

**The Villages®**  
**Community Development Districts**  
**District Management**

TO: All District Board Supervisors, Directors, and Committee Members

FROM: Richard Baier, P.E., LEED AP  
District Manager



DATE: October 5, 2021

RE: District Management Achievements FY 2021

As we rapidly approach the end of the year and wow what a year it has been; I would like to share the many achievements that the District Team has accomplished. Since my last published letter of achievements dated March 26, 2021, the District Team has continued to focus upon Efficiency and Effectiveness, Customer Service and Community, Utilities and Growth, Technology, Recreation, and Executive Golf just to name a few. During the Balanced Score Card Update in October 2020, I introduced a new organizational structure pertaining to my Senior Management Team when Kenny Blocker assumed additional responsibilities as Deputy District Manager including Utilities and Sanitation and Carrie Duckett assumed Community Watch and Risk Management. With the creation of two new District Boards in the past 6 months, it was apparent that a review of the services District Staff provides the Boards needed to take place.

In looking at the experience and strengths of my Senior Team, in addition to the Department Directors, we have realigned the support staff providing services to each District Board and Committee during the 21+ meetings each month. Mrs. Duckett will serve as the District Manager's designee for Village Community Development Districts 1 through 4 and the Brownwood Community Development District. Mr. Blocker will serve as the District Manager's designee for Village Community Development Districts 5-6, 8-11, North Sumter County Utility Dependent District, and Wildwood Utility Dependent District. I will serve the Village Center Community Development District, Sumter Landing Community Development District, Village Community Development Districts 7 and 12-14, the Amenity Authority Committee, and Project Wide Advisory Committee. We have been operating with this new system for the past 5 months and I am very pleased with the encouraging feedback I have received from several Board and Committee members and have full confidence moving forward!

In addition, each department represented at District Board and Committee meetings will be utilizing this same concept. By having designated District Staff aware of each Board's specific needs, I am confident that this will not only create time efficiencies for District Staff but also allow us to better serve you.

As always, I will continue to meet with my team to ensure each Board and Committee is receiving consistent information on all areas impacting our community.

**Under the purview of Deborah Franklin, Director, Human Resources and Strategic Planning,** the senior leadership team continued with the development of our strategic planning initiatives. We have focused the planning around a 5-year planning horizon. - Organizational Excellence, Communications, Customer Service, Technology, People & Culture, and a Safe & Active Community. To ensure the success of our intended outcomes a tracking system and regularly scheduled meetings to report on the progress have been established as benchmarks to ensure internal governance. Mrs. Franklin will now oversee the Strategic Planning & Training Development Department and Pamela Webb formerly the Human Resources Manager, has been promoted to the Director of Human Resources. Mrs. Webb will continue the initiatives put in place for utilizing more features of the Paychex System which in turn benefits our initiative for a more paperless system. Mrs. Webb will continue her work on the Employee Manual which will offer clear and concise policy language and will be easier to navigate. Also, she will continue to enhance the Employee Newsletter and improve the process of job postings and recruiting the best talent for the District.

**Under the purview of Kenny Blocker, Deputy District Manager,** the North Sumter County Dependent District (NSCUDD) Board of Directors purchased property to relocate Sumter Sanitation to a permanent site. NSCUDD refunded Sumter Sanitation Series Bonds 2012 with a forward delivery agreement to be funded October 2022 representing a Net Present Value (NPV) savings of ~ **24% or ~ \$15MM**. Also, NSCUDD entered into an agreement to purchase Sumter Water Conservation Authority (SWCA). The Village Center Community Development District (VCCDD) Board of Supervisors has purchased a fueling station to allow fuel to be purchased in bulk through a procurement process for use by the white fleet, public safety fleet, and sanitation fleet. The direct bulk purchase of fuel will allow for savings by purchasing direct from vendors providing fuel from the port or utilizing state contacts. Also, the fuel station will allow the District to always be prepared during times of emergency and have fuel available to provide critical and crucial services to the residents.

The District added to its portfolio, The Wildwood Utility Dependent District (WUDD) in March 2021 of this year. The City of Wildwood approved Ordinance Number O2021-16 on March 22, 2021, to create the Wildwood Utility Dependent District (WUDD). This newly created district held its organizational meeting on March 23, 2021, and elected a Chair and Vice-Chair to serve. This new Dependent District will be similar to North Sumter County Utility Dependent District

(NSCUDD) in that it will purchase and operate utilities south of SR 44. WUDD is purchasing South Sumter Utilities (SSU).

In a joint effort, Kenny Blocker and I worked closely with the current Project Wide Advisory Committee (PWAC) on the creation of the Project Wide II or South of SR 44 Committee. It has been given the green light to proceed by the current Project Wide Advisory Committee (PWAC). The PWAC Committee unanimously gave direction to the Chairman to present to the Sumter Landing Community Development District (SLCDD) Board to seek their approval to proceed with the creation of PWAC II to begin October 1, 2022. The SLCDD Board voted unanimously to move to create and directed legal counsel to draft the documents. However, a unanimous vote of all signatory parties to the agreement was required and not all parties approved the amended agreement. Therefore, the parties to the existing Project Wide agreement will remain with the existing agreement for 18 more years.

