

District Government Update

Friday, April 5, 2019

Richard J. Baier

District Manager

Welcome to

▶ **16 Community Development Districts**

- Community Development Districts (CDD) 1 through 13
- Village Center Community Development District (VCCDD)
- Sumter Landing Community Development District (SLCDD)
- Brownwood Community Development District (BCDD),

...and North Sumter County Utility Dependent District (NSCUDD)

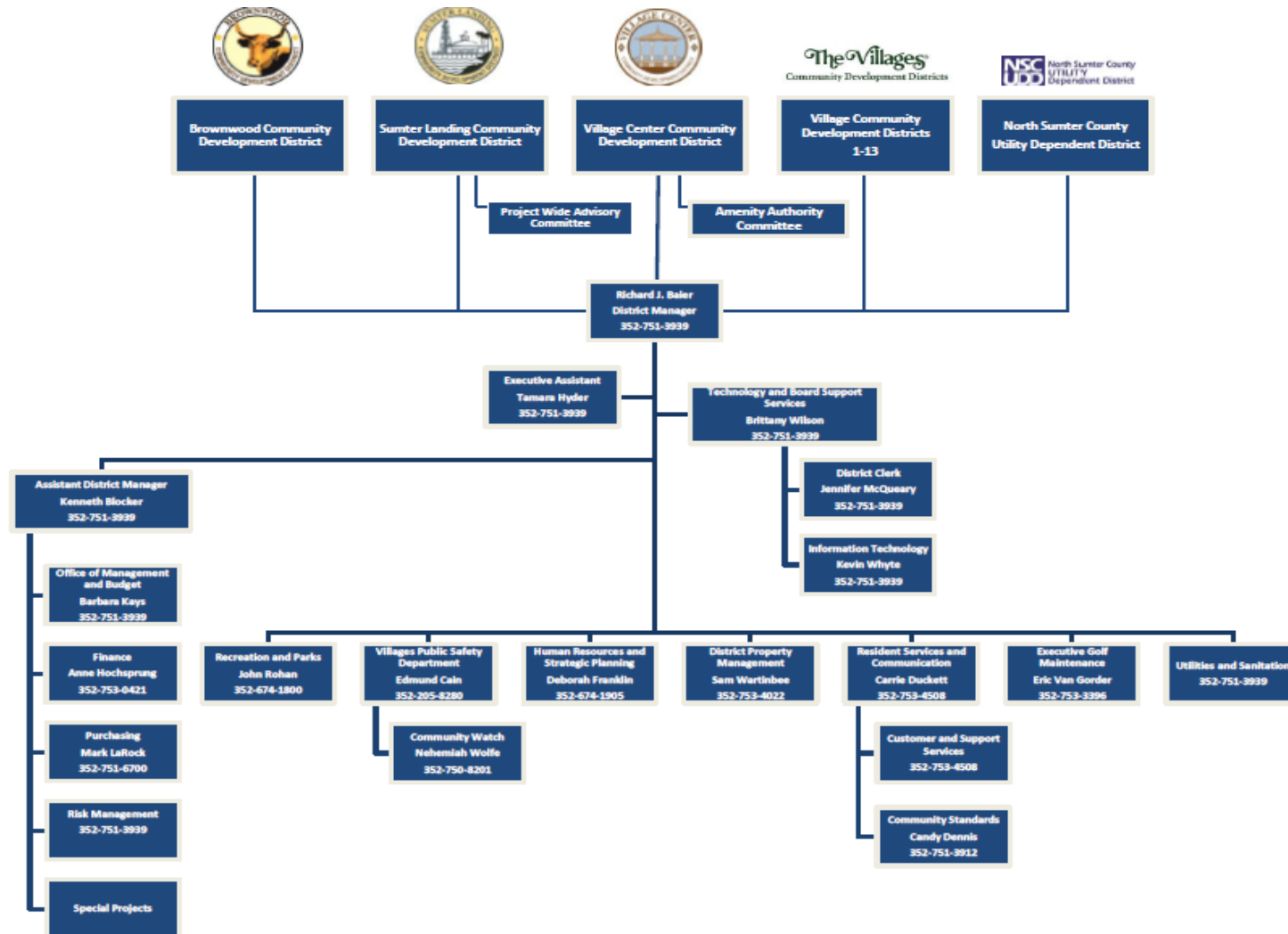
- ▶ Spans approximately 70 square miles and population is approximately 125,000 + residents.
- ▶ The Villages' population is larger than 96% of the municipalities in the State of Florida. (17th largest of 412)
- ▶ The Villages' population is larger than 30 of the 67 Counties in the state of Florida.

