

Strategic Planning

for

Beaufort County

**Summary of
March 18-19, 2005
Planning Retreat Review
2004-09 Strategic Plan**

Facilitator:

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Beaufort County will continue to be one of the most desirable places in the United States to live, work, and enjoy a sense of community in a culturally diverse coastal setting.

Mission

Beaufort County government exists to serve the people of Beaufort County in a cost-effective manner, so all our citizens may enjoy and appreciate a protected quality of life, natural and developed resources in a coastal environment, a diverse heritage, and economic well-being.

Core Businesses for Serving County Citizens

- Keep public records
- Protect public health and welfare
- Collect and distribute taxes
- Administer court and justice system
- Provide law enforcement
- Operate detention facility
- Manage future growth and development
- Provide emergency management
- Manage transportation system and drainage system
- Provide parks and leisure programs
- Provide libraries and library services

Support Services for Core Business

- Information Technology
- Employee Services
- Communications
- Legal

All Individuals who offer Public Service in Beaufort County Government will:

- Act with Integrity
- Show Respect to Others
- Provide Outstanding Customer Service
- Get the Job Done for Citizens (Be Responsible and Accountable)
- Strive for Continuous Improvement
- Work Together as a Team

**GOAL 1: STRONG, DIVERSIFIED
SUSTAINABLE LOCAL ECONOMY**

Beaufort County Council in the March 2005 Review considered that this Goal should be the primary focus in 2005 and felt that if this Goal could have substantial progress in 2005, many of the remaining goals/objectives of the Strategic Plan would be easier to achieve. The objectives for emphasis on this goal for 2005 should be on Objectives 3 and 5. The Council especially wants to work on developing more commercial business opportunities and on securing additional affordable housing for workers.

Primary Objectives

1. Keeping our military bases and plan for redevelopment in event of closing.
2. World class educational opportunities and continue to improve the educational system.
3. Greater diversity in County's local economy: Tourism, military, services and retail, knowledge base, value-added business.
4. Making medical and healthcare and expanding part of the economy.
5. Affordable homes available for the workforce.
6. More new job opportunities with higher wages for our residents.
7. Grow percentage of commercial tax base.

GOAL 2: FINANCIALLY SOUND COUNTY GOVERNMENT

Major emphasis on this goal in 2005 should be on Objectives 1, 4 and 5. The Council wants to explore the fees that are legally available and the variety of other income sources such as business licenses in order to diversify the tax base and reduce the tax burden on property owners. The Council also wants in this year to begin preparing for a sales tax referendum in 2007 by planning and organizing the effort and by determining the use of such a tax (i.e., Roads, land purchase, etc.)

Primary Objectives:

1. Diverse revenue sources for County, diverse County tax base.
2. Responsible, balanced budget: adequate funding for services and service levels.
3. Residents can afford to stay/live in Beaufort County.
4. Reduced tax burden on individual property owner.
5. Use sales tax to support capital investment.
6. Appropriate financial reserves for unforeseen events consistent with written policy.

GOAL 3: PLANNED AND ORDERLY GROWTH

The second most important Goal for focus in 2005 should be on planned growth. The Council wants to begin working on reviewing the current Comprehensive Land Plan, possibly selecting a "pilot project" to explore changes/models for the development of a new 2007 Comprehensive Plan. The hallmark in this review and in working on all of the objectives of this Goal is "balance" for the multiplicity of interests within the County. For example, a balance in the type of growth should be noted when considering commercial, residential and economic growth. The Council believes that the County will not be successful in achieving planned growth without continuing a regional approach to the issues and exploring new avenues for achieving regional cooperation.

Primary Objectives:

1. Preservation of the county's waterways and natural areas.
2. Realistic plans, zoning and development regulations used in decisions.
3. Quality development: residential and commercial in best locations.
4. Growth paying for services and infrastructure.
5. All governments working together on annexations and future development.
6. Support infill and redevelopment.

GOAL 4: COST-EFFECTIVE DELIVERY OF COUNTY SERVICES

The Council considers that this Goal is the primary responsibility of the County Administrator and his staff with policy direction from the Council. The major emphasis on this Goal in 2005 will be on determining the "level" of service expected/possible with the resources available and on how to communicate this "level" to the citizens. Facilities (including space), equipment and personnel issues of employee compensation, retention and training are significant needs within this Goal that must be addressed and that seriously impact level of service and operating in a most cost-effective and efficient manner.

Primary Objectives:

1. County services delivered in an efficient, most cost-effective manner.
2. Giving taxpayers valued services, value for tax dollars and fees.
3. Continuous improvement of County operations and processes.
4. Customer-friendly County services.
5. Streamlining County government: management, structure and operations.
6. Professional well trained workforce dedicated to public service.

GOAL 5: EFFECTIVE TRANSPORTATION AND ROAD SYSTEM

This is the third major goal for focus to be addressed in 2005. The need for attention on this goal results from the growth in the County. The major ideas for working on this goal include increasing the communication between the Council and the staff on all transportation issues and to examine the legal aspects of such concerns as median cuts or gaining consensus of residents for paving roads, etc. Continued efforts will be made to increase state funding for roads and to work closer with SCDOT and the regional governments on transportation issues.

Primary Objectives:

1. Safer roads: better design, fewer accidents.
2. Increased federal and state funding for transportation projects.
3. Increased use of local and regional alternatives to cars, such as ferry service, public transit, and bicycle paths.
4. Improved traffic flow on major highways and roads.
5. Well maintained roads, fewer dirt roads.
6. Sales tax for capital investment.
7. Improved relationship with SCDOT and other governments.