Additionally, District- 4 refunded 2010 Series Bonds with a bank loan for 10 years at 1.42% representing a Net Present Value (NPV) of ~ **15%** or ~ **\$409k**. All bonds for all Districts are reviewed routinely to take advantage of potential savings when the bond refunding is eligible. \$83.5MM in Bonds for District 13 Phase II were issued.

**Under Brittany Wilson, Director of Technology and Board Services**, she and her team continue to focus on Asset Management/GIS while also managing IT and Board Support Services.

Following the regular election cycle in November 2020, the District had five (5) new Board Members and one (1) Committee Member complete orientation, and take their Oath of Office to fill mid-term vacancies. Additionally, the District Clerk and her team coordinated the organizational meetings for the Wildwood Community Development District (WUDD) and Village Community Development District No. 14, resulting in the addition of ten (10) new Board Members. Over the course of the fiscal year, the Clerk's Office effectively published agendas, provided staff support, and prepared minutes for 243 Board and Committee Meetings, totaling more than 230 hours. In an effort to increase resident participation at meetings and gain efficiencies in reserving rooms at the recreation centers, beginning in October 2021, the Board and Committee meeting locations have been regionalized to include the Savannah Regional Recreation Center, Seabreeze Regional Recreation Center, and the Everglades Regional Recreation Complex.

Ms. Wilson continues to work with numerous parties on the Asset Management- GIS development and this multi-year, multi-phase project. The GIS data development was approached in two phases. The first phase, approved by the North Sumter County Utility Dependent District and the Village Center Community Development District, encompassed the water and wastewater utility infrastructure between C.R. 42 and S.R. 44. This phase was completed nine (9) months ahead of schedule. There are over 300,000 utility assets that were

mapped and attributed, including 2,847 miles of pipe that were drawn from over 20,000 record drawings.

Based on the expeditious completion of phase one, Staff received direction from the Amenity Authority Committee, Project Wide Advisory Committee, Village Center, and Sumter Landing Community Development Districts to proceed with phase two. Phase two of the project encompasses recreation facilities, swimming pools, golf courses, gate facilities, parking lots, multi-modal paths, benches, and permanent landscaping. Phase two is scheduled for completion in April 2022.

As the GIS phases are complete, implementation of the CityWorks Asset Management System will begin. CityWorks obtains asset information from the GIS data and will afford the District with enhanced data analytics, electronic workflow, remote access to data, additional maintenance reporting features, and integration with existing software initiatives.

Below is an overview of savings and information that Ms. Wilson and her team has accomplished over the fiscal year;

### **Information Technology**

In coordination with the District's Information Technology Coordinator and vendors, the following has been achieved;

1. **Phish Alert Button/SPAM alert button** – The Phish Alert and SPAM plug-in buttons have been added to email accounts for use by District Staff to improve the response to security concerns. This enables the end-user to assist in preventing phishing attacks via email and filter out future SPAM emails.
2. **Operating System Upgrades** – More than 400 computers were upgraded to the current Windows operating system. An estimated **savings of \$10,000** was achieved by performing in-place upgrades of existing computers, and utilizing the downgrade license they were originally acquired with.
3. **VoIP Phone Services** –The VCCDD approved a contract with Spectrum Enterprise for SIP VoIP phone services. This change in service results in a **monthly savings of \$1,055, or \$12,660 annually**, and a **6,000** increase in long-distance minutes to accommodate future growth.
4. **Security Incident and Event Management (SIEM) Server** – The District included **\$45,000** in the budget for the development and operation of a SIEM Server as a security enhancement. In coordination with our technology vendor, an alternative cloud-based server was identified that is a recurring monthly expense, with no additional hardware needed. This robust alternative **saves approximately \$40,000** in one-time expenses.

## **Board Support Services**

In coordination with the District Clerk's Office, the following has been achieved;

1. **Recording Equipment** – In coordination with I.T., the Clerk's Office evaluated the recording equipment to improve performance and sound quality. By upgrading the version of the software, purchasing more robust laptops, and acquiring new portable microphones, the District achieved the intended goal and **saved approximately \$9,000** that was budgeted for the replacement of recording mixers.
2. **Regionalization of Board and Committee Meetings** – Regionalized meeting locations to promote resident attendance and create efficiencies in reserving recreation center rooms.
3. **Organization of Duties** – the three positions within the Clerk's Office were evaluated to ensure there was a proper alignment of responsibilities to meet growth expectations.
4. **Document Retention** – The Clerk's Office continues to assist in reviewing paper documents to ensure proper retention and destruction, and facilitate the electronic storage of information in accordance with the State of Florida's retention schedule.

