

# **Charlotte's Balanced Scorecard: Aligning Vision with Government Performance**

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# City of Charlotte

- **Population: 658,848**
- **Council/Manager Government**
- **6,491 employees**
- **\$1.37 billion budget**
- **Second largest financial center in U.S.**
- **Used Balanced Scorecard since 1996**



# Charlotte's Balanced Scorecard

## Aligning the Vision...

### Charlotte will be:



The safest large city in America



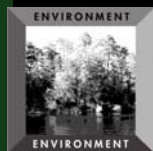
The most prosperous for all citizens



A city of great neighborhoods



The premier city for integrating land use and transportation choices



A city of environmental stewardship

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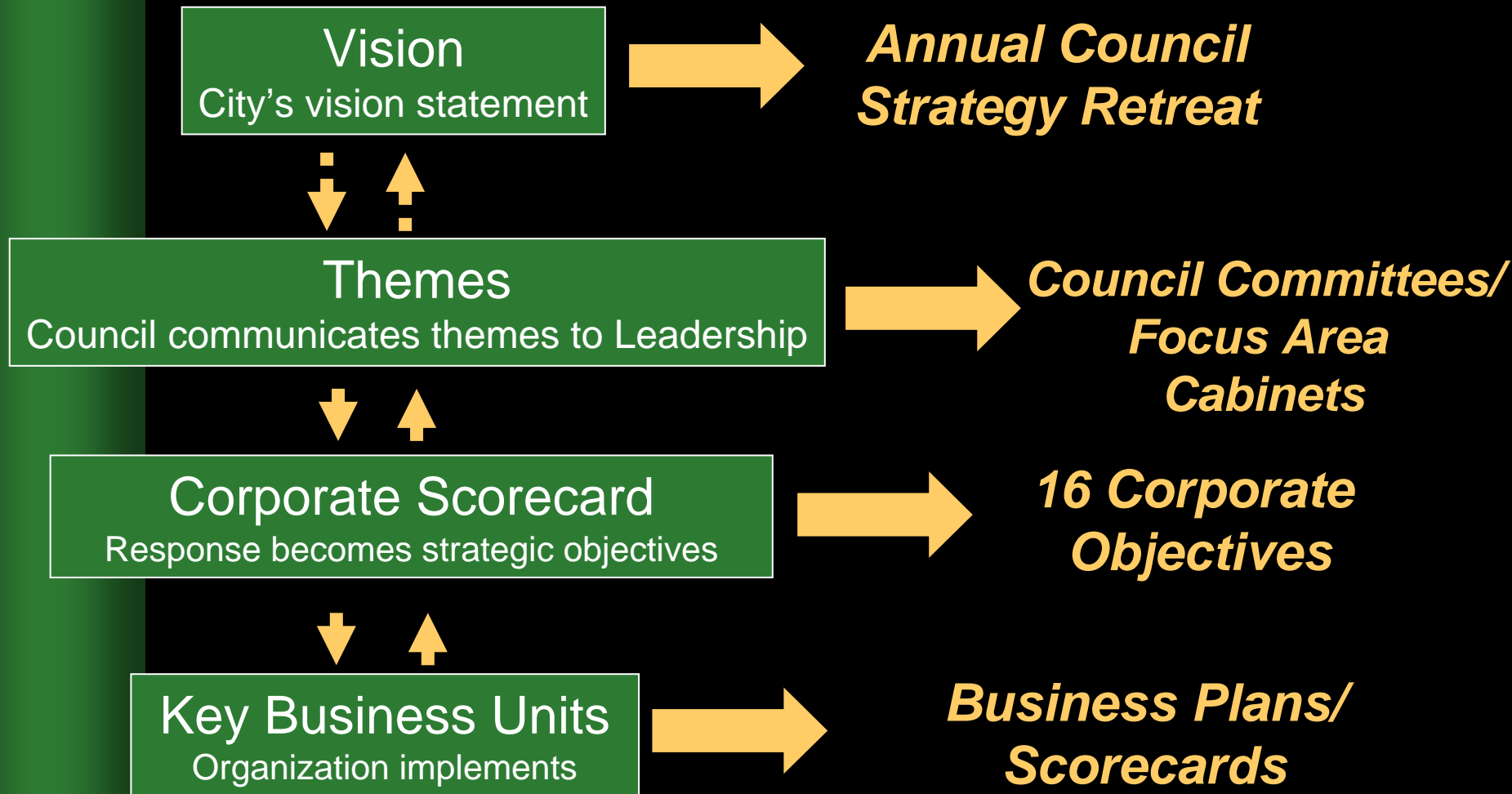
# Charlotte's Balanced Scorecard

