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

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

DATE: August 19, 2019

RE: District Management Achievements 2018/2019

It does not seem like one year has elapsed since my District Team embarked on our mission to maintain The Villages Core Values of Hospitality, Stewardship, Hard Work, Innovation and Creativity while embracing enhancements and cost-saving measures to sustain what The Villages have created for today as well as tomorrow.

The strategic initiatives are focused upon the organizational structure with emphasis on greater communication, transparency, customer service, and analytical decision making systems.

Reflecting, my first project was to carefully analyze the manner with which the District was organized in order to position and meet the challenges in the coming decade and

- Streamline communications within and between departments and our customers
- Foster transparencies to enable our customers to interact and understand their government
- Reassess the processes & systems we utilize and how we utilize them, in order to execute organizational decisions.

In regard to the organizational structure, you will recall that the new organizational chart, combined Technology and Board Support Services under Director, Brittany Wilson and I also combined Customer Service and Community Standards under Director, Carrie Duckett. There have been numerous organizational, purchasing and technology changes affecting the District Property Management department in order to address its workload and allow the department to operate more efficiently. All Directors have reviewed procedures and these procedures have been implemented.
In order to streamline communications within and between departments, my Senior Leadership Team offers quarterly “Momentum Meetings”. At these meetings, Senior Leadership and I review with all staff current events taking place, programs, projects, and process changes within the District. These meetings are held in the morning and afternoon, as well as taped so all staff is presented this information.

To enhance communication and customer service, I restructured Resident Academy which eliminated the long waitlist and the District now uses a larger theater-style venue with reformatted presentation materials. The District Weekly Bulletin has taken on a crisp more informative stature and can be found online at Districtgov.org. This publication reaches a mass audience of 4,000 – 6,000 residents per week and offers useful information to readers. On July 9, 2019, the District opened the first Satellite Customer Service Office located at Fire Station 47 on S. Morse Boulevard. For this and all customer service functions, the customer service staff has been cross-trained so they are proficient in the provision of a multitude of programs including the issuance of Resident ID Cards, Gate Access Cards, Guest ID’s, Executive Trail Fee payments, Utility/Amenity payments, as well as Bond information, and the sign-up for Community Watch Services Programs. Furthering the District’s stewardship core value, the District also offered workshop educational forums to residents and staff in regard to Stormwater Management, Waste Water Treatment, and Solid Waste Management & Recycling within The Villages. These Community Workshops will continue with this winter’s workshops focusing on Florida Friendly Landscaping and Stormwater Pond Management.

Our new Community Standards and Customer Service Department staff team reviewed and updated the Architectural Review Committee (ARC) processes and application with immeasurable input from the community and the dedicated ARC members. The updated application is more user-friendly and can be accessed through the Districtgov.org revamped website. The District now offers additional educational materials for the ARC/Deed compliance process and provided additional technical training for staff and ARC Board Members. In order to enhance transparency, the ARC Agenda is now posted at all postal stations and one can receive ARC information by signing up for e-notification as well.

Under the District Clerk’s purview, one of our transparency initiatives was to place the Board of Supervisors photos on their respective website pages for increased exposure and bring greater attention to all of their roles. We reformatted the Consent Agenda which increased transparency for Elected Officials/Public/Press for discussion and input. We have placed videos of content specific meetings on the Districtgov.org website for Supervisors, Board Members and the general public to view. Board Rules, Policies & Procedures were rewritten for the first time in over a decade to clearly define the roles, expectations, and current practices of the Boards and the interactions between Board Members, members of staff and the public.
Elements of the rule rewritten include a solution of implementation of Joint Supervisors/Director Meetings to reduce redundancy of shared information among all District Supervisors, Directors, and Committee Members.

Intergovernmental relations with Sumter County resulted in savings for the Districts. Some of those areas mitigated duplication of services and gain economies of scale for Fire Services, Stormwater, GIS, Public Safety Radio System, and Fleet Maintenance.

