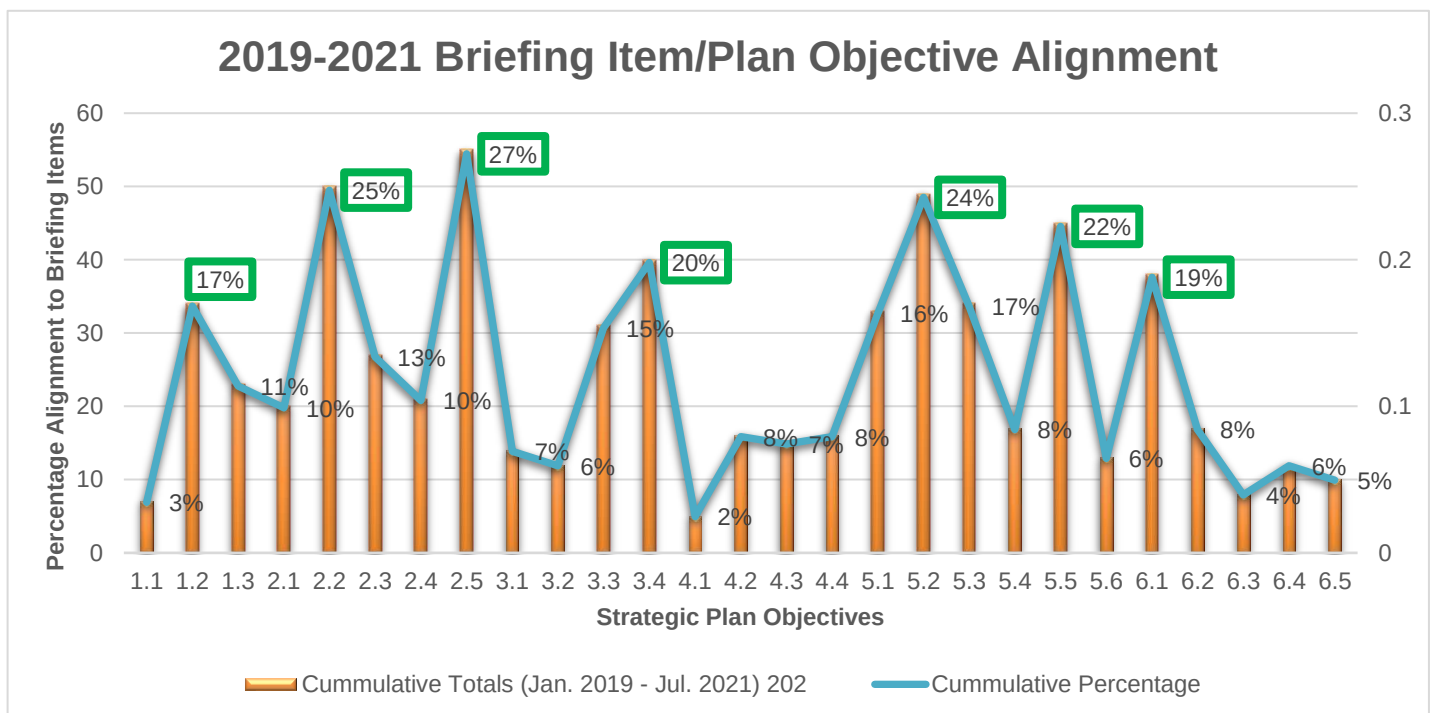
Staff last shared a Connect Morrisville Strategic Plan update with Town Council early in 2022. Following the organizational plan revision, departments were finalizing revisions to department-level strategic plans, the layout of our Morrisville PRO Community Dashboard was being modified to align, and updates were being made to the Town's Strategic Planning webpage reflecting the ongoing work efforts of staff to support our community and organizational plan.

ORGANIZATIONAL STRATEGIC PLAN - *Connect Morrisville*

Below you will find a graphic summary of how various elements of the Connect Morrisville Strategic Plan have performed from January 2019 to December 2023 (our first plan was adopted April 2018).