**Under Anne Hochsprung, Finance Director**, the Finance team continued to make great strides in updating processes in all areas to maximize the use of the new BSA software and create electronic processes to provide more efficiencies and better use of the talent of the employees. During the current year, we realigned the general ledger teams and created "experts" and redundancies throughout all areas of responsibility. Workstations were reassigned for all employees to provide for better collaboration between team members and create opportunities for daily mentoring for the newer staff. The Finance team reduced the time to prepare monthly board financial statements by 10-days. The Finance team created an electronic workflow for all journal entries and all paperwork requiring signature; thus eliminated 14 desktop printers, saving an approximate **\$6,000** in associated toner and paper cost annually, as well as increased productivity. These efficiencies have allowed the team time to devote more regular and timely review of the general ledger accuracy, more detailed, and timely analysis of the financial results, and more timely documentation for the external auditors.

A new Project Manager position was added in the current fiscal year through savings achieved with the BSA software last year. With this new position, Finance created a standard "process charter template" and timeline to use for all projects reviewed to assure accountability and documented results. Finance has modified the Miscellaneous Receipts process to reduce the processing time by 10 hours per week; the collection of all receivables is more efficient and therefore more successful. Finance refined the Special Assessment Database to create more redundancy and have automated the review of weekly cash flow to more than double the amount of funds on average in interest-bearing investment accounts (average collective cash balance in CFB) as of December 2019 was **\$16.8 Million**, **\$12,6 Million** as of December 2020 and **\$6.7**

**Million** as of May 2021.) Lastly, we have fully implemented the BSA Fixed Asset module this year, allowing a more efficient and timely interface to Purchasing and AP. The Finance Team has modified the sale and resale utility setup processes to create better communication with the Developer, DPM, and Finance. This process redesign program is now used cross-departmentally to successfully review the year-end AP/Purchasing process with the Purchasing, Budget, and Finance teams.

The Citizen's First Bank Lockbox went into effect at the beginning of the fiscal year. Finance eliminated two positions this year to pay for the lockbox services and moved the function from Utility Billing to Cash Receipts to create more redundancy and create more resources in Utility Customer Service to respond to resident inquiries more timely.

The Utility Billing team has worked with TSG to set up WIFI areas throughout The Village community. The Jacobs team is now able to transmit the daily meter reads to the Utility Billing team allowing for more timely review and completion of the daily billing. The Utility Billing team worked with the Jacob's team to consolidate meter reading monthly routes and billing cycles to keep the number of billing cycles at a manageable level as we continue to see The Villages grow. Finally, the Utility Customer Service team has kept detailed records to provide evidence to the vendor identifying a manufacturing glitch. This has saved the District **\$172,000** in replaced meters.

The Accounts Payable Team has essentially removed all paper invoices from their process. Currently, they receive less than **30** invoices monthly where they received **1200** invoices through the mail one year ago. We worked with all five major Electric Utility Companies to download more than **1000** invoices directly from their website. Over **500** vendors were converted from a paper check to ACH payment with the cost of check stock, envelopes, and postage estimated at **\$5,000**.

**Under Mark LaRock, Purchasing Director**, the Purchasing Department has just concluded another Fiscal Year of Challenges, Opportunities, and Efficiencies that I would like to present. As the COVID Pandemic appears to be in decline, we have continued to follow all precautionary processes to ensure safety and distancing by performing our Bid Openings and Contractor Meetings by Tele-Conference. During this time we developed our process for E-Bidding of ITB's through DemandStar, we gained efficiencies by the elimination of unnecessary paper submittals and both Staff and Contractor time in attending openings.

Purchasing has also just completed and shared a new updated version of the BS&A (our Financial Software) Purchase Order Guidelines Manual to assist all existing District Staff with a comprehensive, step by step instruction process for the proper completion of Requisitions, View Purchase Orders and create Change Orders to comply with District Purchasing Requirements.

As it relates to Stewardship and following our procedures to dispose of unwanted and excess property by using our Auction Services Agreement, a better sourced Piggyback with Lake County was established resulting in a higher return over our previous Piggyback Agreement through Volusia County. For Fiscal Year 2020/2021, our new yield from auction sales has been **\$35,659.11** versus **\$14,144.91** from the prior agreement. This has resulted in a **152% increase** for the District.

Piggybacking, as mentioned earlier, simply means as a governmental entity the District can utilize contracts that have been formally solicited by another governmental entity. These methods afford us the ability to gain efficiencies on time and resources by using other agencies awarded agreements for products and services that meet the District's needs, terms, conditions, and ultimately pricing. We have entered into several of these Piggybacks this Fiscal Year such as; Storm Drain Services with 2 contractors, Firefighter Protective Gear, Carpeting, Utility Meters, and Timber Bridge Rehabilitation Services just to mention a few.

Purchasing continues to consolidate and align agreements and solicitations when viewed in the best interest of the District to achieve an "Economy of Scale Advantage", a term often used in Procurement when soliciting like services "en-masse" across all lines of the District for consistency and efficiencies. Here are a few examples of our consolidation efforts; Pine Straw (removed Pine Straw from individual Executive Golf Contracts and Bid District Wide for savings to Exec. Golf of **\$25,830.00**), Tree Services (2 contractors), Pool Maintenance, Fountains/Water Features Maintenance, Painting Services for Buildings, Painting services on Villa Walls and Signs, Tunnel Painting, and Sports Courts Resurfacing.

