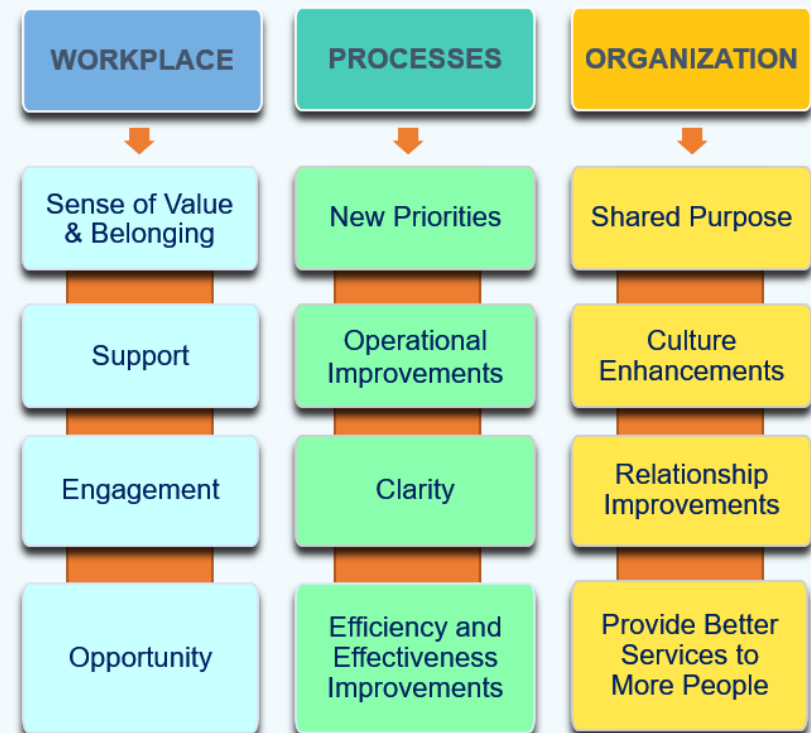# STRATEGIC *Plan*

SCORECARD

January 2025

Purpose

For a strategic plan to be successful, the entire organization must understand and embrace it. Otherwise…

- Organizational behaviors are inconsistent
- Projects don't align with the plan
- People feel disconnected and/or devalued
- Lack of accountability
- Adjustments don't get made
- Loss of credibility and momentum

Collective Impact Model

Here's what we're looking to achieve 👇

WORKPLACE	PROCESSES	ORGANIZATION
Sense of Value & Belonging	New Priorities	Shared Purpose
Support	Operational Improvements	Culture Enhancements
Engagement	Clarity	Relationship Improvements
Opportunity	Efficiency and Effectiveness Improvements	Provide Better Services to More People

OUR VISION

Cabarrus County strives to:

EMPOWER *our People*

ACT *Intentionally & Decisively*

FOCUS *on the Future*

OUR MISSION

THROUGH meaningful partnerships and engagement we serve & **support all** *on their journey to thrive.*

