Four years ago Wake Forest adopted the slogan “Honor the Past, Celebrate the Present and Embrace the Future” to commemorate the town’s 2009 Centennial Celebration. Now, as we look to the future, Wake Forest must plan for how it will continue providing services in a manner that efficiently meets the needs of our growing and ever-changing community.

In 2007, the town took a giant step in the right direction by embarking on a two-year process to develop a vision and guide for what Wake Forest would look like in 20 years. The result of that effort was the Wake Forest Community Plan.

Throughout the plan’s development, the Community Plan Steering Committee solicited input from citizens in a variety of public forums. The resulting plan includes 15 specific visions detailing what our citizens said they want Wake Forest to look like in the Year 2029.

Wake Forest has also developed several other plans that complement the visions set out in the Community Plan, including the Renaissance Plan for the Heart of Wake Forest, Northeast Neighborhood Plan, Transportation Plan, Open Space and Greenways Plan, and the Pedestrian Plan.

The final step in the process of charting Wake Forest’s future and achieving the visions of the Community Plan was the development and implementation of a strategic plan. The strategic planning process began at the Board of Commissioners’ annual planning retreat in August 2012. During that retreat the board adopted four main goals on which the town should focus. The board, with assistance from town staff, then developed a set of strategies to meet each goal. Each one of those strategies was then assigned to the appropriate staff for completion.

The next major milestone in our strategic planning process is to review the plan at the January 2015 retreat. At that point, the plan will be revised and modified.

Our strategic planning process is another wonderful example of why Wake Forest is recognized as a regional leader in planning and good government. As we proceed with the plan’s implementation, we are, in effect, charting our course towards providing an excellent and sustainable quality of life for our citizens.

I wish to thank the town’s Board of Commissioners and staff for their efforts creating Wake Forest’s first strategic plan. It is through their hard work and dedication that we “Honor the Past” and “Celebrate the Present” – but most importantly – “Embrace the Future” with a collective sense of excitement and purpose.

Mark S. Williams
Town Manager
Community
Provide a high level of trust between our community and one another. By accepting accountability, conducting ourselves responsibly and demonstrating loyalty, we preserve an environment that supports sincerity, honesty and ethical behavior.

Innovation
We recognize that every employee can improve themselves professionally. While it is important to remember the past, we should accept and understand a changing work environment as the town continues to grow. Professionalism begins with dedication to the empowerment of competent, well-trained employees. Our work environment encourages innovative ideas and solutions, growth of self-esteem, and pride in our work and accomplishments. Our demonstrated integrity provides positive role models for our community.

Valued Employees
Each employee has a valuable contribution to the town. Creating a quality work environment is important for all employees. By providing the support and treating our fellow employees and citizens with respect which we, in turn, expect, by showing consideration for one another’s time, priorities, work responsibilities, and individual contributions to the Town of Wake Forest, we strive to ensure an attractive and effective work environment.

Importance of Core Values
Staff’s dedication to the town’s core values of caring, commitment, integrity and innovation fosters a collaborative organizational culture that promotes teamwork and celebrates the achievement of common goals. While always respecting the value of each individual or departmental goal, we recognize the importance of the common good of our community and organization.

Communication
Effective communication can be achieved through listening and understanding. We recognize that this is the cornerstone of a progressive and successful organization. By maintaining and projecting an approachable, open-minded attitude and respecting appropriate confidentiality, we ensure open, two-way communication.
## Goal 1: Stimulate Economic Development

### OBJECTIVE A: RETAIN AND FOSTER BUSINESS

<table>
<thead>
<tr>
<th>STRATEGIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partner with the Wake Forest Area Chamber of Commerce to develop video</td>
</tr>
<tr>
<td>and other materials to showcase Wake Forest as a destination for businesses</td>
</tr>
<tr>
<td>• Support the chamber's efforts to develop an incubator</td>
</tr>
<tr>
<td>• Assessment of workforce training needs</td>
</tr>
<tr>
<td>• When businesses open, find out why they came to Wake Forest</td>
</tr>
<tr>
<td>• When business close, conduct study to find out why</td>
</tr>
<tr>
<td>• Investigate a Strategic Plan for economic development</td>
</tr>
</tbody>
</table>