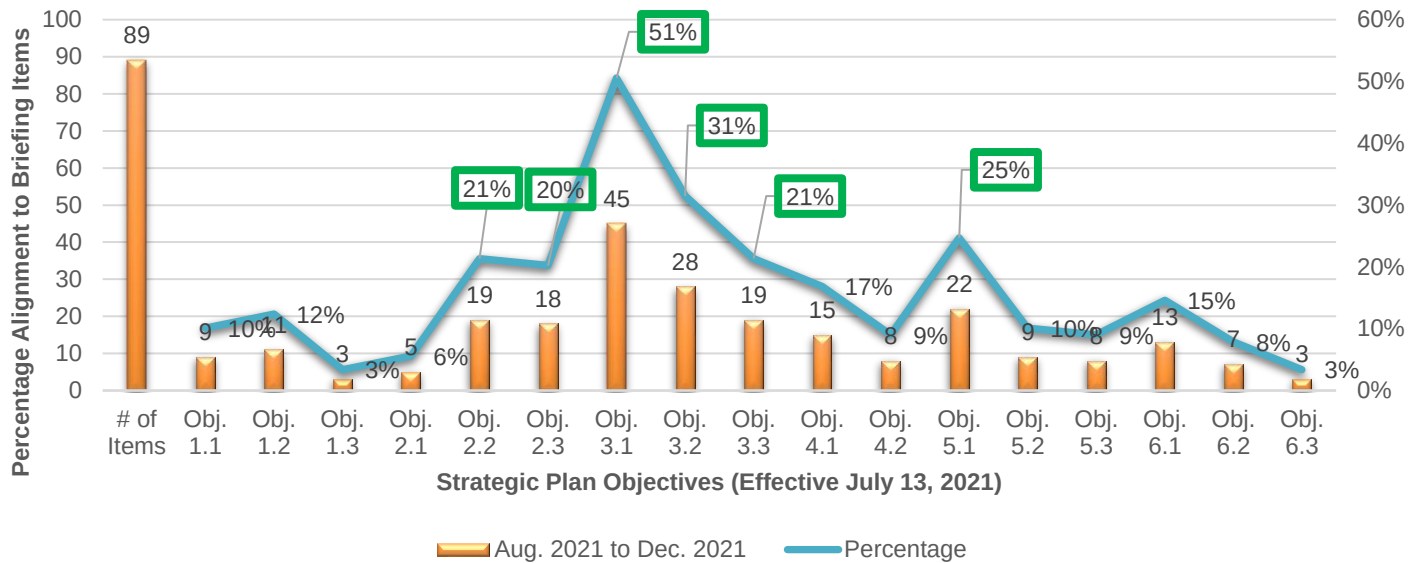
In reviewing our tracked data, staff observed that within a given time period, generally, there would be objectives that had around 20% alignment or greater with briefing items submitted to Town Council. While the six Goals of the Connect Morrisville Strategic Plan have remained constant (listed below), Objectives, Initiatives, and Outcome Measures were revised in July 2021. Staff has shared projects or initiatives reflective of the time periods below, and associated with the identified objectives.

- Goal 1 – Improved transportation mobility
- Goal 2 – Thriving, livable neighborhoods
- Goal 3 – Engaged, inclusive community
- Goal 4 – Public safety readiness
- Goal 5 – Operational excellence
- Goal 6 – Economic prosperity



- 1.2 Leverage resources through partnerships with other government entities and the private sector (17%)
 - Comprehensive Transportation Plan adopted March 2019
 - Public Transportation Study Report approved October 2019
- 2.2 Create a sense of place through insightful development that balances commercial and residential growth (25%)
 - Purchase of Property at Harris Mill Road Authorized (future Fire Station #3) July 2020
- 2.5 Plan and provide for current and future infrastructure (27%)
 - Town Center Regional Stormwater Facility Project Contract Awarded February 2020
 - Agreement for MAFC Roof Replacement Approved June 2020
- 3.4 Provide opportunities for meaningful public engagement and collaboration (20%)
 - Smart City Plan presented August 2020
 - Remote engagement process developed/utilized for revision of Connect Morrisville Strategic Plan Spring 2021
- 5.2 Deliver customer-focused service (24%)
 - MPD achieved reaccreditation November 2019
 - MFD revised Standard of Cover and aligned department plan to Connect Morrisville, received Class 1 ISO Rating March 2020
- 5.5 Align priorities with resources (22%)
 - Senior Center Lease Agreement Executed April 2020
 - CIP Policies for TOD and Affordable Housing Adopted January 2021
 - Smart Shuttle Service Contract Executed March 2021
- 6.1 Attract and retain businesses that provide a diverse tax base (19%)
 - Economic Development Incentive Agreement to Microsoft, Inc. Approved January 2020
 - Resolution of Support to Reopen and Rebuild Local American Economies Approved June 2020