OUR GOALS

ENGAGEMENT

STEWARDSHIP

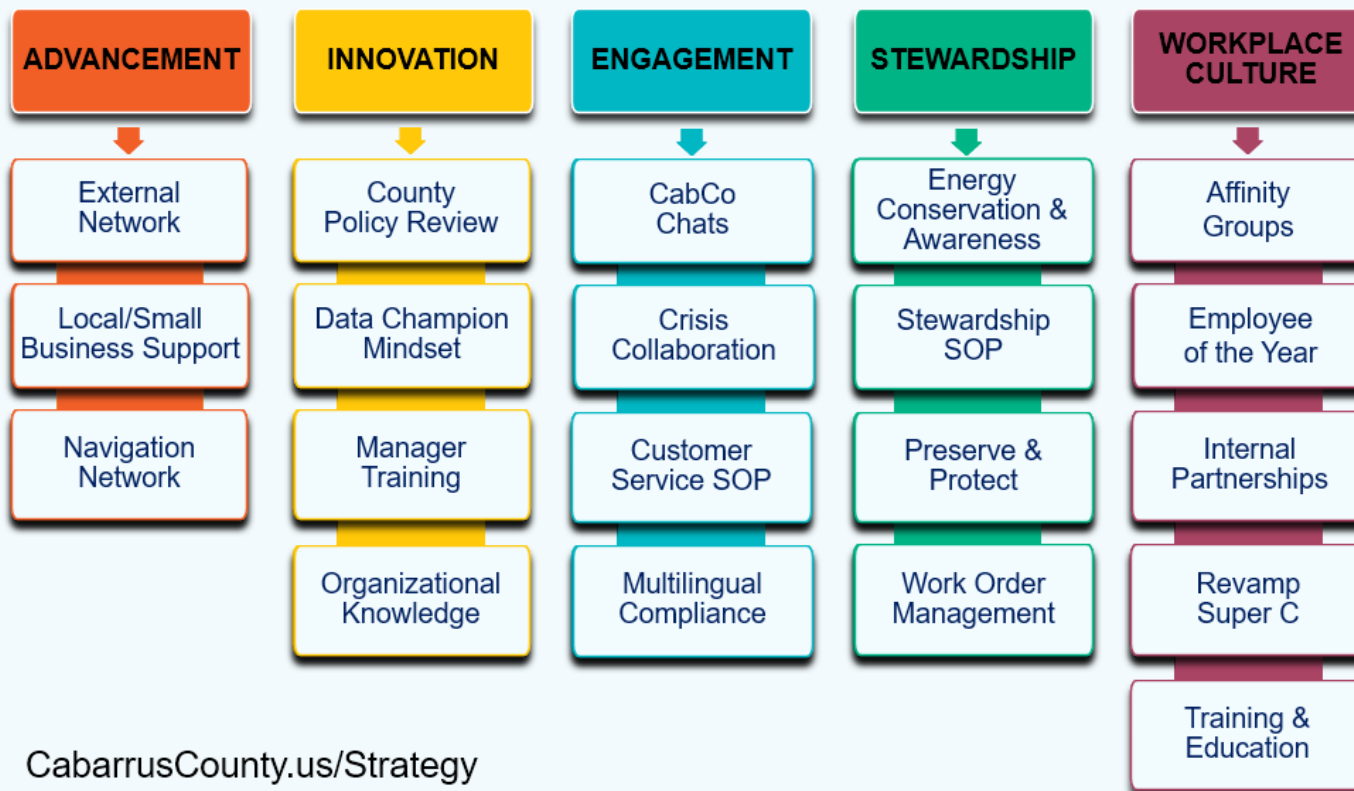INNOVATION

WORKPLACE CULTURE

ADVANCEMENT

Implementation Forecast

Task Forces
Identifies agency challenges/opportunities within a goal area, sets agency standards, recommends solutions, addresses roadblocks, evaluates impact, updates strategies and reports on goal progress
Meets quarterly: October, January, April and Summer
Submits quarterly and annual updates to commissioners

Work Groups
Develops and moves forward implementation plans for Task Force recommendations, determines capacity and resources, assigns tasks and parameters, tracks progress, calls attention to roadblocks & possible solutions, implements solutions, measures and reports progress on the recommendation
Shares quarterly reports with the Task Force

Team CabCo
Carries out day-to-day operations assigned to them, reports on metrics and impacts, and makes front-line recommendations
Reports progress to the Work Group