Based on price submittals, Purchasing can negotiate pricing with Contractors. Several contracts were successfully negotiated such as Sweetgum and Sandhill Greens Renovations (**a \$17,096.00 reduction**), Wet Lab Refurbishment (**a \$12,586.00 reduction**), Bocce Court Carpet replacement (**a \$100 per court reduction**) along with successfully negotiating Tree Services with two awarded contractors to agree to consistency in pricing, also Service Fees with five District approved Engineering Firms for Continuing Professional Services.

We are pleased to report that many other contracts from Formal Solicitations came in under budget estimated to be around **\$981,863.00**. We also renewed many agreements District Wide for **FY20/21** with **NO INCREASE IN PRICING**, approximately **38** in all were approved.

Supply Chain issues related to the Pandemic, have caused both Purchasing and District Property Management to seek alternative measures to obtain goods and services. A prime example to gain efficiencies and have uninterrupted services due to the inability of our Fence Contractor to purchase lumber at a fair market price and pass on to the District, Staff found it beneficial to

procure fencing lumber and posts directly in bulk for the remainder of FY 20/21 and offer the Contractor to continue to install at “install pricing only” using District supplied materials. This has resulted in savings on taxes and Contractor mark-up.

Our Purchasing Card Program, currently with JP Morgan Chase, gives us the ability to provide an efficient method for small purchases under the **\$5,000.00** threshold specifically for on-site field purchases and/or emergencies when needed and in the event, a vendor will not accept a purchase order. By using these cards, we also receive annual rebates. The current rebate yield with the JP Morgan card is **1.72%** compared to the prior program with Bank of America at **1.68%**. These rebates are now received quarterly resulting in year-to-date FY20/21 total received rebates of **\$150,674.70**. These rebates are distributed back to the using departments.

**Under the purview of Carrie Duckett, Assistant District Manager,** the Customer Service Department made changes to its department structure with the ongoing emphasis on enhancing the customer service experience for our community. Matt Armstrong was promoted within the organization from Assistant Director of Recreation & Parks to Director of Resident Services. Becky Perkins, Customer Service & Administrative Support Representative was promoted to Customer Service Manager. Mrs. Duckett and Mr. Armstrong strategically implemented a cross-departmental customer service experience with the inclusion of recreation customer service team members; and unified our community’s customer service needs into one location. As The Villages continues to grow and expand, we will re-examine how customer service is provided in order to meet our community’s needs.

As the District re-opened the offices from an appointment-only basis to regular operating services, the Customer Service department returned to serving walk-in customers regularly. During the timeframe of March 2021 through mid-September 2021, the Customer Service department assisted approximately **12,000** customers and answered **28,000** phone calls. During the same time period the previous year (March – September 2020), Customer Service assisted approximately **3,689** by appointment customers and **33,000** phone calls. Collectively, that is an increase of **3,311** customers served from the previous year. Customer Service also issued **2,334** resident and non-owner IDs, and **1,763** single and double gate cards in March 2021 – mid-September 2021.

Community Standards made changes to their department structure as well, aligning the department for future growth of The Villages. A deed compliance Administrative Coordinator was hired to support department operations and provide support to the Deed Compliance Manager; attending deed compliance public hearings at VCCDD, Districts 1 – 4, and Lady Lake / Lake County portion of The Villages.



Deed Compliance is preparing for Adoption of the Rule, policies, and procedures for the implementation of deed compliance and architectural review for Village Community Development District No. 12, effective October 1, 2021; as well as the adoption of policies and procedures for unauthorized home improvements on District-owned rights of way within the boundaries of Village Community Development District No. 4. An educational and awareness period of October 1, 2020, through September 30, 2021, was in effect and the policy is effective October 1, 2021.

The Architectural Review Committee (ARC) continued to meet weekly, processing **5,000** applications from Lady Lake/Lake County and Districts 1 – 10 portions of The Villages from March 2021 to mid-September 2021.

The Risk Management Department managed by Kathleen Storey has seen several improvements to processes and savings over the previous year.

The Preferred TIPS program is an insurance premium reimbursement program with matching training/safety incentives that can be applied for by any current member of the Preferred Governmental Insurance Trust (PGIT), the insurance carrier for all of our 18 Districts. Each entity is eligible to apply for a matching incentive of **50%** of the cost of such safety-related expenses up to a maximum of **\$5,000.00** per coverage year. Risk Management applied for and received the maximum insurance premium reimbursement of **\$5,000.00** for Brownwood Community Development District, Sumter Landing Community Development District, Village Center Community Development District, and a **\$1,650.00** reimbursement for the North Sumter County Utility Dependent District. This amounts to a total insurance premium reimbursement to the Districts of **\$16,650**.

Insurance Premiums decreased for FY 21-22, rather than the predicted market increase. During FY20-21, two insurance trusts submitted proposals to Risk Management for the insurance coverage on our 18 Districts for FY21-22. After comparing two proposals for all premiums, limits, deductibles, and coverages across all 18 Districts, the rates of our present insurer, Preferred Governmental Insurance Trust (PGIT), were found the most competitive for the best overall coverage in FY 21-22. The total premiums for property and liability coverage on all Districts showed a total decrease of 1% from FY 20-21, despite the predicted national trends upward of at least **5%**. Per our insurance broker, the decrease in premium is “due to the excellent loss experience in the General Liability coverage” by the Districts.