2021 Briefing Item/Strategic Plan Objective Alignment



2.2 Utilize components within Town guiding documents to plan and provide for current/future infrastructure (21%)

- Land Use Plan Implementation for McCrimmon Parkway and TOD Approved July 2021

2.3 Ensure responsible, sustainable development and redevelopment, reviewing and considering guidance in Town policies/plans (20%)

- LAPP Grant Application October 2022

3.1 Validate community interests/desires/needs (50%)

- Advisory Committee Appointments July, November 2021

3.2 Offer events and programs that meet the needs and interests of the community, and increase awareness of activities and opportunities for public engagement and collaboration (31%)

- Pop up Dog Park and Disc Golf Course Introduced 2021

3.3 Create and promote both a community and staff environment that is welcoming to, inclusive of, and values diverse populations (21%)

- Agreement with Major League Cricket Approved November 2021

5.1 Enhance community-facing programs and services (25%)

- Morrisville Smart Shuttle Operating Agreement Approved July 2021
- ARPA Funds Accepted July 2021
- Bond Referendum Approved by Voters November 2021



2.3 Ensure responsible, sustainable development and redevelopment, reviewing and considering guidance in Town policies/plans (26%)

- Code of Ordinance Amendments for Stormwater June 2022
- Master Sustainability Plan Adopted June 2022

3.1 Validate community interests/desires/needs (48%)

- Advisory Committee Appointments April, June, July, November 2022
- National Community Survey Results Report September 2022

3.2 Offer events and programs that meet the needs and interests of the community, and increase awareness of activities and opportunities for public engagement and collaboration (24%)

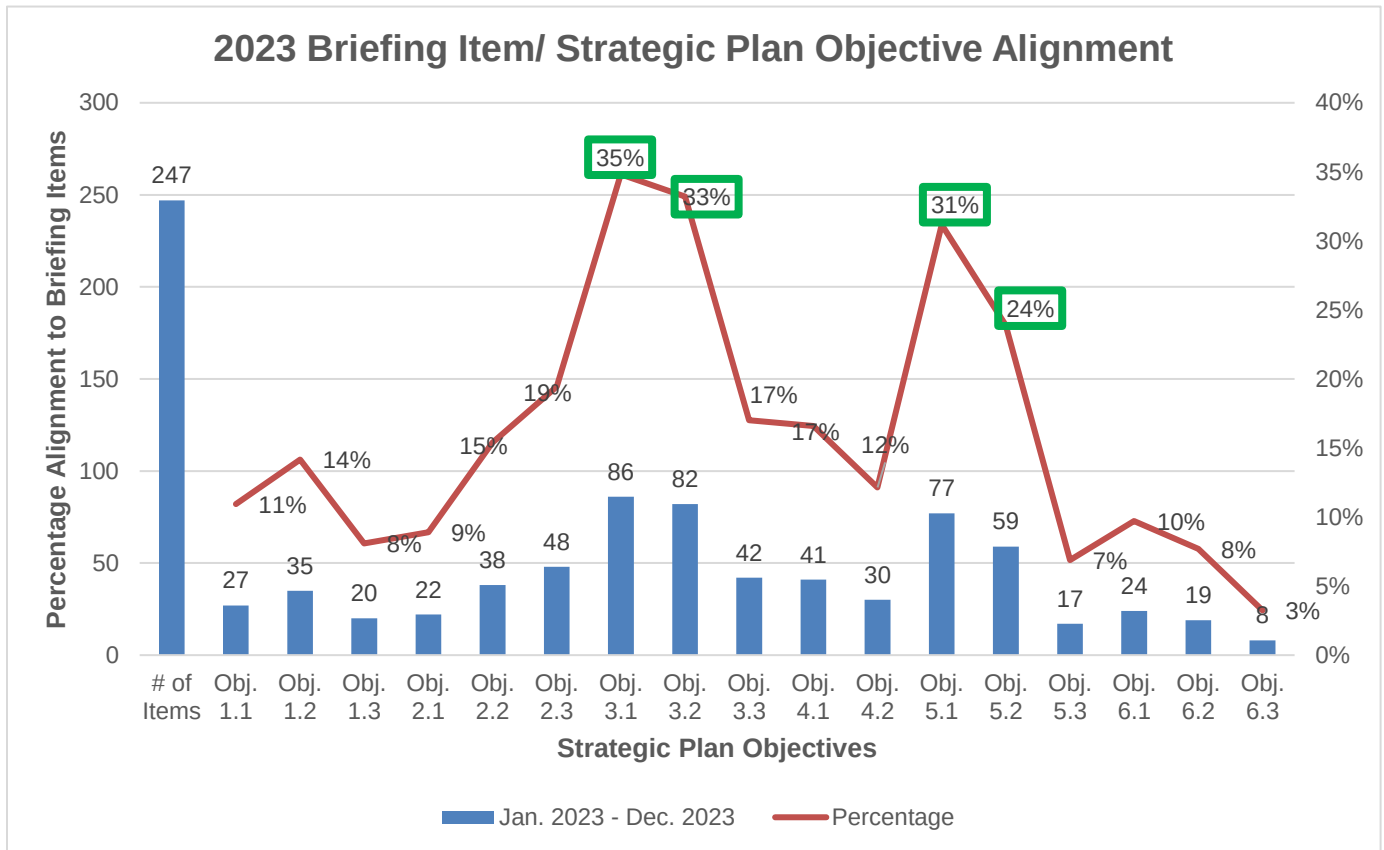
- Phase I Construction of Southern Lot at Church Street Park Approved July 2022
- Teen Morrisville 101 Graduate Recognition October 2022
- Morrisville 101 Graduate Recognition November 2022
- Recognition of MESC Poster Contest Winners December 2022

