

A large, stylized graphic in the background features a yellow sun with white rays on the left, a green leaf with a white vein on the right, and a teal wave-like shape at the bottom. The text is overlaid on this graphic.

Budget Workshop 2023/24 – 2024/25

June 20, 2023



CHARLOTTE COUNTY
FLORIDA

Agenda

- Financial Trends for Efficient & Effective Government
- Efficient & Effective Government Goals
 - Culture (Great place to work)
 - Line of Sight
 - Continuous Improvement
 - Resiliency

A large, stylized graphic in the background features a yellow sun with rays and a green leaf, both with white outlines, set against a light green and blue wash.

Efficient & Effective Government

To manage fiscally sound county operations with a culture of transparency, accountability, citizen engagement and innovation.



CHARLOTTE COUNTY
FLORIDA

A large, stylized graphic in the background features a yellow sun with rays on the left, a green leaf on the right, and a light blue wave-like shape at the bottom. The text "Financial Trends" is centered over the sun.

Financial Trends



Efficient & Effective Government

Budget & Admin. Services

Fiscal

Information Technology

Real Estate

Purchasing

Records Management

Fleet

Risk Management

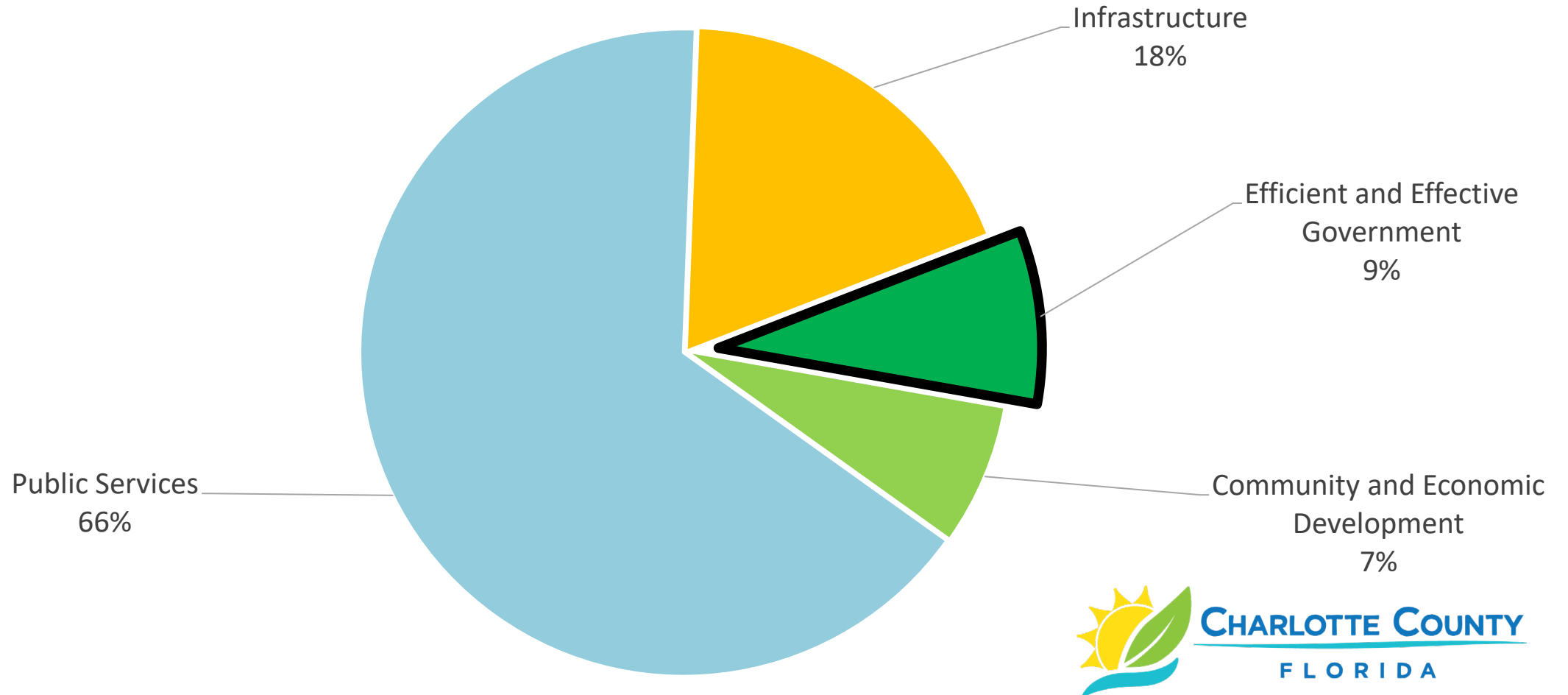
Administration

County Attorney

Human Resources

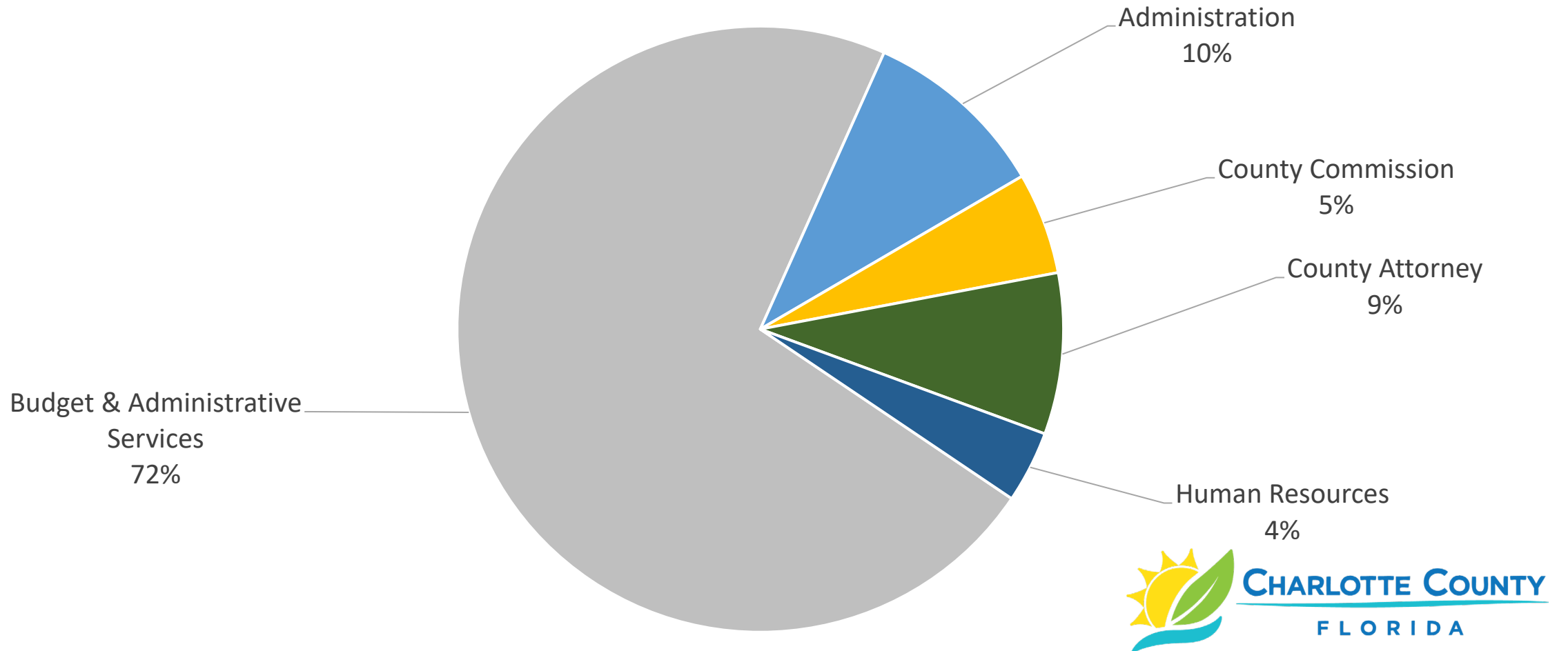
Where does the money go?

Strategic Focus Area – Proportional Expenditures



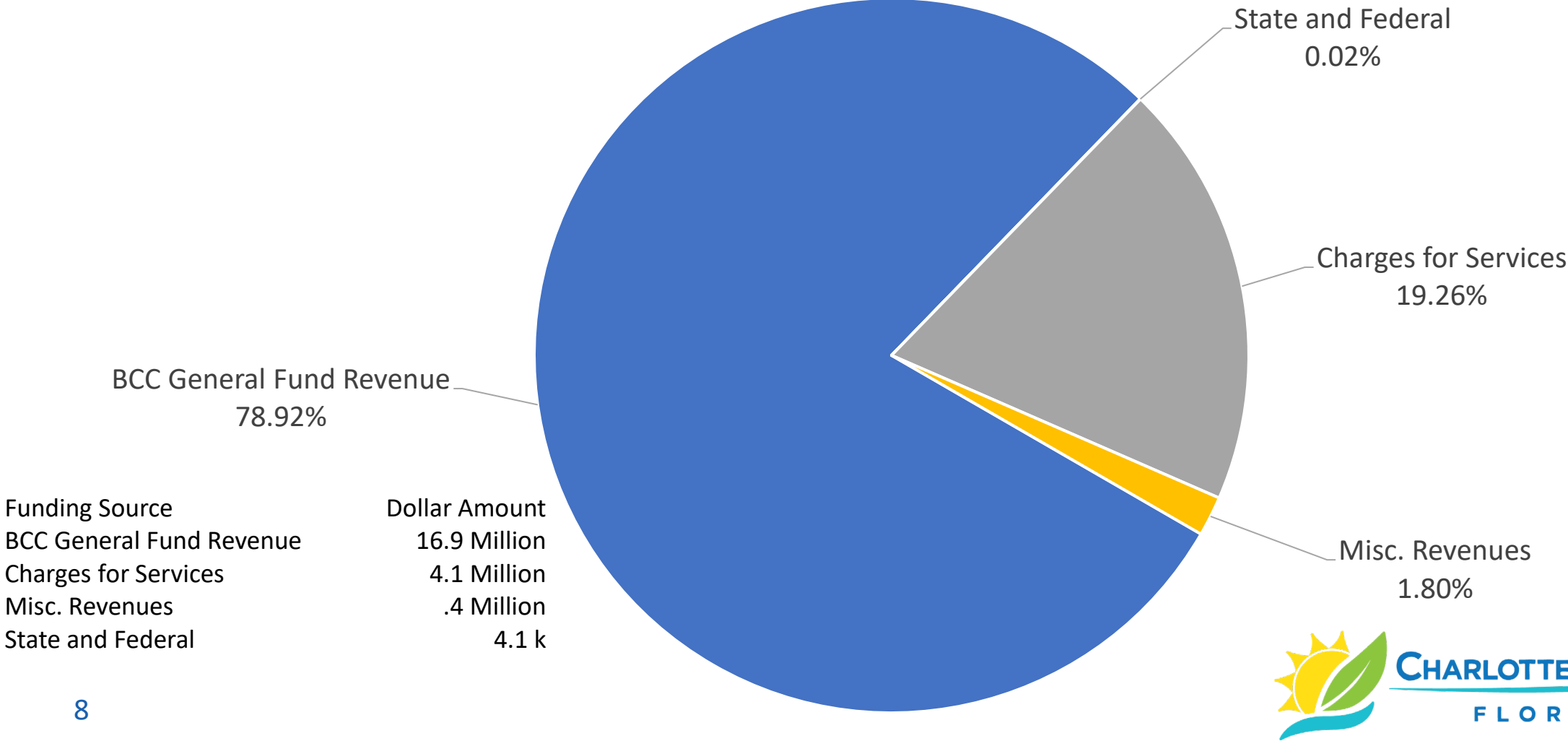
Where does the money go?

Efficient & Effective Government Proportional to All Expenditures



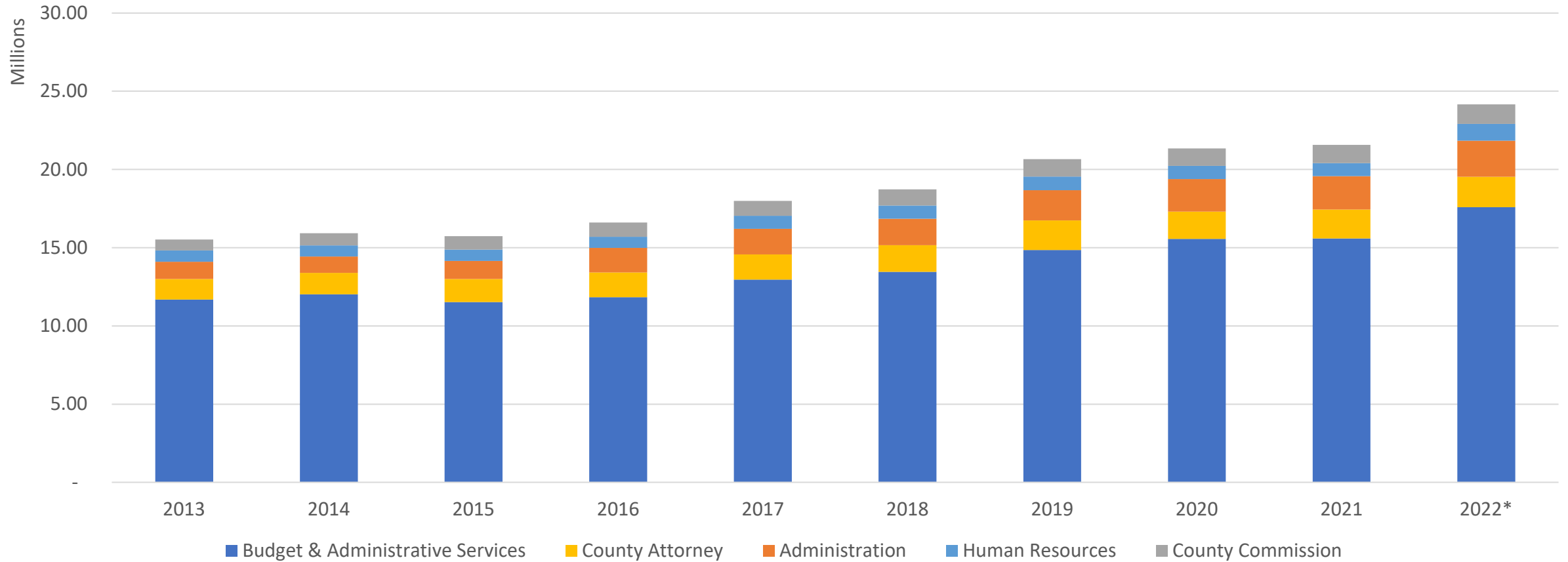
Where does the money come from?