ACTION AGENDA

The County Administrator will arrange a series of Workshops for the County Council with appropriate staff on a variety of topics. These will include:

- Sources of additional revenue possibilities
- Debt administration
- Increasing the amount of commercial land use
- Affordable Housing (pilot project)
- Status of software/hardware/radio upgrades and replacements
- Use of impact fees north and south of the Broad River

The County Administrator and staff will provide to the Council the following:

- Periodic updates on the Capital Improvement Program
- Periodic updates on the County Road Program (at least once a month)
- Periodic updates on the collection rates of impact fees
- Controller's report on items discussed at the retreat on costs of government services
- A list of possible revenue sources (i.e., fees) as defined by State statute.
- A review summary of the ordinance that includes the incentives that could be made available to the private sector for increased commercial growth.
- A review summary on employee compensation that includes research on longevity, merit raises, pay for performance and educational incentives.
- Staff preparation of a schedule through the Land Management Committee of modifying the Comprehensive Plan now and how to prepare for the 2007 changes.

- Report on the review of the rural sections of the County and how to improve the septic system maintenance replacement.

Council will take the above reports and workshops and develop policy and ordinances that support the major emphasis of this plan in 2005. Council also will request an action plan from the Economic Partnership Committee and a list of suggestions on what the Council can do to attract more business to the County. The Council also desires to work with Municipalities to support more economic development, to work harder to develop regional thinking and opportunities for economic development and growth issues. Finally, the Council wishes to become better change agents for a cultural change in the County Government that supports the underlying values inherent in this Strategic Plan and to communicate the needs of the Plan to the Public.

Footnote:

Major Issues Determined in the Pre-Retreat Interviews and addressed by the Council at the March Planning Retreat:

Major Issues of Goals/Objectives:

Goal 1: Developing a Diversified Economy, (including the Economic Development Partnership)

Goal 3: Planned and Orderly Growth

Goal 5: Effective Transportation and Road System

Supporting Issues to the Goal Development:

- Economic Development Partnership
- Affordable Housing
- Zoning
- Comprehensive Plan
- Teamwork (Including: Among the staff, between the staff and council and among council members.)
- Space Issues

Major Employee/Staff Concerns/Internal:

- Compensation
- Space Issues
- Employee Development/Training

Major Council Concerns/Internal:

- Form of government (better understanding and/or history of how and when and what this does for getting the county work accomplished through council)
- Working together among the council members and between the council and other government bodies
- Developing a culture for better working relationships
- Space

All of these pre-retreat issues and retreat decisions about these issues will be the work of 2005 on the Strategic Plan and the topics for the 2006 Strategic Plan Review of 2005

Strategic Planning *for* Beaufort County



Prepared By:
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University of South Carolina Beaufort
March 2005

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Dear Council Member:

The attached document is part of the preparation for the March 18-19 Council Retreat.

Strategic Planning Overview

During January-March, 2005 a number of conversations and interview meetings took place between Dr. Marge Yanker, the facilitator of the Council March retreat, and the Beaufort County Chairman and the Beaufort County Administrator. These meetings were for organizing the March 18-19 County Council Planning Retreat. Between the dates of 2/14/05 and 2/21/05, 25 interviews were held by the facilitator with 9 members of County Council, 6 elected officials of the county and 10 members of the Beaufort County staff. These interviews were approximately one hour each. The directional statements of vision, mission and beliefs were presented to interviewees for comment but the largest percentage of the interview time consisted of a discussion about the Council's five goals and supporting objectives of the 2004-09 strategic plan and the policy agendas of the 2004 planning session. Those interviewed were asked to comment on the goal/objectives, what had been accomplished during 2004 and to offer ideas about what needed to be done in 2005. One of the purposes of the interviews was to determine the topics that were considered most important for the County Council to discuss at the March 18-19, 2005 retreat. These topics were named as the areas of greatest concern and therefore considered enough to be given significant discussion time at the retreat and for the Council to offer direction in 2005 to the County Administrator and his staff. The County Administrator and his staff have indicated to the facilitator that they want to have a clear sense of the desires of the Council on the five goals and the objectives that support each goal. The County Administrator and his staff will take this direction from the Council post the retreat and develop action plans to address these issues and then set up a regular reporting time schedule in order to keep Council informed about the progress on these goals/objectives.

Most important topics for consideration as determined by the above discussions and interviews.

Issues Concerning the Beaufort County Citizens/External:

Goals: 2004-2009

- #1: Strong, Diversified Sustainable Local Economy
- #3: Planned and Orderly Growth
- #5: Effective Transportation and Road System

Supporting Issues to the Goal Development: (List is not in priority order)

- Affordable Housing (Job opportunities, wages, education, medical and other people issues)
- Comprehensive Plan
- Economic Development Partnership
- Space Issues
- Teamwork (Including: among the staff, between the staff and Council and among Council members.)
- Zoning

Major Employee/Staff Concerns/Internal: (List is not in priority order)

- Compensation
- Employee Development/Training
- Space Issues

Major Council Concerns/Internal: (List is not in priority order)

- Developing a culture for better working relationships
- Form of Government (Better Understanding and/or History of How and When and What this does for getting the County Work Accomplished Through Council)
- Space
- Working together among the Council Members and Between the Council and Other Government Bodies

The material that follows is organized to give you the highlights of the comments made and the suggestions offered for reviewing the 2004-09 Strategic Plan. The organization for the Retreat will be:

Overview of the Retreat

Presentation of the Directional Statements

Discussion, Changes and Recommitment

Presentation of the Five Goals with Objectives

Discussion of Each of the Goals with the Accompanying Objectives. The time will be planned for the three Goals: Economic Development, Growth and Transportation. These, in order, will get the major portion of the discussion time. Each of the Goals and each Objective will be projected by power point for discussion, but the comments contained within this document will not be presented again. The other discussion time will be devoted to the internal issues noted above. You may use this document as a starting point for your own thinking about the contributions you wish to make in the discussions of each goal and objective at the retreat. In addition to this document, you may wish to review and bring to the retreat, the Beaufort County, January 2004 Document prepared by Lyle Sumek Associates.