The Pressures

- ◆ Growth & Management
- ◆ Resources
- ◆ Financial Stability
- ◆ Resident Connectivity
- ◆ Change



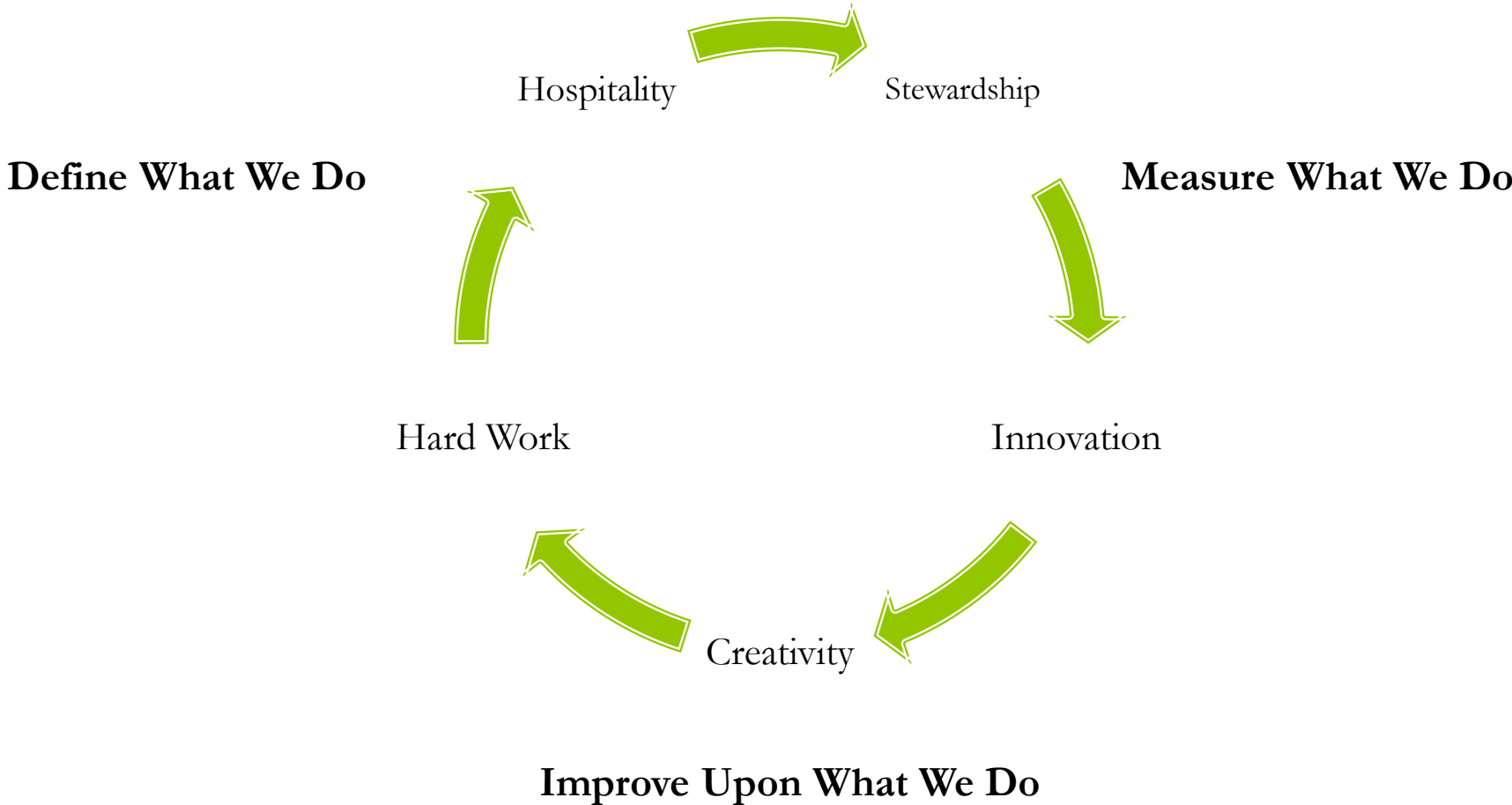
July 2018 Re-Organization



District Government Organization Chart 2018

- ◆ Enhanced Communication
- ◆ Transparency
- ◆ Enhanced Customer Service
- ◆ Systems and Analytical Decision Making

