



FY2020

Executive Management Work & Performance Plan

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FY2020 Work Plan

Key Initiative #1 -- Finalization of the 2019 Countywide Reappraisal

Description:

Effectively finalize the 2019 countywide reappraisal; final accounting of the quality control process for appraisal, exemption, and appeal procedures by the CAO Quality Assurance team, as they pertain to the 2019 reappraisal; complete 2019 informal reviews and formal Board of Equalization and Review appeals.

Rationale:

Effectively complete 2019 countywide reappraisal, monitor the quality control, complete all reviews and appeals of 2019 revaluation assessments.

Completion Date:

Complete all functions of the 2019 countywide reappraisal, except for appeals to the Property Tax Commission, by June 30, 2020.

Updates/Project Milestones:

Include the following:

- Analyze and report the quality control practices for the 2019 countywide reappraisal to ensure that best practices in performance and communication were used throughout the organization.
- Complete all remaining informal reviews filed before May 18, 2020.
- Mail notices of value change for any informal reviews, allowing customers the opportunity to file to the Board of Equalization & Review within 30 days of notice.
- Complete all BER formal appeals filed in relation to the 2019 countywide revaluation.
- Perform final sales ratio analysis and submit to the North Carolina Department of Revenue for the 2019 countywide revaluation.

Outcomes/Measures:

Key Initiative #2 -- Increase the Value of Procurement Services

Description:

In Fiscal Year 2020, Financial Services will arrange for an independent evaluation of the procurement functional area in support of the delivery of high quality, valuable procurement services to our business partners and customers. The Department will also work with key stakeholders to identify ways to improve procurement policies and increase access for Minority Women and Small Business Enterprise (MWSBE) organizations.

Rationale:

Promoting the delivery of value for money through good procurement practice and optimal use of procurement collaboration opportunities

Completion Date:

June 30, 2020

Updates/Project Milestones:

On July 1, 2019, work will begin on the following:

- Develop and deploy a public health pilot to identify gaps in current policies
- Conduct an independent evaluation of the procurement functional area (Engage with the National Institute of Governmental Procurement)
- Survey similar agencies (big 10) to engage in industry-industry collaboration

Work on the following will begin in fiscal year 2020 and be completed in fiscal year 2021:

- Partner with other County departments to identify improvements in service delivery (Focused on customer perspective associated with ease of process and opportunities for collaboration)
- Partner with SP&E to develop cost/benefit measures (Developing measures is dependent on completion of the evaluation)
- Partner with the Equity and Inclusion team to develop and implement a plan to increase access for Minority Women and Small Business Enterprise (MWSBE) and other minority non-profit organizations

Outcomes/Measures:

The Department will evaluate the procurement function in the County to identify best practices and opportunities for improvement. We will also partner with other County departments to ensure we capture stakeholder input in shaping expectations for service delivery.

- Set a baseline target for the percent % of negotiated savings and cost avoidance realized from contract negotiations, discounts, rebates from total purchase amounts, and improved financial terms
- Document the findings from the Public Health Pilot
- Complete the Procurement Function Independent evaluation
- Begin a partnership with other County departments to identify improvements for procurement service delivery
- Identify improvements for MWSBE utilization and reporting

Key Initiative #3 -- Improve employee satisfaction and engagement

Description:

The Finance Department will implement strategies to improve employee satisfaction and engagement by focusing on organizational learning and change management efforts.

Rationale:

The Financial Services Department staff play a critical role in the day to day operations and major initiatives for the County, which is experiencing dynamic growth and change. Employees are our most valuable resource in meeting these goals, and increased employee satisfaction and engagement will translate into strong customer service and added strategic value for the County. Strategies are expected to improve employee motivation and development scores on the Employee Climate Survey for FY20.

Completion Date:

June 30, 2020

Updates/Project Milestones:

- Deep dive session with staff on ECSFY19 results, facilitated by UNC School of Government – Q1
- Staff and manager actions on communication, training, and staff support needs identified in ECS deep dive sessions Q2-Q4
- Complete Finance Organization Assessment including HR classifications, functional reorganization, and strategic new hires Q2-Q4
- Raise opportunities for employee feedback and communication through monthly newsletter, all hands meetings, department director lunch and learns, and informal meetings and celebrations. Q-1-Q4
- Implement targeted training opportunities for all staff through increased use of onsite training courses facilitated by local colleges, GFOA, and UNC School of Government – Q2-Q4
- Continued professional development coaching for Department Director – Q1-Q4

Outcomes/Measures:

Improved FY20 ECS measures across all Finance Departments

Key Initiative #4 -- Secure the Business Platform

Description:

Improve system security, data security and disaster recovery capabilities to provide the County with a trusted technology platform for its critical business operations.