Explanation of the color coding of the interview notes in this document is as follows:

Black: The previously agreed upon Vision, Mission and Beliefs followed by the original plan document Goals and Objectives.

Green: Comments that indicate no change suggested by the interviewees.

Red: Suggestions for change by Dr. Yanker/interviewees from the analysis of the interview comments.

Blue: Discussion summary highlights from the comments derived from the interviews.

Violet: Notes only in the Policy/Agenda Sections.

Of course, the suggestions and the comments are just that and the Council will determine what changes, if any, are necessary in offering direction to the Administrator and his staff for 2005. Each objective is on a separate page so that you may take notes of your thoughts and ideas for the retreat.

See you on March 18,

Marge Yanker

BEAUFORT COUNTY DIRECTIONAL STATEMENTS

VISION

No suggestion for change to Vision Statement.

Beaufort County will continue to be one of the most desirable places in the United States to live, work, and enjoy a sense of community in a culturally diverse coastal setting.

MISSION

No suggestion for change to Mission Statement.

Beaufort County government exists to serve the people of Beaufort County in a cost-effective manner, so all our citizens may enjoy and appreciate a protected quality of life, natural and developed resources in a coastal environment, a diverse heritage, and economic well-being.

Change Suggested

AND
PRACTICE

Core Businesses:

- Keep public records
- Protect public health and welfare
- Collect and distribute taxes
- Administer court and justice system
- Provide law enforcement
- Operate jail and detention facility (eliminate jail—same as detention)
- Manage future growth and development
- Provide emergency management
- Manage transportation system and drainage system
- Provide parks and leisure programs

Suggestion for Change:

EDUCATION
MEDICAL
LIBRARY

1. Review the Core Business list to be certain that it is inclusive of services provided to citizens of Beaufort County.
2. Add to the Core Business list, another list that might be called, “Support Services for Core Businesses” that includes the County’s business that is not visible to the citizens. For example: IT, Employee Services, Communications, Legal, etc.

Rationale for Change: County spends a lot of taxpayer dollars on these support services and includes them in the strategic plan, but does not have a place in the directional statements to indicate their importance. Also, it is a positive change for employee morale when they feel included and important to the plan.

BELIEFS (VALUES)

Change Suggested

In Beaufort County, we show S-P-I-R-I-T:

Serving with pride

Producing results

Acting with **Integrity** and respect

Taking **Responsibility** and being accountable

Being **Innovative** and creative

Practicing **Teamwork**

Suggestion for Change: “Beliefs” to “Values”

Rationale: Values is a more frequently used term in Strategic Planning. Values statements are the “shoulds” that one aspires to, not always the reality, but what “drives” behavior and serves as a “direction” for ideal behavior.

Suggestion for Change: Change the “Spirit” format to one such as the following:

All Individuals who offer Public Service in Beaufort County Government will:

- Act with Integrity
 - Show Respect to Others
 - Provide Outstanding Customer Service
 - Get the Job Done for Citizens (Be Responsible and Accountable)
 - Strive for Continuous Improvement
 - Work Together as a Team
-

Rationale: Beliefs section from the original often elicited a chuckle from interviewees, not about content but about format. The above suggested Values were the ones most noted in the interviews.

Interview Discussions:

This Beliefs section was rich in producing lots of comments and reactions on a number of issues, some mentioned only here and some mentioned again in other areas of the goal discussions.

The following is a sample of these comments.

County Administrator's Contribution to "Spirit":

A New "Spirit" Noted: There was a consensus from among the Department Heads, the Elected Officials and the Council members interviewed that the new County Administrator enjoys a significant vote of confidence for the job he has done to date. There were many comments voicing respect for his efforts, admiration for his courage and integrity and optimism for the future under his leadership. These positive attitudes permeated the interviews and were often mentioned throughout the interviews on specific issues such as, "We haven't accomplished (name the issue) yet, but we are moving forward on this and I believe we will get the job done with the new administrator."

County Council Need for "Spirit":

A number of council members' interviews suggested a need to develop a new spirit (new teamwork) among the council. Comments centered on the following:

- Need to better understand, work within or lobby to change the form of government under which the Council works
- Work with increased concern for the "common good" of the entire County and not just the district parochial interest. (These were related to the form of government issue.)
- Difficulty often noted for the Council procedures which prevent studied concentration of an item before a vote. A suggestion for a procedure of "resolution" prior to the meeting was often mentioned but the concern about the procedures of Council was more pervasive than one issue. Many expressed a desire to devote time in the retreat to consider the internal working of the Council itself.
- Work with greater respect for each other. (Specific examples of non-respect were often mentioned.)
- Need to have a sense of PLACE—HOME and OPPORTUNITIES OUTSIDE COUNCIL MEETINGS FOR TEAMING. It was felt that for Council to develop a team spirit they need to have a space for meetings, both formal and informal, and a place or time to gather with each other outside Council meetings. Otherwise, some feel that they remain "strangers" to one another only coming together for Council meetings. Space was a major issue for Council, as it was with all individuals interviewed. It was a constant refrain in almost every interview.

