



## **Strategic Plan 2020-2021**

Updated January 5, 2021

# Introduction

In developing an effective strategic plan, an organization needs to decide who will be involved in the planning process and at what stages. The Town of Davidson's facilitator, Ed Manning of Leadership Asheville, recommended the use of an inclusive planning process for several reasons: to review past performance and critical issues; to promote buy-in of the process; and to establish a smooth course for implementation. As such, the Board of Commissioners and the management team for the town were all involved in the planning process.

The process began when board members and staff came together for a two-day planning session on February 27-28, 2020 to develop the following strategic plan.

This strategic planning process aims to answer four key questions:

Where are we now? (Ensures everyone is on the same starting page)

Where do we want to be? (Shared vision)

How do we get there? (Clear direction)

How do we measure our progress? (Monitoring)

In answering these questions, the Town of Davidson established the following document to guide its growth and direction.

# Where are we now?

## SWOT Analysis

To get everyone on the same starting point, the participants identified the town's current strengths and weaknesses, as well as identifying potential opportunities and threats. The following are the results of this SWOT analysis:

### Strengths

- Sense of community
- Engaged community
- Talented staff and elected officials
- Uniqueness
- Beautiful place
- Financial stability
- Stewardship
- Good resources (Intellectual capital)
- Local economy
- Intentional vision
- Quality of life
- Davidson College
- Preservation – History
- Main Street

### Weaknesses

- Lack of diversity/inclusivity
- Geographic separation of parts of town (silos)
- Limited capacity (funding, staff)
- Facilities
- Limited Downtown
- Lack of conserved land in rural area
- Non-profit (AMI) /Higher taxes
- Limited mobility

## Opportunities

- Existing non-profits
- ETJ
- Financial growth potential
- Unoccupied community space (opportunity to build)
- Expand affordable housing
- Leverage outside financial resources (housing, transportation)
- Expansion off town/College relations
- Development that can lead to amenities
- Corporate expansion, potential for new corporate headquarters in Davidson
- Boundary line/annexation agreement with Mooresville

## Threats

- State legislation
- Interstate traffic cutting through town and impacting quality of life
- Climate change
- Threats to watershed
- Lack of diversity
- Aging population
- Development around Davidson
- Recession
- Social media/Working environment

# Where do we want to be?

The participants reviewed the previous vision and mission statements and discussed the importance of being brief and clear. To that end, they agreed to not spend time on modifying the vision and mission at this time. There was concern that the vision is not clear enough and may need to be revised.

## Vision

Davidson remains committed to controlling our own destiny as a distinct, sustainable, and sovereign small town. Our sense of community is rooted in citizens who respect each other; in racial and socioeconomic diversity; and in pedestrian and bicycle orientation; all in the presence of a small liberal arts college. Our history and character guide our future.

## Mission

Davidson's government exists to help citizens in maintaining the town's unique qualities and to provide superior services to every resident. To this end, the town government of Davidson will operate according to the following core values:

## Core Values

- Citizens are the heart of Davidson, so town government will treat all people fairly, with courtesy and respect.
- Open communication is essential to an engaged citizenry, so town government will seek and provide accurate, timely information and promote public discussion of important issues.
- Davidson must be a safe place to live, work, and raise a family, so the town will work in partnership with the community to prevent crime and protect lives, property, and the public realm.
- Davidson's historic mix of people in all income levels and ages is fundamental to our community, so town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here.
- Davidson's traditional character is that of a small, historic college town, so land planning will reflect its historic patterns of village-centered growth including connection of neighborhoods, preservation of our historic resources, conservation of rural area, and provision of public spaces.

- Citizens entrust town government with the stewardship of public funds, so government will provide high quality services at a reasonable cost.
- Davidson's economic health is essential to its remaining a sustainable community, so town government will judiciously encourage and guide the location of new business opportunities.
- Citizens need to move easily throughout the town and region, so government will provide a variety of options, such as sidewalks, bike paths, greenways, connected streets, and transit.
- Citizens must live in a healthy environment, so town government will protect watersheds, trees, air quality, and other elements of the town's ecology.
- The physical, social, and intellectual well-being of Davidson citizens is fundamental to our community, so town government will provide and encourage enjoyable, safe, and affordable recreational and cultural lifelong learning opportunities.
- As home to Davidson College, the town will engage the college's faculty, staff and students in constructive communication and collaboration.
- Davidson exists in proximity to and is interdependent with other jurisdictions, so we strive for local, regional, state and federal cooperation.