## ... with Government Roles

Service:	garbage collection; water/sewer; transit; housing
Regulate:	ordinances/codes; zoning; land development
Protect:	police; fire; environment;
Build:	infrastructure; public facilities
Administer:	collect revenues; human resources; data management



# Charlotte's Balanced Scorecard





# CITY STRATEGY

## VISION

COMMUNITY OF CHOICE FOR LIVING, WORKING AND LEISURE



## CITY COUNCIL FOCUS AREAS

Community Safety • Housing and Neighborhood Development  
Environment • Transportation • Economic Development

## COMPREHENSIVE CITIZEN SERVICE

## CORPORATE OBJECTIVES

SERVE THE CUSTOMER

Reduce Crime

Increase Perception of Safety

Strengthen Neighborhoods

Provide Transportation Choices

Safeguard the Environment

Promote Economic Opportunity

RUN THE BUSINESS

Develop Collaborative Solutions

Enhance Customer Service

Optimize Business Processes

MANAGE RESOURCES

Maintain AAA Rating

Deliver Competitive Services

Expand Tax Base & Revenues

Invest in Infrastructure

DEVELOP EMPLOYEES

Achieve Positive Employee Climate

Recruit & Retain Skilled, Diverse Workforce

Promote Learning & Growth

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# Charlotte's Balanced Scorecard

## How it Works

- Five strategic themes adopted by City Council
- Balanced Scorecard perspectives modified to city needs
  - Serve the Customer
  - Manage Resources
  - Run the Business
  - Develop Employees
- 16 Corporate Goals
- Key Business Units link to corporate scorecard through their business plans



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# Charlotte's Balanced Scorecard

## How it Works

- Bring people together from different key business units to work on strategies and plans
  - Theme Cabinets
  - Work Teams: Run the Business, Manage Resources
  - Manager's Cabinet
- Organize Council committees around themes
- Promote and reward collaboration





# Charlotte's Balanced Scorecard

## Transportation Linkage



- **Initiative** - Design or redesign streets to increase safety for pedestrians and bicyclists and to reduce speeding in neighborhoods
- **Target** - Percentage application of street design guidelines on new land development plans



# Charlotte's Balanced Scorecard Transportation Linkage



Develop  
Collaborative  
Solutions

Enhance  
Customer  
Service

Optimize  
Business  
Processes

- **Initiative** - Improve citizen access to city services
- **Target** - Rating in biennial citizen survey of good or better from 70% of respondents
  - Support with data and personnel for successful opening of 311 Call Center



# Charlotte's Balanced Scorecard Transportation Linkage



Develop  
Collaborative  
Solutions

Enhance  
Customer  
Service

Optimize  
Business  
Processes

- **Initiative** - Development of agreement of regional travel demand model
- **Target** - Agreement in place by January 2006
- **Initiative** - Collaborate with Neighborhood Development on neighborhood issues
- **Target** - Percentage participation in neighborhood improvement projects



# Charlotte's Balanced Scorecard Neighborhood Development Linkage



Reduce  
Crime

Increase  
Perception of  
Safety

Strengthen  
Neighborhoods

Provide  
Transportation  
Choices

Safeguard  
the  
Environment

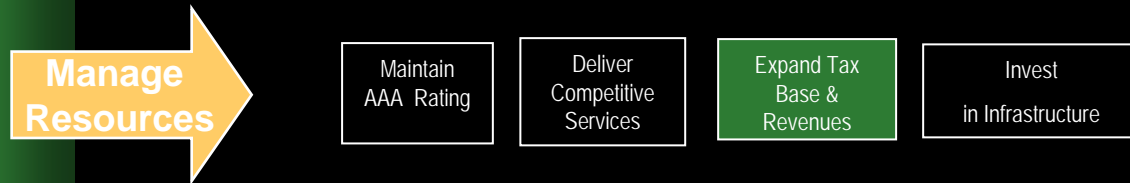
Promote  
Economic  
Opportunity

- **Initiative** - Conduct housing and property inspections to enforce city codes
- **Target** - Number of compliances achieved and Improvement in Neighborhood Quality of Life Index Scores



