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Financial Plan

Point Person - Piet

Outcome

Develop a financial plan that provides guidance for revenue and expenditure decisions

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Evaluate Government Finance Officers Association resources to create a model for Davidson	February 2016-Fall 2016 (first draft), ongoing enhancement of scope	On track to provide first draft in Fall 2016			
2. Review financial metrics, including tax rate (compare to our Benchmark towns)			The model includes all major financial metrics utilized by the town, LGC and rating agencies		
3. Decide on plan timeframe (5-10 years)			Currently 5 years		
4. Create revenue and expenditure categories and projection assumptions			Categories are in place; projection assumptions will be updated with each model version		
5. Review/test-drive with board of commissioners to get feedback			First draft was presented to the board on January 10, 2017.		
6. Finalize financial plan model				Working model will be presented to the board in conjunction with public facilities discussion and budget. Model updates will be provided every year in August and January to the board.	Model has been used to provide "what if" projections on public facilities and bond referendum. We will continue to provide scenario testing as needed. Model incorporates revenue and expenditure budget projections, capital expenditures, financing options, and fund balance

Financial Capital Projects

Point Person - Jamie/Piet

Outcome

Consider projects that could be financed with general obligation bonds and other financing tools

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Solicit needs for projects from various stakeholders	Capital projects financing plan by summer 2016; ongoing updates	Produced the "3-bucket" project list which was presented to the Board and citizens at multiple venues in spring 2016; Have run several scenarios with multiple variables on ways to finance the capital projects under consideration.	Waiting for public facilities steering committee to progress with possible options and cost estimates to run new scenarios.	A Public Facilities options and costs report will be presented to the Board on April 25th which will include potential financing options.	
(a) project possibilities for financing:					
(i.) Municipal building (fire station 1 and 2, police department)		Fire Station #2 will be financed (approved at August 9, 2016 meeting)	Fire Station #2 has been financed and construction is underway.	Public safety facilities will be included in the April 25th update for the Board.	The Public Facilities steering committee is vetting the two options for public facilities of new town hall and renovate existing town hall for police and fire or build new police facility and renovate existing town hall for administration and fire; potential financing options have been
(ii.) Public works facilities (could include parks and recreation offices)			Architect is evaluating the two options for comparison to renovate existing building versus build new; also evaluating aesthetic improvements.		Architect has evaluated the two options for comparison to renovate existing building versus build new; also evaluated aesthetic improvements. Presentation at July 11th Board meeting.
(iii.) Affordable housing					
(iv.) Sidewalks					
(v.) Road improvements					
(vi.) Greenways and athletic fields					
(vii.) Open space land purchases					
(viii.) Cultural facilities and partnerships (funding)					
2. Consider bonds for adding public assets (greenways, parks, roads, etc.)		The board has decided to not pursue a bond referendum (summer 2016), but will continue to review in the future.		The board is considering a possible GO bond referendum for November 2017 and will be discussed during the budget/CIP process.	On August 8, the board of commissioners will decide on placing a bond referendum for three bond orders totaling \$15million on the November 7
(a) Research bond ratings process/referendum wording		We presented this information to the board, and based on preliminary analysis by First Tryon gave an estimate of the Bond Rating as "AA".			

(b) Educate stakeholders on general obligation bonds		We presented this information to the Board, as well as worked to educate our citizens on GO Bonds and other financing options for capital projects during various presentations during spring 2016.			A multi-modal GO bond education program regarding the GO bond referendum is underway
(c) Determine if general obligation bonds should be pursued and decide on services/projects		The board has decided to not pursue a bond referendum (summer 2016), but will continue to review in the future.			
(d) Outline the general obligation bond process/timeline/referendum date		We have educated ourselves to be able to manage these processes effectively when we are ready to finance capital projects.			
3. Engage financial advisor, Local Government Commission, and bond counsel		We have developed a solid relationship with the LGC, First Tryon Financial Advisors and Parker Poe Bond Counsel			
4. Establish a schedule of capital projects with categorized financing options		We have developed a model, with First Tryon, which will allow us to complete financial analysis and feasibility on any capital project scenario. This model will be incorporated in to the Long-Term Financial Plan as well.	A next phase of financing scenarios will be created with updated capital projects and updated expenditure/revenue projections and will be included in the financial plan.	The updated capital projects schedule will be presented to the Board on April 25th, which includes Public Facilities and CIP needs and financing options.	
5. Develop a timeline for financing and completion of projects		Ongoing			