Efficient & Effective Government Revenue Sources



Historical Trend

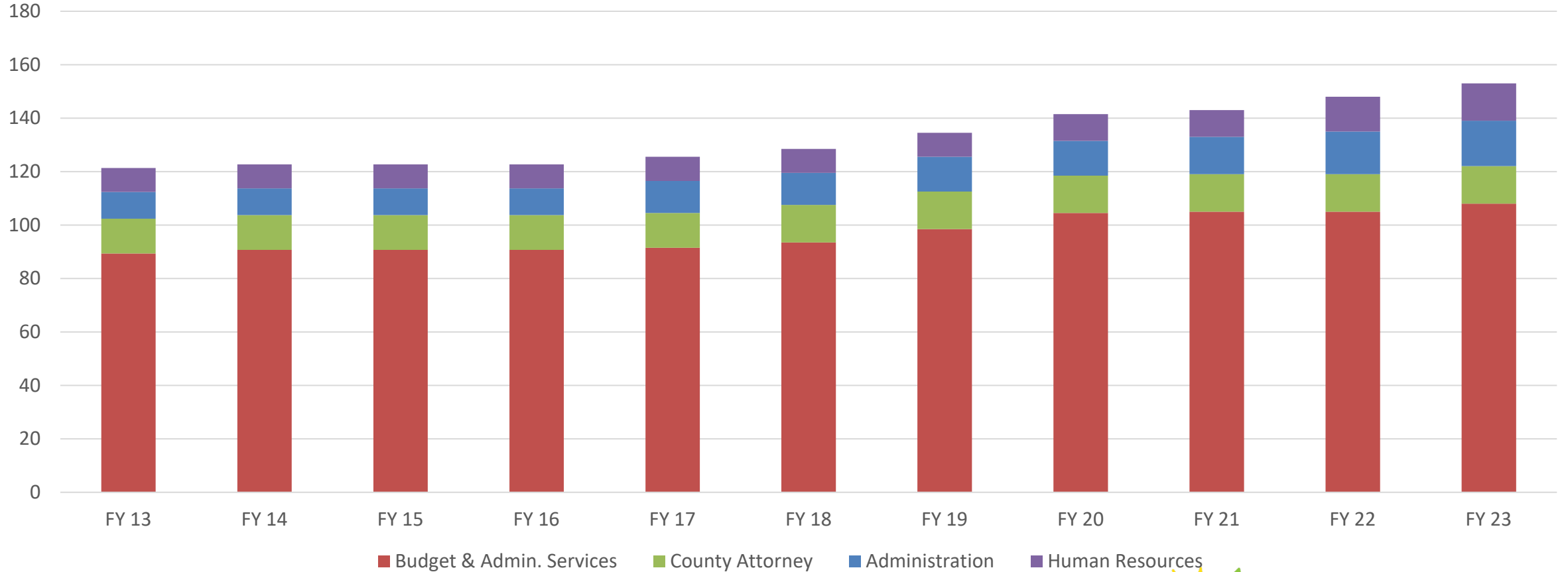
Total Expenditures by Department



*Unaudited

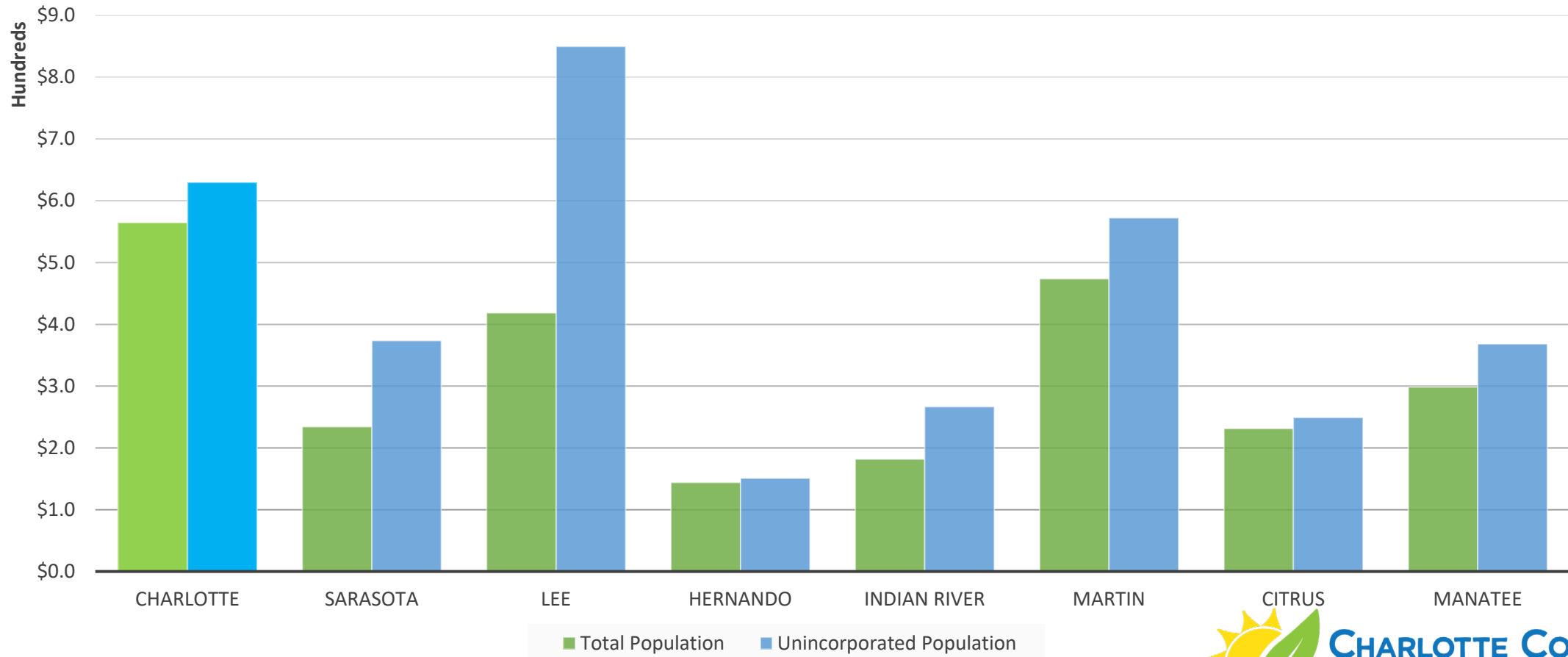
Historical Trend

Total FTE by Department



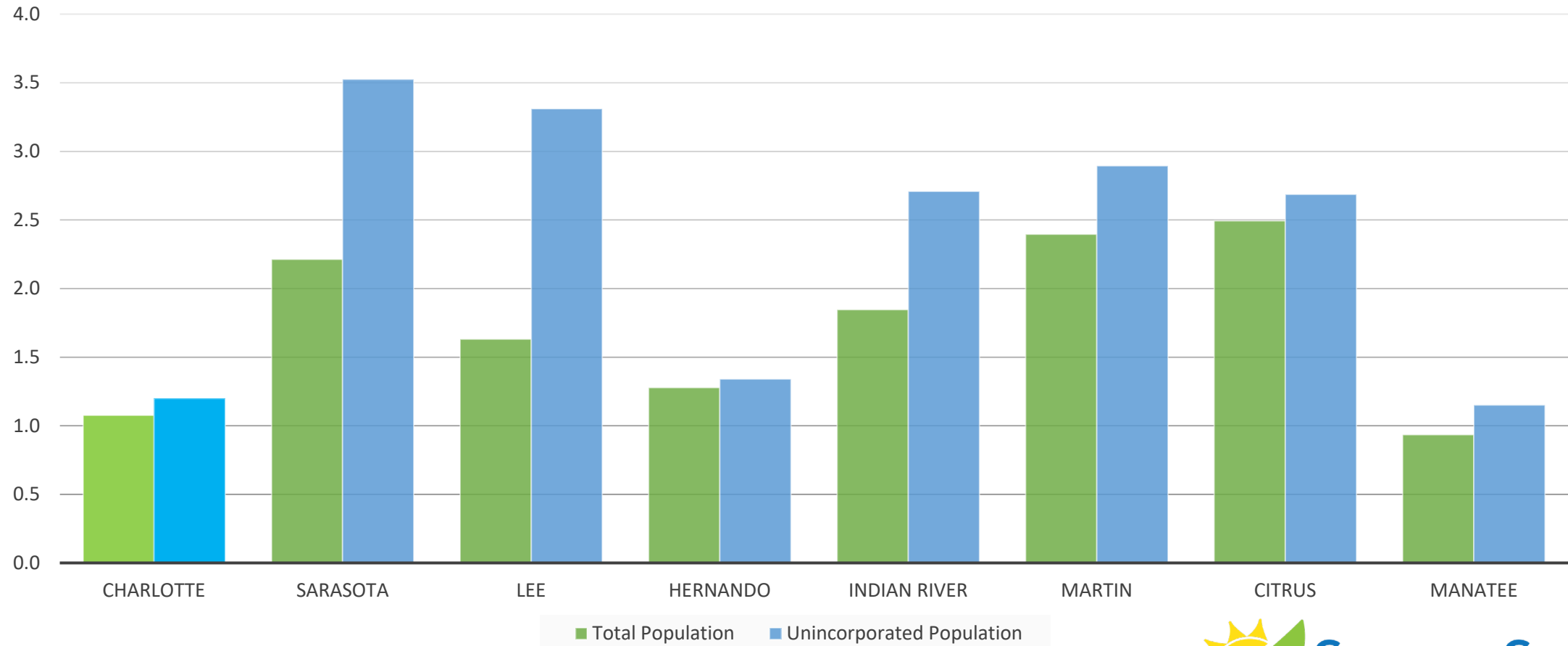
County Comparison

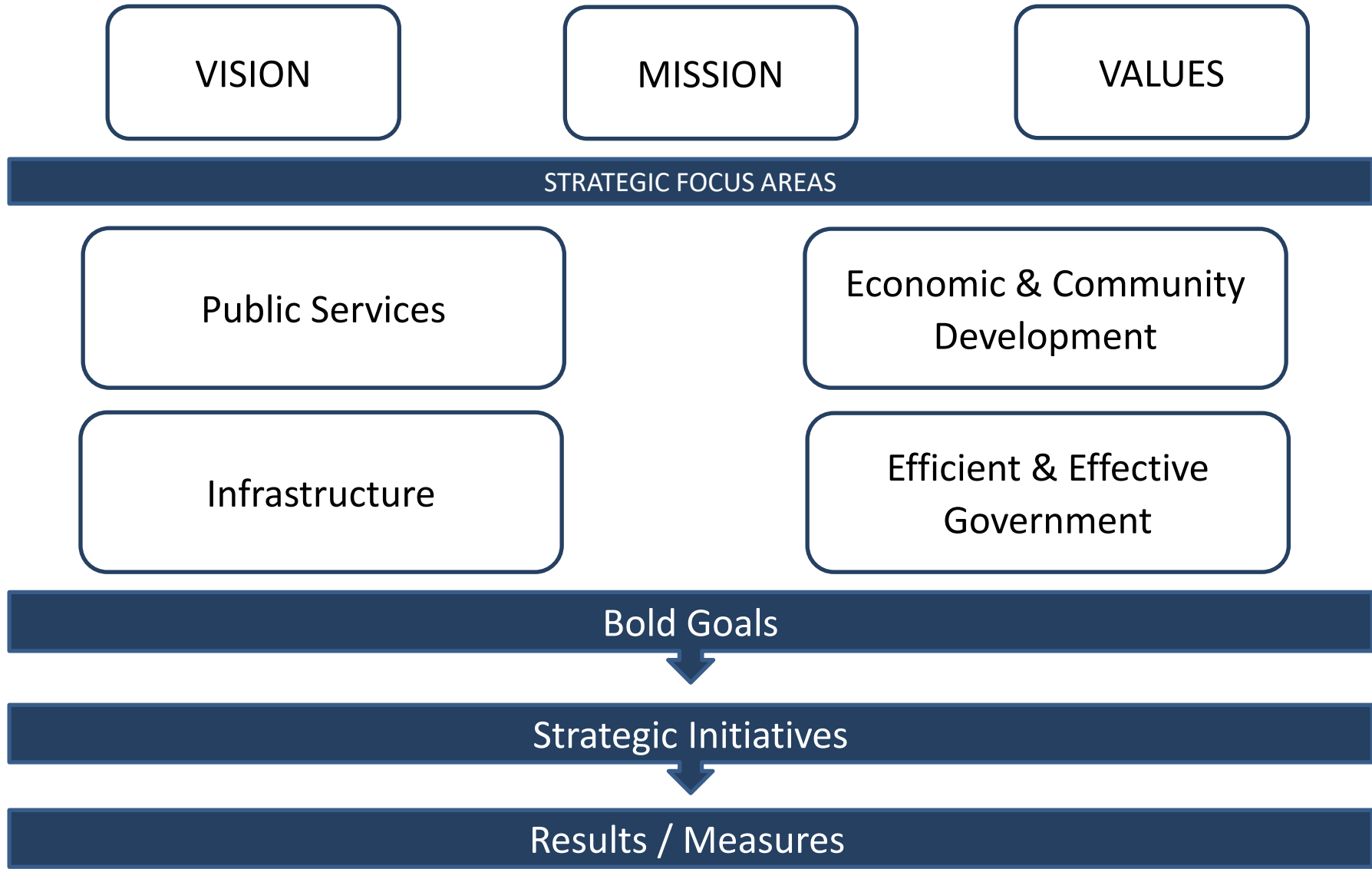
\$ Spent Per Capita on General Government



County Comparison

FTE Per 1,000 for General Government





Efficient & Effective Government

Revised Goals

- Ensure Culture as “Great Place to Work”
- Line of Sight
- Ensure Culture of continuous improvement
- Strengthening the resiliency of the organization and community

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“Great Place to Work”



CHARLOTTE COUNTY
FLORIDA

MISSION

Delivering Exceptional Service

VISION

**To preserve and enrich our
community's quality of life
for those who live, work and play
in our paradise.**

VALUES

**Charlotte CARES
Committed
Accountable
Resourceful
Energetic
Supportive**



Great Place to Work

- Employee Recognition
- Employee Appreciation
- Education and investment in employee's future
- Culture of belonging
- Flexible benefits aimed at meeting the needs of a varied workforce



Employee Recognition

Employee Appreciation



A stylized graphic featuring a yellow sun with rays on the left, a large green leaf on the right, and a light blue curved shape at the bottom. The text "Line of Sight" is centered over the sun and leaf.

