

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: March 26, 2021

RE: District Management Achievements FY 2020/2021

As we rounded off the year 2020 and bid it farewell in the rearview mirror, we forged ahead into 2021. The District Team has remained focused and steady while keeping the District on track and open for business with all District Board meetings and Capital Projects full throttle. From October 2020 through March 2021, the District Team has achieved many milestones I would like to share with you.

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 focused the planning around a 5-year planning horizon. Between October and January 2020, and throughout five interactive strategic planning workshops, the team worked together across departmental functions to collaboratively review, develop, and refine the District's strategic planning model. Given the elimination of all silos, this joint effort permitted the team to draw upon the knowledge and experience of **"all"** team members to identify specific strategies that reinforce our purpose, mission, and vision - Organizational Excellence, Communications, Customer Service, Technology, People & Culture, and a Safe & Active Community. Once our strategies were defined, we were able to set specific goals pertinent to each strategy, and define those action steps necessary to bring those goals to fruition. In so doing, we were also able to more quickly identify areas that would require cross-functional work teams and shared calendaring to ensure everyone, from leadership to frontline staff, was efficiently working at a high level of effectiveness. To ensure the success of our intended outcomes a clear point tracking system and regularly scheduled meetings to report on the progress have been established as benchmarks to ensure internal governance. This includes scheduled updates to our District Boards, our staff, and our community using various communication modalities. Throughout this process, we will continue to work not only on our

current action plans but also on refining measurements of our success, as well as how we will choose to celebrate our successes, both internally and externally.

Under the purview of Kenny Blocker, Deputy District Manager, the District addressed the monetary impacts of a shrinking global secondary market for our recycled goods and the monetary impacts of long hauling our municipal solid waste. This awareness follows the leadership of the North Sumter County Dependent District (NSCUDD) Board of Directors through Sumter Sanitation Solid Waste as it began its collection and disposal program with the Lake Okahumpka Covanta Waste to Energy Plant. NSCUDD Board of Directors has purchased property to relocate Sumter Sanitation to a permanent site. 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 contract. 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 has added to its portfolio, The Wildwood Utility Dependent District (WUDD). 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.

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.

Additionally, District- 9 refunded their Phase I bonds to realize a net present value savings of approximately **\$15MM or 46%**. All bonds for all Districts are reviewed routinely to take advantage of potential savings when the bond refunding is eligible.

Under Mark LaRock, Purchasing Director, the Purchasing Staff continues implementing their efficiencies regarding the E-bidding of contracts and training of staff. The Purchasing office has a new piggyback contract with Lake County for surplus property auction services resulting in a higher return year-to-date, with an average **increase of 166%** in estimated proceeds from the old contract to new contract payment. The previous contract under Volusia County charged 15% to 70% commission and the new contract under Lake County only charges 5% to 7% commission

depending on the item auctioned. Proceeds from auction sales are returned to each respective department. Further, the **Purchasing Card Rebate received to date is \$149,207.00**. The transfer of providers from Bank of America to J P Morgan Chase has resulted in a higher rebate percentage from **1.68% (BOA) to 1.72% (Chase)** we are now receiving rebates quarterly as opposed to annually. The revenue earned with the new provider J P Morgan Chase is shared with all Districts.

Under Brittany Wilson, Director of Technology and Board Services, she and her staff continue to focus on Asset Management/GIS while also managing IT and Board Support Services. In November 2020, the District saw fourteen new Board members complete orientation, and be sworn in on their prospective Boards. Ms. Wilson continues to work with numerous parties on the Asset Management- GIS development and this multi-year, multi-phase project. The first phase of the project encompassed assets that support the Water and Wastewater Utility Infrastructure. The GIS data development of the first phase was completed in January 2021, and it is anticipated that District Staff and contractors will have access to the system in Spring 2021. The first 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. In the operational phase of the GIS data, the District will continue to work with the Jacobs team to further refine attributes for each asset.

It is anticipated that the Cityworks Asset Management System implementation process will commence in April 2021, yielding benefits of electronic workflow, centralized asset expenses and repair history, and improved capital improvement projections. The first phase of the Cityworks implementation will encompass only Phase I of the Water and Wastewater Utility Infrastructure.

As the first phase of development was completed in advance of the projected schedule, the District will be presenting information to the Amenity Authority Committee, Project Wide Advisory Committee, Village Center as well as Sumter Landing Community Development District in March 2021, to request approval to proceed with Phase II of the GIS data development. Phase II of the project primarily encompasses recreational amenity assets. With a project commencement date nine (9) months ahead of schedule, this will effectively expedite the timeframe of implementing Cityworks for the balance of the District assets.