In regard to fleet maintenance, the Interlocal Agreement allows the direct maintenance of vehicles, both public safety and non-public safety to be performed by Sumter County. This will reflect a savings of approximately $400,000. On top of that, the District entered into a Leasing Agreement with Enterprise Fleet Leasing. This agreement not only keeps our fleet new and energy-efficient it saves the District $70,000 annually and $700,000 over a ten year period.

The Interlocal Agreement with Sumter County also addressed Sumter County paying for street light operations for the numbered districts in Sumter County for an estimated savings of $350,000 net after taking back the right-of-way maintenance.

In regard to analytical decision making and efficient operations, the District entered into an agreement with TSG, our primary technology service provider, and we now have a dedicated client site-manager. We began implementing the BS&A Phase II platform in January 2019, the estimated go-live date should be the first quarter of 2020. This will include new software for Financial Management, Asset Management, Document Imaging, and Financial Reporting. The District has substantially completed a transition to a web-based document management system created by TSG. Concurrently, Laserfiche will be implemented to reduce paperwork and provide electronic workflow features for various financial, budget and procurement processes.

The first phase of the Cityworks Asset Management program has commenced. The project kick-off was April 2019, with the focus on water, wastewater utility infrastructure, and data collection methods. This includes the District, Jacobs, Cityworks and Sumter County. Additional phases will include the numbered districts and amenity infrastructure (sign walls, stormwater management, recreation facilities, roads, etc.).

To assist the District with the Cityworks implementation the Interlocal Agreement with Sumter County addressed the use of GIS services. The District and Sumter County have met to discuss layers and review available data. The initial data transmitted to Sumter County includes utility valve and meter locations. This GIS-based platform will centrally store and manage information pertaining to approximately $2 billion in vertical and horizontal assets. By using the existing GIS platform from Sumter County it will save the District approximately $400,000.
The Purchasing Policy & Procedure Manual was updated and approved by the Boards. The Purchasing Department conducted staff training on the new manual. Purchasing created a project visual board and tracking spreadsheets for sole source and standardized products approved by the Boards. Monthly meetings are conducted with department heads for planning and communication.

Human Resources unveiled a new Payroll/HRIS System. Leadership Training programs were created as well as certificate programs to recognize skills for promotions, transfers, and successions, as well as Compliance & Legal training. A FICA Alternative plan was introduced for the many part-time employees to give them an opportunity to save for retirement in lieu of Social Security. Meetings were conducted and positive feedback was received. The FICA Alternative plan will be implemented in October 2019 and will save the District $500,000 annually.

These are just a few of the many projects we have completed and are currently in the mid to final stages on. I have provided the attached PowerPoint presentation “Balanced Scorecard” with a breakdown of facts and figures for your review.

It has been a wonderful year with an amazing team. As we continue the momentum, I look forward to accomplishing the exciting and forward-thinking ideas coming up in 2020.
Balanced Scorecard 2018/19
Administration

Interlocal Agreement With Sumter County
- Street Light Operations
  Annual Savings $350,000
- Signal Maintenance
  Annual Savings $3,000

Finance
- PFM Asset Mgmt. Advisory Agreement.
  Annual Savings $10,000
- PFM Asset Mgmt. Long Term Investment Advisory Agreement.
  Annual Savings $25,000

FICA
- FICA Alternative Plan
  Annual Savings $500,000

Fleet
- Enterprise Fleet Leasing
  Annual Savings $70,000
- Interlocal Fleet Maintenance with Sumter County
  Annual Savings $400,000

Utilities
- Utilities Staff Consolidation with expanded use of consultant.
  Annual Savings $100,000

Total Annual Savings $1,458,000
**District Clerk / Board Support**

Summary Minutes – Improved the concise preparation of minutes to accommodate expanding Districts.

Consent Agenda Criteria- Increased transparency and Elected Official/Public discussion and input.

Filming Content Specific Meetings – Additional access on the web to meetings and information for Supervisors and members of the public.

Supervisor Photos on Website- Increased exposure of elected officials and their role.