Employee/Manager Needs for Improved “Spirit”:

Need for Employee Training

- Customer Service
- Safety
- Cross-training job functions
- Developing a “mind-set” for Public Service

Need for Manager/Supervisory Training

- Customer Service
- Employee Relations
- Labor Laws
- Performance Management
- Communications
- Teamwork
- Mentoring

Need for Improved Staff Pay

- Often noted as a major factor in the lack of spirit and a contribution on the difficulty in improving employee morale, employee recruitment and retention.
- Dissatisfaction with Past Studies. Expectations were raised by the studies, but not realized. (Maximus, 2003 and Price-Waterhouse, 1999-2000) where significant consultant fees were spent, considerable time expended by staff for the study with little implementation and what implementation existed benefited few and may have caused more morale issues than any solved. (i.e. In Maximus about one-half of the employees got a pay increase to the minimum of the rate band, but others got nothing. The study created many new titles, but little else. No one suggests doing another study, but do suggest a new compensation package based on longevity and merit—especially “pay for performance.”)

Need for Additional Space

- All but one department head and elected officials noted that the workload of services has increased and in some cases additional personnel with no accompanying space allowance.
- Numerous pleas were made for additional space for personnel, records, offices (to serve citizens in locations throughout the county), etc.

Need for Stability (Assurances)

- Issues of numerous changes in leadership, outsourcing, etc. named as concerns for creating a positive spirit. However, most were aware that change is the “name of the game” but they feel most employees need assurances that the changes are for the better. A “wait and see” attitude seems to prevail.

Need for Developing an Appropriate Involvement of Council Members in Staff Interactions, A Balance Desired:

- Department Heads and Elected Officials want the Council to “care” about their concerns and the employee concerns but not “meddle” in their responsibilities. A few feel the Council may not rely on the administrator and department heads to solve a problem of a citizen, but rather want to get involved inappropriately.
- Some Council members express a frustration in not being able to have enough communication on how an issue is being resolved so as to be responsive to their constituents.
- Both Staff and Council recognize a need for “balance” in their relationship and need help or reminders on how to achieve the “balance” all desire.

Need for Improved Teamwork (Related to all of the above.)

- Department heads/Elected Officials want better teamwork in working together—among departments, within departments and between themselves and council.
- Council members expressed the need for greater teamwork among the members of council and between the County Council and other governmental bodies.
- Again all expressed a positive look ahead for the County Administrator to create improved teamwork within the staff/employees and between the Council and the staff.

GOALS/OBJECTIVES: GENERAL

Suggestion for Change: The Goals and their accompanying Objectives need to be developed into action plans by the Administrator and his staff and then monitored throughout the year. A timetable for review by the Council from the input of the Administrator should be established.

Suggestion for Change: The Objectives need to be stated as SMART objectives—Specific, Measurable, Attainable, Realistic, and Timely. This may be a directive to the Administrator and his staff to take these generally stated Objectives and rewrite them for the Action Planning phase of this planning process.

Interview Discussion: Many interviewees claimed not to have seen the previous year's work until preparing for the interview. However, all staff and especially the County Administrator see the retreat and the outcomes on goals/objectives as their "marching orders" and hope to have a clear direction from the Council so that they can use this as their roadmap for the remainder of the year.

Suggestion for Change: The Council's retreat should give direction on all of the goals, but especially on the goals considered most important by the interviewees for direction. These interrelated goals are:

- Strong, Diversified Sustainable Local Economy
- Planned and Orderly Growth
- Effective Transportation and Road System

Goal 1: Strong, diversified, sustainable local economy

Interviewees consider that if Council could offer direction on this Goal, most of the other Goals/Objectives would be relatively easy to accomplish.

Primary Objectives:

1. Keeping our military bases and plan for redevelopment in event of closing.

Possible Change: Readdress the “redevelopment” portion of this objective.

Interviewee Discussion:

- County supported and participated in the Military Enhancement Committee work but was not responsible for the committee. Interviewees considered that through this committee the objective for now has been achieved and that the effort is appropriate through their representative, Skeet von Harten, for keeping the bases.
- There is no plan for redevelopment in case of base closing so that part of the objective has not been achieved. (One Council member suggested that to have a plan for redevelopment means that we are not confident of success in keeping the bases and this aspect of the objective should be dropped. Another council member pointed out that the municipalities where the bases are located—Beaufort and Port Royal—would have the first opportunity to suggest redevelopment.)
- There were a number of county relationships that were pointed out as positive in a possible consideration of keeping the bases: For example, William Winn’s program of Public Safety and its relationship between bases and county government has been recognized by the Navy and is being used as a template throughout the country. Other examples were offered such as the coroner’s relationship with the bases or the auditor’s function in providing current information to military personnel. Land was also purchased around the Air Station to protect it from encroachment.

2. World class educational system.

Change Suggested in the Statement of the Objective or a Refinement of the Objective with Incremental Steps.

Rationale: "World Class" seemed a vision statement to most interviewees rather than an objective. However, it was considered that incremental objectives were important to set in the pursuit of "world class" and one interviewee suggested that a more appropriate way to state this objective was in providing "world class opportunities".

Changes in Actions to Implement.

Interview Comments:

Areas of possible "world class" opportunities were mentioned:

- USCB's South Campus as a first rate facility (one completed County project) and its new status as a four year institution were often mentioned as moving toward "world class".
- TCL's nationally recognized programs and its new building progress were noted also as making strides toward "world class".
- Public school programs such as the Bluffton Technology High School and Battery Creek's International Baccalaureate were also mentioned. (The new cooperative committee formation was seen as a good move for education.)
- The County Library System and facilities were also noted as a positive move toward "world class" education for all citizens
- Even with all of the above opportunities, it was noted that all are seriously crippled by a lack of proper funding and therefore, even these educational programs cannot be called "world class".