# How do we get there?

## Goals

In order to achieve the town's mission, the participants identified the strategic goals - broad areas of endeavor that must be addressed if the organization is to make progress towards its vision and mission. The following strategic goals were identified for the Town of Davidson.

- A. **A Well-Planned and Livable Community**
- B. **Historic Preservation**
- C. **Connecting People and Places**
- D. **Operational Excellence**
- E. **Equity and Inclusion**
- F. **Sustainability and Natural Assets**

# How do we measure our progress?

## Objectives, Critical Success Factors & Barriers

For each strategic goal identified, the participants developed objectives - key measures of what is to be achieved over a specific period of time – generally 1 to 2 years – in order to achieve a goal. Objectives are specific, quantifiable, realistic targets that measure the accomplishment of a goal over a specified period. In addition to objectives, the participants also identified critical success factors and barriers for each strategic goal. After this, the participants took time to brainstorm strategies to achieve each objective and address each critical success factor and barrier. The following are the objectives, critical success factors, barriers and strategies for each goal.

**Goal: A. A Well-Planned and Livable Community** – Preserve our rural area and create well-planned, dynamic community places with connected progressions between them.

Objective	Baseline	1 <sup>st</sup> Year	2nd Year	10 Year
Increase % of Publicly Accessible Open Space	10.5 percent (973 acres)	10.5 percent (973 acres)		
Increase % of Total Acres Preserved in ETJ	13 % (758 acres)	14.6 percent (758 acres)		
Maintain 95% Commercial Occupancy Rate	90.8%	92.1%		95%
Net Number of New Businesses	3 new/2 closed	6 new/2 closed		

<b>Critical Success Factors</b>	<ul style="list-style-type: none"> <li>• Increased preserved acreage in rural area</li> <li>• Create commercial nodes, especially in the eastern portion of the community</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Land owner rights to develop property</li> <li>• NIMBY sentiment towards development</li> <li>• Stringent Ordinance</li> <li>• Perspective that creating commercial nodes in the east could detract from downtown</li> </ul>

Top Strategies	
A1	Develop land preservation tools and objectives that include: -Explore a “purchase of development rights” program -In partnership, create a voluntary agriculture district program for Mecklenburg County
A2	Formalize growth management tiers map and annexation criteria from the Comprehensive Plan into Davidson Planning Ordinance -Implement targeted conditional zoning and use the fiscal impact study as part of the process -Revisit water/sewer policy
A3	Develop a small area plan for downtown
Strategies for Further Vetting	
A4	Encourage the development of an eastern commercial hub
A5	Review restrictions on east commercial nodes
A6	Continue to use economic development tax grants and other tools for corporate expansions and relocations
A7	Create programs to support local food economy

Goal: B. **Historic Preservation** – Preserve our historic properties that contribute to our vibrant and unique community and honor the history of the lived experiences of our residents.

Objective	Baseline	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	10 Year
Increase number of landmarked properties by X	25 current (67 potential)	27 (67 potential)		67
Achieve complete overlay of national historic district with local historic district (by acre)	13%	25%		100 %

<b>Critical Success Factors</b>	<ul style="list-style-type: none"> <li>• Community buy-in and trust</li> <li>• Funding for a historic preservation plan</li> <li>• Expertise and ability of the consultant, staff and Historic Preservation Commission</li> <li>• Good relationship with the Historic Landmarks Commission</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Time (before properties are demolished)</li> <li>• State legislative limitations</li> <li>• Development pressure</li> <li>• Property owner concerns and perspectives</li> </ul>

Top Strategies	
B1	Develop a historic preservation plan
Strategies for Further Vetting	
B2	Establish/continue to expand local historic district
B3	Revise historic district guidelines
B4	Develop a strategy for naturally occurring affordable housing that aligns with historic preservation goals
B5	Use available grants to help commercial property owners to rehab historic properties

**Goal: C. Connecting People and Places** – Expand the town’s transportation network to provide residents and visitors with safe, convenient and efficient travel choices to connect people across the community.