Line of Sight



Increasing Line of Sight

Line of sight means that employees can see the connection between their goals and the organization's goals. The benefits are many – to ensure that employee's best efforts are helping achieve the organization's goals, as well as to help them know that the work they're doing matters.

Increasing Line of Sight

- Orientation
- Line of Sight Boards
- Educational programs
- Teambuilders and focus on departmental culture
- Consistent messaging

Ann and Chuck Dever Regional Park Pool

CHARLOTTE COUNTY FLORIDA

LINE OF SIGHT

See the connection between the work you do and the county's goals! With a dry erase marker, write your name and what you are doing - a project, single task, accomplishment - in the matching focus area below.

STRATEGIC PLAN

PUBLIC SERVICES
To maintain a safe and healthy community by delivering essential services from skilled, professional and dedicated public servants.
BOLD GOALS:
Define levels of maintenance by 2024
Optimize organization based on Levels of Service

*Mia Butsch - Keeping people safe in the pool!
Sean Taylor - Keeping trash out of the parking lot to maintain a safe environment
Sya - Communicate pool rules efficiently
Alaina Mast - Keeping patrons safe and preventing accidents
Nicholas Fisk - Teaching little ones to swim while living in our beach state
Wick Hays - Taking care of the pool for Patron Safety*

INFRASTRUCTURE
To build and maintain countywide infrastructure that meets our evolving needs and enhances our community appearance, improves public safety and protects our natural resources.
BOLD GOALS:
Fund & complete Capital Needs Assessment through 2025
Define and maintain balance between capital and operating budgets

*Sean Taylor - Maintaining the county facility to cultivate a community image and atmosphere
Alaina Mast - Clearing the deck to provide a safe and clean environment*

ECONOMIC & COMMUNITY DEVELOPMENT
To create a business climate that promotes a diversified, growing economy consistent with sustainable growth management plans, environmental stewardship and enhanced quality of life.
BOLD GOALS:
Add 200 affordable housing units per year
Increase internships to 20 students
Implement One Charlotte, One Water plan

*Mia Butsch - Teaching water aerobics + water polo - Sarah...
Sean Taylor - Keeping the public aware of youth pool and county through word of mouth
Sya - Help people stay active by suggesting the use of the rec facility & water aerobics exercises
Alaina Mast - Teaching water aerobics
Wick Hays - doing swim lessons & water aerobics
Alaina Mast - getting people up to speed with water aerobics
Nicholas Fisk - providing excellent customer service!*

EFFICIENT & EFFECTIVE GOVERNMENT
To manage facility sound county operations with a culture of transparency, accountability, citizen engagement and innovation.
BOLD GOALS:
Ensure culture as a "Great Place to Work"
Ensure culture of continuous improvement
Increase line of sight
Strengthen resiliency of the organization and community

*Sean Taylor - customer service (four days)
Sean Taylor - speak with patrons to help or assist in daily tasks while giving feedback on facility and facility actions or activities
Alaina Mast - providing customer service at the boat dock
Nicholas Fisk - Always trying to give the county by being others of the opportunities available here*

CONNECTING GOALS & ACHIEVEMENTS WITH THE STRATEGIC PLAN FOCUS AREAS AND BOLD GOALS

CHARLOTTE COUNTY FLORIDA

FY2023 & 2024

Increasing Line of Sight



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Continuous Improvement



Continuous Improvement

- Encourage innovation and out of the box thinking
- Develop a desire to always want to do better
- Research and seek out best practices and new technology
- 38 NACo Achievement Awards
- Top 10 in the Digital Counties Survey for communities of our size



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Strengthening the resiliency of the organization and community



Resiliency

The ability of an organization to absorb and adapt to a rapidly changing environment. (To enable it to deliver its objective and to survive and prosper)

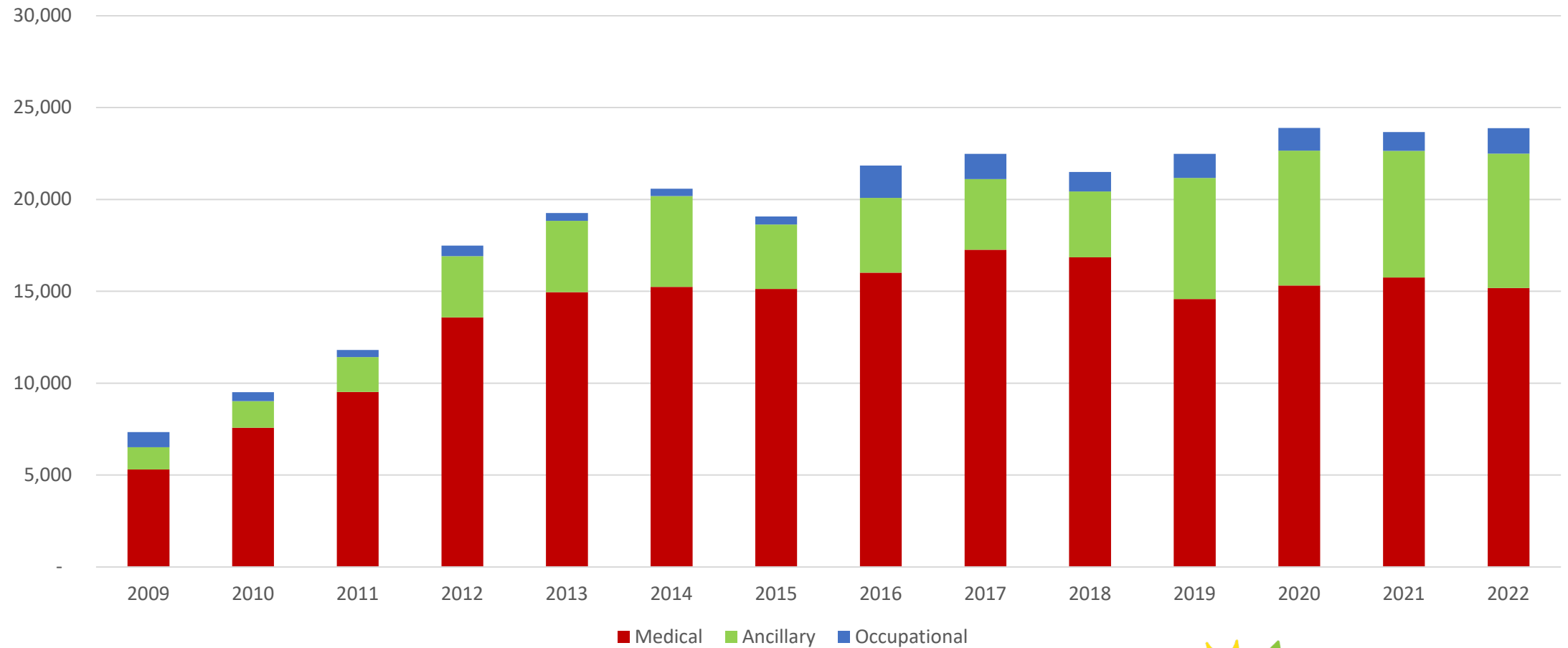
- Emphasis on strategic planning and implementing those plans
- Fiscal stabilization
- Optimizing the organization
- Definition of levels of service/maintenance
- Agile leadership and workforce – ability to quickly adapt
- Leaders in resiliency to changing climate threats
- Make tough decisions to mitigate future risks
- Supporting the wellbeing and development of our workforce

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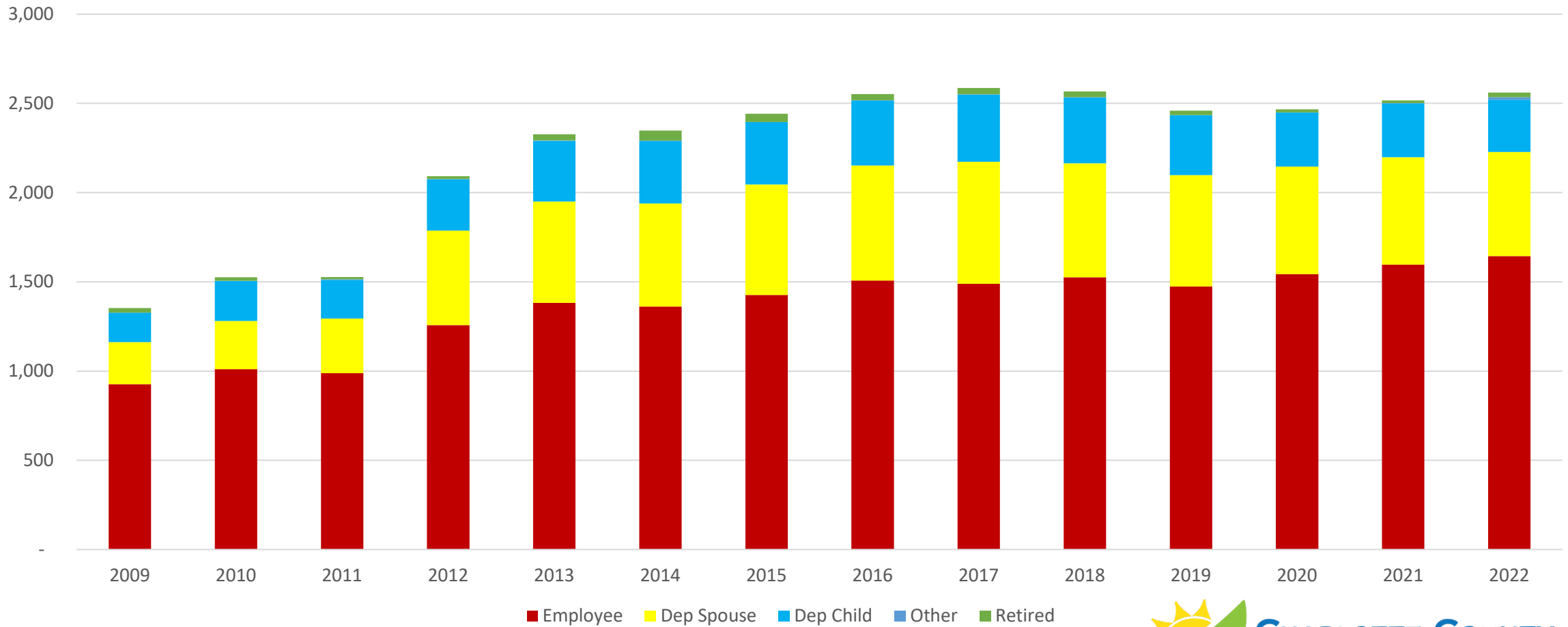
Employee Health Center