### CURRENT RELEVANT MEASURES

<table>
<thead>
<tr>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Customer service rating of the Planning Department by developers</td>
</tr>
<tr>
<td>• Continue to provide business retention visits</td>
</tr>
</tbody>
</table>

### NEW MEASURES

<table>
<thead>
<tr>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Total value of additional development per year</td>
</tr>
<tr>
<td>• Commercial</td>
</tr>
<tr>
<td>• Retail</td>
</tr>
<tr>
<td>• Residential</td>
</tr>
<tr>
<td>• Number of building permits issued</td>
</tr>
<tr>
<td>• Commercial</td>
</tr>
<tr>
<td>• Retail</td>
</tr>
<tr>
<td>• Residential</td>
</tr>
<tr>
<td>• Number of privilege licenses issued</td>
</tr>
<tr>
<td>• Number of businesses close</td>
</tr>
</tbody>
</table>
# Objective B: Strategies

**Promote business in the Renaissance Area**

- Make the Renaissance Area a cultural and entertainment destination
- Generate housing that is walkable and safe to the Renaissance Area
- Promote complimentary businesses in the Renaissance Area

- Accelerate marketing, branding and promotional plan for the Renaissance Area
- Evaluate options of venue for cultural arts
- Partner with other organizations to promote and provide activities in the Renaissance Area
- Continue to promote space for lease (especially housing)
- Continue property owner seminars at least twice a year (promote second floor housing)
- Expand grant opportunities for property owners and businesses
- Explore the possibility of a revolving loan program for Renaissance Area property owners
- Develop public education effort to promote a clean Renaissance Area
- Periodic review of the sense of safety in the Renaissance Area
- Continue the streetscapes project
- Encourage extended-stay space

## Current Relevant Measures

- Citizen rating of their sense of security in the Renaissance Area

## New Measures

- Value of grants and loans for Renaissance Area projects
- Percent of buildings in the Renaissance Area that are vacant
- Total days of vacancy in Renaissance Area buildings

# Objective C: Strategies

**Provide more workforce housing**

Define and assess workforce housing needs

## Current Relevant Measures

- None

## New Measures

- Determine relevant measures based on assessment findings
- Percentage of working residents employed within the corporate limits of Wake Forest
### Goal 2: Enhance and Promote Community Cohesion

#### OBJECTIVE A: STRATEGIES

**Implement the plans already in place (greenway, pedestrian, community, transportation, parks and recreation)**

- Update and re-evaluate the priority list and plans already in place
- Schedule work sessions to review the elements of all plans

**CURRENT RELEVANT MEASURES**

- Public rating of the walking environment
  - Length of time to get to destination
  - Ease of movement
  - Attractiveness
  - Connectivity to destinations of interest
  - Sense of safety of town pathways
- Number of intersections w/ pedestrian signals added
- Number of feet of sidewalk constructed
- Number of feet of greenway constructed

**NEW MEASURES**

- Number of items in the plans completed
- Number of crimes that occur on greenways

#### OBJECTIVE B: STRATEGIES

**Develop multiple convenient means of crossing US1 and the railroad**

- Educate the board on the current status of both the US1 and railroad corridors

**CURRENT RELEVANT MEASURES**

- No measure at this time due to lack of funding and high-speed rail construction

#### OBJECTIVE C: STRATEGIES

**Provide convenient and easy access for crossing Dr. Calvin Jones Highway**

- Educate board on current plans concerning the Dr. Calvin Jones Highway

**CURRENT RELEVANT MEASURES**

- No measure—based on development
<table>
<thead>
<tr>
<th><strong>OBJECTIVE D:</strong></th>
<th><strong>STRATEGIES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide an at-grade crossing at Elm Street</td>
<td>Cannot be accomplished per DOT response; pedestrian crossing only viable alternative</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OBJECTIVE E:</strong></th>
<th><strong>STRATEGIES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable citizens to be well-informed about town government</td>
<td>Develop citizen academies</td>
</tr>
</tbody>
</table>

**CURRENT RELEVANT MEASURES**
- Number of e-news subscribers
- Number of e-notifier subscribers
- Number of app downloads
- Number of Facebook followers
- Number of visits to the website
- Number of citizens watching government access
- Citizen perception of the ease of use of on-line services
- Citizen perception of the availability of town on-line services