Maintain quality education system

3. Greater diversity in county's local economy: Tourism, military, services and retail, knowledge base, value-added business.

Possible Change is adding Healthcare to the list.

Changes in Actions to Implement.

This objective is such a HOT ISSUE that more emphasis, direction and discussion needs to occur at the Council retreat in order to give the Administrator and his staff more direction so that they can develop appropriate action steps to achieve this objective by 2009. For example, direction on interplay and issues that are not mutually exclusive such as Zoning, the Comprehensive Plan, Rural/Urban Balance, Land Values, etc. In addition, Council may wish to add Medical to the list.

Interview Discussion:

- Most often mentioned source of concern was around the funding of the Economic Partnership Committee and the lack of results. This concern was directed not just at this committee, but most saw the Council as sharing in the lack of results for such things as: criticism of the Council for abdicating the major thrust of this objective to one group; the belief that "no one, including this committee could do this job" both for conditions in the County, but also the state and the competition for business/industry throughout the world; the concern about the lack of support for this objective (and the committee) in developing proper zoning, land for industrial parks (noted that 72% of existing parks are devoted to wetlands and thus not usable), providing housing, roads, education, etc.
- Although the Economic Partnership was most often negatively criticized in the interviews; there were one or two sources of praise for the Partnership in their recent move to include local business development issues such as trying to retain and expand these enterprises, especially minority-owned businesses.
- Lots of concern and finger pointing about the source of the "failure" of this objective, but little in concrete suggestions on how to accomplish it in the future.
- Seen as critical to so many other objectives such as higher wages, lower taxes, etc. but again little suggestion for changing the progress was noted.
- Actions such as establishing a plan on Economic Development with measurable benchmarks as suggested in 2004 has not been achieved.

4. **Making medical and healthcare an expanding part of the economy.**

No change suggested in this Objective. Only possible change is to include medical in the objective list above, but would not suggest eliminating the objective.

Interview Comments:

- Several interviewees consider that strides have been excellent in achieving this objective and that medical and healthcare have been an expanded part of the local economy.
- Concern expressed to ensure that people, especially low-income citizens, don't fall through the cracks for receiving care.

5. Affordable homes available for the workforce.

No change suggested in the Objective.

Changes in Actions to Implement.

This objective is such a PRIORITY ISSUE that more emphasis, direction and discussion needs to occur at the Council retreat in order to give the Administrator and his staff more direction so that they can develop appropriate action steps to achieve this objective by 2009. Council might consider moving this objective into the Growth Goal—Number 3.

Interview Comments:

- Suggestion is that Council should waive impact fees for contractors who build affordable housing.
- Zoning and land value is an impediment to affordable housing since it is difficult to find land.
- Previous suggestion about building affordable housing in Jasper County was mentioned by a number of interviewees and elicited strong reaction, including that it was: irresponsible to think about spending Beaufort County money in another county or it was a veiled attempt to move minorities out of Beaufort County.
- Concern for many that affordable housing anywhere should not be turned into a ghetto and isolated from other residential communities. Instead, affordable housing should be of diverse housing styles and that regulations/laws prohibiting predatory lending practices should be developed.
- Participation in the Housing Consortium considered to be a strong positive move.
- Concern expressed for the impact of Affordable Housing in certain areas such as maintaining a rural balance.

6. More new job opportunities with higher wages for our residents.

No change suggested in this Objective.

Changes in Actions to Implement.

Rationale: Most of the comments were a rehash of the comments made in Objective Number 3 above on Economic Development.

7. Grow percentage of commercial tax base.

No change suggested in this Objective.

Changes in Actions to Implement.

Rationale: Most of the comments were a rehash of the comments made in Objective Number 3 above on Economic Development. Although related to Objective #3 above and to Goal # 3 below, zoning was most often mentioned as an impediment to being able to grow the commercial tax base. Overarching issue is how much Council is willing to do in zoning, infrastructure, utilities, etc. and in creating policies to help support economic and growth development plans. Also it was suggested that there is a need to offer tax credits/breaks for new businesses.

Goal 2: Financially Sound County Government

Primary Objectives:

1. Diverse revenue sources for county, diverse county tax base.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion:

- Diversification in tax base helps tax burden but geographic makeup of County limits manufacturing and commercial development.
- Should bring more corporate development to keep people here. No new revenue sources seen at the moment.
- Implementation of a transfer fee by local referendum for funding of specific services that have a natural nexus to real estate—such as storm water management. Such a fee should bring in \$1.5 million or more from the unincorporated areas of the county.
- Other new fees: Hospitality tax, building improvement fees, permitting fees, business license and development fees
- Use of grants. It was repeatedly noted that the use of grants in Public Safety and in the Sheriff's function were good examples of alternative sources of revenue. Significant equipment in both areas has been made possible with grants such as those from Homeland Security. Most are one time equipment purchase grants so that the County is not committed beyond the life of the equipment for personnel, capital expenditures, etc.
- Successfully implemented the Sunday Alcohol Sales referendum.
- Unless this objective is achieved, it will remain a problem for economic development in the County.

2. Responsible, balanced budget: adequate funding for services and service levels.

Possible Change suggested in redefining words. Words such as “responsible” and “adequate” were questioned as to what these meant and as defined by whom.