Plan sustainability

Dedicate resources

Track & report measures

Make adjustments & align with budget

Evaluate progress & discuss options

⭐ Community participation opportunities

FY25 Task Forces and Work Groups

ADVANCEMENT	INNOVATION	ENGAGEMENT	STEWARDSHIP	WORKPLACE CULTURE
External Network	County Policy Review	CabCo Chats	Energy Conservation & Awareness	Affinity Groups
Local/Small Business Support	Data Champion Mindset	Crisis Collaboration	Stewardship SOP	Employee of the Year
Navigation Network	Manager Training	Customer Service SOP	Preserve & Protect	Internal Partnerships
	Organizational Knowledge	Multilingual Compliance	Work Order Management	Revamp Super C
				Training & Education

CabarrusCounty.us/Strategy

FY25 Goal Progress Indicator Overall

Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Advancement: Create pathways for upward economic mobility to support a prosperous and sustainable future for our community	On Track	On Track		
Engagement: Improve the value of information, resources and opportunities we offer the community	On Track	On Track		
Innovation: Modernize county government to meet current and future needs, improve efficiency and raise the level of accountability	On Track	On Track		
Stewardship: Responsibly manage resources and care for assets to support the interests of our community	On Track	On Track		
Workplace Culture: Support employees through shared actions, values and culture to deliver exceptional service and become an employer of choice	Intentional Hold	Intentional Hold		

Advancement Goal Progress

Advancement: Create pathways for upward economic mobility to support a prosperous and sustainable future for our community
Status: On Track

Work Groups	Status	January 2025 Check-In
External Network: Encourage the use and development of external committees and coalitions	Intentional Hold	Work will begin after FY26 priorities and scope are set.
Flex Work & Service Hours: Expand service hours with minimal impact on budget. Flexible hours, spaces and locations allow residents to receive a sampling of services outside of the 8 a.m. to 5 p.m., Monday through Friday workweek	In Progress	**Progress update** The Flexible Work policy is approved, but the group recommends manager training on its various applications. Consider expanding work hours at open facilities and through technology in FY26. **Next steps** As of 2022, nearly 20,000 Cabarrus residents work inside the county's footprint and another 68,000 work outside. Many of these workers have little to no availability to do business with the County between 8 a.m. and 5 p.m. at the primary service locations. Our Library and Active Living and Parks facilities are open to residents beyond that timeframe and are not at full programming capacity. Identify remote service locations and develop a plan to staff those locations with a rotation of services not usually offered in those areas and at that time. This process may also address staff redundancy in the name of safety (e.g., at least two people per facility until close). Outreach opportunity: Research community interest in services to help determine which departments would be most beneficial to the community in remote locations (during either regular or extended hours).
Navigation Network: Build internal relations through a network of service navigators that guide employees and the public through complex and confusing pathways to service	In Progress	**Progress update** Communication channels were established using Microsoft Teams. The first Team channel includes work group members. The second Team Channel will serve as a test portal for the proposed "Help a Teammate Site." Collaborated with the Customer Service SOP Work Group to help with testing and data gathering. They are excited about the Navigation Network and its potential to improve customer service. It feels good to know we are working on something that staff want to use. The work group has created and is testing a Teams site with staff recruited into the effort and are working on referral forms. **Next steps** The work group expects to discuss the test data collected and modify functionality as needed. The data will help them finalize the Navigator Roles & Responsibilities documentation and develop a plan to get department head buy-in.

| Small Business Support: Find new and innovative ways to use County resources in support of local and small businesses, and their workforce | In Progress | **Progress update** The work group has held informational interviews with EDC and the Chamber. Based on the information gathered, they're developing subcommittees to support action areas. The team met with ITS to discuss website options, data collection/resources and past processes. Based on the discussion, they're considering location-based service menus. The group began work on an inventory of County services, an inventory of municipal business registration processes, a review of prior County webpages focused on business services and developing an increased understanding of how other areas of the County work with small businesses. The group started a Teams site for communication.