MI-Connection

Point Person - Jamie

Outcome

Determine future options for MI-Connection

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status	Q3 Status	Q4 Status
1. Gather information needed for future decisions	Start spring 2016	In progress	In progress	In progress	

2. Continue to analyze the MI-Connection business plan and projected results for future		In progress	In progress	In progress	Town Manager continues to serve on the MI-Connection Board of Directors and participates in bi-weekly operations update
3. Create task force of Town of Davidson and Town of Mooresville board members for joint discussions regarding options and decision points (Town of Davidson Board of Commissioners will handle)		In progress	In progress	In progress	

I-77 Managed Lanes Project

Point Person - Doug/Travis

Outcome

Mitigate the impacts of the project during construction

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
Work with NC Department of Transportation, I-77 Mobility Partners, Sugar Creek Construction, and other entities to plan for and mitigate the impacts of the project during construction (Travis)	Spring 2016 and ongoing	CATS CEO John Lewis briefed BoC on August 9, 2016; Davidson Police have agreement with Highway Patrol to respond if needed to accidents along I-77 in town jurisdiction in order to clear accidents faster and mitigate impact on the rest of Town, especially 115; Staff discussed the short ramps issue at exit 30 with I-77 Mobility Partners and SCC and they agreed to modify the designs to lengthen the ramps to allow for more space to mitigate that safety issue.	Staff meets regularly with I-77 Mobility Partners, Sugar Creek Construction, and NCDOT to receive project updates and share concerns should they arise.	Staff meets regularly with I-77 Mobility Partners, Sugar Creek Construction, and NCDOT to receive project updates and share concerns should they arise.	Staff meets regularly with I-77 Mobility Partners, Sugar Creek Construction, and NCDOT to receive project updates and share concerns should they arise. We are currently monitoring the work being done at Exit 30 to ensure that our citizens remain safe during the bridge construction process and while detours are in effect. We are also working to ensure that an effective landscaping plan is set to replace the tree canopy that was removed from the area.
(a) Talk with Lake Norman Transportation Commission about doing this regionally		In progress	In progress		
(b) Assemble staff work group		Staff team meets monthly with I-77 Mobility Partners, Sugar Creek Construction and NCDOT. Doug, Jason, and Travis meet with the project team monthly and Cristina meets with the PIOs from I-77 Mobility Partners, Sugar Creek Construction and NCDOT monthly.	Staff team meets monthly with I-77 Mobility Partners, Sugar Creek Construction and NCDOT. Doug, Jason, and Travis meet with the project team monthly and Cristina discusses communications to citizens/stakeholders with their communication directors.	Staff team meets monthly with I-77 Mobility Partners, Sugar Creek Construction and NCDOT. Doug, Jason, and Travis meet with the project team monthly and Cristina discusses communications to citizens/stakeholders with their communication directors.	Staff team meets monthly with I-77 Mobility Partners, Sugar Creek Construction, and NCDOT. Jamie, Doug, Jason, and Travis meet with the project team monthly and Cristina discusses communications to citizens/stakeholders with their communications directors. Public safety staff are made aware of traffic situations and detour

(c) Develop list of opportunities and challenges		Travis is point person with NCDOT to obtain landscape plan. We should have it in December 2016.	Landscape plan for Exit 30 received; Town suggesting we re-design and submit alternative to DOT for approval; also consider future phases post-completion for additional landscaping.	Retained landscape architect to design Exit 30 roundabouts; Worked with the project on the planned tree removal; Pursuing power and water conduits in project for future needs; Tracking accident activity in the project	Town-contracted landscape design complete. Tree removal discussion with contractor and the NCDOT has not been acceptable. Working to develop landscape area to replace lost trees
(d) Provide information to citizens		Cristina meets with the PIOs from I-77 Mobility Partners, Sugar Creek Construction and NCDOT monthly and shares information with citizens via social media, in the Town Manager's Report and in the quarterly newsletter to ensure citizens are informed and stay safe throughout the construction process.	Cristina is working with I-77 Mobility Partners and Sugar Creek Construction to ensure they are communicating their plans for the managed lanes project and more importantly, the Exit 30 bridge project, so that our citizens are aware of dates, lanes changes, alternate routes and stay safe during this process. They will send communications to our businesses, schools, etc. Information was in the October newsletter. I-77 Mobility Partners and Sugar Creek Construction will present to the Davidson Board of Commissioners on December 13.	Cristina works with I-77 Mobility Partners and Sugar Creek Construction to ensure they are communicating their plans for the managed lanes project and more importantly, the Exit 30 bridge project, so that our citizens are aware of dates, lanes changes, alternate routes and stay safe during this process. They will send communications to our businesses, schools, etc. Jamie's most recent video update featured this project, and it was one of the "Hot Topics" covered in Civics 101 and the Civics 101 Reunion. As we get closer to the May 5 detour, we'll be sure to communicate route change and safety information to our citizens.	Cristina works with I-77 Mobility Partners and Sugar Creek Construction to ensure they are communicating their plans for the managed lanes project and more importantly, the Exit 30 bridge project, so that our citizens are aware of dates, lanes changes, alternate routes and stay safe during this process. They will send communications to our businesses, schools, etc. This project was one of the "Hot Topics" covered in the summer newsletter. This project is featured in the center of our website's homepage.