Changes in Actions to Implement.

Interview Discussion:

- A balanced budget has been achieved (demanded by law?) so that the County is living within its means. However, there has been a “no growth budget” expectation and therefore funding that is “adequate” is based upon how you determine service level. Changes made to the budget reflect the level of service; so as budget goes down or remains static while the demand for services goes up, the level of service goes down.
- All departments, including all functions run by elected officials, cite that they have had increased workloads and are providing increased services or same services to an expanding population. The department heads and elected officials believe they have been very cost effective but are “burning out” employees, losing employees or unable to attract new employees because of the resultant working conditions and/or salary implications of “no growth” budget.
- Space to do the job is a major concern with no prospect of change for the better with the “no growth budget” policy.
- Internal audit department is being set up. New Financial Analysis will be in place and a Budget Director/Budget Analyst needs to be hired to help the departments plan and develop a model to support their budgets.
- Widespread dissatisfaction in the funding for salaries. Department heads believe that the budget must include new funding for salaries. The Maximus study of 2003, the compensation plan that was partially implemented and the outsourcing of HR and pay problems have affected the trust level among employees. Department Heads do not want another external study done, but do suggest an internal study and salary increases based on both merit and longevity. Some of the interviewees saw the use of consultants as a lack of courage in delegating the tasks such as salary to a consultant group without really addressing the issue.
- Often mentioned was the non-parity of salaries of the sheriff’s function with all others department and functions. This was particularly seen as acute when it came to the difference between the sheriff’s function and that of public safety. Although there was no doubt envy in what the sheriff has been able to do—many expressed a need to “keep up” in their areas of responsibility to improve morale. Note: Even with the better pay and increase in the number of sheriff officers in the last few years, the sheriff feels he is short about 50 officers to be at the recommended national standard and needs more officers to improve the presence within gated communities.

Suggestion: Discussion of Salary Issues. COMPENSATION IS A HIGH PRIORITY ISSUE FOR ALL THREE GROUPS: COUNCIL, STAFF AND ELECTED OFFICIALS

Suggestion: Set priorities within the budget by instituting a cost/benefit analysis process for all budget items. This will be aided with the new financial analyst position.

3. Residents can afford to stay/live in Beaufort County.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion:

- Hard to attract professionals to the area because of salaries of County (see above) and high cost of living.
- Lack of affordable housing.
- Change assessments law to apply only when the property is sold.
- Connected to economic development and growth goals. Most feel we aren't doing enough about this especially for minority residents.

4. **Reduced tax burden on individual property owner.**

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion:

- Was not achieved in 2004 and if tax burden is reduced in 2005, service level will be seriously affected.
- Treasurer does a good job of collecting taxes, currently at 90%. Have not had problems collecting tax income.
- Some suggest implementing a county hospitality tax or other taxes/fees to shift the burden away from property owner.

5. Use sales tax to support capital investment.

Division among interviewees on whether to eliminate this as an Objective.

Interview Discussion:

- Failed in 2004. Some thinking of how to implement in '07; others just considering ways to do the projects in the 2004 referendum anyway.

6. Appropriate financial reserves for unforeseen events consistent with written policy.

No Change Suggested for this Objective

No change in Action, just to continue making strides to increase the reserves.

Interview Discussion:

- The Objective generated a number of comments about the low reserves and the possibility of losing the AA bond rating were mentioned in a number of interviews. However, Tom Hendrickson relayed that the County is working on increasing reserves and are at about 80% now. Efforts are being made to have reserves reach 85-90% in 2005. He says there is no danger of losing the AA rating.

Goal 3: Planned and Orderly Growth

Primary Objectives:

1. Preservation of the county's waterways and natural areas.

No Change Suggested for this Objective

Little Change in Actions to Implement Recommended

Interview Discussion:

- Southern Beaufort County Planning Project and other planning groups were mentioned as "taking care of this Objective."

MARSUANDS

2. Realistic plans, zoning and development regulations used in decisions.

No Change Suggested for this Objective except possible refinement of the word “realistic.”

Changes in Actions to Implement.

- HOT TOPIC. Intertwined with Economic Development. Each subject constantly mixed with the other.
- Zoning too complex—3000 pages. Zoning ordinances need to be perceived as user friendly and attempts have been made to make this possible but need to continue. Without changes in zoning it is difficult to attract more commercial businesses.
- Attempts made to try to be fair to most people.
- Comprehensive Plan was discussed and seen as a “savior” to a “devil”—no consistent reaction. It was seen by most as an attempt to be “middle of the road.” It was widely felt that Council needs to give more direction on the Comprehensive Plan. Zoning and for some, the Comprehensive Plan hinders development.
- In Dist. 6 the Comprehensive Plan does not allow for growth because of water and sewer restrictions. This district has watched the rest of the Co. grow and has not been able to participate economically.
- Rural Business District: How do we balance growth and rural areas?
- Developers want to develop in Beaufort County as long as regulations are consistent.
- Have made strides in trying to simplify zoning process.

Suggestion: Discussion at the retreat and a presentation by Tony Criscitiello on zoning, the status of the various planning groups and what preparation needs to be done for '07 review of the Comprehensive Plan. He and County Administrator will decide the proper presentation needed.

3. Quality development: residential and commercial in best locations.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion:

- Comprehensive Plan discussed. Some see the Comprehensive Plan as being in conflict with the need for affordable housing and commercial locations.
- Burton Wells Park considered a good residential community.

Suggestion: Part of the TC presentation.

AFFORDABLE
HOUSING ?