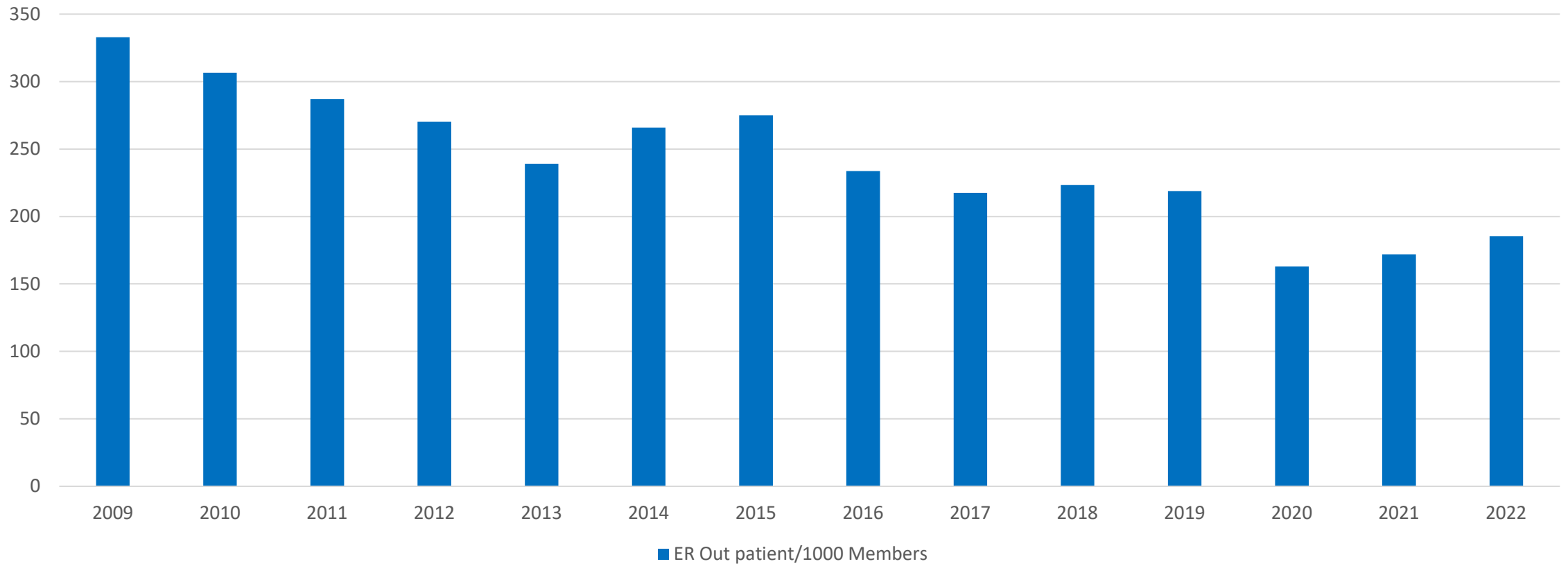
Appointment Breakdown Trend



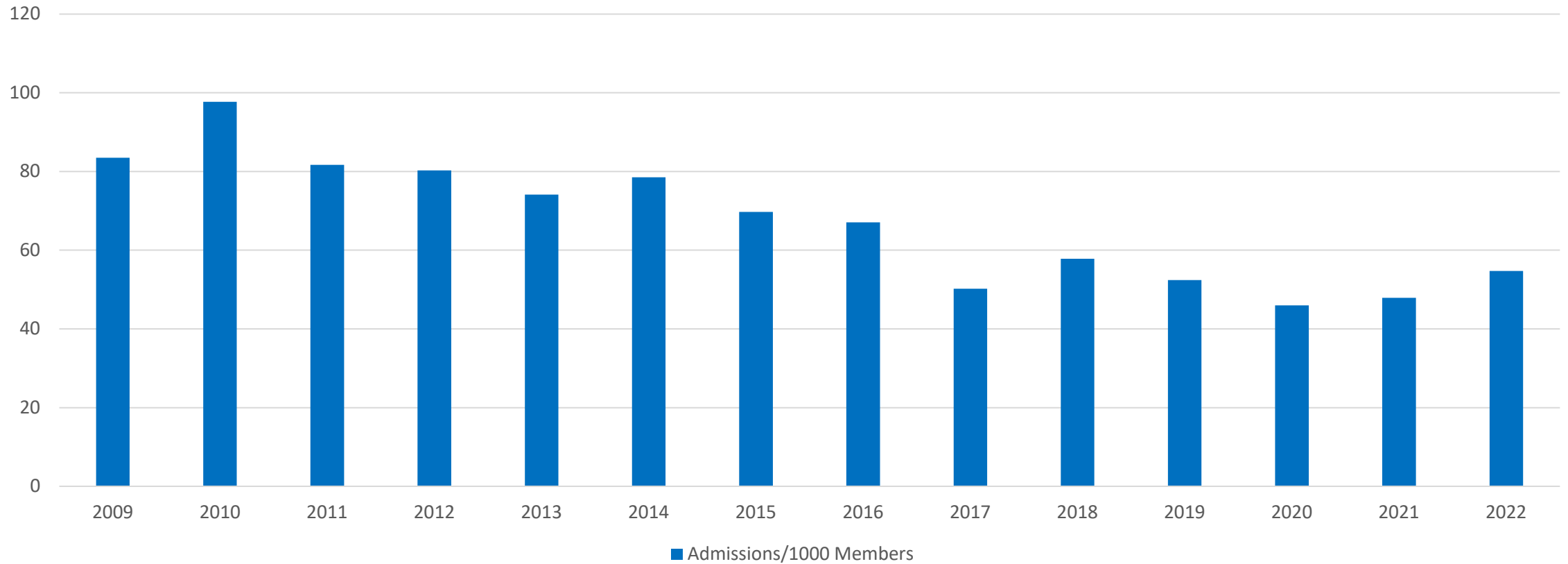
Unique Patient Participation



Health Plan ER Visits

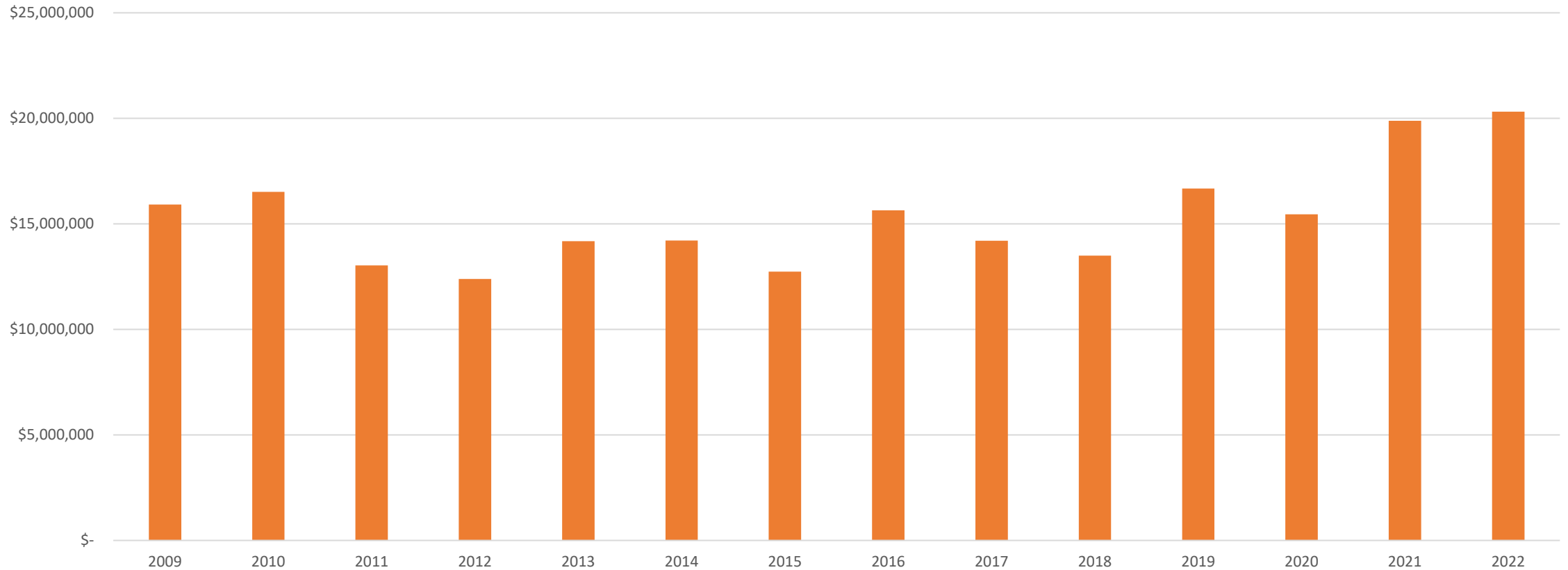


Patient Admissions



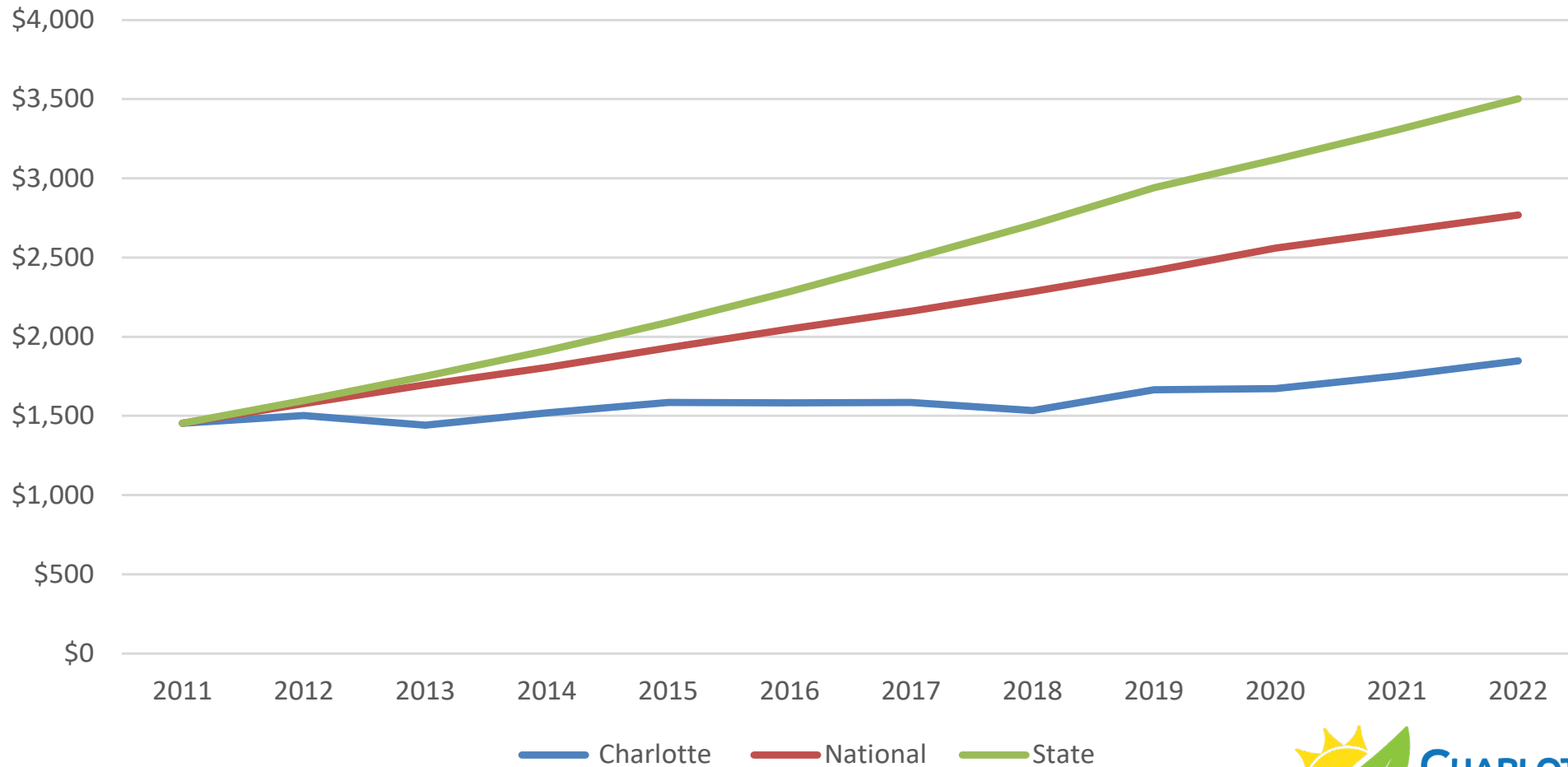
Health Plan Gross Medical Costs

Medical Claims

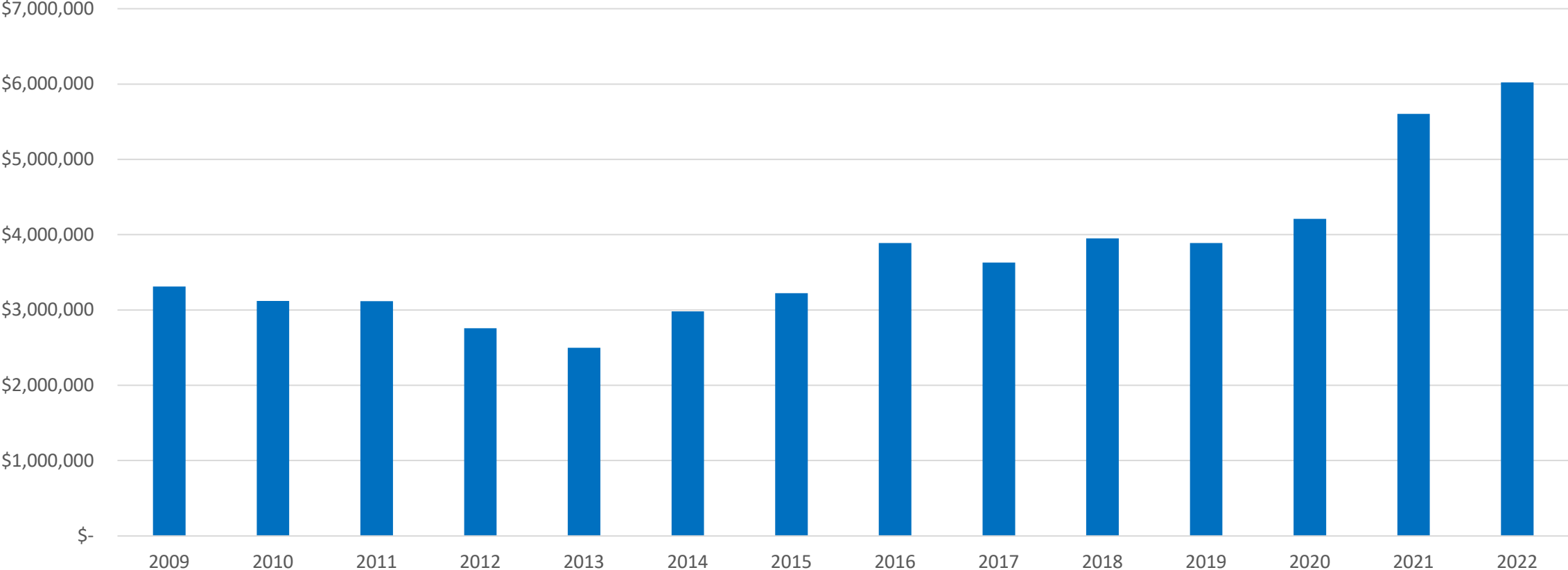


Projected Savings

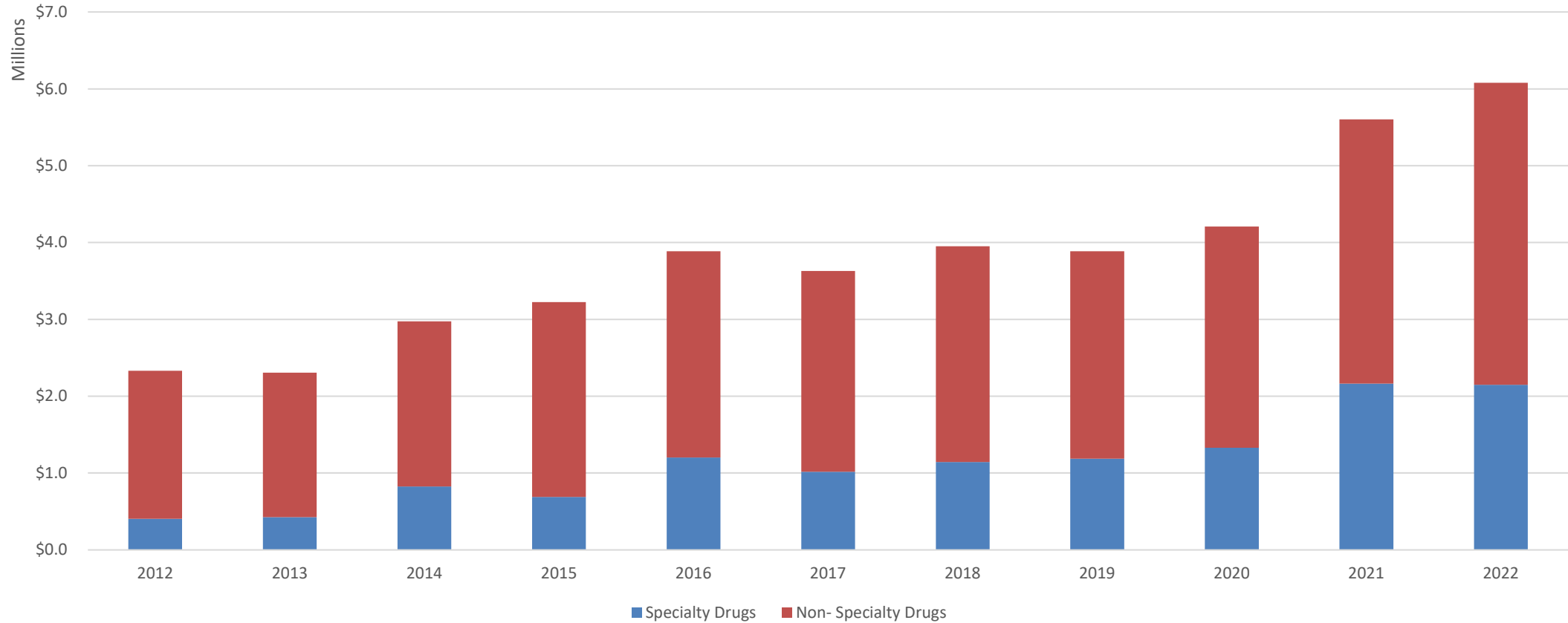
Cost per employee per month



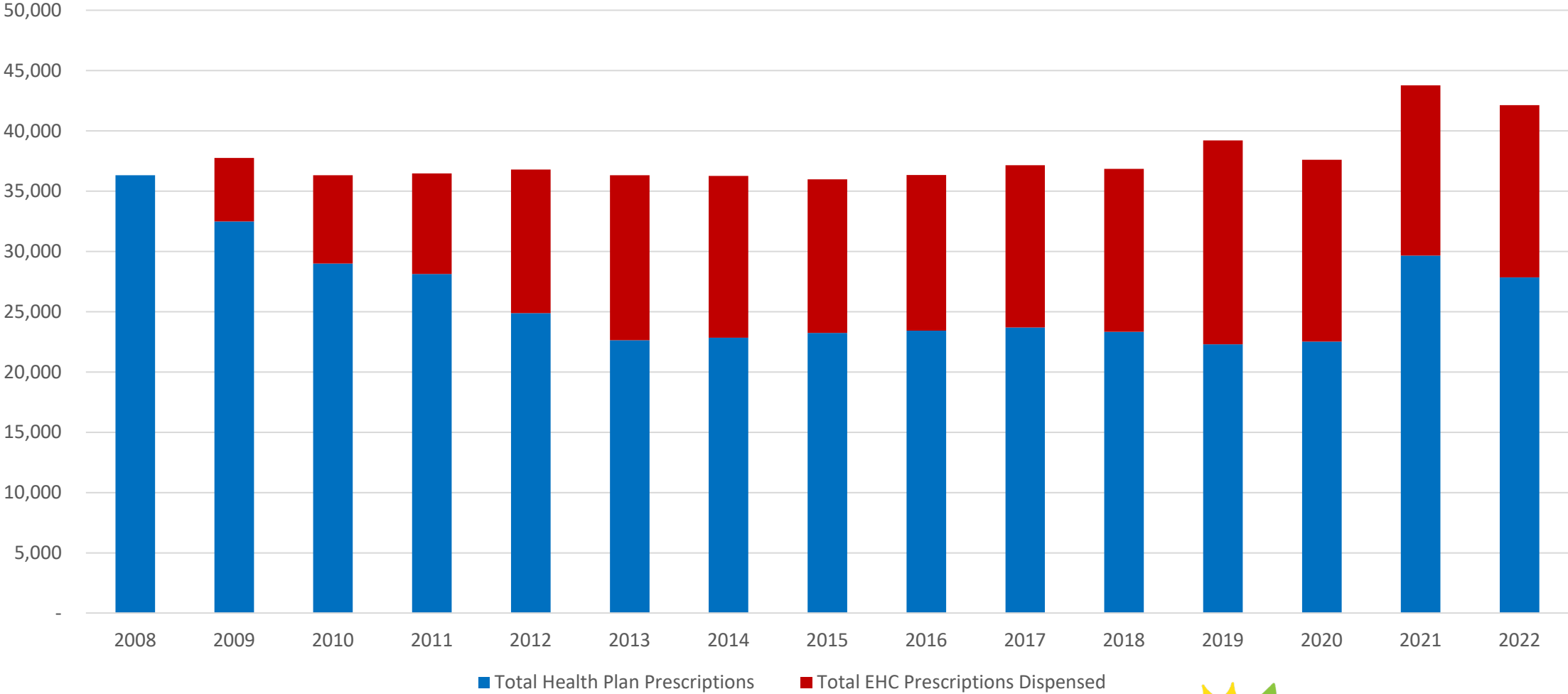
Health Plan Employer Paid Rx Costs



Specialty Drugs



Rx Utilization Trends



On-site Pharmacy

- Currently operating as a dispensary with the physician serving as the dispenser.
- Migrating to function as a “closed pharmacy” governed by the Board of Pharmacy which separates the roles of prescribing and dispensing
- “Soft opening” - Summer 2023

On-site Pharmacy

- Expanded formulary – both generic and specialty drugs
- Intake process for electronic prescriptions to include those sent from outside providers
- Cost savings to County as usage shifted from Cigna to Health Center
- Cost savings to employees as more Rx available
- Cost savings in reduced provider time

On-site Pharmacy



On-site Pharmacy



On-site Pharmacy



On-site Pharmacy

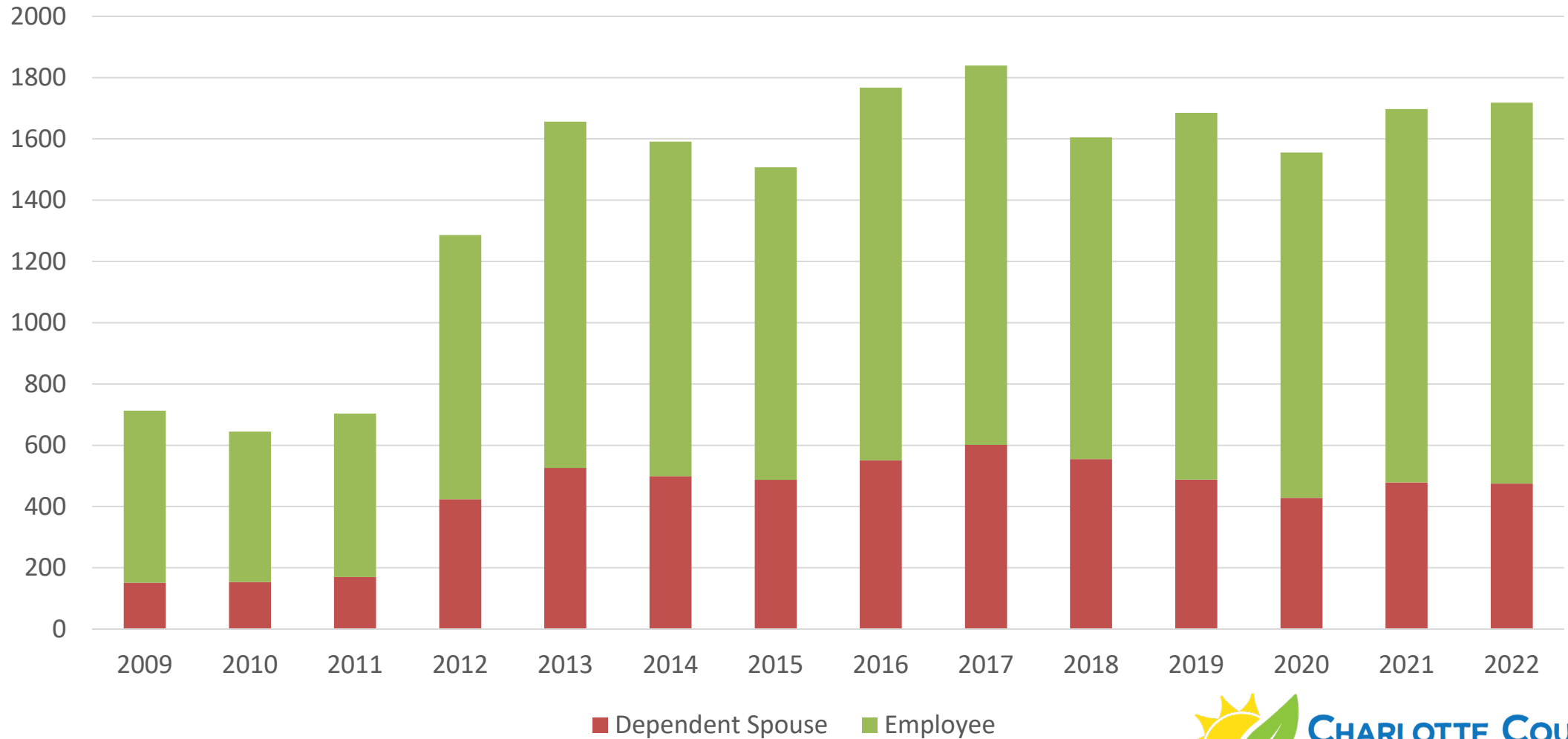