Operating Policies and Procedures – clearly defines roles, expectations and current practices of the Boards and the interactions between Board Members, members of the public and Staff.

Joint Supervisor/Director Meetings – Established a forum to reduce redundancy of shared information among all District Supervisors, Directors and Committee Members.

Trespassing Policy – Outlined expectations and due process for members of the public.

**Asset Management**

Asset Management – A GIS based platform to centrally store and manage information pertaining to approximately $2 billion in vertical and horizontal assets.

GIS services from Sumer County - Savings of approximately $400,000 for use of Sumter County’s existing GIS platform.

**Annual Savings $400,000**

**IT Services / TSG**

Agreement with TSG- Memorialized the service level expectation with our primary technology service provider. A dedicated client-site manager from TSG ensures a dedicated resource for resolution of issues and streamlined communication.

Implementation of Password Recovery Program- Permits employees 24/7 access to reset computer passwords saving approximately $23.75 per password reset request.

**Document Management**

Risk Aversion/Process Improvement. Migration off of document management system with security issues and implementation of a web based DMS to host all current data. Laserfiche will ultimately be implemented to reduce paperwork and provide electronic workflow features for various financial, budget and procurement processes.

**Current Year Savings of $6,500**

**Financial Management**

Implementation of a new financial management platform will significantly enhance the process and procedure to permit numerous departments to operate with increased efficiency and effectiveness.

**Review of Rate Rule (s) –** A number of amenity, utility and sanitation related charges have been under review to ensure charges adequately relate to the services received.
Balanced Scorecard 2018/19
Villages Public Safety

**Interlocal Agreement With Sumter County**
Small Equipment Maintenance through Interlocal Agreement with Sumter County.
Annual Savings $16,000

**Villages Public Safety**
Fleet Staffing reorganization, 3 Fleet Technicians reduced to 1 Fleet Manager.
Annual Savings $155,000

**Reserve Funds**
No Reserve Fund necessary for Vehicles or Buildings.
Annual Savings $608,000

**Fleet**
Interlocal Fleet Maintenance Agreement with Sumter County.

**Report System Software**
Upgraded Software to Halligan which communicates with Emergency Reporting System for better efficiency.
Annual Savings $9,000

**Total Annual Savings**
$788,000
### Balanced Scorecard 2018/19
#### Community Watch

<table>
<thead>
<tr>
<th><strong>Patrol Drivers</strong></th>
<th><strong>Dispatch</strong></th>
<th><strong>Gate Operations</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Watch Patrol Drivers attended Patrol Driver refresher training to increase productivity and reduce safety hazards.</td>
<td>Five Community Watch Dispatchers received Florida 911 Public Safety Telecommunicator Certification in 2019. This increases productivity and a better understanding of government agency operations.</td>
<td>The Gate Operations Staff trained on collecting “gate hit data” for submittal to Risk Management for damage reimbursement.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Gate Attendants</strong></th>
<th><strong>CW/Customer Service</strong></th>
<th><strong>Quality Assurance</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Watch Gate Attendants attended a Customer Service Training Class to enhance their customer service skills.</td>
<td>Customer Service will now offer registration and process payments for the following CW Programs, Adult Watch, House Check, and Resident out of Town. This new service offers convenience for the resident and they can pay by cash, check or credit card.</td>
<td>Community Watch Dispatch Supervisors score three calls per shift. This is to ensure quality of service and provide feedback to the Dispatcher on quality of response to the caller and if further training is required.</td>
</tr>
</tbody>
</table>
Balanced Scorecard 2018/19
Customer Service / Community Standards

Resident Academy
Restructuring of Resident Academy by offering larger seating venues and meeting quarterly instead of monthly. Reduced the presentation to five hours and eliminated the waiting list from 700 to zero.
Annual Savings $588.00

Technology
Now utilizing MaxGalaxy Software for Resident Academy Registration.
Enhanced Districtgov.org website.
Expanded Online Weekly Bulletin Publication.