- Protect and control County data and other technology assets
- Redesign and implement more secure and highly available enterprise network architecture
- Multi-year refresh cycles on infrastructure equipment (e.g. Network and compute devices)
- Asset & Vendor Risk Management: "Single View of Mecklenburg County IT" (IT Contracts & Vendor Mgmt., IT Risk Mgmt.: Source Code, Continuity of Operations Plan & Disaster Recovery)

Rationale:

- Effective Risk Management Requires a Secure Business Platform

Completion Date:

FY20

Protect and control County data and other technology assets

- SIEM (Security Information and Event Management): Baseline user profiles based on Behavioral Analytics
- SIEM: Enhance user profile with data with additional feeds; tune and customize to create actionable alerts.
- Security & Systems Availability Monitoring: On board Tier 0 (most critical services and applications) services into SolarWinds: Network, Data Center Infrastructure, Edge Services (Internet, Express Route, etc.)
- Security & Systems Availability Monitoring: Develop operational procedures incident response of alerts for Tier 0
- Security & Systems Availability Monitoring: Begin to on board Tier 1 applications and dependencies into SolarWinds
- Build Cybersecurity and Communication Command Center: Begin Developing solid model for 8-5 support and formulate strategic approach for 7x24.
- Implement Identity & Access Management: Develop strategy and evaluate solutions.
- Adopt Trust by Exception Policy: Identify client environment & endpoint software catalog
- Adopt Trust by Exception Policy: Evaluate tools; implement and configure
- Complete internal audit remediation actions

Redesign and begin multi-year refresh cycles on infrastructure equipment implement more secure and highly available enterprise network architecture

- Implement Secondary Data Center: Update network core (Peak 10/ Flexential Charlotte & Atlanta) & redeploy edge services (internet) from existing providers to new carrier
- Continue multi-year implementation of ISE & DNA (Identity Services Engine & Digital Network Architecture): Start Upgrading network equipment and on board onto ISE and DNA

Ensure the protection and reliability of systems by maintaining current County systems, end user devices and infrastructure equipment

- Multi-year refresh cycle of infrastructure equipment
- Multi-year refresh cycle of End User Devices
- Maintain application releases

Strengthen collaboration and partnership with Departments which have and manage IT functions while dramatically accelerating IT Asset Management and Vendor Risk Management

- Asset Management Capability: Implement remediation plan to internal audit findings
- Asset Management Capability: Develop inventory reports
- Asset Management Capability: Develop technology asset management policies and procedures

- Vendor Management: Inventory all vendor systems; Categorize vendors by spend and service/commodity
- Vendor Management: Define County requirements for vendor systems
- Vendor Management: Establish vendor governance; policies and procedures

Updates/Project Milestones:

- Vendor governance program is created

- Onboard additional Cybersecurity and Communication Command Center resources to provide security and systems availability monitoring and response
 - Achieve the ability to monitor and recognize unusual user activity based on established user profiles
 - Monitoring alerts are prioritized based on risk
- Privileged Access Workstation Administration (PAW)
- Tier Zero Active Directory Hierarchy
- Systems management server redesign and deployment

- Planned (portion of End user devices, infrastructure, and audio & video equipment are successfully refreshed)
 - Evergreen PC Replacement
 - Evergreen AV
 - Evergreen Network Refresh (Year 2 of multi-year plan)

- On-Base upgrade and migration to the cloud
- Business Objects migration
- Windows 2008 to 2016 server migration

Outcomes/Measures:

Key Initiative #5 -- Implement a Medic Collection Strategy

Description:

Partner with Medic to design and establish a collection strategy that utilizes tax collection tactics under the direction of the Tax Collector to collect delinquent Medic bills.

Rationale:

Utilize tax collection techniques to reduce delinquency enabling flexibility regarding Medic charges, county subsidies, and other budgeting opportunities.

Completion Date:

The expected completion date is Q4 FY 2020.

Updates/Project Milestones:

- Q1: Work with the party responsible for creating and implementing a Memorandum of Understanding (MOU) for program governance.
- Q1: Create Medic Collection Strategy.
- Q2: Identify and integrate collections system to administer Medic collections.
- Q2: Recruit, on-board, and train new Assistant Fiscal Analyst and Deputy Tax Collectors.
- Q2: Develop and implement a public communications plan.
- Q4: Improve Medic collections through garnishments.
- Q4: Document workflow processes.

Outcomes/Measures:

Key Initiative #6 -- Equity and Inclusion Initiative

Description:

Begin the implementation of the County's Equity Action Plan adopted in June 2019.

Rationale:

To address the challenge for Mecklenburg County to become a stronger pro-equity organization, strategies must be implemented that enhance the work Mecklenburg County has already completed to promote equity and inclusion. The County has partnered with the Government Alliance on Race and Equity (GARE) to create both an equity training curriculum for County staff, an Equity Action Toolkit and a three-year Equity Action Plan. To continue to build the capacity of the organization, it is critical that the County begin the implementation of year one action items identified in the Equity Action Plan.