A large, stylized graphic in the background features a yellow sun with rays on the left, a light green leaf on the right, and a light blue curved shape at the bottom. The text "Wellness @ Work" is centered over the sun.

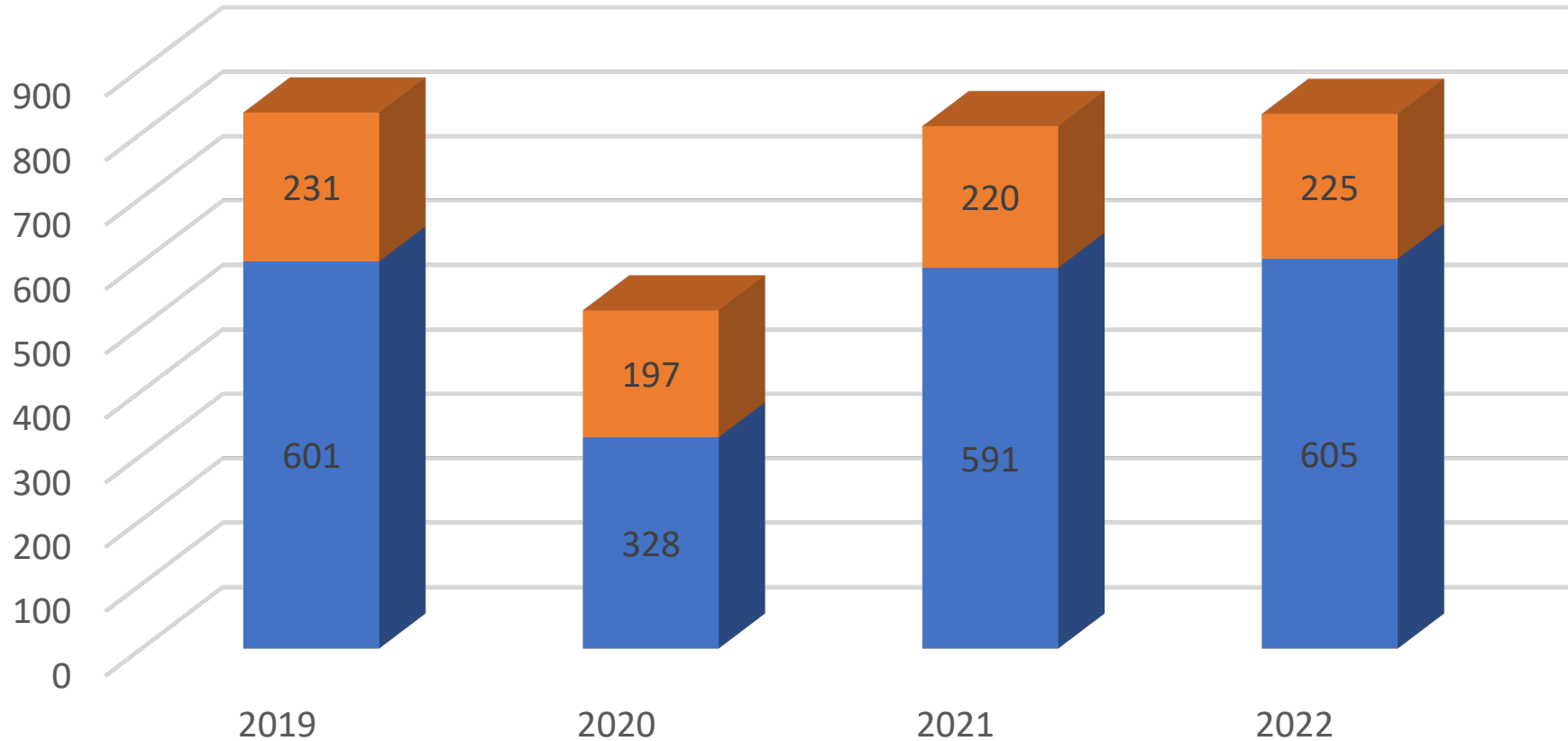
Wellness @ Work



VHP Participation Trend

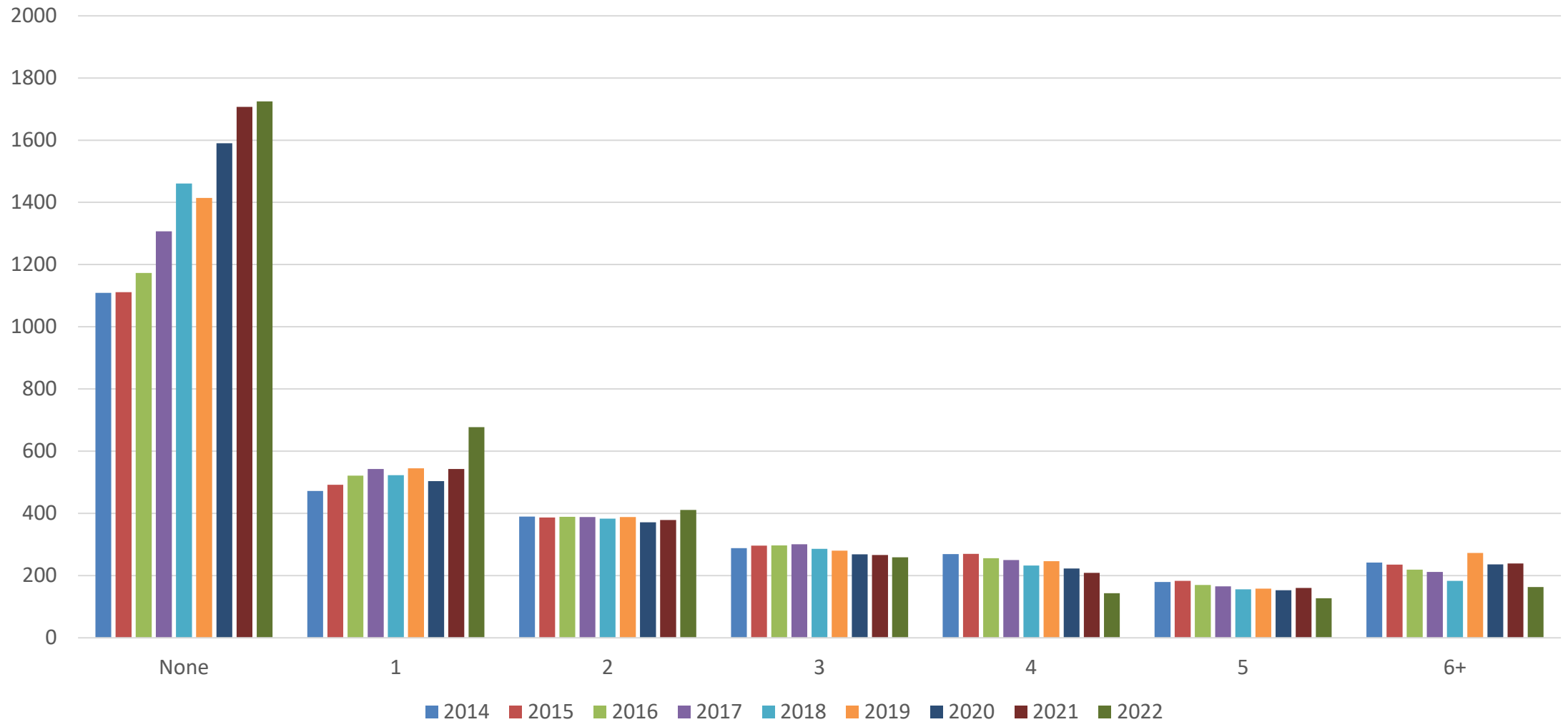


Met BMI or Height to Waist



Movement by Number of Risk Factors

Number of Chronic Diagnosis/Conditions Per Member



Mental Health Services

- Dramatic Impacts
 - COVID
 - Inflation
 - Hurricane Ian
- Mental Health Task Force

Recommendations

People			Accountability
Leaders understand, visibly support, and normalize mental health.	Managers are proactive in supporting mental health and know how to respond to challenges.	All employees are aware of the mental health supports available.	<p>Mental health goals are measured, tracked, and iterated on to meet the needs of the organization.</p> <p>Clear ownership over mental health strategy and goals.</p> <p>Strategy, programs, and practices are inclusive.</p>
Daily practices and working norms are supportive of mental health.			
Systems	Policies name mental health and support mental health goals		
	Benefits are high-quality, well-understood, and accessible.		