4. Growth paying for services and infrastructure.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion:

- Serious need to control annexation and revisit growth plans.
- Impact Fees need to be revisited.

5. All governments working together on annexations and future development.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion:

- All see improvement in governments working together and all see the need to continue this improved relationship. However, most see this as a function of the fact that there is less current annexation going now than in the recent past and that the relationships are tenuous. There are on-going and constant issues with the relationship in such areas as law enforcement or other matters that require serious cooperation.
- Need all zoning ordinances among the government entities to be the same or not in conflict. Cited as a positive move is the Southern Regional Plan where the Towns of Bluffton and Hilton Head are working with the County on zoning issues. This will also encourage Jasper County to tie into this by creating a regional plan that will coincide with Southern Beaufort Regional plan ^{COMPATIBLE}
- However most mentioned the need for more State Funding in most areas such as Roads. Somehow the County must work harder in working with the State which would help in future development of the County.

6. Support infill and redevelopment.

No Change Suggested for this Objective

Continued Changes in Actions to Implement.

Interview Discussion

- Need to help communities fix dilapidated homes. Cited as positive movement on this was what is taking place in Beaufort and Port Royal by Dick Stuart.
- Homes in areas surrounding new facilities like the Burton Wells Park were also cited.

Goal 4: Cost-Effective Delivery of Country Services

Most interviewees considered that this section was the role of the County Administrator and Staff with only the "Policy" statements of the Goal and Objectives coming from the Council.

Primary Objectives:

1. County services delivered in an efficient, most cost-effective manner.

No Change Suggested for this Objective

Continued Work in Actions to Further Implement.

Interview Discussion:

- Again, the Administrator was praised for his efforts in doing "good" things and promoting cost-effective operations.
- Most agreed that there has been progress made on this objective in 2004. Examples: Restructured departments, lower negotiated attorney fees; process flowchart; eliminating duplication of effort, improved risk assessment and an on-going review of services.
- A few felt that there had been a focus on procedure over substance.
- Need to consolidate Fire and EMS services.

Suggestion is to implement a Cost-Benefit Analysis throughout the system.

① DETERMINE LEVEL OF SERVICES DESIRED

② \$ " SERVICES DELIVERED

③

④

2. Giving taxpayers valued services, value for tax dollars and fees.

No Change Suggested for this Objective

Continued Work in Actions to Further Implement.

Interview Discussion

- Most agreed that there has been progress made on this objective in 2004.
- Internal and external communication needs to be improved. Need to improve image of government with the citizens. Does not contribute to the taxpayer feeling he/she is getting valued services. "Bad press" has not helped the image and has contributed to the morale problem of employees.

3. Continuous improvement of county operations and processes.

No Change Suggested for this Objective

Continued Work in Actions to Further Implement.

Interview Discussion

- Move toward outcome reporting, not output is helpful. Tied to outputs not outcomes.
- Goal is to have zero increase in budget. (Note discussion on “realistic” budget under Goal #2.)

Suggestion: Cost-Benefit Analysis

4. Customer-friendly county services.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion

- Priority Issue. Although one long-term Council member saw improvement because he has had fewer constituent complaints on the Customer Service of County employees than in the past, most agreed this is still an important concern. Almost everyone talked about the need for training and hiring people with a “public service” mind-set.
- Many felt the Service level is very uneven. Some Department Heads believe that they are seeing some improvement within their areas of responsibility in delivering customer-friendly service; others believe they need a lot of help in this area. Most felt that they needed more people and that they could provide better customer service with more help. Most agree, except sheriff's department, that they need training in good customer-service. All claim to work on this issue constantly but have no measuring tool to gauge success except, “No news is good news,” when they don't have complaints. (BCSO has ongoing training in all areas and bring training in-house to reduce cost. They offer this in-house training to local police departments free which helps foster a better relationship.)

Suggestion: Training in 2005.

5. Streamlining county government: management, structure and operations.

No Change Suggested for this Objective

Continued Work in Actions to Further Implement.

Interview Discussion

- Suggest that there must be streamlining going on because the County is continually adding to the workload of staff but with the same number of resources. Many department heads and elected officials are cross training employees, working to eliminate duplicate service and are developing processes which they believe should make a greater difference in 2005.
- Managers need to take ownership of enforcing policy and procedures. Duplication of effort changes should be helped by the internal audit and cost/benefit analysis.
- The restructuring of certain departments such as Human Resources is noted by a few that some employees and citizens are suspicious that this is a County plot against minorities. Suggestion by these few is that the County restructure every area, not just a few.
- Criticism of County for hiring consultants, spending lots of money on studies and not implementing the studies. Most do not want more studies, just more action.
- Records Management: Still too much old school but trying to move to a paperless department.
- Information Technology function has made a major difference in the streamlining of government and through this, with the web site and other IT improvements, has added greatly to the user friendliness of County Government. Central imaging will be done this summer and will need training for the department to use.
- Land Manager: Proposed to hire to manage departments (Assessor, Building, Register of Deeds, etc.) in order to make it easier for developers to use and combine departments that must work together for better customer service.

6. Professional well trained workforce dedicated to public service.

No Change Suggested for this Objective

Changes in Actions to Implement.

Interview Discussion

- PRIORITY ISSUE. See Objective #4 on Customer Service Training. Not only is customer service training needed but a host of other management and employee training needs were named. Departments sent people to training in 2004 and used training where possible according to a limited budget. Few felt they had the people needed to do the tasks at hand (Coroner's office, for example, was an exception). Some cited up to a triple workload recently with the same number of employees to do the work. Employees are being "burned out" and the staff is stretched about as far as it can go. It is felt that training for all and more staff will provide better customer service, improve morale and reduce turn-over.
- Diverse County is reflected in employees and most need training in business practices from bottom to top, including managers and supervisors.
- Employee training is a must in order to elevate employee level, and where possible, managers should take advantage of free training. Improving a Public Service mind set should be stressed for employees and part of the training.