Completion Date:

This is a multi-year project (FY2020-FY2022).

Project Milestones:

Begin the Implementation of Year One of the County's Equity Action Plan

- Rollout "Advancing Racial Equity Training" for all County employees to enhance abilities to advance racial equity. Target: Training completed by Group One and Two departments identified in the rollout plan.
- Develop ongoing communication, training and engagement plan to ensure employees have the understanding and ability to advance equity. Target: Ongoing.
- Identify performance data needs and ensure mechanisms are in place to track and collect critical data. Target: Baseline measures and tracking mechanisms identified by June 2020.
- Collaborate with department action teams to support the creation of department specific equity action plans. Target date: June 2020.
- Finalize development of the Customized Racial Equity Toolkit and provide training on tool usage to County mid-senior management. Target: June 2020.
- Begin building partnerships/alliances with nonprofits, towns, cities, counties in North Carolina and Government Alliance on Race and Equity jurisdictions to advance racial equity. Target: Ongoing.

Outcomes/Measures:

Successful accomplishment of established milestones.

Key Initiative #7 --

Provide Leadership to Strengthen Services Across the Housing Continuum and Create Affordable Housing Opportunities

Description:

Lead the County's efforts and commitments to address affordable housing through various efforts

Rationale:

The County currently employs a range of programs to support residents' housing needs. In recent years, the primary focus has been on combating homelessness and providing supportive services to those in need. The County will expand on these efforts moving forward, while also putting forth a more comprehensive approach to address the full continuum of housing instability. This includes initiatives aimed at preventing homelessness, maintaining housing, securing stable housing and increasing the stock of affordable housing.

Examples of investments and efforts the County is engaged may include:

- **Preventing Homelessness:** Supportive services and housing assistance through the Criminal Justice Services and Community Support Services departments
- **Maintaining Housing:** Habitat for Humanity's Critical Home Repair Program; Expansion of legal aid services
- **Securing Stable Housing:** Rental Housing Subsidy Fund; Community Service Grants for local programs offering wraparound education and employment services
- **Increasing the Affordable Housing Stock:** Tax Foreclosure Affordable Housing Pilot; County Code Enforcement incentives

Additionally, the County seeks to develop a comprehensive affordable housing strategy and land disposition strategy in fiscal year 2020.

Primary work for this key initiative is four-fold:

1. Rental Housing Subsidy Program
2. Housing Continuum – Community Support Services
3. Tax Foreclosure Affordable Housing Pilot – Office of the Tax Collector
4. Housing Assistance for Reentry Services' Clients – Criminal Justice Services

Rental Housing Subsidy Program

In this fiscal year, County staff will identify and work with a potential housing partner to administer the rental housing subsidies to families in need throughout Mecklenburg County. This work will ensure the County is remaining committed addressing affordable housing matters in the community. The initial investment in the program is \$11 million.

Housing Continuum – Community Support Services

Housing status is a continuum, in which individuals may move towards or away from housing stability due to changing life circumstances or ongoing challenges. Understanding the process that both cause and prevent homelessness, and the programs designed to help individuals at each stage, is important to improving coordinated care for individuals experiencing housing instability, homelessness, or who are formerly homeless.

Tax Foreclosure Affordable Housing Pilot – Office of the Tax Collector

The Office of the Tax Collector foreclosure affordable housing pilot presents a unique opportunity to partner with organizations and agencies to use foreclosed property for affordable housing. The County is empowered by law to take actions for the purpose of providing affordable housing to people in need of it. This is a portion of an overall enterprise strategy to provide affordable housing that utilizes innovative tactics to contribute to the enterprise solution.

Housing Assistance for Reentry Services' Clients – Criminal Justice Services

Criminal Justice Service (CJS) is responsible for promoting improvements in the local criminal justice system that enhance systemic performance and heighten public safety. As such, CJS provides programs and supportive services to individuals with various levels of justice involvement (i.e. pretrial, probation, post-release, etc.) Research shows the lack of suitable housing puts people at risk of arrest and incarceration. Unfortunately, justice involvement creates significant housing barriers and negatively impacts recidivism rates. Therefore, in FY2020, the department will work to increase the availability of housing options for justice involved persons who do not qualify for federal housing assistance or other housing services.

Completion Date:

This is a multi-year initiative

Project Milestones:

Rental Housing Subsidy Program

- The key step to developing a rental housing subsidy program is first to receive and review proposals from potential partners that will administer the program and second, assist the County with fully implementing the program in fiscal year 2021. The work associated with this key initiative will also align to other work focusing on child care and workforce development.