Organizational Core Values



Initiatives

- ◆ Masterplan for Communication
- ◆ Strategic Plan / SWOT
- ◆ Procurement
- ◆ Employee On-Boarding

Increased Inter-governmental Synergy

Transparency

Customer Service

Analytical Decision Making and Efficient Operations

Transparency

- Quarterly Momentum Staff Meetings
- Board of Supervisors Photos on Web Page
- Consent Agenda Reformat
- District Manager Staff Updates
- PWAC/AAC First Joint Meeting
- Individual Supervisor Staff Meetings
- Resident Academy Reformat
- Workshops – Stormwater Management and Advanced Wastewater Treatment.
- Pending - New Financial Reports to Boards

Customer Service

- Cross Training of Staff
- Customer Service Satellite Office
- District Bulletin – Enhanced Format
- Board Rules – Policy and Procedures
- Architectural Review Committee -
Agenda, Application, Format and
Delivery Changes

Analytical Decision Making & Efficient Operations

- Financial Management – BS&A Phase II Platform
- Asset Management Platform
- Document Imaging
- Financial Reporting
- Investment Advisory Committee
- TSG Service Level Agreement

BS&A Financial Management System

- ▶ The BS&A Phase II project began on January 23, 2019
- ▶ BS&A representatives are collecting data and meeting with individual departments to map internal processes
 - Finance Accounting, Special Assessments, Budget, Purchasing
- ▶ Estimated Go-Live Date – First Quarter 2020
 - BS&A will provide an extensive amount of training in advance of software implementation, as well as post go-live support that extends into July 2020.



Document Management System

- ▶ District has substantially completed a transition to a web-based document management system created by TSG.
 - Docusphere server has been removed from the system eliminating a security concern.

The screenshot shows the 'The Villages Community Development Districts Document Management System' interface. It features a search form with the following fields and labels:

Index Definition	Creation Date	Document ID	Voucher #	Company #	Location/Job #	Date	Doc Type	Scan User
GA - Select - GA GB GJ GC GD GP RP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	To	Invoice #	PO #	Check #	Amount	Vendor	Scan Date	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

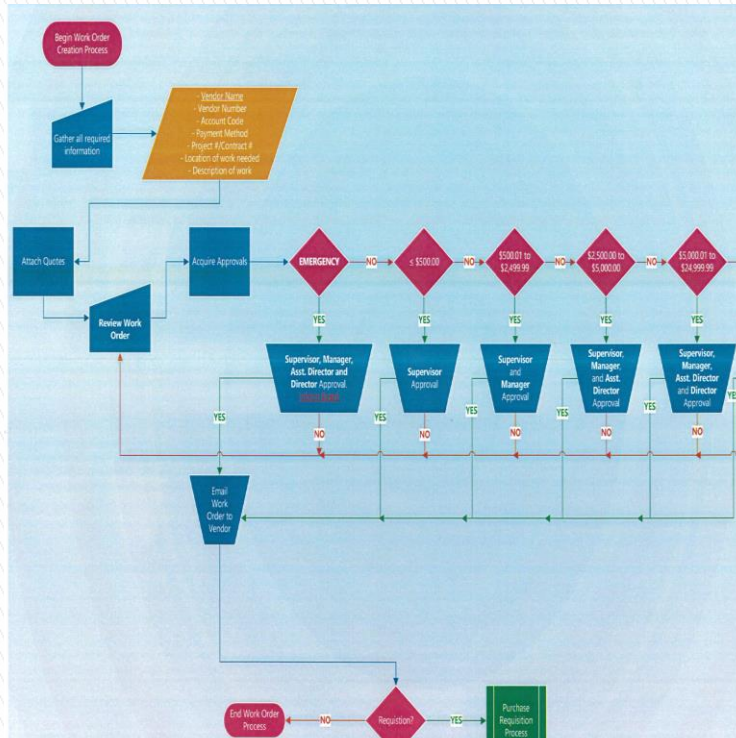
A green 'Search' button is located at the bottom right of the form.