Below is an overview of savings and information that Ms. Wilson has accomplished over the past few months.

Technology

- 1. Recreation Center Wireless Internet Agreement** – The price schedule for the management and licensing of the wireless internet equipment at the recreation facilities was reduced, resulting in an annual **savings of \$25,410**.

2. **Internet Bandwidth** – A reduction in cost for individual static IP Addresses resulted in an annual recurring **savings of \$8,832** for internet bandwidth that supports all District operations.
3. **Co-location Agreement for Servers-** The construction of a new data center by the District’s technology vendor permitted servers to be consolidated and housed on a single rack, which significantly reduced the resources necessary to support the equipment. This has resulted in an annual recurring **savings of \$117,900**.
4. **Completion of Phase I GIS Development-** Phase I of the GIS development of utility infrastructure is complete and will be accessible for use by Staff and Contractors in the coming months. Over 300,000 assets were mapped and attributed. This includes 2,847 miles of pipe that were drawn and attributed from over 20,000 record drawings.

Board Support Services

1. **Board and Committee Meeting Computers** – The District Clerk’s Office ordered new Chromebooks for use at all District and Committee Meetings in support of the electronic agendas. The purchase of Chromebooks for internet use versus a traditional laptop **saved \$300 per device**.
2. **Public Speaking Timer** – An electronic public speaking timer was introduced to the Boards and Committees as a feature available for use to manage public comments by adopted Rules.
3. **Document Retention** – The Clerk’s Office continues to assist in reviewing paper documents by the State of Florida’s retention schedule. The continual review and adherence to the schedule maximize available storage space at the District offices.

Under the purview of Carrie Duckett, Assistant District Manager, her focus on communication from the District is always a top priority and communication has been very important during the COVID-19 Pandemic. In response to COVID-19, the District made several communication improvements and enhancements to ensure residents and the District team remained in communication during a time in which personal interaction was kept to a minimum. To comply with social distancing guidance, both CDD Orientation and Resident Academy were canceled in 2020 until further notice. To ensure residents and those providing services within the community have the opportunity to obtain information on the District until the valuable programs could resume, a hybrid of both CDD Orientation and Resident Academy, titled ‘District Orientation’ was created as was described in Board and Committee meetings. A total of 9 videos and presentations were posted on www.DistrictGov.org for those residents and team members wishing to learn more about the services and functions of the District. We have already received tremendous beneficial feedback from residents and we have had over 1,110 page views, less than 2 weeks after posting the videos.

As deed compliance continues to be a topic discussed in monthly District Board meetings, Community Standards is now preparing and presenting quarterly presentations on deed

restriction complaints and violations. These reports allow District Supervisors and residents the ability to obtain accurate and timely information regarding deed restriction complaints. It also provides the opportunity for residents in the audience to learn more about the deed compliance process and ask questions.

The Architectural Review Committee (ARC) continued to meet weekly, processing 2,306 applications from the Lady Lake/Lake County and Districts 1-10 portions of The Villages from October 1, 2020, to February 28, 2021. Also, the Community Standards team averaged over 570 phone calls per week during the same period which allows staffing the opportunity to educate residents on deed compliance rather than through enforcement.

Each District adopted a Holiday Decoration Policy in October 2020 that identified the process and procedures for authorized holiday decorations on District property. The policy is managed by District Property Management and provides residents guidance on decorating District gatehouses, sign walls, and rights-of-ways. Managing items being placed on District property and rights-of-ways reduces liability and promotes safety not only for those traversing on District property, but it also maintains the aesthetic consistency of the community while allowing residents to contribute to the festivity and celebration of specific holidays.

While the District office continues to operate on an appointment-only basis, the Customer Service Center certainly hasn't stopped providing services. During the timeframe of October 1, 2020, to February 28, 2021, the Customer Service department assisted approximately 7,152 walk-in customers and answered approximately 23,597 phone calls. As the District operations had to be adjusted just like other government agencies across the country due to COVID-19, many of our services were offered over the telephone rather than in person. During the same period the previous year (October 1, 2019, to February 28, 2020), Customer Service assisted approximately 11,472 walk-in customers and answered 16,352 phone calls, a decrease of 38% for walk-ins and an increase of 44% for phone calls.