**NEW MEASURES**
- Number of applicants and participants for Citizen Academy
- Number of town articles in local media
- Number of citizens watching meeting via website
- Number of applicants and participants in Leadership Wake Forest

<table>
<thead>
<tr>
<th><strong>OBJECTIVE F:</strong></th>
<th><strong>STRATEGIES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure citizens are well-informed about community activities (town-sponsored or not)</td>
<td>Develop ideas of ways to engage citizen through the website and other means of technology</td>
</tr>
</tbody>
</table>

**CURRENT RELEVANT MEASURES**
None

**NEW MEASURES**
- Number of participants attend events
- Number of hits/visits to the Community Calendar
- Number of hits/visits to specific event webpages (i.e., Christmas Home Tour, Fourth of July, etc.)
- Citizen perception of how well-informed they are about community events
- Ensure that each department visits website to make sure their website is up-to-date and accurate
## OBJECTIVE G: STRATEGIES

**Build citizen participation in the community**

- Educate citizens on the resources available for volunteer opportunities
- Develop a plan to promote volunteer opportunities
- Work with Wake Forest ARTS and other organizations to connect with citizens

### CURRENT RELEVANT MEASURES

Number of vacancies on town advisory boards

### NEW MEASURES

- Number of hits to advisory board web pages within six week of advertisement
- Number of volunteer hours for specific events
- Number of applicants received for advisory boards
- Number of inquiries to town clerk with regard to advisory board vacancies
- Total meetings missed due to vacancies

## OBJECTIVE H: STRATEGIES

**Enhance the sense of connection of all neighborhoods to the town**

- Contact HOAs to promote Wake Forest community news
- Partner with the chamber to provide newcomer packets (e.g., electronic) to include downtown and town material
- Schedule annual meeting with HOA presidents to share information
- Continue Community Watch program

### CURRENT RELEVANT MEASURES

- Number of HOA contacts
- Number of HRC Community Outreach Meetings
- Public rating of the walking environment in providing connectivity to destinations of interest
- Public rating of the sense of safety of town pathways
- Public rating of their sense of security in Wake Forest
  - Zone 1 (NW)
  - Zone 2 (NE)
  - Zone 3 (South)
- Public rating of the overall appearance of the town
- The extent to which residents believe that the character of their neighborhood is consistent with the small town feel of Wake Forest
- Citizen rating of the flow of traffic and the ease of pedestrian movement

### NEW MEASURES

- Number of newcomer packets distributed
Goal 3: Instill an Organizational Culture that Reflects/Embraces our Core Values

**OBJECTIVE A:** Maintain continuity of operations

**STRATEGIES**
- Incorporate into the hiring process an assessment of how committed candidates are to the core values of the town
- Evaluate and enhance professional development in each department
  - Mentoring
  - Formal training (e.g., courses, certificates)
  - Employee involvement (e.g., cross-training)
- Develop a succession planning initiative
  - Employee development analysis (assessing competencies early)
- Develop disaster recovery plans

**CURRENT RELEVANT MEASURES**

*Supervisor and department head perception of:*
- The quality of supervisory training provided by Human Resources
- Usefulness of supervisory training provided by Human Resources
- Turnover rates
  - Voluntary
  - Involuntary
- Satisfaction with new hires
  - By department heads
  - By supervisors
- Percent of new hires who pass probation within established timeframe
- Department head perception of how well IT has maintained the availability/up time of systems
- Employee rating of the operation of the following town facilities:
  - Town hall
  - Police department and substation
  - CID building
  - Public works building
- Number of electrical outages
- Average response times to outages
  - Workday hours
  - Off hours and weekends
- Percent decrease in the downtime of equipment and vehicles
- Average number of missed collections per day
  - Yard waste
  - Solid waste

**core values**
- Caring
- Commitment
- Integrity
- Innovation
**OBJECTIVE B: STRATEGIES**

**Be an employer of choice through benefits and working environment**

- Assess the professional development program
  - Evaluate, refine and expand the Career Ladder
  - Evaluate and standardize selection/promotional and lateral transfer processes
  - Consider using assessment center for key positions
- Benchmark benefits of other organization
- Redesign internal survey to capture work environment
  - Schedule survey regularly
- Use of social media for recruitment

**CURRENT RELEVANT MEASURES**

- Employee perception of their departmental:
  - Motivation
  - Performance
  - Quality of supervision
  - Performance appraisal system