The Districts have more than **984** vendors who are required to submit Certificates of Insurance (COI) to show their proof of insurance each year. This insurance is required to protect the Districts’ assets and liability while they are present on District property or working for the Districts. The responsibility of monitoring all District vendors’ insurances (Liability, Auto, Workers’ Compensation, Professional Liability, and cyber liability) to ensure that they carry all

required insurances is overseen by the Risk Management Department. As of July 2021, Risk Management has uploaded all current vendor contact information and COI's into a software called CTrax. In doing this, we have eliminated all paper COI files and automated the notification process that is required to let vendors know when they are due to update any of their insurances in order to remain eligible as vendors with the District.

**Under Chief Wolfe, Director, Community Watch,** the Community Watch Dispatch division has officially become the State of Florida's first non-911 Call Center to earn accreditation status from the Florid Telecommunications Accreditation Commission. Chief Wolfe and Assistant District Director Carrie Duckett went before the Commission in Orlando on June 23<sup>rd</sup>, 2021. The Assessment Team Leader Emily Merritt presented the report to the Commission. The Commission Chair Marette Sims stated that The Villages Community Watch was required to meet **100%** of all applicable standards, instead of the normal **90%**, due to the stipulation that it is not a 911 Call Center. The Commission voted unanimously that they had successfully completed this task.

The accreditation changes have made several enhancements and efficiencies in Community Watch Dispatch. Policy and Procedures were updated to meet the same requirements of the six local law enforcement agencies that Dispatch communicates with every day. Documentation has been improved to help secure statistical data and informational purposes.

Gate Operations Division has implemented the new software to initiate the well-being checks on the Gate Attendants. This software alerts the Gate Ops employee that a call is required then electronically keeps track of the call and any information that the employee noted about the call. This has also provided cost savings by moving the well-being checks to a paperless function.

Patrol Division has engaged in three separate community outreach/door hanger events during this quarter where they made contact with numerous households to inform them of change of trash pick-up, conditions and restrictions of parking, and Wetland flyers.

The Training Unit has been able to instruct **54** drivers in Coaching the Experienced Driver and Field Driving Test.

The Gate Attendant Division has begun to receive the installation of computers in the gatehouses. This project will allow the gate attendants to have access to the District website and important information that can assist with the customer service they are providing to the residents. It will improve the communication between staff at various locations. This will also provide a paperless function reduction in cost as bulletins and paper timesheets will no longer have to be printed. By reimaging existing computers to be placed at each of the **24** gates, the District achieved a savings of more than **\$25,000**.

Chief Wolfe has completed ten speaking engagements with various groups and meetings throughout The Villages. This has proved to be extremely beneficial to provide information on the functions and operations of Community Watch provides to the residents.

**Under Barbara Kays, Director, Office of Management and Budget,** the OMB team worked with the District team to prepare, review, and present the FY21-22 Budget for final adoption. The FY21-22 Total Budget for all Districts over **57 funds**, is **\$399,829,746**, including over **\$18 million** in capital projects with **\$10 million** being in the Utility Funds. The FY21-22 Budget process included working with **17 Districts** and two committees during **55 meetings**, including budget workshops and board meetings.

The OMB team also assisted departments with the budget management of the FY20-21 Amended Budget of over **\$427 million**. During FY20-21 the OMB team implemented improvements to the Capital Projects process to track and monitor capital project costs more efficiently and effectively. One improvement is the incorporation of Capital Project codes to more easily identify all related costs to each specific project.

The OMB team has worked on several larger projects over the past year, including the analytics and presentations for the new Project Wide South of SR 44 concept. In addition, the OMB team has embarked on the task to provide a more formal policy for the working capital and reserve minimum levels. During the May Budget workshops, the numbered District Board of Supervisors were presented various methodologies and breakdown of their fixed assets report by category to consider as we move forward with finalizing the policy prior to the FY22-23 Budget process!

The OMB and Property Management teams worked together to update/develop 5- and 10-year Capital Improvement Plans for Districts 1-11, Project Wide Fund along with the two amenity funds. These were presented during the May Budget Workshops with funding forecasts and options to assure funds will be available when infrastructure is scheduled for replacement in the future.

OMB continues to improve the budget development and management of the District funds to maintain high-quality services while ensuring a sustainable future through strategic and capital planning of operations, services, and systems.

**Under John Rohan, Director of Recreation and Parks,** he and his staff are continually reviewing better ways to serve our community. During the year, Recreation & Parks tested a new recreation software called Active.Net which will roll out this month October 2021. The software has unique features and options for managing recreation and parks services, facilities, leagues, and activity registrations. It will be live just in time for the upcoming fall/winter season. We are excited about the additional features and upgrades that enhance our guest's experience.