3.3 Create and promote both a community and staff environment that is welcoming to, inclusive of, and values diverse populations (24%)

- Non-Discrimination Ordinance Adopted March 2022
- Resolution Supporting ADA Policy Statement Approved September 2022

5.1 Enhance community-facing programs and services (28%)

- MOU with WCPSS Approved (facilitate future construction of a public high school in Morrisville) April 2022
- Small Business Program Grant Program Introduced October 2022



3.1 Validate community interests/desires/needs (35%)

- Advisory Committee Appointments February, July, November 2023

3.2 Offer events and programs that meet the needs and interests of the community, and increase awareness of activities and opportunities for public engagement and collaboration (35%)

- Morrisville Community Garden, Inc. Lease Renewed September 2023
- Western Wake Farmers Market, Inc. Agreement and Lease Renewal September 2023

5.1 Enhance community-facing programs and services (31%)

- ADA Transition Plan Approved for Pedestrian Facilities in the Public Right-of-Way March 2023

5.2 Commitment to professionalism and employee engagement (24%)

- Authorization of Parks, Recreation and Cultural Resources Staffing Adjustments November 2023

DEPARTMENT STRATEGIC PLANS - 2023 to Present

Beginning in 2023, following the strategic plan update, staff engaged in a robust evaluation of our internal strategic planning processes to ensure we were working effectively and efficiently and if there were improvements that could be made to our internal process. This was an opportunity to reinforce and continue alignment built between budget and strategic planning begun with the FY23 Budget development. Evaluation steps included:

- Survey of department heads and other staff engaged at various levels, to obtain feedback on prior processes and tools utilized
- Discussions and testing between our strategic planning software vendor and staff to determine integrative capabilities
- Onsite training with our strategic planning software vendor for all staff users
- Focus group discussions with staff and senior leadership to best understand any challenges previously experienced with the process to allow for development and setting of expectations

During this process, staff and senior leadership considered and evaluated timelines needed to effectively complete this work, and how these timelines may overlap/compete with other work priorities during the year. Ultimately, the aim was not to unduly burden staff with additional work at a time when other work process timelines may already be structured.