Under Chief Wolfe, Director, Community Watch, the Community Watch Dispatch division has been reviewing, revising, and implementing updated and new policies in preparation for the Telecommunication Accreditation Commission review. A team of assessors from the Florida Telecommunication Accreditation Commission (Fla-TAC) arrived on March 2, 2021, to examine all aspects of the Villages Community Development Districts Community Watch Dispatch policies and procedures, management, operations, and support services. Community Watch Dispatch has to comply with approximately 110 standards to receive accredited status. Many of the standards are critical to life, health, and safety issues. Achieving Accreditation status is a highly prized recognition of professional excellence. The accreditation is valid for three years and once achieved The Villages Community Development Districts Community Watch Dispatch will be **the first non-911 emergency call center to earn this achievement**. The Accreditation Board will meet in June 2021, and the Accreditation Team will take forward to the Board a recommendation to approve. Accreditation embodies the precepts of community-oriented

services. It creates a forum in which community watch and citizens work together to prevent and control challenges confronting the residents and provides clear direction about community expectations of services. Accreditation provides objective evidence of Community Watch's commitment to excellence in leadership, resource management, and service delivery. Thus, government officials are more confident in the agency's ability to operate efficiently and meet community needs. Accredited agencies are better able to defend themselves against civil lawsuits. The accreditation standards give Community Watch a proven management system of written directives, sound training, clearly defined lines of authority, and routine reports that support decision-making and resource allocation to establish stewardship in operations.

The Community Watch hybrid vehicles are continuing into the New Year with a reported **\$5,123.78 reduction in fuel cost from October 1, 2020, to February 28, 2021.**

Under John Rohan, Director of Recreation and Parks, he oversaw a redesign of The Enrichment Academy (TEA) website to make the experience more user-friendly. The Learn & Grow Course Catalog is online so you may view all the courses available and register with ease. TEA not only offers course programs but also offers a dynamic Speaker Series that you may also register for online. TEA offers 300 plus courses and added 100 NEW courses beginning October 1, 2020.

Also, beginning October 1, 2020, The Recreation & Parks News had a name change as well as a new design and became Recreation & Parks Publication. This publication can be found on the Districtgov.org website under Recreation and you can pick up a copy at any Recreation Center in The Villages.

The Fitness Clubs had a name change as well beginning October 2020 and took on a new marketing logo of FIT Club. They also received upgraded Cardiovascular Machines, Circuit Training, Free Weights, Core/Sports training, and Supplemental Strength equipment. Locations and membership fees can be viewed on the Districtgov.org website under Recreation.

October 2020 also saw Phase I of new aquatic microphones at Sports Pools and the restart of Resident Lifestyle Volunteer Clubs/Activities under COVID-19 guidelines. Under the leadership of Ann Forrester, AAC Chair, and the entire committee, the Rio Grande Air Gun/Croquet, Lawn Bowling Facility had a grand re-opening. November 2020 showcased the new Hawkins Neighborhood Recreation area and December 2020 showcased the opening of the new Aviary Village Recreation Center. January 2021 brought us the new Saint Catherine Neighborhood Recreation area and the beginning of the Shade Structure project at the Mulberry Dog Park.

The anticipated opening of the new Brownwood Woodshop in April 2021, will allow residents to now have two (2) Woodshop locations. This Public/Private partnership with the Developer donating the property a total of 9.31 acres and the District building the facility, will enhance the lives of the residents by allowing them to enjoy their woodworking hobby at either location.

Under Mitch Leininger, Director, Executive Golf Maintenance, began the procurement of a new golf course maintenance contract to provide service at the three Belvedere golf courses. This new contract secured a more experienced and reliable vendor to improve the golf courses and also attained a **\$30,000 annual cost savings** in the process. Additional cost savings were achieved through securing a 5-year renewal program of the Executive Golf courses Rain Bird Irrigation System service plan, **estimated at \$30,000+ total savings** including new computers. This important service and cost savings accomplishment was attributed to capitalizing on the combined large amount of golf course inventory of both Executive and Championship Golf renewal needs which helped to procure a discounted rate.

Executive Golf has strategically structured the department with the addition of a supervisor position and assigned staff geographically north and south to cover all 36 District-owned Executive Courses. This new structure will provide better customer service to our residents and guests, ensure better accountability of the contractors, and provide the ability to operate more efficiently and effectively. The Executive Golf team is committed to ensuring that our facilities contribute to the high standard of safety in The Villages. Residents benefit from the enhanced hygiene protocols while still maintaining an active lifestyle. The team has been able to keep the cost of these new procedures low-therefore not sacrificing quality or service in other places-by taking them on in-house, rather than through contracting out at a high cost. For example, we have been able to sanitize all public buildings associated with the Executive Golf courses with a microbe spray. This includes the 24 Starter facilities, 36 on-course restrooms, and the District Executive Golf office. This safety microbe spraying will continue on a bi-annual basis.