- ▶ Transition to Laserfiche with automated work-flow will occur in conjunction with BS&A go-live date.

CityWorks Asset Management Program

- ▶ Project Kick-Off in April 2019
 - District, Jacobs, CityWorks, Sumter County
- ▶ Multi-year, multi-phase project
 - Initial focus on water and waste water utility infrastructure and data collection methods
- ▶ Additional phases will include numbered district and amenity infrastructure (sign walls, storm water management, recreation facilities, roads etc.)
- ▶ District Property Management (DPM) has initiated process mapping to prepare for implementation

CityWorks – Process Mapping



The screenshot shows the Cityworks Work Order Profile interface. The top navigation bar includes 'Cityworks', 'Inbox', 'Recent', 'Create', 'Search', 'Assets', 'Schedule', and 'Report'. The main content area is divided into several sections:

- Work Order:** Description: Rase Manhole, Number: 126431, Entity Type: SMAN-HOLE, Category: Corrective, Status: Open, Priority: Medium, Requested By: (S) PARKS, BRANDON, Date: 01/17/2019 1:10 PM, Supervisor: (S) HUBBARD, CARO, Submit To: (S) PARKS, BRANDON, Date: 01/17/2019 1:10 PM, Projected Start: 04/27/2019 11:45 AM, Projected Finish: 04/29/2019 11:45 AM, Actual Start: , Actual Finish: , Stage: Actual, Expense Type: Maintenance.
- Location Information:** W/O Address, Location Details, Shop, Map Page: E6, Title Number: HENDERSON HILLS, District: Mid South, X Location: 2.125 872 501, Y Location: 330 982 585.
- Assets:** Total Entities: 1, Asset List: SMAN-HOLE 7429 25992.
- Map Layer Fields:** Reset button.
- Work Cycle:** Repeat: Never, Interval: 6 Months, From: Actual Finish Date, Date Printed: , Next Print Date: 4/25/2019.
- Related Work Activities:** Service Requests, Inspections, Work Orders, Permits.
- Details:** Project, Contract, Account, Legal Billable, Contractor Billable, Update Map, Cancel Work Order, Canceled By, Date, Cancel Reason, Units Accomplished, Labor Cost: \$0.00, Equipment Cost: \$0.00, Total W/O Cost: \$0.00, Material Cost: \$0.00, Permit Cost: \$0.00.