Davidson Mobility Plan (Comprehensive Transportation Plan)					
Point Person - Travis/Jason/Doug					
Outcome					
Create a mobility plan for Davidson to improve circulation around town for citizens					
Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)

1. Update of Circulation Plan (becomes the Davidson Mobility Plan)	FY2017	Finalizing RFP for September 2016 release.	In a holding pattern due to potential \$100,000 grant funding from UPWP (Unified Planning Work Program) for FY 2018. Received support from Board of Commissioners to wait for funding decision (expected Feb 2017). Updated Circulation Plan in October 2016.	Notified in mid-March that UPWP funding is secured (though not available until July 1). Finalizing RFP for release in April with consultant selection in June.	RFP released. Selection of a consultant expected in early August.
(a) Engage consultant for the update		In progress	On hold	In progress	In progress
(b) Outline a process that includes a task force and public input		In progress	On hold	In progress	In progress
(c) Identify stakeholders/partners		In progress	On hold	In progress	In progress
(d) Identify projects by priority level and determine implementation		Have draft transportation priorities document	On hold	In progress	In progress
2. Partner with Cornelius, Huntersville, Mooresville and Lake Norman Transportation Commission?		Attended North Meck alliance meetings. Regularly consult with LNTC.	Working with LNTC regularly to pursue funding opportunities. Presenting to North Meck Alliance in November.	Ongoing	In progress
3. Include vehicular, golf cart, pedestrian, bicycle, transit (both local and regional)		In progress	On hold	In progress	In progress
4. Look at innovative solutions (work with consultants), e.g. the intersection of Pine and Concord		Are in process of engaging engineers for interim projects	On hold	In progress	In progress

Greenways								
Point Person - Doug/Kathryn								
Outcome								
Work with Mecklenburg County to evaluate the opportunities and accelerate the construction of our greenway system								
Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (16)	(update Nov)	Q3 Status (Mar 17)	(updated)	Q4 Status (Jun 17)	(updated)

1. Work with county to:	Summer 2016 and ongoing	County staff presented update on current projects and priorities at Aug 8 meeting w/Cornelius and Huntersville; Town will need to submit priorities in FY 17 for new 5-year CIP starting FY 18.	Priorities to submit to county are Summers Walk to River Run greenway segment and nature center projects.	Town submitted in January 2017 for new County 5-year CIP starting FY 18: Summers Walk to River Run greenway segment, Kincaid Trail Extension, the remainder of the Charlotte to Mooresville Trail through town, the connection from town center to Fisher Farm/Abersham/Allison.	The county is committed to completing the projects tied to the 2008 bond referendum before adding new projects to its list. Without a match, none of the northern towns have had success getting county P&R funding for projects except the North Meck Recreation Center.
(a) Determine options					BOC considering bond referendum, which would not only provide base funding but would also offer matches for county and state/federal grants
(b) Define what needs to be built				County beginning construction of greenway in Fisher Farm and Abersham Parks	Project 95% complete in Fisher Farm. Scheduled to work in Abersham by mid-July.
(c) Prioritize					
(d) Determine costs and funding options					
2. Need plan to show which greenways will be procured through development				A map in in development.	Map completed
3. Consult Davidson Parks and Recreation Master Plan		Kincaid Trail Extension project design is being finalized and next step is ROW and potential DA funding in winter	Kincaid Trail Extension project design is being finalized and next step is ROW and potential DA funding in winter.	Kincaid Trail Extension right-of-way acquisition in process; County beginning construction of greenway in Fisher Farm and Abersham Parks	Kincaid Trail re-design and right-of-way acquisition in process. Construction of greenway in Fisher Farm and Abersham Parks underway
4. Evaluate funding options			Applied for TAP grant for Kincaid Trail Ext.; will apply for DA as well.	Submitted STP-DA grant application for Kincaid Trail extension project	
5. Develop implementation schedule					