Community Standards/ARC
Reviewed and updated Architectural Review Committee application and process. Developed additional educational materials for ARC / Deed Compliance process. Provided additional training opportunities for ARC Board Members.

Welcome Wednesday
Due to lack of attendance, Welcome Wednesday was cancelled and the Weekly Bulletin Publication was expanded to cover more information.
Annual Savings $14,560

Satellite Office
Customer Service is now offering registration for Community Watch programs and processing payments, cash, check, or credit card.

Total Annual Savings $15,000
Balanced Scorecard 2018/19
District Property Management

**DPM Staff Optimization**
- Reorganization of Department into Functional Area Divisions
- Implemented Smart Goals
- Developed Training Programs
- Improved "Chain of Command" Structure
- Reorganized Administrative Support Across Divisions – $59,720
- Reduced Town Square Staff with reorganization – $80,289

Annual Savings $140,000

**Purchasing/Contracts**
- Sole Source & Standardization of Products
- Wharf Lumber and Fasteners
- ADA Pool Lifts - Aquatic Access
- Sport Court Surfacing –NOVA
- Shade structures changed from Wood to PVC
- Lighting conversion from solar to 110V LED – Roadway
- Postal Facility lighting conversion to LED
- Aqualink Temperature Controllers in all 9 Sports Pools
- ADA Main Door Controls (RRC and VRC)
- ADA Hearing Impaired Loop System
- Sign Poles (Brandon Industries)

Annual Savings $44,700

**Technology**
- Purchased and Implemented the use of Tablets for DPM Field Operations Managers and Supervisors
- Emergency Preparedness Training
- Streamlined Halligan System for DPM Workflow
- Facility Asset Management

**DPM Process Optimization**
- Designed and Automated Tunnel M-5 Pump
- Created Postal Facility Inspection Forms
- Created Gatehouse Inspection Forms
- Meet with Vendors on a Quarterly Basis
- Developed Supervisor Trainee Position - $4,160
- Installed Tamper Proof HVAC Controls at Postal Facilities - $15,000
- Manage On-Call Procedure – $1,200

Annual Savings $20,360

**Contracts/Purchasing**
- Contract Efficiencies
- Negotiated Termite Treatment Piggyback Contract for Facilities - $20,000
- Revised Tunnel Pest Control Contract – $2,300
- Revised Maintenance of Shrub Beds in Landscaping Contracts - $30,000
- Purchased Barricades Instead of Rental - $8,442
- Purchased Pipe Plugs Instead of Rental - $38,028
- Renegotiated Pump Rentals - $35,100
- ADA Pool Lifts - Aquatic Access - $4,200
- MMPDG Project Savings – Sign Poles - $50,000
- Duke Energy Rate Review & Reduction- $66,000

Annual Savings $254,000

*Total Annual Savings* 
$459,060
Balanced Scorecard – Finance 2018/19

Utility Team
Restructured Utility Team by combining Accountant and Utility Supervisor position.
Annual Savings $15,000

Cash Room
Revised the cash handling process in order to reduce the number of manual Journal Entries.

Financial Statements
Reduced amount of consultant time needed to prepare audited financial statements.
Annual Savings $7,500

Board Financial Statement
Revised the Board Financial Statement presentation in order to provide greater transparency.

Total Annual Savings $22,500

Fixed Assets
Program change to eliminate duplicate transactions due to outdated software.
Elimination of paper binders for Capital Improvement construction projects.
<table>
<thead>
<tr>
<th>Balanced Scorecard 2018/19</th>
<th>Executive Golf</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Space</td>
<td>Purchasing</td>
</tr>
<tr>
<td>Relocation of Executive Golf Office to a District owned property.</td>
<td>Vendor change for Furniture purchases/replacements.</td>
</tr>
<tr>
<td>Annual Savings $15,000</td>
<td>Annual Savings $5,200</td>
</tr>
<tr>
<td></td>
<td>Annual Savings $7,500</td>
</tr>
<tr>
<td>Property Management</td>
<td>Water Conservation</td>
</tr>
<tr>
<td>Retrofitting all Executive Course Restrooms to LED Lighting.</td>
<td>Installing quick couplers on greens to hand water isolated dry areas, reducing the amount of water running cycle from the computer.</td>
</tr>
<tr>
<td>Landscaping</td>
<td>Total Annual Savings</td>
</tr>
<tr>
<td>Future plans to install Florida native plants which will conserve water.</td>
<td>$27,700</td>
</tr>
</tbody>
</table>
Balanced Scorecard 2018/19
Recreation & Parks