DPM Process Mapping

Cityworks Work Order Profile

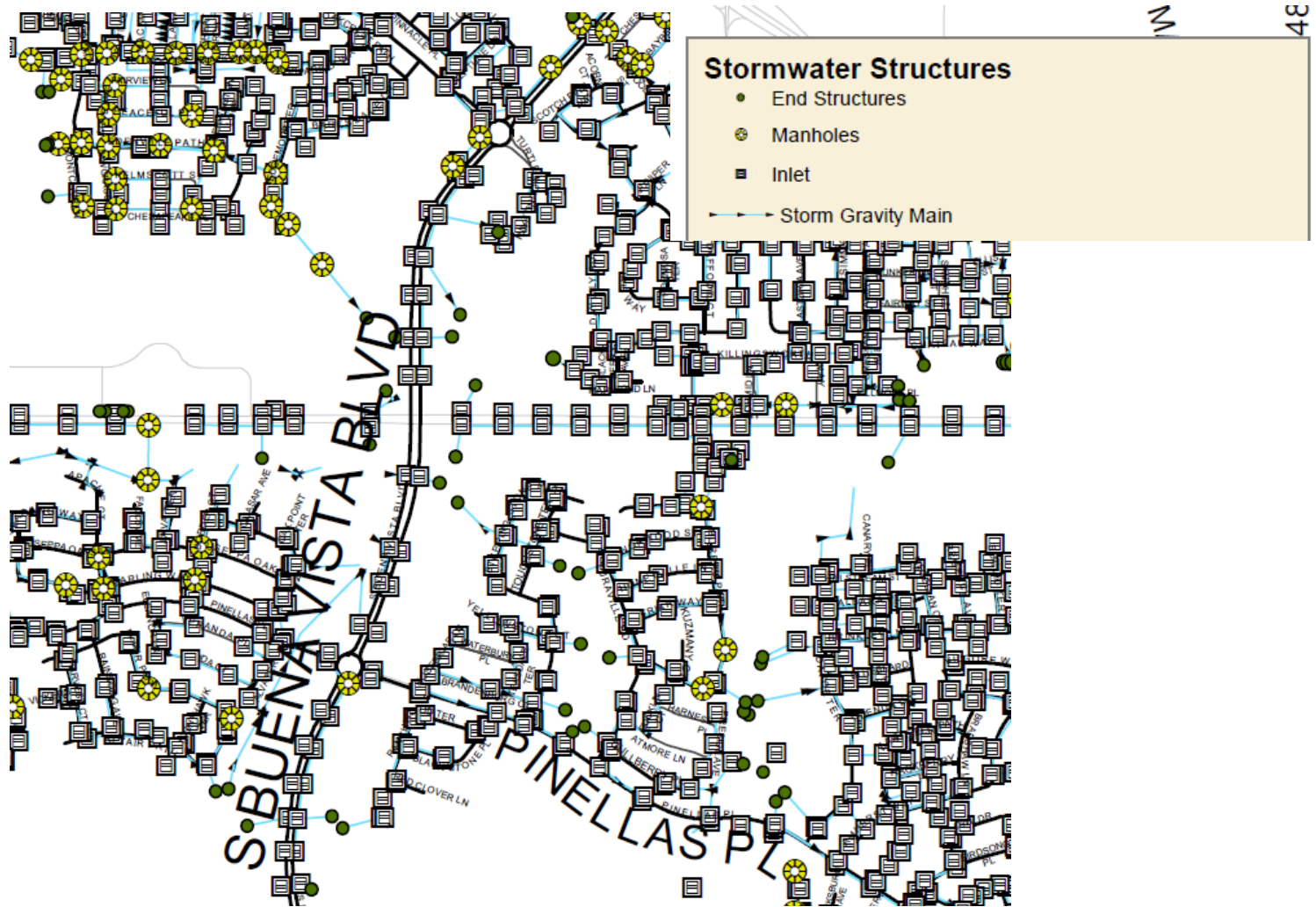
Geographic Information Systems (GIS)

The District entered into an Interlocal Agreement with Sumter County to provide GIS services in January 2019.

The District and Sumter County have met to discuss layers and review available data.

Initial data transmitted to Sumter County includes utility valve and meter locations.

Sample GIS Data from Sumter County



Proposed Board Financial Reporting

- ▶ Finance Team Responsibility
- ▶ Fiscal Responsibility as a Board member
- ▶ Concise easy-to-read financial results
- ▶ Financial Summary of key elements:
 - Describe big picture results
 - Include information important to the District
 - Explain any large fluctuations to budget/prior year
 - Cash and Investment balances and earnings
 - Compare financial results over time

Proposed Board Financial Reporting

- ▶ **Statement of Activity format**
 - Comparison to Budget Year-to-date
 - Comparison to Prior Year-to-date results
 - Other Changes in Net Position

- ▶ **Summary memo of key drivers that impact financial results**
 - One Page Summary
 - Operating result highlights
 - Change in cash balance (prior year end and year over year)
 - Change in fund balance

Proposed Board Financial Reporting

- ▶ Future Considerations
 - Financial Elements of Strategic Plan
 - District Growth
- ▶ Review Draft with Supervisors at each of the May or June board meetings.

Investment Advisory Committee

Modified Investment Policy

Enhanced Cash

1-5 Year Fixed Income

Rebalanced portfolio reducing the (1) 1-3 strategy
and moved to Enhanced Cash

Took advantage of the short end of yield curve

Annual Cash Flow Analysis

Evaluated Long term investment portfolio

Repositioned the LTIP portfolio where appropriate

Operational Efficiencies

- Fleet maintenance
- Fleet Procurement (Right Sizing)
- DPM / CW / Fire Station 47 - Multiple Services Space Sharing
- NSCUDD /LSSA / VCSA – 2 Position Consolidation
- Interlocal Agreement with Sumter County