Objective	Baseline	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	10 Year
Increase number of bus stop amenities	0	1		
Build greenways + sidepaths that are outlined in Mobility Plan	9	9		18 miles
Ease of travel by bicycle in Davidson*	66%			85%
Ease of walking in Davidson*	89%			95%

*\*Percent rating positively on National Citizen Survey*

<b>Critical Success Factors</b>	<ul style="list-style-type: none"> <li>• Funding</li> <li>• Land acquisition/partnerships</li> <li>• Enforcement/education</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Understanding and encouraging non-vehicle transportation options</li> <li>• Physical barriers</li> <li>• Regional challenges</li> <li>• Access</li> </ul>

Top Strategies	
C1	Prioritize and implement mobility plan recommendations for policies and programs
C2	Use 2017 GO Bonds to fund infrastructure improvements
Strategies for Further Vetting	
C3	Develop and implement an education program around TOD multi-modal mobility approach and safety awareness program for all ages
C4	Implement mass transit stop amenities
C5	Develop events and programming throughout the town
C6	Prioritize building/completing sidewalk gaps in a contextually sensitive manner

**Goal: D. Operational Excellence** – Provide superior services in an efficient and fiscally responsible manner to our entire community through a professional and committed workforce.

Objective	Baseline	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	10 Year
Maintain positive perception of the town of Davidson*	89%			95%
Obtain and Maintain a AA+ Bond Rating	n/a	n/a		
Increase the number of community engagements by the Davidson Police Department	1480	160**		1750
First due fire apparatus arriving on scene within the Davidson jurisdiction within 6 minutes 85% of the time	80%			90%

\*Percent rating positively on National Citizen Survey

\*\*Impacted by COVID-19 Pandemic

<b>Critical Success Factors</b>	<ul style="list-style-type: none"> <li>• Planning for growth</li> <li>• Effective workforce development (equipment, staff, etc., hiring, training retention)</li> <li>• Ensure municipal best practices by all department</li> <li>• Town must be good stewards of public funds</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Municipal boundaries –(stretched out, connectivity)</li> <li>• Fiscal Restraints</li> </ul>

Top Strategies	
D1	Implement a workforce development plan that addresses succession planning, professional development, and maintaining best practices in each department.
Strategies for Further Vetting	
D2	Implement a front-line public engagement policy and related training for all employees
D3	Develop a comprehensive resident issue tracking and response system with a web-based portal the includes outcome reporting capabilities

**Goal: E. Equity and Inclusion** – Work together to create a culture of belonging, address our past inequities, provide opportunities for all, treat everyone with respect and dignity and recognize every voice

Objective	Baseline	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	10 Year
Openness and acceptance of the community toward people of diverse backgrounds*	72%			95%
Create 715 affordable units as recommended by the UNCC Urban Institute Housing Needs Assessment	262	262		715**
Achieve appointed commissions with composition that is reflective of community characteristics	4%	6%		13% non-white

\*Percent rating positively on National Citizen Survey

\*\*Based upon UNCC Urban Institute Analysis 2017

<b>Critical Success Factors</b>	<ul style="list-style-type: none"> <li>• Develop awareness (staff/internal) and understanding</li> <li>• Funding for Housing program</li> <li>• External education and buy-in</li> <li>• Dedicated staff</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Our whiteness</li> <li>• Our history</li> <li>• Broader culture impacts</li> <li>• Affirmative commitment</li> </ul>

Top Strategies	
E1	Develop an affordable housing plan
E2	Establish an affordable housing manager/equity position
Strategies for Further Vetting	
E3	Develop a formal equity and inclusion training program for staff, town board and appointed commissions
E4	Establish living wage certification program
E5	Revise boards and commissions appointment process to reflect community characteristics

**Goal: F. Sustainability and Natural Assets** – Implement and encourage innovative solutions to environmental, energy, and climate- based challenges

Objective	Baseline	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	10 Year
TBD based on committee recommendation March 2021				
Decrease garbage + recycling tons per household	1.26 tons			

<b>Critical Success Factors</b>	<ul style="list-style-type: none"> <li>• Reliable data</li> <li>• Clearly defined objectives</li> <li>• Buy-in and community involvement</li> <li>• Resources-funding, labor</li> <li>• Tools and insights</li> </ul>
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• External influences</li> <li>• Regional growth</li> <li>• Culture/human habits</li> <li>• Political climate</li> <li>• Time</li> </ul>

	Top Strategies
F1	Create tree canopy master plan
F3**	Define the desired outcome of the town’s sustainability efforts
	Strategies for Further Vetting
F2	Reaffirm role of Livability Board in sustainability initiatives
F4	Develop a sustainability education program to bring together board and community

*\*\*This strategy was added to the top priority list after town board discussion at the meeting on August 11, 2020.*

## Prioritized Strategies

After brainstorming strategies for each goal, the participants went through a process of voting to determine the top strategies for the organization to undertake first. The following are the top strategies chosen. While the original plan was to identify 10 top strategies, the town board instructed staff to add an additional sustainability strategy during their meeting on August 11, 2020.