CURRENT

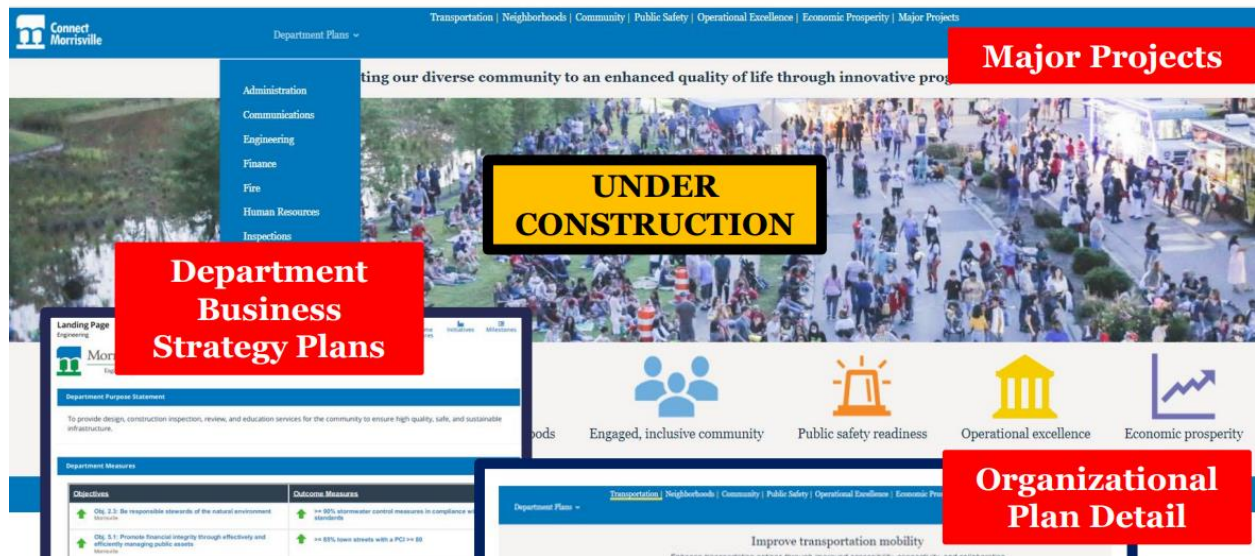
Departments are beginning to engage in revising their Strategic Plans, designed to create more value to staff, for more functional and intentional use. They may feature budget alignment, accreditation alignment (where applicable), enhanced data, more imagery, etc. Following our evaluative process, departments are encouraged to utilize tools and resources readily available to them, rather than feeling as though something new should be created:

- Current systems (strategic planning software, Finance software, integrative/sync capabilities)
- Prior Department Business Strategy Plans available for historic reference
- Current and Prior Fiscal Year budgets (Department and Organization)
- Current and prior Department presentations provided to Council

Capital/Major Projects will no longer be intermingled with department strategic plans – Engineering and Communications and Outreach staff have developed a robust [Town Project webpage](#) that could be referenced within department or organizational plan detail where appropriate rather than creating duplicate information.

Morrisville PRO was pulled down within the last six months and noted as “under construction” as staff began its evaluation process, and pending upcoming discussion with Town Council, anticipating potential adjustments to information reflected on the site.

Morrisville PRO: Project, Report, Organize



UPCOMING

Staff's recommended approach moving forward would be to layer the most recently updated information (FY25 Budget and CIP, Department Strategic Plan detail, community feedback), and bring forward consensus details from each to provide as prompts for the Organizational plan revision discussion with Town Council. Staff will also identify and utilize overlapping themes between each resource to engage the public for their insight and feedback.



Staff will work with the Communications and Outreach team to develop a Public Outreach plan aiming to reach a broad cross-section of the community, as well as engage staff for additional layered input. Public Outreach is scheduled for November/December following November 14 Work Session with Town Council.

FOR CONSIDERATION at NOVEMBER 14 WORK SESSION

- Does Town Council desire to review specific Organization plan elements or ALL plan elements?
 - Mission, Vision, Values (4), Goals (6) have not been reviewed/revised since original adoption April 2018
 - Objectives, Initiatives, Outcome Measures were last reviewed/revised Spring 2021 (Council, Community, and Staff input)
- Areas of Focus
 - Consensus priority areas between all interest groups
 - Relevant vs. no longer applicable/outdated?
 - What is within our CONTROL?