Fleet Procurement - Cost Savings over 10 years

EFM Program	Capital	Less Equity	Total
End of Year 1	\$472,471.80	\$152,849.56	\$319,622.24
End of Year 2	\$472,471.80	\$172,089.56	\$300,382.24
End of Year 3	\$472,471.80	\$164,663.96	\$307,807.84
End of Year 4	\$472,471.80	\$167,459.96	\$305,011.84
End of Year 5	\$472,471.80	\$195,745.88	\$276,725.92
End of Year 6	\$472,471.80	\$164,663.96	\$307,807.84
End of Year 7	\$472,471.80	\$167,459.96	\$305,011.84
End of Year 8	\$472,471.80	\$164,663.96	\$307,807.84
End of Year 9	\$472,471.80	\$167,459.96	\$305,011.84
End of Year 10	\$472,471.80	\$185,741.16	\$286,730.64
		Total Cost for 10 years	\$3,021,920.08
		Current Fleet Equity	\$657,345.00
		Net Total Cost	\$2,364,575.08
Current Budget	Capital	Total	
Avg Since FY14-15	\$371,611.00	\$371,611.00	
		Total Cost for 10 years	\$3,716,110.00

Interlocal Agreement

The Interlocal Agreement with Sumter County will create Sub-Agreements to address areas to mitigate duplication of services and gain economies of scale

- Fire Service
- Stormwater
- Geographic Information Systems
- Public Safety Radio System
- Fleet Maintenance



The Villages Fire Rescue

We are the Fire Department that protects The Villages*

120 Full-time Firefighter personnel and 29 Fire Administration personnel

Goal: 70% medic / 30% EMT

A Shift

2 Battalion Chiefs
40 Personnel

B Shift

2 Battalion Chiefs
40 Personnel

C Shift

2 Battalion Chiefs
40 Personnel

24 hours on and 48 hours off

Nine Fire Stations

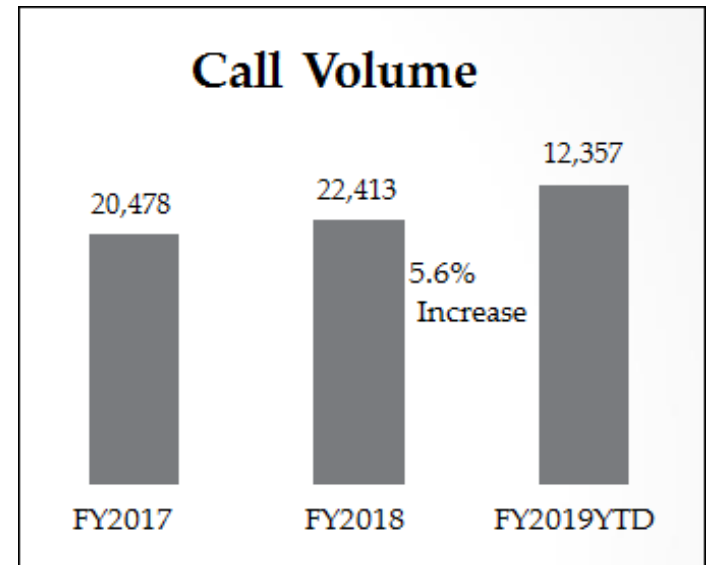
* We also protect areas in Wildwood, Fruitland Park, Lady Lake, Lake County, Marion County & Sumter County. The Villages Coverage area is 70 square miles.

How busy are we?