Next steps Work group members are gathering information and forming drafts for the intake forms, directory and menu of services. They're holding discussions on adding a business listing question to the vendor registration process and possibly connecting the listing form to the intake form. The group will partner with the City of Concord as they develop their new business packet (created for downtown businesses). They're also working to develop a plan for deployment and partnerships. |
|---|---|---|

Engagement Goal Progress

Engagement: Improve the value of information, resources and opportunities we offer the community
Status: On Track

Work Groups	Status	January 2025 Check-In
CabCo Chats: Provides an opportunity for the public to connect and communicate with County staff	Intentional Hold	Work will begin in FY25 Q4.
Crisis Collaboration: Guide, prepare and improve emergency response to crises by bringing all the team members to one table before an actual crisis	In Progress	**Progress update** 1. The Cabarrus County Sheltering Standard Operating Guidelines have been completed after nearly two years of collaborative effort by the Shelter Task Force. 2. Two key projects, the Shelter Task Force Tabletop and the Local Emergency Planning Committee (LEPC) Tabletop, are nearing completion and are both scheduled for November. 3. Planning and training have already begun for upcoming exercises: a functional shelter exercise in May 2025, a full-scale McGuire exercise in summer 2025, and departmental COOPs have been completed. The goal is to create an exercise for at least two departments to test their COOP procedures in 2025. To optimize workload and leverage expertise, Cole Whitehurst and Dawn Gustafson have divided exercise responsibilities. Cole will manage COOP and LEPC exercises, while Dawn will focus on sheltering and radiological exercise planning. This division allows for more efficient coordination and ensures each exercise receives the attention it requires. Further exercises will be allocated based on expertise and availability. **Next steps** Completed two exercises along with their After-Action Reports (AARs) and Improvement Plans (IPs). These reports were shared with relevant organizations and will be presented in person over the next two weeks. Initiated planning for the Functional Shelter Exercise in May, with the planning team already meeting and organizing training plans and equipment. Continued collaboration with McGuire Nuclear Station to finalize the schedule for this year's exercise, anticipated in mid-July. Training plans and equipment organization are also underway. Preparations for COOP exercise planning are set to begin after completing logistical improvements to the warehouse and deployable trailers, many of which will be utilized in upcoming exercises.

Customer Service SOP: Develop new approaches to manage customer requests and establish standards to ensure positive customer experiences.	In Progress	**Progress update** The Customer Service work group has made a shared Takeaways document on our Teams site to collect our highlights and things we think are most important to include in our working S.O.P. This document will transition into our workings S.O.P. as we move forward. The group created a working list, identifying front-facing departments so we can prioritize future work/data collection. We discussed this list as a group and helped to organize a few more departments—this is an ongoing process. They've completed a shadowing project to improve their understanding of challenges across the organization and have created an Action Plan inclusive of customer service data and a department head questionnaire based on discussions. **Next steps: Progress leap** By the end of March, the work group will develop a draft basic customer service guide new employees will receive at orientation. It includes best practices for answering the phone, greeting customers and building visitors, responding to emails, setting up email signatures, directing problems you don't know how to answer (that may or may not have to do with your line of work) and escalating challenging scenarios.

| Multilingual Compliance: Ensure compliance with State and Federal programs and meaningful access to County information for affected populations. | In Progress | **Progress update**
The Multilanguage Compliance group was able to get a better understanding of the legal implications of Title VI for certain departments based on federal funding. The departments that could be liable under Title VI based on having received federal funding in 2024 are Health and Human Services, Jail, Transportation, Sheriff, ARPA, Emergency Management, Planning and Development.

The work group has also developed a survey to distribute to all departments to better understand the current process to identify and assist Limited English Proficiency (LEP) individuals, their methods of collecting data, their top languages, frequency of encounters, and their awareness of the Bilingual Incentive Program offered by HR.