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Catalyst Study- transitioned to Public Facilities

Point Person - Kim

Outcome

Determine what best serves the needs of the town in the downtown area and create a development strategy to meet those needs

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Public input process with small groups to address name, scale, etc. in February/March 2016	Contract with DFI expires December 2017	Well-attended public input sessions held in Feb., March and June.	N/A	N/A	N/A
2. Evaluate proposed scope for the project to include private development components and public facilities	Aug-16	Study will not include private development, focus will transition to public facilities (police, fire, public works, and administration) and a parking solution.	N/A	N/A	N/A
3. Develop public-private partnership model and financial model	N/A	There is no public/private partnership because there is no private investment.	N/A	N/A	N/A

Economic Development Plan

Point Person - Kim

Outcome

Update Economic Development Strategic Plan for next 5 years to maximize the commercial development potential that meets the needs of the community

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
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1. Include South Main area	FY2017		Rose & Associates is consultant working on the EDSP 2017-2022. Initial presentation to the BOC on Oct. 25. Developing strategy and work plan.	Strategy and work plan finalized in April 2017.	
2. Include plans for east Davidson			Will include as part of the EDSP.	Part of EDSP work plan.	
3. Explore incubators (including PiES), entrepreneurship ideas (Davidson College), and co-working (similar to Packard Place in Charlotte)		In conversations.	Jamie participating in PiES strategic planning effort.	PiES and Launch LKN are exploring partnership ideas.	PiES merged with Launch LKN.
4. Commerce Station		Final approval pending for adding 2 spec buildings in the park.	Final approval pending for adding 2 spec buildings in the park.	Two speculative buildings have been approved; Road and utilities extension is underway; Reduced debt through loan payoff.	Two speculative buildings have been approved; Road and utilities extension is underway.
5. Expand cultural offerings (Kim and Dawn)		In conversations.		In conversations.	In conversations.

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Comprehensive Plan

Point Person - Jason

Outcome

Update Comprehensive Plan to use as our guiding document

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Complete Comprehensive Plan	FY2017-18	Planned for FY18.	Planned for after the Mobility Plan	Seeking funding for FY2018; will not begin until after Mobility Plan finishes.	Not funded in FY2018; Should the Mobility Plan finish early, additional funding may be sought. Planned for completion in FY 19
(a) Get scope of work, timeline, and cost estimate		On hold	On hold	On hold	On hold
(b) Solicit input from planning board and other stakeholders		On hold	On hold	On hold	On hold
(c) Review process; how include planning board, citizens?		On hold	On hold	On hold	On hold

Rural Area Plan

Point Person - Jason

Outcome

Develop implementation strategy for the Rural Area Plan

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Seek Rural Area Plan approval in early summer 2016		In progress; bringing batches of text changes to commissioners for discussion. Planning for Dec or Jan adoption.	RAP adopted September 2016.	Complete	N/A
2. Update ordinance recommended by the Rural Area Plan by fall 2016		In progress. Planning for ordinance updates to be completed by December 2016 or Jan 2017.	Continue to bring batches of topics to commissioners for discussion. Trending towards January public hearing and February adoption	Scheduled adoption 3/28/17.	Complete

3. Work with Charlotte Water to formalize sewer extension strategy		In progress. Planning for ordinance updates to be completed by December 2016 or Jan 2017.	In progress; Travis developed a build out sewer estimate for Charlotte Water; formal sewer extension request forthcoming - December 2016.	BoC approved in December 2016.	Complete
4. Implementation/timelines to come		In progress	In progress.	In progress	Complete
5. Consider affordable housing: incentivization via Rural Area Plan ordinance implementation		Proposing to include a variation in lot size requirement in the Neighborhood Edge Planning Area. 12.5% AH requirement to remain. Potential density bonus for AH in RPA.	Discussion item at 11/8 BoC meeting. Refinement needed.	Included in implementation strategy.	Complete