20,478 calls for service in FY2017

22,413 calls for service in FY2018

12,357 calls for service in 2019YTD



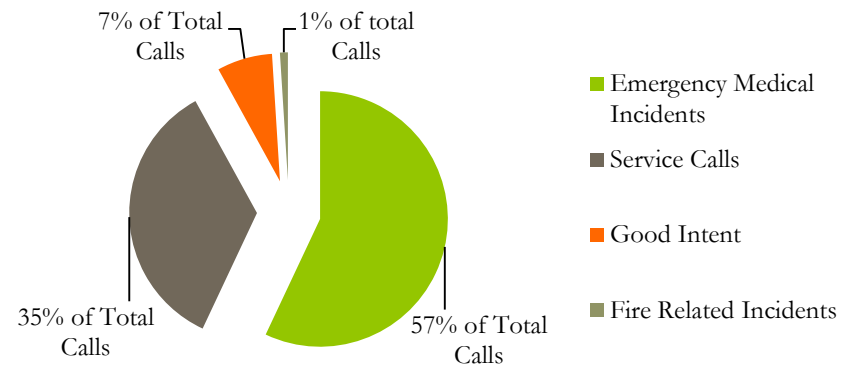
2018 Emergency Medical Incidents 57%

2018 Service Calls 35%

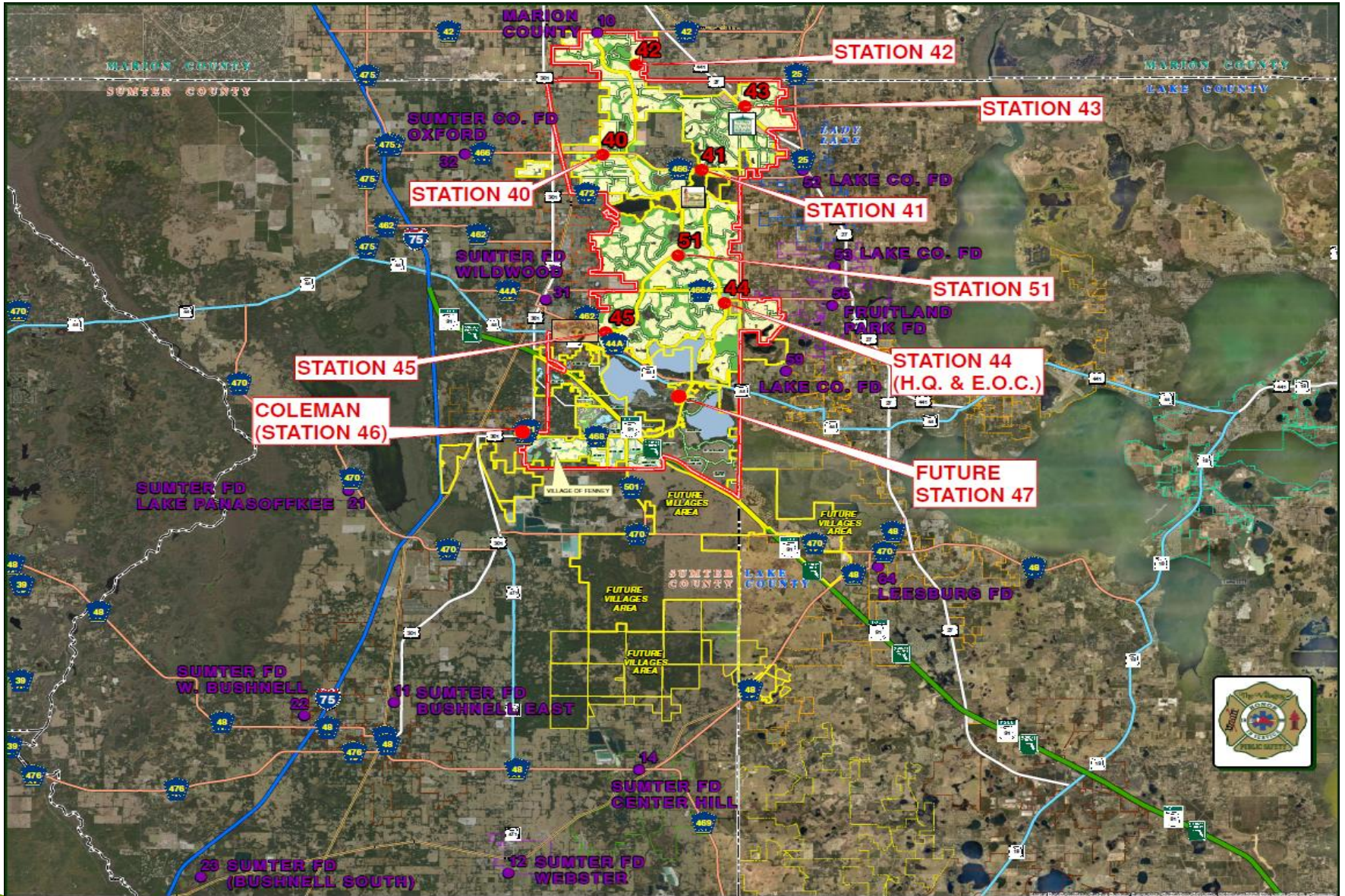
2018 Good Intent 7%

2018 Fire Related Incidents 1%

*Based on Fiscal Year



Coverage Area



How do we measure level of service?