**Technology**
MaxGalaxy Software Customer Interface real time updating.
On-Call Tablets – effective and efficient for On-Call Managers to assist staff from remote sites.
Eliminated charge of $300 per month for MaxGalaxy Internet/Active Directory Account charge an Annual Savings of $3,600.

**Recreation Centers**
New ID Scanners for all Recreation Centers that increase efficiency of checking in residents and guests. The new scanners are not sensitive to sunlight making for ease of scanning at outdoor amenities.

**Fitness Centers**
Upgraded fitness programs and scanners to have the ability to record/report activity at all locations. Data and support for future planning.

**Resident Lifestyle**
Streamlined 70/30 contractual agreements.
Format changes to the Recreation & Parks News to reduce costs.
RLVG application process one stop shop for all necessary information.

**Enrichment Academy**
Revised Refund Policy
Decreased cancellation requests and reduced staff processing time throughout departments.
Kiosk – Lake Miona Recreation Center - Increased customer service for participants and instructors which resulted in less traffic at District Office.

Reproduction of course material (photocopies)
Reduced by 65% from December 2018 – current
Effective, October 2019 – eliminated option, projected to reduce to minimal amount FY2019/20
Balanced Scorecard – Purchasing 2018-19

**Purchasing Department**
- Approval of Updated Purchasing Policies and Procedures
- Staff Training on Policies and Procedures

**SLAD**
- Contract Consolidations for Landscaping and Janitorial Services

**Planning / Communication**
- Ongoing Monthly Meetings established with District Property Management and Recreation Department

**Scrap Metal / Surplus Property**
- Revenue Generating Contracts for FY2017/18
- Scrap Metal – Received $42,694.67
- Sale of Surplus Property through Auction – Received $51,827.88

**Tracking**
- Spreadsheets created for Sole Source and Standardized Products approved by Boards
- Piggyback and Utilization Agreements approved by Boards

**Purchasing Card Program**
- Calendar Year 2018 Purchasing Card Total Spend $9,348,192.98
- *Rebate Amount $128,905.98

A Project Visual Board is posted as you enter the Purchasing Dept. for instant viewing of the current status of projects.
Balanced Scorecard 2018/19
Office of Management & Budget

Budget Workshops

Revised Budget Workshop
Presentations utilizing PowerPoint

PWAC

Developed a process to utilize
restricted funds for Project Wide
Capital Projects

Conducted Amenity Fee
Analysis for Deferral
Rate Discussions

Capitol Improvement

Worked in conjunction with Staff to
develop Capital Improvement plans
for SLAD, RAD, LSSA, VCSA and NSU

Planning / Communication

Worked with Staff during Budget
Meetings to identify efficiencies and
cost control measures
Balanced Scorecard 2018/19
Human Resources

**Recruitment**
We strive to recruit and maintain the best of the best employees and work with department managers to address future staffing needs in regard to the growth with the District.

**Payroll /HRIS**
2019 saw the implementation and rollout of the new Payroll/HRIS System **PayChex** related to the following components, Payroll, HRIS, Performance Mgmt., Time & Attendance, Benefits and Onboarding.

**Training / Onboarding**
Continued Training for all software programs. Leadership Training Program. Certificate programs to recognize skills for promotions, transfers and succession, as well as Compliance & Legal Training.

**Strategic Planning:**
continue to align with the District Manager to prepare the organization for transparency in communications, initiatives, and project management.

**Benefits**