Recommendations

- Provide Mental Health Professional at the Employee Health Center
- Provide Manager Trainings in Mental Health
- Create a Mental Health Employee Resource Group

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Munis Transition



Enterprise Resource Planning (ERP) System

Current System

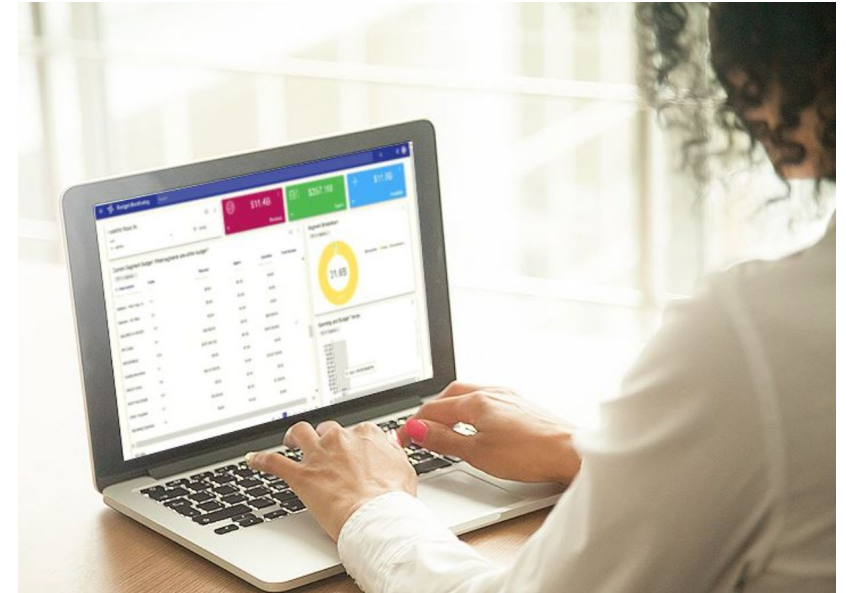
- Tyler Eden
- Owned by The Clerk of the Court
- Implemented in 2004
- Software at end of life



Enterprise Resource Planning (ERP) System

New System

- Tyler Munis
 - Core Functions
 - Financials
 - Procurement
 - Human Resources
 - Payroll
 - Streamline Business Processes
 - Enhance Workflow
 - Web-based Access
 - Improved Transparency & Reporting



Project Status

Completed

- Project Consultant on board
 - Plante Moran
- Data Collection
- Project Consultant Interviewing
 - Process Owners
 - Department Directors & End Users
- Process Mapping
- Tyler Contract Executed
- Implementation Started
- Financial Modules
 - Solution Orientation
 - Current/Future State Analysis

Currently Underway

- Steering Committee Meetings
 - Clerk, BCC Staff & Consultants
- Purchasing/Human Capital Modules
 - Underway as of January 2023
 - Solution Orientation
 - Current/Future State Analysis
- Financial Modules
 - Process Refinement
 - Workflow Mapping



plante moran



Project Status



Next Steps

- Identify Key Integrations
 - CityWorks, Accela, Banner, GIS, Microsoft BI
- Finalize Modules Configuration
- Finalize System Workflows
- User Testing/Training

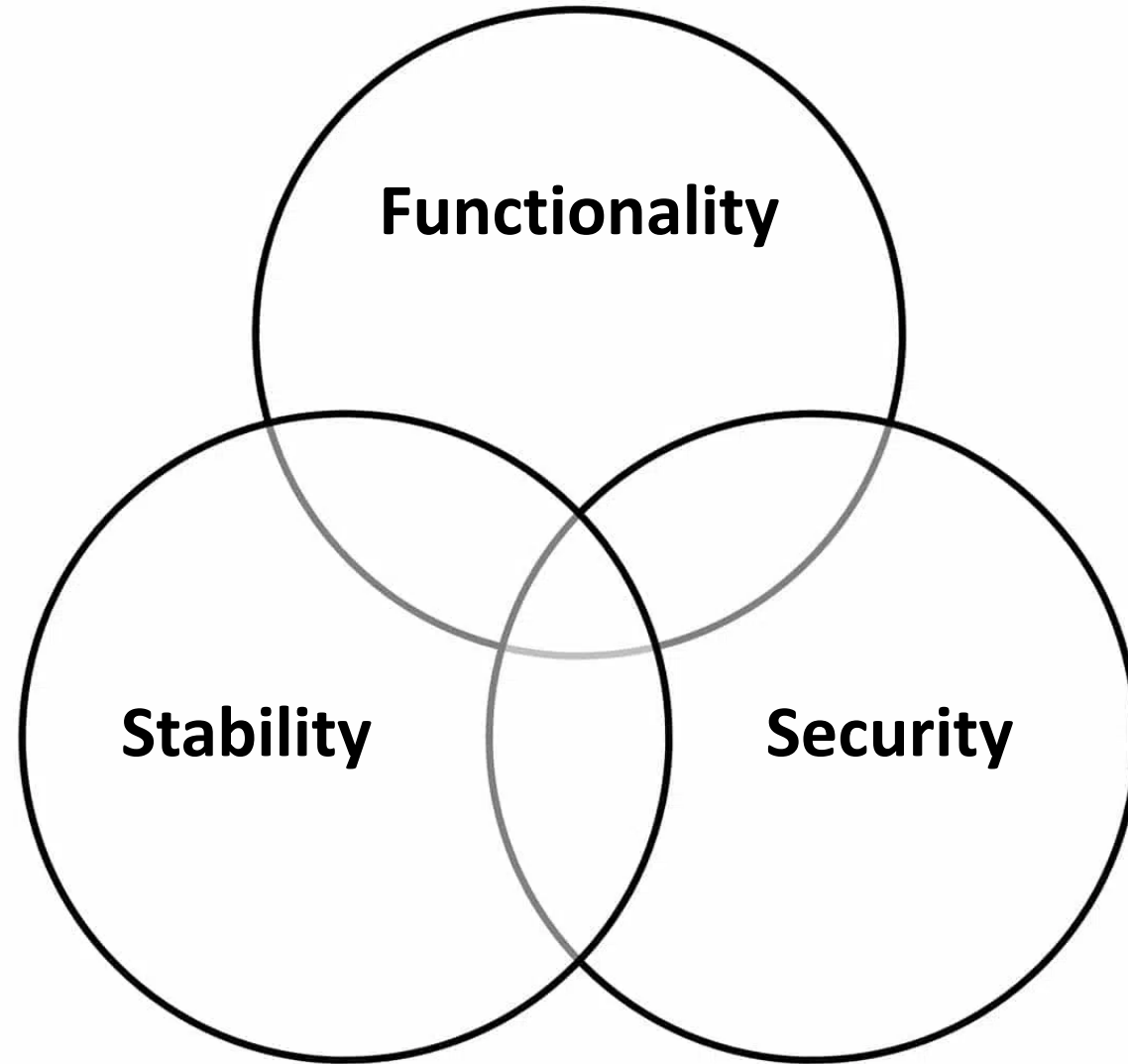
Go Live

- Financials – April 2024
- Human Capital – June 2024

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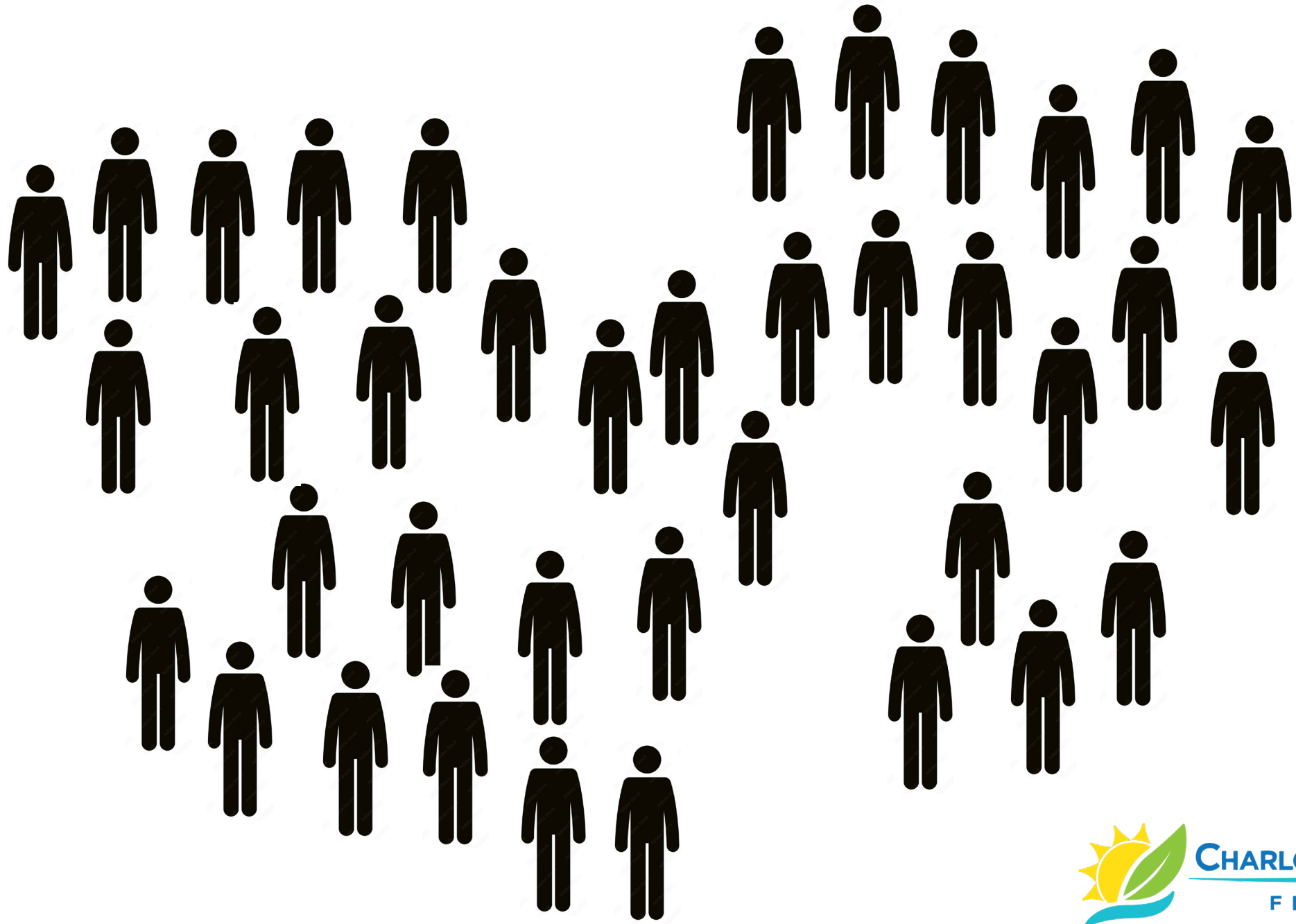
Information Technology

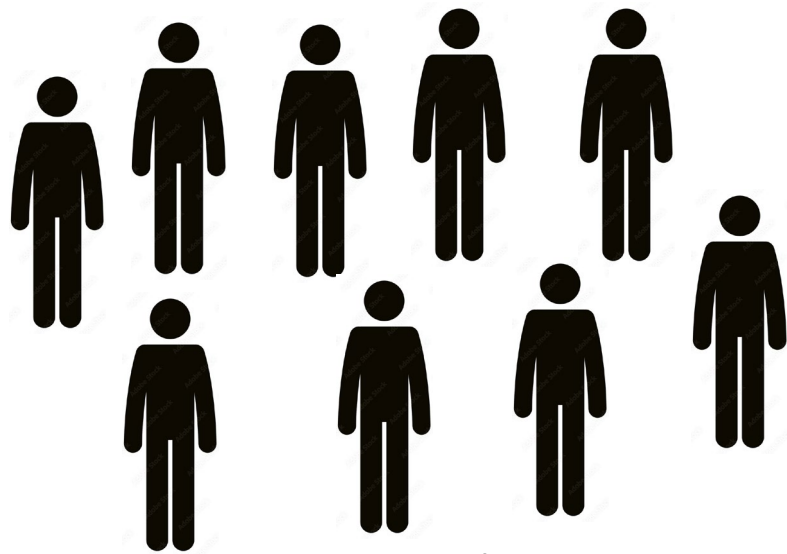




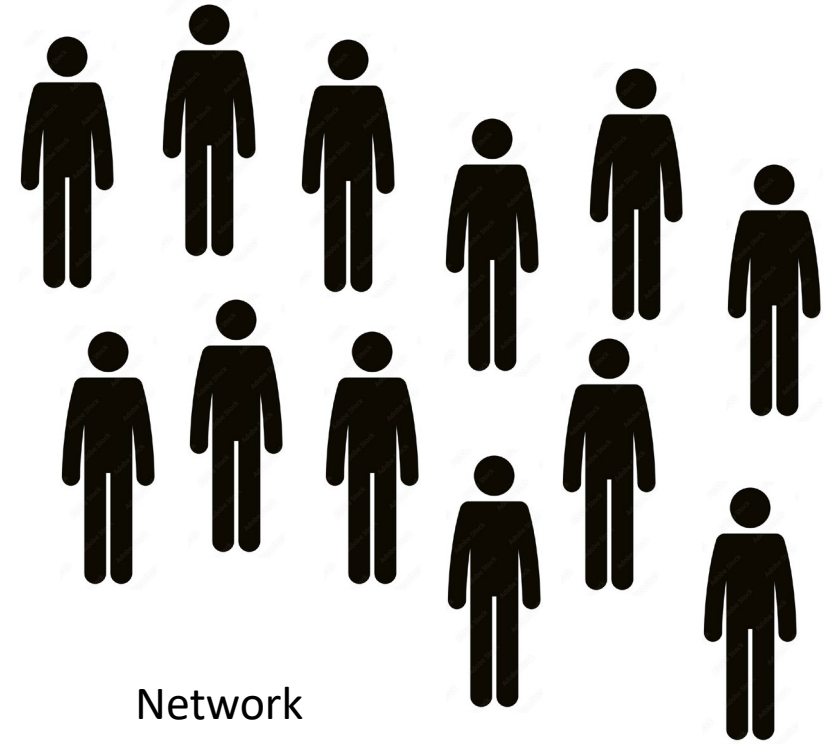
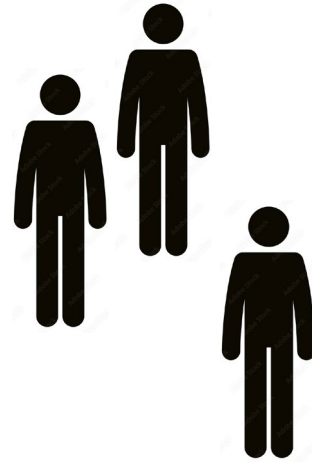
A Changing Picture