Camp Villages 2021 Summer of Fun started on Monday, June 7, and wrapped up on Friday, August 6; 9 weeks of fun! Camp Villages is in its 20th year, and 2021 proved to be a very

successful program! Nearly 4,000 children participated in 57 different activities for a grand total of 153 sessions. In addition, over 200 volunteers assisted our Recreation Team in staffing this year's summer event. Finally, 2021 marks our 7th year for our Camp Buckaroos, activities geared primarily for children between 3 and 6 years old.

Mrs. Kacie Linton was promoted to Assistant Director of Recreation and will assist Mr. Rohan in a leadership role as the department expands during The Village's growth. She has held several positions of increasing responsibility throughout her ten-plus years with the District.

In August 2021, the Aviary Recreation Center (est. December 2020) was one of the few recreation centers in the state selected for the 2021 Facility Showcase by the Florida Recreation and Park Association. Aviary Recreation Center is in The Village of Hawkins, set amongst an eagle preserve, and features a theme focused on birds. This Showcase is The Villages Recreation & Parks twelfth recognized facility in the last ten years!

In a joint venture, Recreation & Parks and District Property Management have been working on the First Responders Recreation Center, a major capital improvement project scheduled to open in 2022. The Recreation & Parks Department is developing a formal plan to advertise, promote, and receive memorabilia donations for this new recreation facility. A few of the outdoor amenities planned are a Resort Style Pool, 18 Hole Putt & Play, Croquet/Lawn Bowling Court, Beach Tennis/Sand Volleyball Court, Outdoor Exercise Equipment, Basketball Court, Tennis Courts, Pickleball Courts, Fire Pit, and Picnic Pavilions.

**Under Mitch Leininger, Director, Executive Golf Maintenance**, there have been three major golf course renovations completed. A comprehensive renovation of the Silver Lake Executive Course occurred in the historic side of The Villages which included new greens, tees, complete re-grassing, and landscape enhancements. This project came in under budget for a **\$170,765.88 cost savings**. Additionally, two course greens renovations took place at the Sweetgum and Sandhill Executive Golf Courses, which utilized new turf varieties developed for drought resistance and shade tolerance. These capital infrastructure improvement projects will bring continued enjoyment to our residents and guest.

Following the completion of a project to map all District-owned golf courses in 2020, the Executive Golf department has developed a detailed mapping of all the Executive Golf Maintenance building complexes and fueling stations, including an extensive asset inventory, and cataloging. This will benefit future contract procurements, lease agreements, contractor accountability efforts, and continued environmental initiatives with Audubon International on District-owned facilities.

The needs of the Executive Golf courses for pine straw were incorporated into a newly procured Districtwide contract for service on all the Executive Courses. This strategic move not only obtained an **annual savings of over \$25,000** but also improved on efficiencies with immediate installation by the pine straw contractor versus prolonged install by golf course maintenance

contractors. Executive Golf also improved on cost and efficiencies with the use of the recently acquired District tree service and building painting contracts. These resources will aid in continuing to provide the standard of excellence that The Villages is known for on the Executive Golf Courses and their associated buildings.

**Under the purview of Fire Chief Edmund Cain**, The Villages Public Safety Department (VPSD) has grown to nine Fire Stations, with **150** Firefighters and six Battalion Chiefs. The current makeup of the department is **61%** Paramedics and **39%** EMTs. VPSD held four new hire classes for firefighters this year.

VPSD welcomed Dr. Desmond Fitzpatrick and Dr. Alison Leung as our Sumter County liaison Medical Directors who join our Medical liaison, Dr. Frank Fraunfelder.

VPSD implemented the use of Power DMS® policy/document management software to make all Standard Operating Procedures (SOP) paperless and streamline the SOP creation, implementation, and staff review process. This was a **cost savings of \$2,784.90**.

The new Village Center CDD Fueling Station located at 8560 N.E. 44<sup>th</sup> Drive, Wildwood, FL, is open and running and we are currently in the training phase. The Fueling Station will be utilized by all Departments for White Fleet and Public Safety Fleet and can be accessed 24/7. The Fueling Station all the District to purchase fuel in bulk at a less expensive rate and be better prepared for any natural disaster.

The Neighbors Helping Neighbors® AED program continues to be a huge success and has grown to over **247 AED groups** throughout The Villages with over **5,000** trained responders and a total of **651 AEDs** in service. The Cardiac Save rate in The Villages is at **15%** which is above the National Average of **10%**.

VPSD welcomed Chaplain Joe Lacognata to The Villages Public Safety Department to offer assistance with emotional support for our firefighters. In addition, a Peer Support Program has been added to aid in the mental health awareness and support for firefighters.

An Ad Hoc EMS, Transport, and Fire Committee were established by the Sumter County Board of County Commissioners to look into options for improved patient outcomes. There has been an overwhelming response from the residents of The Villages, the VHA, the POA, and the local news in favor of keeping The Villages Public Safety Department as-is and separate from the Sumter County Fire Rescue. Four Open House events were held in the past few months at Station 44, Station 40, Station 45, and Station 47. Over **650** residents of The Villages toured the stations, interacted with firefighters, and observed truck demonstrations. Also, The Villages Public Safety Department worked closely with The Villages Recreation and Parks Department and participated in nine Camp Villages events at various Recreation Centers that allowed fire staff to meet and greet with residents of The Villages and their grandchildren during these fun summer activities.