Next steps
Once the survey results are received, the group plans to develop an action plan for departments that need to comply and may not have a current plan in place to assist LEP citizens. |

Innovation Goal Progress

Innovation: Modernize county government to meet current and future needs, improve efficiency and raise the level of accountability
Status: On Track

Work Groups	Status	January 2025 Check-In
County Policy Review: Develop a framework that supports best practices for creating, reviewing and implementing policies and procedures that apply to internal and external County business.	In Progress	**Progress update** Archive review: ITS has pulled information in folders. Strategy has started a catalog that merges information from several sources, including ITS folders and incomplete lists compiled more than 5 years ago. Best practice: Strategy conducted an informational interview with CabCo Schools to understand their policy review committee work and used it to develop a high-level example of a policy draft. Legal started work on the first draft of the policy. The Trauma-informed Counties Project is interested in reviewing the County's policies from their view. The group is interested in an inclusive model for external policy change prompts. If a department receives information about a federal or state change or local need that impacts policy and operations, a group with representation from across the County will learn about it and discuss organizational impacts. (Traditionally addressed in silo.) The work group will develop a draft policy review process/committee for task force consideration. **Next steps** In the third quarter of FY25, the work group will develop a formal policy review process and complete the catalog of current policies.
Data Champion Mindset: Measure and report progress made toward the County's strategic and business plans to drive internal performance and accountability	In Progress	**Progress update** Power BI (1,200) and ESRI (1,000) licensing information went to employees across the organization. Strategy and ITS began work on the automation process with Construction Standards. The Accela dashboard is almost up and running. They've engaged three additional departments in data conversations – Transportation, Library and DSS. The group also worked on a base framework for an automation process map. **Next steps** The group will pause operations to support ITS work on the TCP conversion. Once the project resumes, the work group will complete the Accela dashboard, continue relationship-building with departments, build a data automation process with Transportation, Library and DSS. Strategy will continue with quarterly data collection for the budget book using the Teams Planner to assign tasks and collect information. Long-term assignment: Consider what needs to happen to improve the use of data in BOC agenda items.
Manager Training	Indefinite Hold	Work is paused due to organizational changes.

Organizational Knowledge: Create staff opportunities for cross-organizational education	Indefinite Hold	**Progress update** The work group developed the "Inside CabCo" brand and held the first live Q&A session the week of November 18, 2024, with host Jason Reece (ITS) and subject matter expert Yesenia Pineda (Budget) on the County's budgeting process. It was promoted through Direct Connect and word-of-mouth. The group established an appropriate virtual platform (Teams) for hosting the live sessions ensuring a seamless interaction between employees and speakers and worked to gather questions from employees to promote interactivity. The work group learned a lot from the "pilot" live event and received some very constructive feedback from viewers. They've have taken this feedback and are already implementing it with the planning of our upcoming episode. **Next steps** A new episode of Inside CabCo is coming February 18, 2025 with host Jaelyn McCrea (Communications & Outreach) and subject matter expert Erin Newkirk (HR) to discuss Employee Benefits and other HR topics. The group is discussing ways to increase the number of episodes distributed each year (originally 4 per year).

Stewardship Goal Progress

Stewardship: Responsibly manage resources and care for assets to support the interests of our community
Status: On Track