# Charlotte's Balanced Scorecard

## Neighborhood Development Linkage



- **Initiative** - Manage Housing Trust Funds and housing projects to leverage private funds with public funds to expand number of housing units
- **Target** - Leverage ratio of one public dollar to five private dollars



# Charlotte's Balanced Scorecard Neighborhood Development Linkage



Develop  
Collaborative  
Solutions

Enhance  
Customer  
Service

Optimize  
Business  
Processes

- **Initiative** - Develop a strategic IT Portfolio for Neighborhood Development functions
- **Target** - Implement the *City View Code Enforcement Information System* by year end



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# Charlotte's Balanced Scorecard

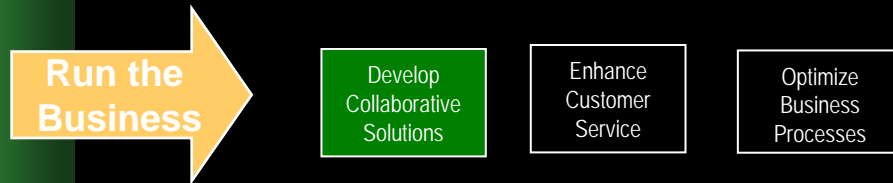
## Alignment of Key Business and Corporate Support Functions

- Business Planning
- Budgeting
- Training and Development
- Customer Service Philosophy
- IT Investments



# Charlotte's Balanced Scorecard

## Current Challenges

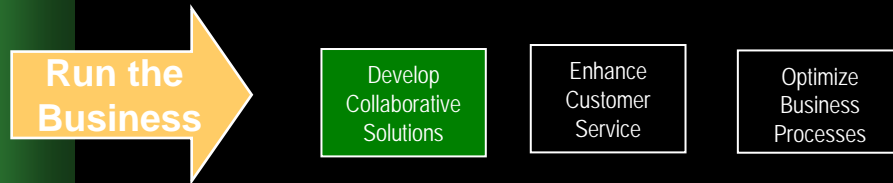


- **Customer Service**
  - 311 Call Center - 13 Different data platforms
  - “SILO” approach
  - “My customer” not the citizen
  - Not achieving excellent customer service



# Charlotte's Balanced Scorecard

## Current Challenges



- **IT Investments**
  - Separate e-mail systems
  - Multiple work order systems
  - Duplication
  - Priorities for expenditures not made strategically

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# Charlotte's Balanced Scorecard Technology Collaboration

- **Goals**
  - Adopt a unified citizen view of city services
  - Align expenditures with priorities
  - Eliminate duplication
- **Teams organized across Key Business Units**
  - Policy Management
  - Technology Management
  - Strategic Alignment
  - Total Cost of Ownership
- **Celebrate results to date**



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# Charlotte's Balanced Scorecard

## Celebrating Achievement

- **Manager's Strategy Award**

Recognizes a Key Business Unit or team that has made significant progress in a key area:

- **2006 Award - Developing Collaboration Solutions**

- South Corridor Light Rail Transit/Infrastructure Program
- Team of six Key Business Units (51 team members)
- Awarded on September 20<sup>th</sup>

- **Previous Awards**

- Training and development (2005)
- Communicating the balanced scorecard and strategy (2004)
- Integrating strategy and budget (2003)



# More Information

- Web site:  
[www.charmeck.org/cibudget](http://www.charmeck.org/cibudget)
  - Publications available
    - Focus Area Plans
    - Balanced Scorecard
    - Strategic Operating Plan
    - Year End Report
  - BSC references
  - Frequent questions