Lieutenant Daniel McGoldrick was awarded Firefighter of The Year by the American Legion Post 347 of Lady Lake. The ceremony was held on June 9, 2021. Each year, American Legion Post 347 holds an awards ceremony to honor Firefighter and Police Officer of the year. Each recipient receives their award and a plaque in recognition of the work they have done throughout the year for the community that they serve. Lieutenant Wesley Roe was named Officer of the Year by the Sumter Republicans Club on July 22, 2021. The Sumter Republicans held their annual Red, White, and Blue Valor Awards Ceremony at Silo Oaks in Sumterville, Florida. Valor award winners are nominated by their peers.

VPSD firefighters have saved a total of over **17-million dollars** in property and contents this fiscal year. This is due to strategic station locations, enhanced staffing, and efficient fire-scene operations.

**Under Bruce Brown, Director, District Property Management**, continues to move towards implementation of sustainable, trackable, and measurable maintenance management plans across all six divisions (Landscape, Water Resources, Infrastructure, Town Centers, Facilities, Construction & Fire Stations). The efforts in this area help to capture past minor and major maintenance evolutions by asset, more accurately predict future needs and investment requirements, reduce deferred maintenance and ensure that all of our assets and service delivery lines are steadfastly focused on timely maintenance, preservation of assets, and maintaining the high standards that we set across The Villages. As we move into the CityWorks Asset Management System over the next year, this groundwork is even more essential to building the legacy life cycle history of any individual asset which gives us instant data on past minor and major maintenance, deferred maintenance, overdue maintenance, and helps us to build a future budget based on asset class life-cycle, physical condition, and other external factors. In the past, DPM was very reactive when something broke or needed attention, resources were diverted and focused on resolving the problem, and then move on to the next issue. Historical data was not captured in terms of what maintenance was performed, what assets were replaced, cost, warranty, and life-cycle history for assets simply didn't exist. With CityWorks, full life-cycle history will be captured and will provide robust data as we continue to grow and take on more and more assets to maintain. Our efforts last year to assess condition and maintenance needs across the Facilities Division revealed the need for major investment in Sports Courts, Pools, and other Recreation Facilities, and enabled us to properly document the need to develop 5, 10, 15, and even 20-year maintenance management plans and translate those into our budgetary submission process which helped us to advocate and obtain the necessary funding to invest in this critical infrastructure. Developing sustainable maintenance management plans to assist with forecasting the timeline and need for major infrastructure investment is critical to the long-term sustainability of our more than **\$2B** worth of assets that DPM is charged to maintain. Investment in proper maintenance and sustainability of assets increases physical asset life expectancies and reduces overall replacement costs and allows us to move towards a sustainable maintenance model where we can use data to make short and long-term decisions regarding major

maintenance and capital investments. Residents should be seeing these tangible investments as we continue to rapidly expand the number of Sports Courts renovations (Tennis, Pickle Ball, Basketball, Bocce, Shuffleboard) as well as full pool renovations, of which there are many scheduled for FY21-22. Likewise, we continue to expand preservation programs such as carpet replacement, interior/exterior painting, wallpaper replacement, specialty cleaning services, and flooring replacement throughout our recreational facilities to maintain the aesthetic quality of our facilities.

DPM successfully responded and completed thousands of “service requests” requests pertaining directly to recreation facilities and Public Safety/Fire Stations, as well as completing numerous planned projects during the fiscal year. From swimming pool renovations, sports court resurfacing, Bocce carpet replacement, Shuffleboard renovations, parking lot and roadway refurbishment, restroom renovations, and interior/exterior painting of Postal Stations. The rebuild of the new “Harold Swartz Trellis” (The Founder of the Villages) was completed at the Village of Spanish Springs Town Center in honor of Mr. Swartz and to pay tribute to Mr. Swartz’s vision. A multi-million-dollar design and renovation of Fire Station #40 were completed to provide the highest level of service to our residents. The construction of the First Responders Recreation Center, “The Districts” largest design, construction, and development project since its inception is well underway and on-schedule to open the summer of 2022. You can track the progress of this project by navigating to [districtgov.org](http://districtgov.org) and then clicking on the First Responders Recreation Center link under the Quick Links section. Drone fly-over videos are also available so you can view the entire construction site.

DPM experienced great success with the addition of the Cross Divisional Supervisor position during the Fiscal Year. With this position, DPM can assist multiple divisions, complete numerous projects, and cover staffing shortages. This allowed the Cross Divisional Supervisor an opportunity to experience several divisional operations, gain knowledge, and receive the necessary training to be successful. This program has been so successful we are adding one more Cross Divisional Supervisor to DPM this fiscal year which gives the ability to continually improve business line delivery to our residents.