Work Groups	Status	January 2025 Check-In
Budget, Finance and Procurement SOP: Develop a centralized, easy-to-reference manual that addresses challenging processes, common questions or concerns, and policy changes related to Finance, Budget and Procurement	In Progress	**Progress update** The work group continues to compile and update the most common processes within the respective departments. These processes will be those that other departments are most likely to have questions about and that impact them the most. The group discussed formatting and how they can make the SOP more cohesive as you flow through the topics. The group discussed the benefits of providing pictures for those who are not as well-versed in our software (NeoGov, Bank of America Works, Munis). They've added Suzanne Moose (DSS) for user and administrator views. **Next steps** The work group plans to expedite plans and have an unformatted draft of priority processes available for the new leadership team. To help speed up the process, the group will use Scribe.
Preserve and Protect: Identify natural and historic resources. Protect through conservation, preservation, purchase, and partnerships. Educate on registered natural and historic resources, opportunities for landowner participation, & the value of resources	In Progress	**Recent process** Brought together staff from Cooperative Extension, Soil & Water Conservation District, Communications & Outreach and the Library's Lore Room to collaborate. Discussed the importance of clear distinctions between conservation through agriculture, land banking and preservation. In year one, the group wants to focus on Century Farms to connect residents and consumers to the county's deep agricultural heritage. Group members have submitted conservation easement applications for this cycle, began recording podcasts, added/renewed new Voluntary Ag District (VAD) enrollees, planning a VAD Dinner to be held next month and a "Save the Farm" event to be held in the spring. **Next steps** Continue event planning work, better understand ways to capitalize on sponsorships and increase cross-organizational involvement with departments with programs that can support the farming community. The state is working to update state-wide heritage sites; continue to update what is already developed. Continue work to understand what historical documents exist related to agriculture in CabCo. Distribute podcast.

Energy Conservation & Awareness Campaign: Create a dashboard or report that provides monthly or quarterly data showing energy usage and cost by facility	Indefinite Hold	**Progress update** This project was already in progress. As software prices escalate, the Environmental Management Director will work to determine the best methods for collecting and analyzing data on accounts. **Next steps** The data collection and reporting portion of this project is impacted by software challenges. The project is on hold until new County leadership can provide input on the staff education campaign portion.
Work Order Management Refine the work order management system by bringing new software online.	Indefinite Hold	**Progress update** This project was already in progress and the tech design is complete. The project is on hold until the Infrastructure and Asset Management Department is ready to launch. **Next steps** The project is on hold indefinitely and will be removed as an individual strategy to achieve the Stewardship Goal until a launch date is set.

Workplace Culture Goal Progress

Workplace Culture: Support employees through shared actions, values and culture to deliver exceptional service and become an employer of choice
Status: Intentional Hold

Work Groups	Status	January 2025 Check-In
Affinity Groups	Indefinite Hold	Work is paused due to organizational changes.
Employee of the Year	Indefinite Hold	Work is paused due to organizational changes.
Internal Partnerships: Establish departmental connections through increased communication, committees and a County government education program	In Progress	**Progress update** The work group held a kickoff meeting in November and has since had conversations on the best ways to understand and grow from each other's strengths, despite inconsistent funding methods, reporting structures and event expectations. **Next steps** Calendar coordination and cross-organizational planning and support for spring and summer events.
Revamp Super C	Indefinite Hold	Work is paused due to organizational changes.
Training & Education	Indefinite Hold	Work is paused due to organizational changes.

Strategic Plan KPIs

Category	January 2025 Check-In

Implement, Measure, and Promote the Strategic Plan	**Percentage of Strategic Plan goals in progress:**
	• FY25 Q1: 4/5 with significant progress; 5/5 have some progress
	  ○ Most Workplace Culture strategies are on intentional hold due to a phased-in rollout.
	• FY25 Q2: 4/5 with significant progress; 5/5 have some progress
	  ○ Most Workplace Culture strategies are on indefinite hold due to organizational changes.
	  ○ The two Workplace Culture Co-Chairs actively participate in the four active Task Forces to ensure their goals are incorporated into the work of the other Task Forces and Work Groups.
	
	Number of stakeholder updates and activities:
	• FY25 Q1: 5
	  ○ Task Force Appreciation (1), Performance Report (1), Work Group Check-ins (1), DirectConnect (3)
	• FY25 Q2: 28
	  ○ Employee Appreciation activity (1), Work Group Kickoff meetings (14), Task Force Meetings and updates (4), Youth Commissioner presentation (1), Values Card distribution (1), DirectConnect (2), Scorecard (1), Work Group Leader Coaching Sessions (4)
	