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Affordable Housing

Point Person - Cindy

Outcome

Develop an affordable housing strategy in support of Davidson's values

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Conduct a needs assessment to better understand what the needs are	3 month check in Nov.2016 and Completed Jan 2017 (needs assessment), Draft plan for (implementation)	Assessment started Aug. 1 and will be finished in 6 months.	UNCC Urban Institute did a mid-point review with Town Board on 11/8/16.	Assessment is complete. Presented to Town Board 3/14/17. Public Charrette scheduled 5/8/17. Next steps-complete affordable housing goals and strategies, including	Needs Assessment, including a public meeting is complete. Affordable Housing Goals and Strategies is completed in draft form to be sent to the steering committee 7/1.
2. Include options for on-site affordable housing when rezoning for RAP. Require 30% small lots and explore		Small lots are required. Density bonuses will work in a rezoning if there are density caps.	Discussion item at 11/8 BoC meeting. Refinement needed.	Different size lots (including smaller) are required in most planning areas.	
3. Review options for town properties (Bailey Springs and Beaty Street)		Bailey Springs RFP completed, sent and a developer has been selected by the AFH Steering Committee	Bailey Springs is moving forward with a neighborhood meeting on November 30.	Bailey Springs contract executed in next 30 days and construction will begin in early summer.	Should be processed through EPM by mid-July and lots deeded to JCB Urban and Habitat by late July. We have a significant
(a) Review with affordable housing committee and with board			Bailey Springs project tentatively scheduled for January 2017 board meeting	Done	
4. Affordable Housing committee report on payment-in-lieu funds:					
(a) Prioritize options for use			In progress. Final will be based on findings in the needs assessment; will develop draft scenarios Fall/Winter 2016	Affordable housing strategies, based on housing assessment and other feedback, such as the survey, will be ready in August.	
(b) Create a financial model		Same as (a)	Same as (a)	Same as (a)	Several in the Affordable Housing Strategy Report

Affordable Housing

Point Person - Cristina

Outcome

Service the needs of our neighborhoods; ensure that all feel supported by the town

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Gather and respond to current neighborhood requests to provide our municipal services; ensure citizen engagement from all areas of town		Ongoing -- as we hear requests from neighborhoods, we work to fulfill needs/develop solutions; reps know they can reach out to Cristina who will facilitate getting answers to their questions/solve problems that are within the town's purview.	Fall 2016: Met long-time street needs of the Bradford neighborhood by repaving their roads. Installed sidewalk on Apollinaire Drive. Chief Miller, Captain Ingram, and Mayor John Woods met with the Blackwelder Drive neighborhood on 11/9 to learn about the parking situation, explain the town's needs and ended up working out a solution. Officer Anthony Better was able	Ongoing -- as we hear requests from neighborhoods, we work to fulfill needs/develop solutions; reps know they can reach out to Cristina who will facilitate getting answers to their questions/solve problems that are within the town's purview. North Main Street meeting with DPD and Public Works date TBD.	Ongoing -- We hosted a meeting for neighborhood representatives in May. Reps continue to reach out to Cristina and other staff members to ask questions. We also engaged with the residents of Williams Place and the leaders of Davidson's places of worship to provide updates on town business, answer questions, and make connections. We will encourage participation from all neighborhoods in town at our National Night Out event on August 1.
2. Use neighborhood representatives meetings to produce list of needs; visit homeowner association meetings/neighborhood events to explain efforts, gather needs			Cristina held a neighborhood representatives meeting and worked with staff to respond to issues/questions. Next meeting is January 9.	Hosted well-attended neighborhood reps meeting on January 9 -- Jamie provided updates and we answered questions/addressed concerns. Great group of citizens. Jamie will speak at the River Run Property Owners Association meeting on May 7. Cristina will hold a neighborhood representatives meeting on May 15. Jamie will attend and will provide updates on town projects and issues, and answer questions/address concerns. Jamie speaking to Rotary Club on April 3rd about	We hosted a well-attended meeting for neighborhood representatives on May 15. Mayor Woods welcomed the group, and Police Officer Greg Frostbutter, Jamie Justice and Cristina Shaul provided information and updates.
(a) Need to share clear expectations of what our municipal obligations are		We do this verbally or via email.		We do this verbally or via email.	We do this verbally or via email.
3. West Davidson needs:					
(a) Review West Davidson Stakeholder Committee Report		Done.		Meet regularly with EPA and participate in monthly call with EPA, DEQ, and Health Department to focus on asbestos situation on the Metrolina site. Encouraging communications from these agencies with west	Continue to interact with the EPA, DEQ, and Health Department. The town is serving as a clearing house for citizens related to this issue. Created a webpage for asbestos-related information at www.towofdavidson.org/asbestos The remediation project is going well.