**NEW MEASURES**

- Exit interview ratings
- Number of applicants per position
- Ratio of qualified (e.g., minimum requirements) applicants per vacancy
- Entrance interview to see why person applied for vacancy
- 360 evaluations

---

**OBJECTIVE C: STRATEGIES**

**Develop a culture of excellent service both internally and externally**

- Review current surveys to see if reflective of the values
  - Develop an implementation schedule
  - Develop an improvement plan based on the results
- Develop and implement a campaign that introduces the town’s core values
  - Develop measurable principles/expectations for delivering excellent service (internal and external)
  - Hold employees accountable
  - Use C.I.V.I.C. as a guide for development of principles
- Enhance continuing education for supervisors and employees on how to document performance and discipline issues
- Benchmark service-level responsibilities with other organizations
- Partner with specific communities to determine needs
  - Structure the citizen surveys so that the results of the survey can be broken down by neighborhoods
## CURRENT RELEVANT MEASURES

**Internal**
- Quality of service rating by other departments
- End user satisfaction with the usefulness of the applications and systems they use
- Employee rating of the customer service of the Public Facilities Department
- Town employee rating of Fleet Services
- Employee rating of the quality of services for routine purchases (i.e., spark plugs and paper)
- Department Head rating of the quality of services for purchases requiring informal bids
- Department Head rating of the quality of services for purchases requiring formal bids

**External**
- Substantiated complaints received per department
- Customer service rating for town as a whole
- Public rating of the effectiveness of the Police Department
- Public rating of their trust in the Police Department
- Citizen satisfaction with their ability to conduct business with the town on-line
- Citizen rating of the Engineering Department in responding to complaints
- Customer service ratings of the Parks and Recreation Department services by parents of child participants in athletics and educational programs, adult participants in non-sports, coaches and instructors

## NEW MEASURES

**Internal**
- Department Head rating of purchasing procedures
- Department Head rating of inventory procedures
- Employee rating of purchasing process

**External**
- Citizens’ rating of how well the Parks and Recreation Department met:
  - Recreational needs
  - Cultural needs
  - Educational needs
- Customer service rating of the Planning Department by citizens
- Customer service rating of utility billing
- Public rating of the service provided by the town’s customer service representatives
- Customer service rating of the Inspections Department
  - Customer satisfaction with obtaining permits and information
  - Customer satisfaction with plan review (commercial-residential)
  - Customer satisfaction with code inspections
  - Customer satisfaction with fire inspections
- Customer service ratings of the Engineering Department
  - By inspectors
  - In providing services to owners/developers
  - In providing services to contractors
  - In providing engineering services to engineers
- Number of commendations received
### Objective A: Strategies

Maintain public trust in the sustainability of the town’s financial system

- Complete financial report card for town’s financial activities
- Adopt formal fiscal policies to guide town’s future financial direction
- Maintain long range financial plan
- Improve transparency on website
- Review Customer Costs for Municipal Services report (maintained by City of Raleigh) Economic Development Strategy

#### Current Relevant Measures

- Unqualified audit opinion
- Public rating of the town’s financial systems
- Conservative estimates of general fund revenues index (budgeted/actual expenditures as found in Exhibit 5 of CAFR)
- Conservative estimates of general fund expenditures index (budgeted/actual revenues as found in Exhibit 5 of CAFR)
- Maintain the GFOA Certificate of Excellence Reporting award (CAFR)

#### New Measures

Obtain the GFOA Distinguished Budget Award

### Objective B: Strategies

Maximize return on town funds

- Re-evaluate fund balance policy
- Maintain or improve town’s bond rating
  - Develop presentation for Fitch rating agency consideration
  - Evaluate feasibility of obtaining a rating from Fitch
- Develop cash flow plan for town
- Update debt issuance plan

#### Current Relevant Measures

- Currently AAA with S&P, Aa1 with Moody’s, 87 with NC Municipal Council
- Rate of return on investments compared to other municipalities of similar size—from annualized APR included in audit
- Percent of accounts receivable received within 30 days of billing
- Total value of accounts receivable
  - Greater than 30 days
  - Greater than 60 days
  - Greater than 90 days

#### New Measures

- Obtain a rating from Fitch if determined to be feasible
- Maintain a fund balance consistent with the policy
- Maintain debt level consistent with the policy