	Quarterly Scorecards published since project kickoff in July 2024:
	• FY25: 2

Support the Task Forces and Work Groups	**Frequency of Task Force meetings and participant data**
	• **Q1 Recap: October 2024**
	  ○ Advancement: 9/15 (60%)
	  ○ Engagement: 10/12 (83%)
	  ○ Innovation: 9/17 (53%)
	  ○ Stewardship: 10/12 (83%)
	  ○ Total attendance over four sessions: 38/56 (68%)
	  ○ Of those who did not attend the October 2024 meetings, 60% (11/18) are departmental leadership (top two positions)
	• **Q2 Recap: January 2025**
	  ○ Advancement: 12/15 (80%)
	  ○ Engagement: 10/12 (83%)
	  ○ Innovation: 8/16 (50%)
	  ○ Stewardship: 8/12 (67%)
	  ○ Total attendance over four sessions: 38/55 (69%)
	  ○ Of those who did not attend the January 2025 meetings:
	    - 71% (12/17) are departmental leadership (top two positions)
	    - 47% (8/17) missed both the first and second meeting
	    - 63% (5/8) of those who missed both meetings are dept. leadership
	• Groups with larger numbers have lower attendance.
	• Planning an annual commitment renewal from members.

Percent of County departments assigned to Task Force and/or Work Group activities (annual):
- FY25: 100%

Percentage of Work Groups with progress (this determines active status):
- FY25 Q1: 67% (14/21)
  - Seven work groups are on temporary hold due to a planned phased-in rollout of the strategic plan.
- FY25 Q2: 57% (12/21)
  - Five of the seven in the phased-in rollout, plus two additional work groups, were moved to indefinite hold due to significant roadblocks (organizational changes, software challenges and administrative roadblocks).

Percentage of active Work Groups (those that are "In Process" or "Completed" annual goals) that provided their Task Force with a quarterly status report:
- FY25 Q1: 100%
- FY25 Q2: 100%

Percent of active Work Groups that made changes based on Task Force input:
- FY25 Q1: N/A
- FY25 Q2: 100% (12/12)

Percentage of ALL Work Groups that have met or exceeded annual goals:
- FY25 Q1: 0% (0/21)
- FY25 Q2: 5% (1/21)

Percentage of active Work Groups that have met or exceeded annual goals:
- FY25 Q1: 0% (0/12)
- FY25 Q2: 8% (1/12)

Number of Resources Allocated vs. Utilized
- People: Underutilized (falls to a few VERY dedicated and invested employees)
- Technology: Improved software knowledge and usage through these projects
- Time: Underutilized (limited staffing and hours are allocated for the work, which slows projects down)
- Financial: No change (Work Groups operate within the County's existing budget)

Satisfaction of Task Force Members on Progress:
- A formal satisfaction survey at the end of year one.
- Detailed feedback and recommendations for each active work group are collected quarterly at Task Force meetings. Synopsis: High satisfaction with completed and projects in process; however, work groups should attempt to expedite timelines. Concerns for the momentum of projects on intentional hold.

- Frontline employee feedback:
  Wow! It was pretty amazing to see a large amount of the ideas from different strategy groups being implemented. I remember when I first joined ours, the biggest comment from people who chose not to participate was "the county has tried this before and it's gone nowhere just like the surveys." Now I stand back and look at all the changes and growth our organization has stepped into and I'm just so proud. Just think, the next time there's an opportunity like this the biggest comment could be "the county started this a few years ago, and I think I can add to it".

Alignment and partnership between various active Work Group projects (across goal areas):
- **Customer-focused service improvements:**
  Customer Service SOP, Navigation Network, Multilingual Compliance, and Flex Work & Service Hours
- **Internal process improvements:**
  County Policy Review, Stewardship SOP, Data Champion Mindset, Small Business Support
- **Improved internal communication for the benefit of the public:**
  Internal Partnerships, Preserve & Protect, Crisis Communication
- **Operational efficiencies:**
  Energy Conservation Awareness & Campaign, Work Order Management Refinement