Suggestion: More in the budget for 2005 for human resources development and training.

Goal 5: Effective Transportation and Road System

Often heard—It is state's responsibility or we need regional approach.

Primary Objectives:

1. Safer roads: better design, fewer accidents.

No Change Suggested for this Objective

Continued Work on Actions to Implement.

Interview Discussion.

- Safer roads needed all over Beaufort County. For example at the intersection of Broad River Blvd and 280.
- Have made progress; for example, there will be a light at Joe Fraiser Road, but more improvement needed.

21

INFLUENCE curve cuts, DESIGN, SPEED LIMITS, DANGEROUS SPOTS

2. Increased federal and state funding for transportation projects.

No Change Suggested for this Objective

Continued Work on Actions to Implement.

Interview Discussion:

- Most comments centered on the lack of Federal and State contributions.
- “Federal government holds states hostage with funding.”
- The situation for road funding is a legislative matter. The County can do little except lobby for legislative actions. “C” funds.
- Need far more lobbying efforts.

3. Increased use of regional alternatives to cars, ferry service, public transit, MDA.

Change Suggested. Remove MDA from the Objective since no one was able to define what MDA is. One person suggested that it was Multi-District Agency or Authority. Another person thought that it had something to do with a regional program with Savannah that no longer was in existence.

Continued Work on Actions to Implement.

4. Improved traffic flow on major highways and roads.

No Change Suggested for this Objective

Continued Work on Actions to Implement.

Interview Discussion:

- Have improved some in 2004. For example, lights have improved and BCSO is enforcing new laws and regulations.
- Need longer term proposals and work with the state for the state controlled roads.

5. Well maintained roads, fewer dirt roads.

No Change Suggested for this Objective

Continued Work on Actions to Implement.

Interview Discussion

- Have made some improvements in 2004. Fewer, but still an issue.
- Some suggested changing regulations to be more aggressive so that the condemnation process could make it possible to move ahead with paving when one property owner holds up the process.
- Rural areas need the same priority as the rest of the County. More rural improvements needed.

6. Sales tax for capital investment.

Eliminate or change to get ready for 2007.

7. Improved relationship with SCDOT and other governments.

Continued Work on Actions to Implement.

Interview Discussion

- Considerable progress has been made on this objective in 2004. Need to continue in 2005.
- Robert Smalls Corridor Plan was accomplished. Hwy 170 to Hwy 280 has a common plan between municipalities.
- A traffic impact analysis is needed for Beaufort County/City of Beaufort/Port Royal.
- Newton and Kubic meet with head of DOT and should continue in their efforts with DOT.

POLICY AGENDA

Top Priority

- Base Closure Strategy Through the Military Enhancement Committee
- Capital Project Referendum Failed
- South Beaufort Regional County Plan In Process
- Highway 278 Project Cameras installed
- Financial Policy and Plan Not in evidence
- Highway 170 Project traffic management Nearing completion

High Priority

- Impact fees Some progress in such areas as providing data
- Bluffton Parkway No
- Road Acceptance Policy No
- Critical Lands $\frac{3}{4}$ of 40 Million applied, need to get next 40 Million
- Dirt Roads Some improvement
- 15% Assessment Cap State needs to fix problem

MANAGEMENT AGENDA

Top Priority

1. Affordable Housing: Project out of the ground HOT ISSUE. Have contract and have the Housing Consortium.
2. Business Plan Development None in evidence
3. Employee Compensation Policy HOT ISSUE. Needed.
4. School Budget Feeling is that this is not a management decision—a political decision.
5. Budget Process Refinement A few positive changes have been made to process.
6. Grants Strategy No grants administrator or strategy except in Emergency Management and Sheriff's function.
7. Comprehensive Plan Development In place but with mixed support.
8. County Facilities and Space HOT ISSUE. Need to look at ALL facilities. COUNTY HAS STUDY....IMPLEMENT NOW.

9. Human Resources Policy A personnel manual has been recently approved by Council but currently only being distributed to departments. Departments need training in employee development to make policies work. TRAINING—HOT ISSUE.
10. Information Technology Recognized by all as being a “shining light” in the County. Considered a great tool. However, training is needed to utilize the IT programs more effectively.

MAJOR PROJECTS

1. USCB: Hargray Completed. (Note: a sheriff substation and drug lab will be in place soon with maximum benefits for both entities.)
2. TCL: Development Project is underway: Land purchased and architects are drawing buildings.
3. Highway 21 St. Helena - Four Lane still needed. Some improvement with the traffic management system of camera and fiber laid which was possible through a grant. Reverse 911 possible through grant. St. Helena lanes. (Note: Many projects still needed for 21: Gardens Corner North to Jacksonboro needs to become 4 lane, Need to continue 4 lane from Combee to Old Sheldon Church Rd. But again a State-Co. Issue.)
4. Highway 170 Traffic management system is 99% complete.

Final Note:

Role of Council in Planning: Council sets the vision, mission and goals, suggests objectives and the administrator and staff refines the objectives and develops action plans to achieve objectives. The plan is distributed to the department heads in a timely manner to implement and work to meet.

Role of Council in Working with Staff: Needs to have interest in employee issues, but not involve themselves in day to day operations. Should work though the County Administrator and his staff.