	2010	2022
Applications	202	129
Virtual Servers	178	400+
Infrastructure Gear (switches, Firewalls, Wireless Access Points and routers)	307	857
IP Phone System (Callmanagers, Call Center, Voicemail and Emergency Responder)	9	16
Tablets	0	373
Smart Phones	25	405
Desktops	1011	434
Laptops	337	1009
Storage	65 TB	215 TB
Integrations	0	159

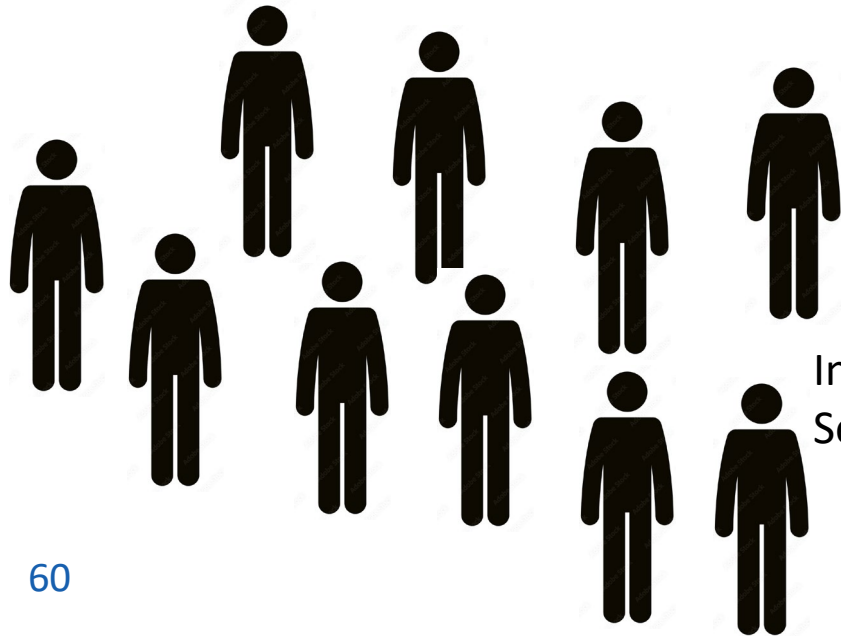




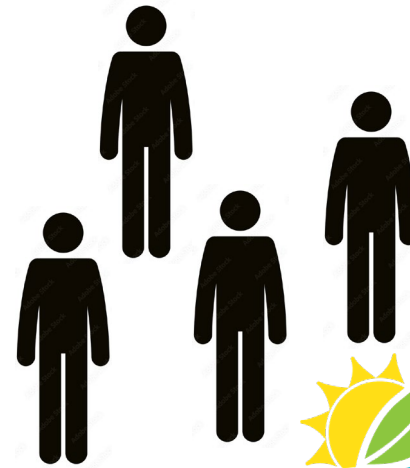
Client Services



Network

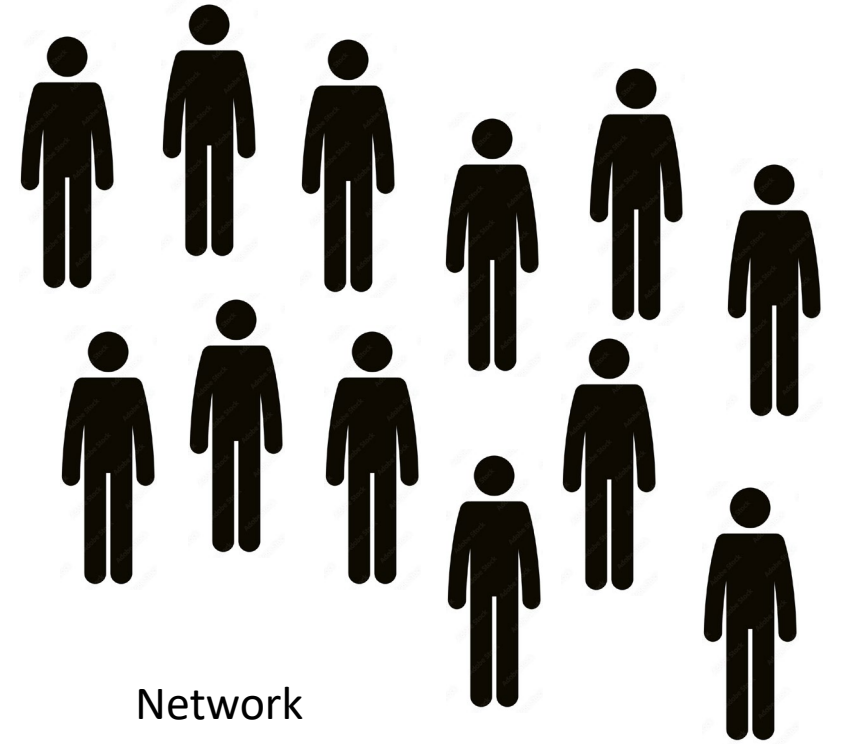


Information Services



GIS

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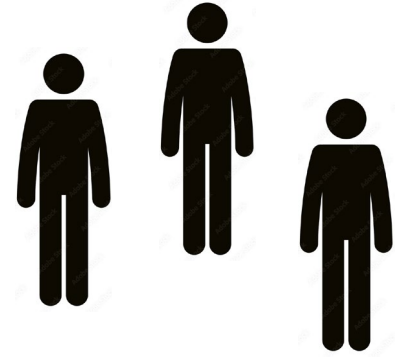




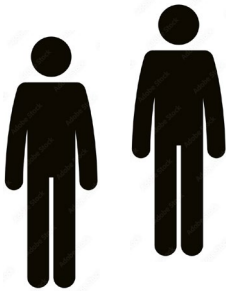
SCADA



Storage & Servers



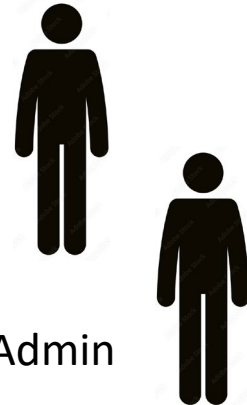
Cyber Security



Telecom



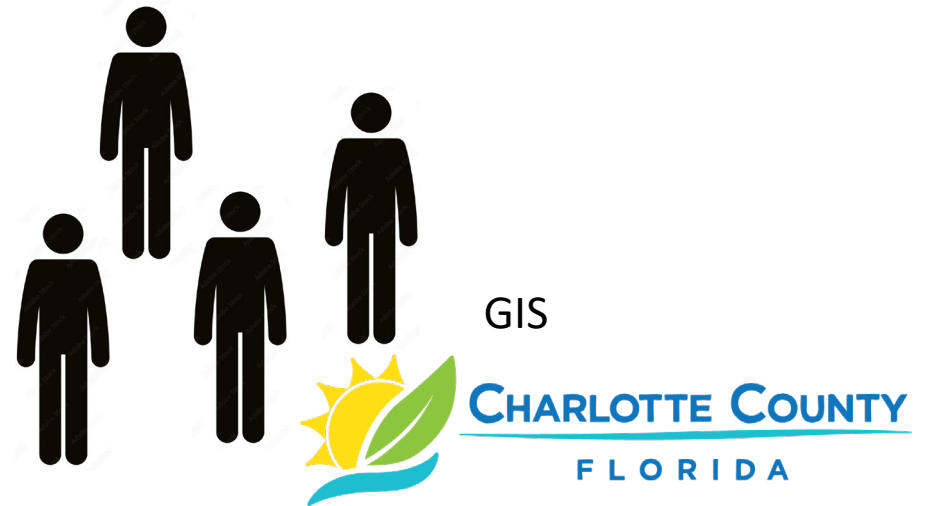
Microsoft Admin



Network Admin

Constitutional Support

- Network Transport (Intra-County): BCC, PAO, TC, SoE, CCSO, Clerk
- Data Route/Switch/Wireless: BCC, PAO, TC, SoE, CCSO
- Internet Service: BCC, PAO, TC, SoE
- Voice over IP (Desk and Public area phones): BCC, PAO, TC, SoE, Clerk, CCSO, Justice Center
- Microsoft 365 (Email, Teams, OneDrive, Office): BCC, PAO, TC, SoE
- Server/Storage Infrastructure: BCC, PAO, SoE, CCSO (physically separate)
- CyberSecurity
 - Firewalls, Network Monitor/Response: BCC, PAO, TC, SoE, CCSO
 - Training/Anti-Phish Campaigns: BCC, PAO, TC
 - Endpoint Protection and Response: BCC, PAO, TC, SoE

