

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: 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

**Total Annual
Savings
\$1,458,000**

Utilities

Utilities Staff Consolidation
with expanded use of
consultant.

Annual Savings \$100,000

Balanced Scorecard 2018/19

Technology & Board Support Services



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 Sumter 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.

Total Annual Savings \$788,000

Report System Software

Upgraded Software to Halligan which communicates with Emergency Reporting System for better efficiency.

Annual Savings \$9,000

Balanced Scorecard 2018/19

Community Watch



Patrol Drivers

Community Watch Patrol Drivers attended Patrol Driver refresher training to increase productivity and reduce safety hazards.

Patrol Drivers attended **Carfit Training** which increases better understanding of equipment operation.

Dispatch

Five Community Watch Dispatchers received Florida 911 Public Safety Telecommunicator Certification in 2019. This increases productivity and a better understanding of government agency operations.

Gate Operations

The Gate Operations Staff trained on collecting "gate hit data" for submittal to Risk Management for damage reimbursement.

Gate Attendants

Community Watch Gate Attendants attended a Customer Service Training Class to enhance their customer service skills.

CW/Customer Service

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.

Quality Assurance

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.

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

**Total Annual Savings
\$15,000**

Satellite Office

Opening of VCCDD Customer Service Satellite Office on July 9, 2019. Cross training of Customer Service and Administrative Support staff for servicing both locations.
Customer Service is now offering registration for Community Watch programs and processing payments, cash, check, or credit card.

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

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

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

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.

Balanced Scorecard 2018/19

Executive Golf



Office Space

Relocation of Executive Golf Office to a District owned property.

Annual Savings \$15,000

Purchasing

Vendor change for Furniture purchases/replacements.

Annual Savings \$5,200

Property Management

Retrofitting all Executive Course Restrooms to LED Lighting.

Annual Savings \$7,500

Landscaping

Future plans to install Florida native plants which will conserve water.

Total Annual Savings \$27,700

Water Conservation

Installing quick couplers on greens to hand water isolated dry areas, reducing the amount of water running cycle from the computer.

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.

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

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.

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

A Project Visual Board is posted as you enter the Purchasing Dept. for instant viewing of the current status of projects

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

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

Capital 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.

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

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.

Benefits

Conducted Comp & Pay Study for 2019-2020 Budget consideration. FICA Alternative Plan Implementation. Assessment and negotiations of current Health/Wellness Plans. Reviewing Tuition Reimbursement and Retirement Planning.