Efficiency and effectiveness are critical to our departmental success. We must be innovative, strive to find new ways to solve challenges, and constantly work hard to ensure that we leverage technology to maintain our vast infrastructure. Across every division, this spirit of innovation and creative thinking is inbred into our culture. Our Infrastructure Division is charged with maintaining our vast underground stormwater system, tunnels, roadways, gatehouses, gating systems, and they also deal with natural anomalies such as depressions. A pilot project was implemented to install epoxy-based flooring in the gatehouses. This epoxy literally lasts forever, does not require annual maintenance (strip/wax), and it **saves \$3,600 per gatehouse** annually in maintenance costs after installation. Our Tunnel Painting program has been a phenomenal success. By painting the tunnels a bright-white instead of installing 24-hour lighting, we will save more than **\$130,000** annually in energy, bulb replacements, and other maintenance costs.

These projects must be completed during low-humidity months therefore you should see the tunnel painting program kicking off again in the October and November timeframe. The use of Cured-in Place Piping (CIPP) versus full pipe replacement has saved thousands of dollars and minimized the impact to residents of full pipe repair and replacement projects. CIPP is a product that can be used to repair, strengthen, and extend the life span of existing pipe structures by 50+ years. It is much less costly than digging up and replacing pipe and typically we can use CIPP sleeves without any “digging” and costly restoration of landscaping, roadways, and turf. Recognizing that this was a truly unique year in terms of natural anomaly activity and also a year with several supply chain shortages, DPM procured direct-delivery of basin liner material which is traditionally both expensive and a long-term time item. By buying direct, we had the on-hand quantity to effect numerous basin liner repairs and as a result, we saved more than **\$76K** in liner repair costs. Our Landscape Division was able to reconfigure the maintenance needs of Basin bed areas, which enabled us to save more than **\$325K** from Project Wide funds. Our Water Resources Division had several major Sluice Gate and Valve replacement projects. These are all critical ensuring that we can maintain our vast network of stormwater basins and manage stormwater runoff to prevent flooding. Recognizing the extraordinary cost of the proposed sluice gates, our Water Resources Team revised the scope of work to meet mission requirements and saved more than **\$161K** in construction costs. Likewise, they took on the task of rebuilding valves versus the cost of full replacement, which saved an additional **\$69K** in costs. Ever-focused on efficiency and savings, DPM has placed great scrutiny on financial management and stewardship of resources.

With new leadership and vision in the DPM Finance Division this team, along with our DPM Technicians, have transformed the way we operate within DPM and instilled both transparency and accountability across the department in terms of budget, finance, and accounting. They have changed the way we operate with regard to invoicing by ensuring that vendors properly invoiced accounts payable versus allowing for manual workarounds, and required monthly statements for the Financial Coordinator to manage the overall invoice flow process which ensured that invoices were submitted, certified, and paid within a timely manner. They developed an Open Purchase Order report which allowed Managers and Supervisors to view the status of every open, partial, or pending Purchase Order which allowed them to manage project schedules, track completion and invoicing by vendors, and reduced duplication of efforts. Our DPM Finance Division produces weekly Open Invoices and Unapproved Invoices reports to ensure invoices are properly approved and paid within the current invoice cycle, which helped eliminate significant lag in vendors receiving payment after completion of work and invoicing to The District. Additionally, they provided hands-on training and assistance to Managers and Supervisors through the budget development and fiscal year close-out process. They developed a tracking system for Government Purchase cards which greatly improved the accountability of credit card use and ensured timely backup documentation and approval processes were instituted for all levels of credit card approvers. In all, their efforts have led to significantly improved internal



controls and financial management within the Department; which all translate to more efficient and more effective service delivery to our residents.

DPM experienced great success with the addition of the Cross Divisional Supervisor position during the Fiscal Year. With this position, DPM had the ability to provide Supervisor expertise that spanned multiple divisions, complete numerous projects, and cover staffing shortages. This allowed the Cross Divisional Supervisor an opportunity to experience several divisional operations, gain operational knowledge, and receive the necessary training to be successful. This program has been so successful, we were approved to add a second Cross Divisional Supervisor to the DPM staff this fiscal year; these incremental staffing changes enable us to support our growing world of work and continue to deliver superior service while maintaining the very high standards of The Villages.

As you have seen in other Departments such as Recreation and Parks and Community Watch, accreditation is a testimonial to the efficiency, effectiveness, and capabilities of an organization. District Property Management will be embarking on a multi-year effort to achieve National Accreditation through the American Public Works Association (APWA). The purpose of the accreditation program is to provide a means of formally verifying and recognizing public works agencies for compliance with the recommended practices outlined in the Public Works Management Practices Manual. This will be an enormously challenging venture, especially given the breadth of responsibilities of DPM across The Villages. We will be briefing all of the Boards and Committees of our intentions to seek APWA accreditation this year and I anticipate this to be a 2–3-year journey to accreditation.

These are just a few of the accomplishments and projects we have completed or are currently in the implementation stage. Every decision that is made by the District is carefully reviewed by management, staff, and the Board Supervisors of which they pertain and is made to enhance the quality of life for the residents of The Villages.

It has been another successful year with an amazing team that never slowed down while dealing with the COVID-19 pandemic and as a result produced major achievements. As we continue the momentum, I look forward to another productive FY 2022.