

Davidson Game Plan

Financial					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Financial Plan	Piet	Develop a financial plan that provides guidance for revenue and expenditure decisions	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)		
			3. Decide on plan timeframe (5-10 years)		
			4. Create revenue and expenditure categories and projection assumptions		
			5. Review/test-drive with board of commissioners to get feedback		
			6. Finalize financial plan model		
Finance capital projects	Jamie & Piet	Consider projects that could be financed with general obligation bonds and other financing tools	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.
			(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)
			(ii.) Public works facilities (could include parks and recreation offices)		
			(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.

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			(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.
			(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
			5. Develop a timeline for financing and completion of projects		Ongoing
MI-Connection	Jamie	Determine future options for MI-Connection	1. Gather information needed for future decisions	Start spring 2016	In progress

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			2. Continue to analyze the MI-Connection business plan and projected results for future		In progress
			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
Mobility					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
I-77 Managed Lanes Project	Travis/Doug	Mitigate the impacts of the project during construction	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.
			(a) Talk with Lake Norman Transportation Commission about doing this regionally		In progress
			(b) Assemble staff work group		Staff team meets monthly with I-77 Mobility Partners, Sugar Creek Construction and NCDOT. Doug 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.
			(c) Develop list of opportunities and challenges		Travis is point person with NCDOT to obtain landscape plan.

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			(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.
Davidson Mobility Plan (Comprehensive Transportation Plan)	Doug/Travis/Jason	Create a mobility plan for Davidson to improve circulation around town for citizens	1. Update of Circulation Plan (becomes the Davidson Mobility Plan)	FY2017	Developing RFP for September 2016 release
			(a) Engage consultant for the update		In progress
			(b) Outline a process that includes a task force and public input		In progress
			(c) Identify stakeholders/partners		In progress
			(d) Identify projects by priority level and determine implementation		Have draft transportation priorities document
			2. Partner with Cornelius, Huntersville, Mooresville and Lake Norman Transportation Commission?		Joined new LNTC July 2016; Attended 1st monthly meeting with Cornelius and Huntersville in August 2016
			3. Include vehicular, golf cart, pedestrian, bicycle, transit (both local and regional)		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
Greenways	Kathryn/Doug	Work with Mecklenburg County to evaluate the opportunities and accelerate the construction of our greenway system	1. Work with county to:	Summer 2016 and ongoing	County staff presented update on current projects and priorities at Aug 8 mtg w/Cornelius and Huntersville; Town will need to submit priorities in FY 17 for new 5-year CIP starting FY 18.
			(a) Determine options		

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			(b) Define what needs to be built		Kincaid Trail Extension project design is being finalized and next step is ROW and potential DA funding in winter
			(c) Prioritize		
			(d) Determine costs and funding options		
			2. Need plan to show which greenways will be procured through development		
			3. Consult Davidson Parks and Recreation Master Plan		
			4. Evaluate funding options		
			5. Develop implementation schedule		
Economic Development					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Catalyst Study	Kim	Determine what best serves the needs of the town in the downtown area and create a development strategy to meet those needs	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.
			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.
			3. Develop public-private partnership model and financial model	N/A	There is no public/private partnership because there is no private investment.
Economic Development Plan	Kim	Update Economic Development Strategic Plan for next 5 years to maximize the commercial development potential that meets the needs of the community	1. Include South Main area	FY2017	Rose & Associates is consultant working on Phase II of the EDSP. Kick-off meeting to be held in Oct. 2016.
			2. Include plans for east Davidson		Will include as part of the EDSP.
			3. Explore incubators (including PiES), entrepreneurship ideas (Davidson College), and co-working (similar to Packard Place in Charlotte)		In conversations.
			4. Commerce Station		Final approval pending for adding 2 spec buildings in the park.
			5. Expand cultural offerings (Kim and Dawn)		In conversations.