- ▶ Reaction Time
- ▶ Travel Response Time

Total Incidents for 2018-2019	12,357*
Average Reaction Time	.53 Seconds
Average Response Time	4.25 minutes



*Based on fiscal year

Goals for 2018-2019



Adding a third firefighter to engine or aerial apparatus.

Opening of Station 47.

Expansion of Station 40 (Parr Drive) to house aerial apparatus.

Renovation of Station 43 (Paradise Drive).

Placing Rescue 40 into service.

Increasing AED program to over 200 resident groups.

Increase Cardiac Survival rate. (currently at 40% an increase of 17% from prior year).

Goals for 2020

Implement company inspection program.

Working on CFAI (Commission of Fire Accreditation International to be completed August 2020).

Working on lowering ISO rating from 2 to 1.

Maintain emergency response time to less than 5 (five)minutes for 90% of our emergency responses.

Community Watch by the Numbers

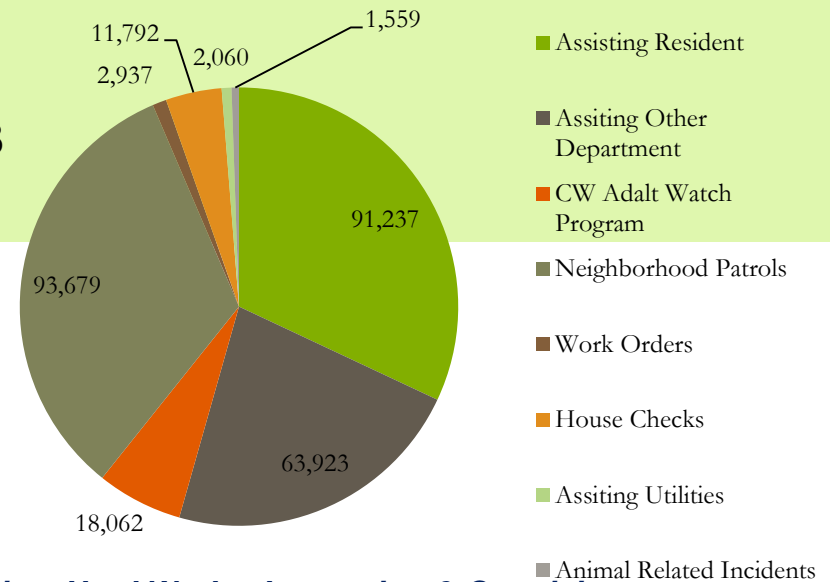
The dedicated and trained staff of Community Watch keeps a “watchful eye” on The Villages community 24 hours a day, 7 days a week, 365 days a year.

- 24 hour Communications Center
- Gate operations personnel who monitor cameras located throughout the District
- Gate attendants at our 23 staffed gate houses
- Patrol drivers patrolling our neighborhoods

Updates for 2019

- Implementation of a new data reporting program “Emergency Reporting” (ER)
- Dispatchers went to 12-hour shifts
- 13 Patrol Zones within the District
- CW Drivers patrolled 1,133,367 miles in 2018

Community Watch handled over 285,000 phone calls and resident interactions in 2018.



Community Watch Security Service Actions 01/01/2018 to 12/31/2018

• Assisting Residents	91,237
• Assisting other District Departments	63,923
• Community Watch Adult Watch Program	18,062
• Neighborhood Patrols – 81 Neighborhoods	93, 679
• Animal Related Incidents	1,559
• Repair Work Orders	2,937
• Utility Problems – Discovered and Reported	2,060
• House Check Program	11,792

Total Incidents 285,249

Looking Forward 2019 / 2020

Re-examining Service Delivery Model

- Facility Maintenance / Janitorial Service
- Review Recruitment and Retention
- Review of Purchasing Practices
- Environmental Initiatives
- Customer Service Delivery Model



Be Sure to sign-up for E-Notification, E-Billing and Resident Academy at Districtgov.org.

The next Resident Academy Class is April 29, 2019, at Rohan Recreational Facility.

The next Workshop scheduled for early 2020, will feature Florida Friendly Landscaping.