Votes	Strategy	Project Lead(s)
32	Develop a historic preservation plan	Karen/Lindsay
31	Establish an affordable housing manager/equity position	Megan
23	Use 2017 GO Bonds to fund infrastructure improvements	Piet/Doug
14	Develop land preservation tools and objectives that include: -Explore a “purchase of development rights” program -In partnership, create a voluntary agriculture district program for Mecklenburg County	Jason/Leslie
12	Formalize growth management tiers map and annexation criteria from the Comprehensive Plan into Davidson Planning Ordinance -Implement targeted conditional zoning and use the fiscal impact study as part of the process -Revisit water/sewer policy	Jason/Trey
14	Develop affordable housing plan	Cindy/Karen
13	Develop a small area plan for downtown	Kim
11	Prioritize and implement mobility plan recommendations for policies and programs	Leslie/Andrew/Penny
10	Create tree canopy plan	Jesse/Pete
5	Implement a workforce development plan that addresses succession planning, professional development, and maintaining best practices in each department	Megan
5**	Define the desired outcome of the town’s sustainability efforts	Leslie/Charlene/Karen

*\*Note: Some strategies may appear to be missing because they appeared in multiple goal categories. To avoid duplication, the team consolidated strategies in the goal area they felt the strategy fit best.*

*\*\*This strategy was added to the top priority list after town board discussion at the meeting on August 11, 2020.*

## Appendix

Below please find all the strategies voted on during the retreat. These have been consolidated and modified on the proceeding pages as part of the vetting process.

	<b>Strategies</b>	<b>Votes</b>
	Develop land preservation tools and objectives that include: -Explore a “purchase of development rights” program -In partnership, create a voluntary agriculture district program for Mecklenburg County	14
	Formalize growth management tiers map and annexation criteria from the Comprehensive Plan into Davidson Planning Ordinance -Implement targeted conditional zoning and use the fiscal impact study as part of the process -Revisit water/sewer policy	12
	Develop a small area plan for downtown	13
	Encourage the development of an eastern commercial hub	6
	Review restrictions on east commercial nodes	
	Continue to use economic development tax grants and other tools for corporate expansions and relocations	
	Create programs to support local food economy	
	<b>Strategies</b>	<b>Votes</b>
	Develop a historic preservation plan	32
	Establish/continue to expand local historic district	1
	Revise historic district guidelines	
	Develop a strategy for naturally occurring affordable housing that aligns with affordable housing goals	
	Use available grants to help commercial property owners rehab historic properties	
	Create opportunities for storytelling in the 251 South Street Space (exhibits, oral history, programming, etc)	
	<b>Strategies</b>	<b>Votes</b>
	Prioritize and implement mobility plan recommendations for policies and programs	11
	Develop and implement an education program around TOD multi-modal mobility approach and safety awareness program for all ages	4
	Use 2017 GO Bonds to fund infrastructure improvements	23
	Implement mass transit stop amenities	2
	Develop town sponsored programming throughout the town	1
	Use partnerships to improve the transportation network	

	Prioritize building/completing sidewalk gaps in a contextually sensitive manner	
	Review parking standards	2
	<b>Strategies</b>	<b>Votes</b>
	Create a workforce development plan that addresses succession planning and professional development	5
	Implement a front-line public engagement policy and related training for all employees	1
	Develop a comprehensive resident issue tracking and response system with a web-based portal the includes outcome reporting capabilities	1
	<b>Strategies</b>	<b>Votes</b>
	Develop an affording housing plan	14
	Establish an affordable housing manager/equity position	31
	Develop a formal equity and inclusions training program for staff, town board and appointed commissions	3
	Establish living wage certification program	6
	Revise boards and commissions appointment process to reflect community characteristics	1
	<b>Strategies</b>	<b>Votes</b>
	Create tree canopy master plan	10
	Reaffirm role of livability Board in sustainability initiatives	5
	Define the desired outcome of the town's sustainability efforts	5
	Develop a sustainability education program to bring together board and community	