(b) Gather neighborhood requests		Jamie and Cristina met with Evelyn Carr and Daisy Raeford (March 2016) to understand needs/issues. Encouraged them to form a neighborhood coalition. Jamie talks/meets regularly with Dan Carrigan & WSC.	October 20, 2016: A staff team met with the Hobbs Hill neighborhood to answer questions related to the Beaty Street RFP. Working with Dan Carrigan to promote the new RWP amphitheater. Jamie has communicated with Dan about	Responded to questions from neighbors related to the Beaty Street RFP. Sent emails, created FAQs, held meetings. Jamie meets periodically with Dan Carrigan , Evelyn Carr, etc.	Continue to receive calls and emails from residents of West Davidson and answer them in a timely fashion.
(c) Encourage/explore community participation		Meet with reps three times per year. The next meeting is October 3, 2016. Cristina encourages these reps to help promote information (ped. safety and encourage participation at events, public workshops, Civics 101, National Night Out, etc.); Staff has partnered with WSC on kids' amphitheater project.	Fall 2016: Mayor Woods met with children from the Hobbs Hill neighborhood in October. Kids Amphitheatre project has progressed to near completion.	Encouraged teens from west side to join Mayor's new teen council. Special outreach to citizens on west side to participate in Public Facilities Workshops. Hosted first-ever Civics 101 Reunion session for 75 Civics 101 graduates. We gave an update on "hot topics" and encouraged citizens to stay connected with	We are planning our annual National Night Out event for August 1 at the Ada Jenkins Center. We always have a great turn-out from West Davidson and will reach out to all neighborhoods in town to encourage participation. We are also planning a "meet & greet" with our new police chief at the Ada Jenkins Center.

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Staffing Plan

Point Person - Dawn/Heather

Outcome

Create a staffing plan using data, staff recommendations, service levels, and metrics that provide a guide for staffing based on community growth and citizen needs (varies by department)

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Implement needs we have from 2015 study	Short-term: Spring 2016; Long-term: Fall 2016				
2. Study long-range staffing needs in coordination with facilities plan		Included future staffing requirements in facilities information gathered 1st quarter FY17		Comparing town-initiated numbers with design team numbers for future growth	Future staffing levels incorporated in calculations for new and renovated facilities

Facilities Plan (Includes all departments, fire stations, public works, police department)

Point Person - Dawn

Outcome

Prepare for Town's future service needs as our population grows to ensure that facilities are planned to provide services to citizens

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
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<p>1. Space: Assess existing buildings, space needs for each department, cost per square foot, and site options</p>	<p>Summer 2016 (existing buildings); Fall 2016 (future space needs)</p>	<p>Reviewed site options for PW and PD on FS #2 site (summer 2016); decided that PD will not go on FS #2 site. Reviewing department locations downtown/town hall as part of ongoing project for public facilities. Will review options for PW site.</p>	<p>Town hall systems assessment will be complete before Thanksgiving. Steering committee in place to guide public facilities process. Will choose design team in December. Reviewing options for PW site w/architect.</p>	<p>Phase I of public facilities (downtown) underway. Design team and construction mgr on board. Steering committee meets monthly for updates. Will bring options to board on March 28. Working with architect on Public Works facility</p>	<p>Public Works facility upgrade to be presented in July. Working on options to lower cost of new construction and renovation of existing town hall.</p>
<p>2. Analyze innovative energy efficiency options and best practices</p>				<p>Discussing with design team.</p>	<p>Discussing with design team.</p>