Under the purview of Fire Chief Edmund Cain, The Villages Public Safety Department received a multi-year **FEMA SAFER Grant Award of \$6,521,958.00**, for the hiring of **27 additional firefighters**. The Grant covers 100% of the salaries and benefits for the firefighters for three years paid 100% by FEMA. This has allowed for an increase in staffing levels from 4 per shift to 9 personnel per shift; bringing our operational levels from 2 firefighters per apparatus to 4 firefighters per apparatus, with minimum staffing of 3 per apparatus. In Florida alone, we are one of 14 departments to receive this award. This will assist with our emergency response matrices, as well as support our Fire Suppression Rating through the Insurance Services Office (ISO), which is used to calculate fire insurance rates. The Villages Public Safety Department currently maintains an ISO rating of 2. The ISO scale is measured from 10 to 1, with a 1 rating equal to an A+. The department has been working to address issues, improve operations, and enhance our strengths for the next review period. With the renovation of Fire Station 40 (on Parr Drive) that includes the addition of a new bay to house the new tower truck that allows accessibility to buildings a minimum of six stories tall, along with the expansion of living quarters to house 10 firefighters, and the purchase of the new ladder truck that will be housed at Fire Station 45 that is capable of reaching the roof of a ten-story building, as well as two new rescue trucks for Fire Stations 40 and 51. These enhancements are just some of how the Districts and the residents benefit as well as provide the improvements necessary to decrease the ISO

score to 1 which in turn reduces fire insurance rates for commercial and residential property in The Villages.

Battalion Chief Mike DiStefano was awarded the Chief Fire Officer (CFO) designation. The CFO process is reviewed by the Center for Public Safety Excellence (CPSE); the applicant must provide documentation in areas of education, training, certifications, and years of employment with management experience in fire department operations. This information is reviewed by the CPSE board, comprised of fire managers throughout the county. Chief DiStefano is one of two officers within our department that has received this designation, and one of 1,519 CFOs worldwide.

Under Blair Bean, Director, and Bruce Brown, Assistant Director, District Property Management, DPM is continuing the task of preparing staff for the implementation of the GIS-based asset management system, Cityworks. As part of this continued effort, Phase 2 of the Sightlines consultant reports establishing baseline data for District-owned building assets such as neighborhood recreational facilities, postal stations, woodshops, and fire stations have been recently completed. Moving into the future, the information from all the Sightlines reports will be used to forecast 10-year Budgets for recreational amenities and District vertical infrastructure. This will allow the Recreation Amenity Division to better identify and forecast funding needs over a longer period as well as manage overall costs and review specific amenity assets. Programs will be developed to review the performance of like assets across the entire District.

In response to potential COVID exposure risks, District Property Management implemented an antimicrobial spray program utilizing trained DPM staff to spray all District staffed buildings including but not limited to all District Recreation Centers, Offices, and Gate Houses. District Fire and District Golf also implemented similar programs for the benefit of staff and residents at their associated facilities.

DPM continued implementation of an organizational structure that allows for equitable division of duties and improved span of control for the Director and Assistant Directors. This reorganization was designed to meet current demand and allow for future growth and expansion. Each Assistant Director is operationally responsible for specific divisions. Landscape, Water Resources, and Infrastructure Divisions report to an Assistant Director while Facilities, Town Centers, and Construction/Fire Station Divisions report to the other Assistant Director. This Fiscal Year we also added a Cross-Division Supervisor position to DPM which has allowed a new Supervisor to have exposure to all six DPM Divisions, delivery surge capacity where needed within any specific division and enables us to have a fully trained and qualified supervisor when vacancies occur. It is critically important that we provide training and education to our employees and afford them opportunities to advance within the department. To that end, we have had numerous internal promotions. Mr. James Morris was promoted to Landscape Division Manager, Mr. Doyle Graf was promoted to Town Center Division Assistant

Manager, and Mr. Bruce Brown was recently promoted to Director of District Property Management.

Building sustainable maintenance management plans, improving asset life cycles, and reducing overall maintenance costs has been a long-standing goal. In recent months, DPM has made great strides with the development of maintenance management plans for all recreational facilities, pools, sports courts, parking lots, and other amenities. Based on Sightlines data, physical inspections, overall condition, and use as well as maintenance history, we are building 5, 10, 15, and even 25-year maintenance plans, which help us to better plan for, forecast, and budget routine, minor and major maintenance evolutions and ultimately reduce costs, extend asset life and deliver a better quality product to our residents. Many of these initiatives are underway such as the tunnel painting initiative, cost reduction plans for fertilizer use, ceramic tile restoration, and blue dye basis treatments to reduce algae and nuisance aquatic vegetation. Others are developed and will roll out shortly including renovation of Sports Courts, Bocce Courts, Pools, and Recreation facilities - all built around data-driven decision making, life-cycle planning, and long-range forecasting.

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 2021/2022.