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Growth Planning					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Comprehensive Plan	Jason	Update Comprehensive Plan to use as our guiding document	1. Complete Comprehensive Plan	FY2017-18	Planned for FY18.
			(a) Get scope of work, timeline, and cost estimate		On hold
			(b) Solicit input from planning board and other stakeholders		On hold
			(c) Review process; how include planning board, citizens?		On hold
Rural Area Plan	Jason	Develop implementation strategy for the Rural Area Plan	1. Seek Rural Area Plan approval in early summer 2016		In progress; discussed several remaining items at the August 9 meeting. Tracking for final approval Sept/Oct 2016.
			2. Update ordinance recommended by the Rural Area Plan by fall 2016		In progress. Planning for ordinance updates to be completed by December 2016
			3. Work with Charlotte Water to formalize sewer extension strategy		In progress
			4. Implementation/timelines to come		In progress
			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.
Neighborhood Level					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Affordable housing	Cindy	Develop an affordable housing strategy in support of Davidson's values	1. Conduct a needs assessment to better understand what the needs are	Summer 2016 (needs assessment), Fall 2016 (implementation)	Assessment started Aug. 1 and will be finished in 6 months.
			2. Include options for on-site affordable housing when rezoning for RAP. Require 30% small lots and explore density bonus		Small lots are required. Density bonuses will work in a rezoning if there are density caps.
			3. Review options for town properties (Bailey Springs and Beaty Street)		RFP sent out for BS (spring 2016); Beaty Street RFP to go out August 2016
			(a) Review with affordable housing committee and with board		Bailey Springs has been vetted by the committee

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			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 2016
			(b) Create a financial model		Same as (a)
Neighborhood needs	Cristina	Service the needs of our neighborhoods; ensure that all feel supported by the town	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.
			2. Use neighborhood representatives meetings to produce list of needs; visit homeowner association meetings/neighborhood events to explain efforts, gather needs		We meet with reps three times per year to provide town updates and listen to issues. The next meeting is October 2, 2016. We develop a list each time we meet and provide answers/solve issues. Jamie, Cristina, Doug, Jeanne, Bo, Jason, etc. have visited HOA meetings since January 2016 to listen, explain, and problem-solve.
			(a) Need to share clear expectations of what our municipal obligations are		We do this verbally or via email.
			3. West Davidson needs:		
			(a) Review West Davidson Stakeholder Committee Report		Done.
			(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.

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			(c) Encourage/explore community participation		Meet with reps three times per year. The next meeting is October 2, 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 ampitheatre project.
Resources					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Staffing Plan	Dawn/Heather	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	1. Implement needs we have from 2015 study	Short-term: Spring 2016; Long-term: Fall 2016	Included future staffing requirements in facilities information gathered 1st quarter FY17.
			2. study long-range staffing needs in coordination with facilities plan		
Facilities Plan (includes all departments, fire stations, public works, police department	Dawn	Prepare for town's future service needs as our population grows to ensure that facilities are planned to provide services to citizens	1. Space: Assess existing buildings, space needs for each department, cost per square foot, and site options	Summer 2016 (existing buildings); Fall 2016 (future space needs)	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.
			2. Analyze innovative energy efficiency options and best practices		
Infrastructure					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Maintenance	Doug	Identify current infrastructure maintenance needs and develop a plan to address	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
			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

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			3. Determine priorities at board meeting after March 1		
			4. Implementation over the next five years		
			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
Recreation/Quality of Life					
Topic	Point Person	Outcome	Action Steps	Estimated Timeframe	Status
Active space: athletic fields & courts	Kathryn	To increase the athletic field, court, and other active recreation space available for use by citizens	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.
			2. Needs assessment by Mecklenburg County Park & Recreation		August 8, 2016: joint mtg 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.
			3. Livability Board input and recommendation		
			4. Talk with other entities for shared athletic space/partnerships		
			5. List of target projects		
			6. Cost estimates & financing/grant options		