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Maintenance

Point Person - Doug

Outcome

Identify current infrastructure maintenance needs and develop a plan to address

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Create a new five-year plan for sidewalks and street paving; complete recommendations by March 1	Fall 2016 (begin implementation)	Five-Year streets plan complete; will review with Board prior to Spring 2017 streets repair project	Doing sidewalks: Apollinaire, Armour, Mock, and Mock Circle	Sidewalks on Apollinaire Dr., Armour St., Peninsula Dr. complete. Design complete for sidewalk on Grey Rd	Work on 5-year street resurfacing plan to start Summer 2017. Bids due on 7-20-17 for a portion of the 5-year plan. 5-year sidewalk plan in progress
2. Categories: storm water (handled as needed, funds are limited - will discuss during budget), streets, sidewalks, parks, athletic facilities, etc. Fall 2016		Streets plan complete		Five-year plan for Parks infrastructure complete	Storm water funding discussed at 5-9-17 board meeting
3. Determine priorities at board meeting after March 1					Priorities discussed for parks and street resurfacing
4. Implementation over the next five years				Working on implementation of first year of 5-year paving plan for summer of 2017	

5. Review development process to consider improvements that ensure infrastructure that the town accepts is appropriate developer process

Working with other Meck townships to improve streets acceptance ordinance; implemented improved road subgrade testing for new development

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Active Space: Athletic Fields & Courts

Point Person -Kathryn

Outcome

To increase the athletic field, court, and other active recreation space available for use by citizens

Action Steps	Estimated Timeframe	Q1 Status	Q2 Status (update Nov 16)	Q3 Status (update Mar 17)	Q4 Status (updated Jun 17)
1. Consult master plan for guidance on athletic space	Spring 2016 (finalize priorities); Fall 2016 (funding); Winter 2017 (implementation)	Bailey Springs/River Run concept approved by Livability Board. Waiting for West Branch plans to potentially expand and/or relocate park amenities. South Street Park concept plan waiting on DE plans.	Decided to hold off on South Street Park plans and put county funds towards Bradford Park expansion.	Bailey Springs community park has begun design. Anticipate bidding project in summer and construction before end of calendar 2017. Bradford Park field turf/lighting to be bid by county in May/June with work this summer.	Bailey Springs Park surveying work hampered by persistent rain but on schedule for bid by end of August and construction before end of calendar year 2017. Bradford Park field turf/lighting county bid delayed. Project schedule: Aug, 2017-Feb, 2018. BOC will receive project updates at 4 pm meeting on 8/8 on these and RWP, Lakeside, McEver 60/90 field, and Ada Jenkins Center options in terms of active space

2. Needs assessment by Mecklenburg County Park & Recreation		meeting w/Cornelius, Huntersville, and Meck CO re regional facility and priorities. Follow-up agenda item/resolution to be considered by BOC 09/13/16. We believe Town will need to submit priorities in FY 17 for new 5-year CIP starting FY 19.		February 14: BOC approved greenway and park priorities to transmit to county staff. \$1 million for design of North Meck Rec Ctr is recommended in county's FY18 budget. Construction funding to follow.	Adopted county budget includes design and construction for North Meck Recreation Center. Public info session is scheduled: Aug. 14, 5:30-6:30 pm, Bailey Middle School. Northern town P&R directors invited to meeting 7/20 to discuss
3. Livability Board input and recommendation				LB has been included in all park plans	Livability board (LB) has continued to be included in all park plans. All residents are invited to participate in the LB subcommittee work (Parks, Greenways, and
4. Talk with other entities for shared athletic space/partnerships			Decided to partner with county and Huntersville for expansion of Bradford Park for rectangular fields.	CSD approached to partner on field development for Bradford Park--awaiting response; Town in discussion with Ada Jenkins Center for a new shared use agreement for gym use and outdoor field use and potential park expansion; Beginning discussions with CMS for potential shared use agreement for new K-8	Staff continues to pursue all partnerships--Davidson Elementary School expansion discussion is mainly discussed via a parent group formed by school. Several members have connections to P&R staff as well as livability board so are advocating for joint use agreement of field and indoor space.

5. List of target projects				Bailey Springs Park, Ada Jenkins Center, Bradford Park, Space by P&R office; Will look at existing parks; Will use Master Plan as a resource: http://www.townofdavidson.org/DocumentCenter/View/4635	Staff and consultant will share drawings for active, improved space at RWP, Lakeside, McEver 60/90 field, Ada Jenkins Center limitations at 8/8 meeting. Beaty property (if BOC acts on proposal-- citizen committee would work with developer and livability board reps on
6. Cost estimates & financing/grant options				Will develop cost estimates and pursue grants if applicable and will work with landscape architect to developer cost estimates if needed; Will use Master Plan as a resource: http://www.townofdavidson.org/DocumentCenter/View/4635	Cost estimate, along with drawings, will be ready 8/8.