Housing Continuum

- **Annual updates regarding eviction prevention**
Evictions play an important role at the intersection of housing stability, housing instability and homelessness. Every year in Mecklenburg County, there are over 20,000 households at risk of formal eviction through the court system.
- **Annual update on the rental subsidy fund**
Develop and begin implementation of a rental subsidy fund program in FY20 to help address the lack of affordable housing for low-income residents of Mecklenburg County.
- **Annual update on Keeping Families Together**
The Corporation for Supportive Housing (CSH) provided technical assistance to Mecklenburg County to address the intersection of child welfare and homelessness. A program model, known as Keeping Families Together, is based on promising practices developed by CSH to provide housing subsidy for families who are frequent-users of the child welfare system and experiencing housing instability or homelessness.

CSS in partnership with DSS will develop and begin implementation of a Keeping Families Together program in FY20.

- **Annual update on the Continuum of Care transition**

In response to the continued community need for permanent, affordable housing, Mecklenburg County and the City of Charlotte partnered to shift the management of the Continuum of Care (CoC) from the City to the County.

The work of the CoC is mandated by the U.S. Department of Housing and Urban Development (HUD) and is designed to promote community-wide commitment to the goal of ending and preventing homelessness as well as providing funding, oversight, planning and evaluation of housing-related services. The CoC boundaries include all of Mecklenburg County. This community change enables the City and County to maximize their individual strengths as well as promote coordination across the housing continuum, helping more individuals and families access and sustain housing.

Mecklenburg County believes that to effectively and efficiently address housing instability and homelessness across the housing continuum requires leadership, collaboration and coordination across public and private sectors. To that end, CSS will lead a community engagement process in alignment with technical assistance provided by the U.S. Department of Housing & Urban Development (HUD), to oversee this management transition.

Tax Foreclosure Affordable Housing Pilot

- Q2 – Adopt and implement affordable housing strategy policies and documents
- Q2 – Modify the Foreclosure Acquisition Program Capital Project Ordinance to permit the funding to be used for affordable housing in addition to foreclosure
- Q4 – Refine tracking, measures, and reports to establish performance baseline

Criminal Justice Services – Housing Assistance for Reentry

- FY20 - Advocate for the inclusion of persons with criminal records and their families in the affordable housing discussions, recruit potential housing partners through education on resources available and the positive impact on the community, and create access to additional housing units through increase in housing vendors.
- FY20 - Develop partnerships with housing programs in the community.

Outcomes/Measures:

Successful completion of all project milestones.

- Serve X# of households through eviction prevention
- Establish a rental subsidy fund
- Establish a Keeping Families Together program
- Complete management transition of Continuum of Care
- Establish an Affordable Housing Pilot
- Establish housing assistance for the reentry population

Key Initiative #8 -- 2020 Republican National Convention Preparation

Description:

Lead the County's role with the 2020 Republican National Convention and ensure Mecklenburg County departments and staff are prepared accordingly.

Rationale:

The 2020 Republican National Convention (RNC) will be hosted in Charlotte, NC in 2020. Multiple federal, state and local government agencies have been asked to support planning efforts as well as to prepare the community to receive the multitude of visitors to the City and County. The following Mecklenburg County departments and offices are expected to support RNC preparation efforts:

- County Manager's Office (CMO)
- MEDIC
- Sheriff's Office (SHF)
- Land Use and Environmental Services Agency (LUESA)
- Park and Recreation (PRK)
- Public Health (HLT)
- Public Information Department (PID)
- Asset and Facilities Management (AFM)
- Information Technology Services (ITS)
- Financial Services (FIN)

Completion Date:

This is a multi-fiscal year initiative from FY2020-FY2021

Project Milestones: All milestones are multi-year initiatives and are subject to change based on planning efforts to begin in FY2020:

- Implement activities that will secure the business platforms and provide proactive measures and collaboration with federal, state, and local planners to reduce cybersecurity risks (ITS)
- Coordinate permitting, plan review, inspections and records requests activities between the City of Charlotte and the County's Land Use and Environmental Services Agency (LUESA)
- Conduct safety assessments, facility inspections, volunteer management, staff trainings and reviews of various park facilities and operational plans (PRK)
- Hold ongoing meetings with the NC Public Health Preparedness and Response, Homeland Security/Biowatch and Food and Drug Administration (HLT)
- Hold regular meetings with MEDIC to coordinate medical assets and plans to deliver Emergency Medical Services to citizens and visitors of Mecklenburg County as needed (MEDIC)
- Conduct regular meetings to review communications, community engagement efforts, and media relations activities (PID)
- Coordinate with the City of Charlotte to ensure accurate and timely payments are provided to the appropriate service providers and vendors (FIN)

Outcomes/Measures:

Successful completion of milestones.