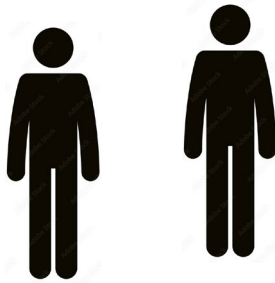




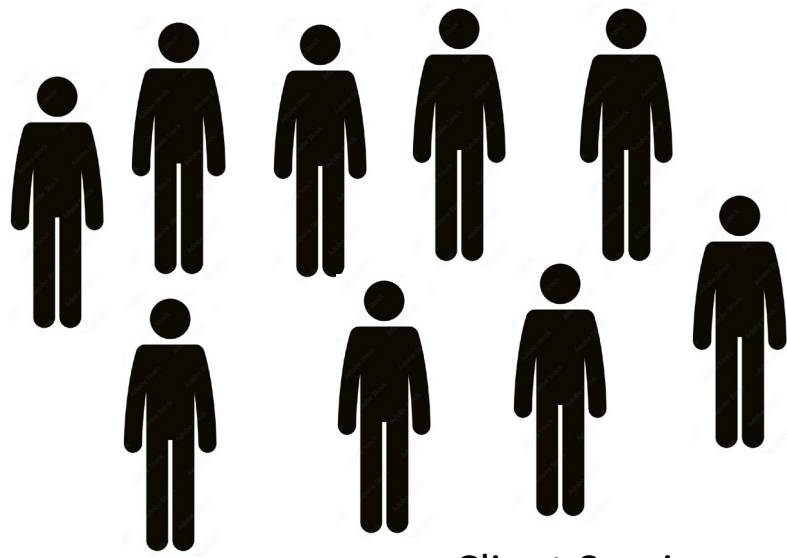
Cityworks



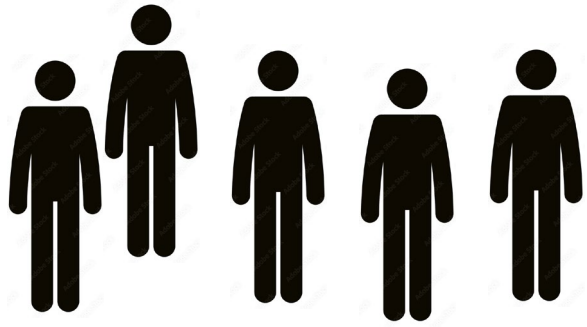
Plats / Developments



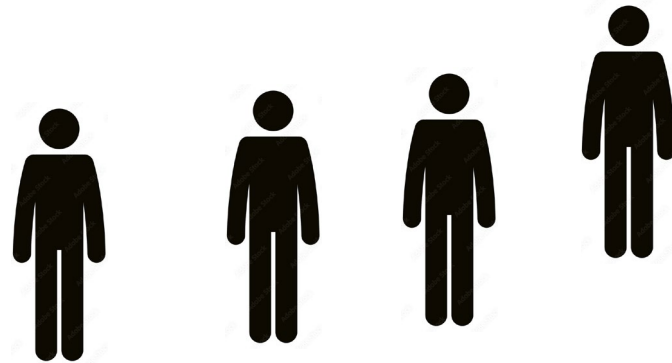
GIS Dev & Main



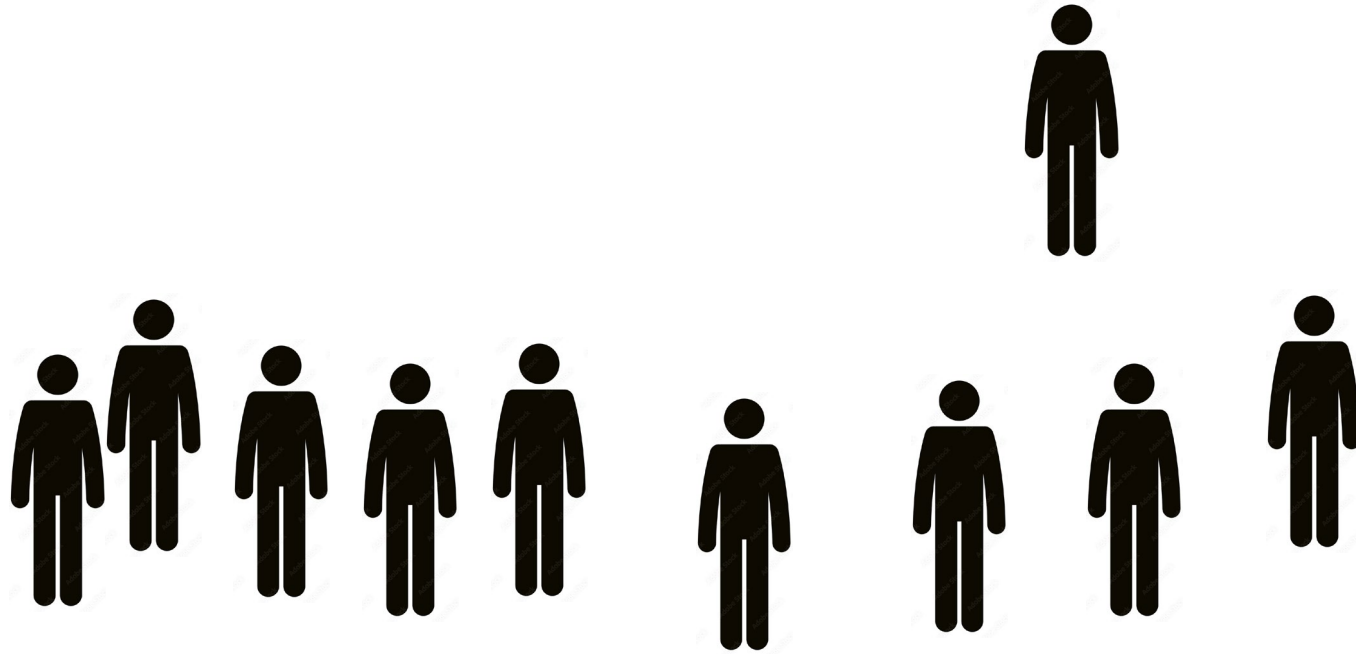
Client Services



Computer Support Specialists

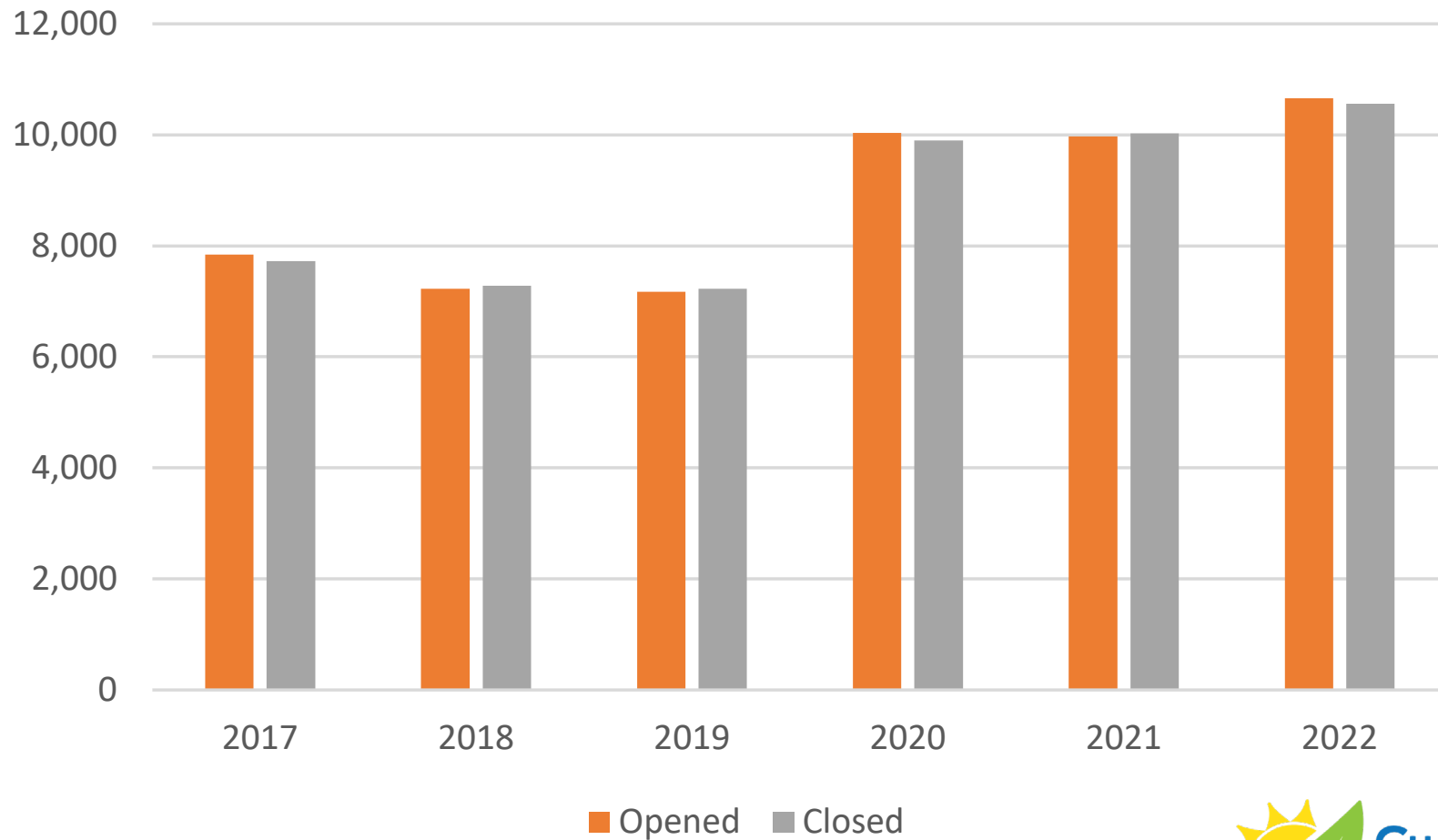


Business Analysts

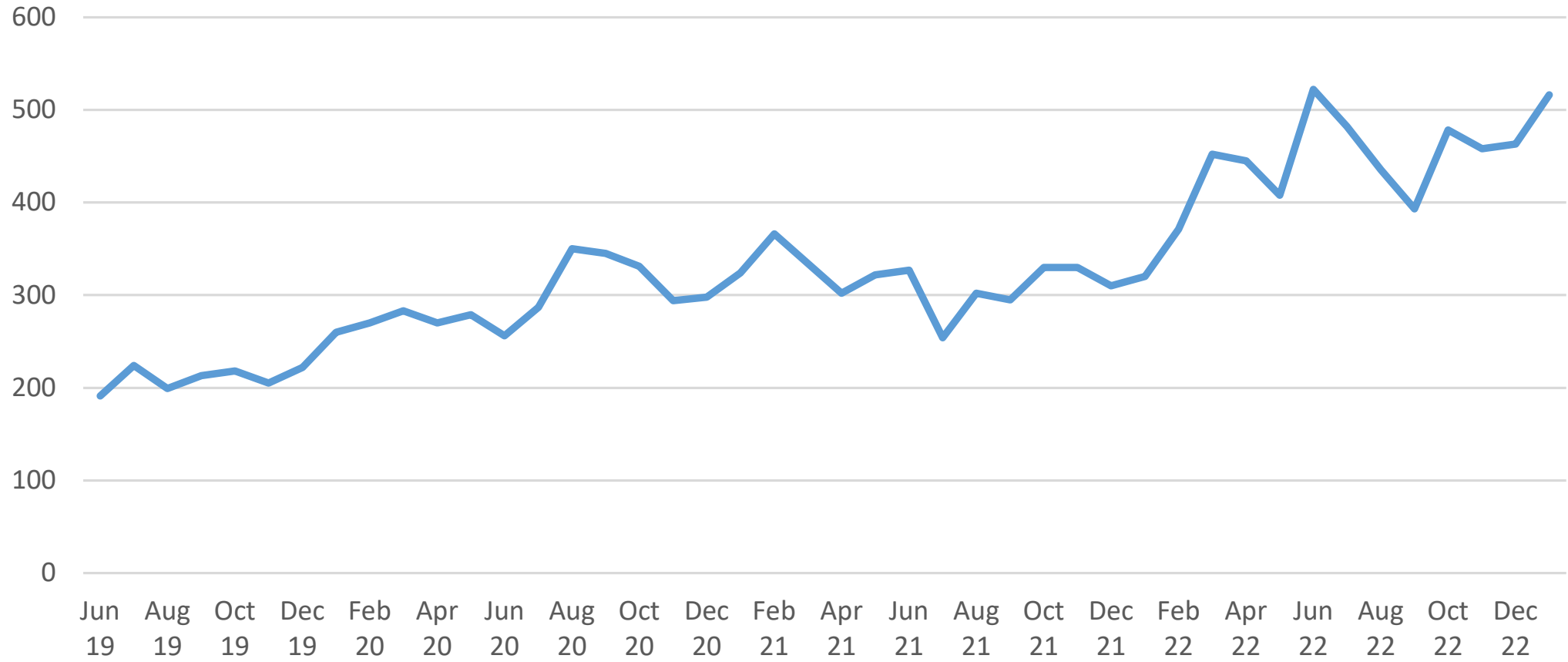


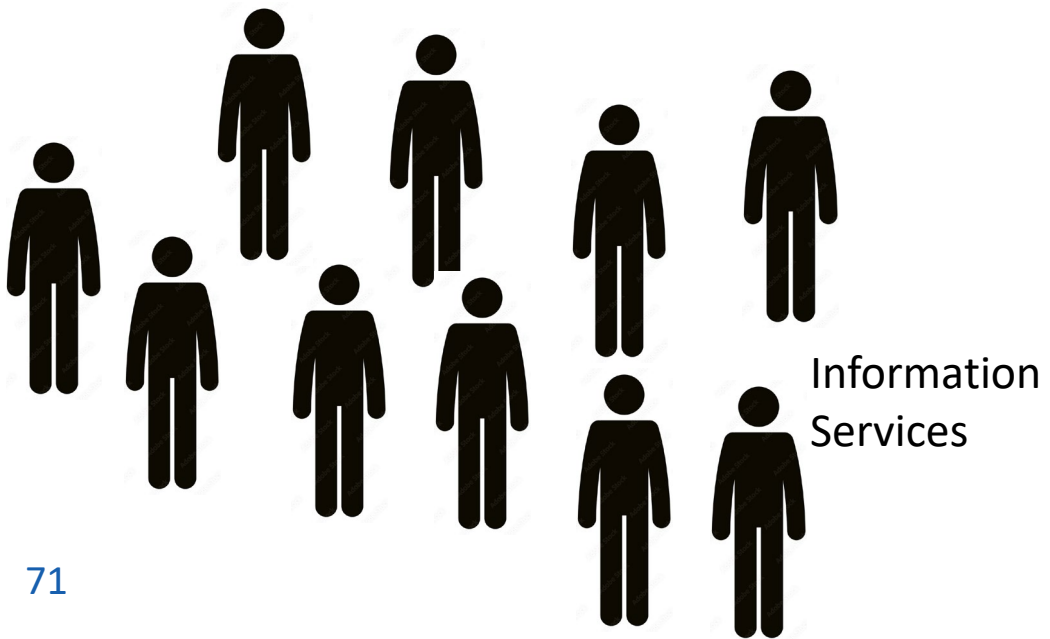
Computer Support Specialists

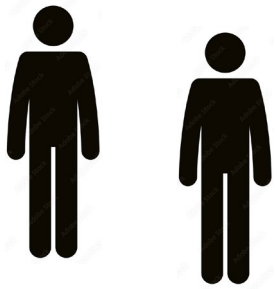
Annual Service Requests



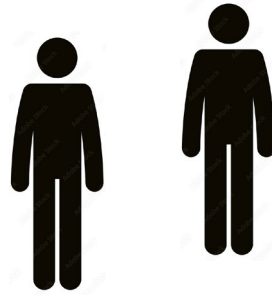
Unresolved Tickets



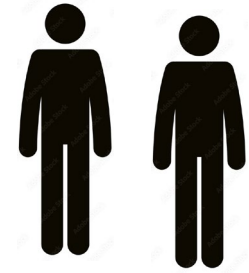




Banner



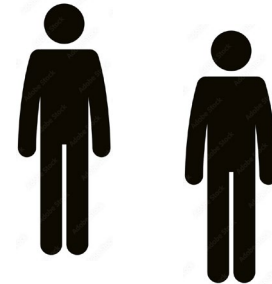
Accela



BI / DBA



SharePoint



Development

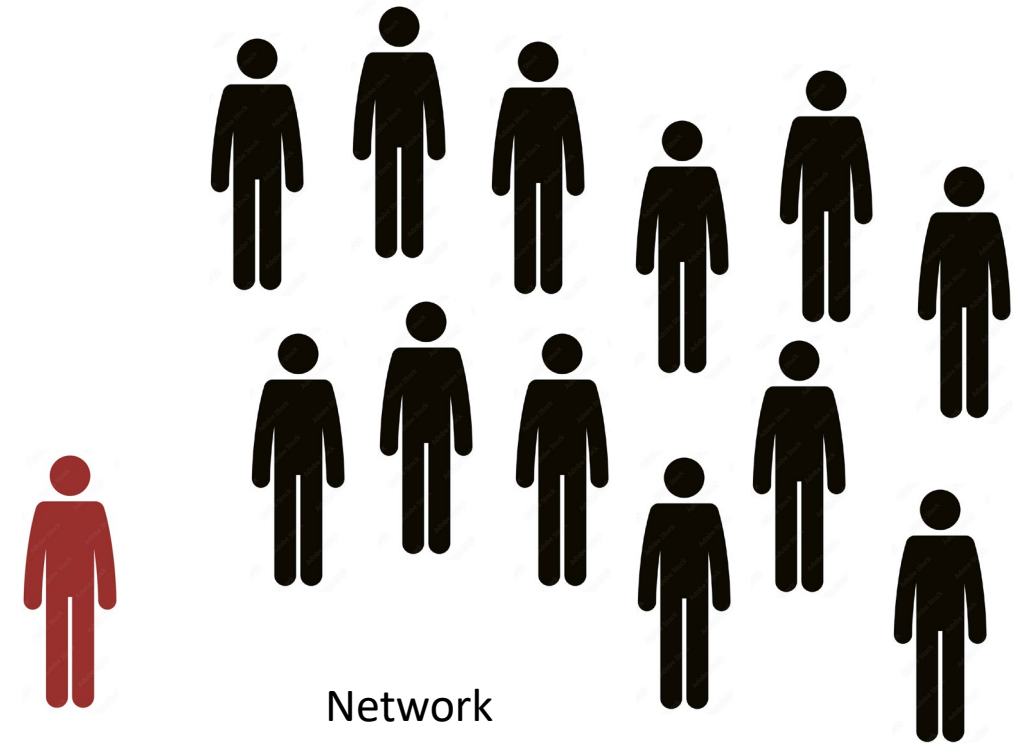
A large, stylized graphic in the background. It features a yellow sun with several rays on the left, a light green leaf on the right, and a light blue curved shape at the bottom. The word "Proposed" is centered over the sun.

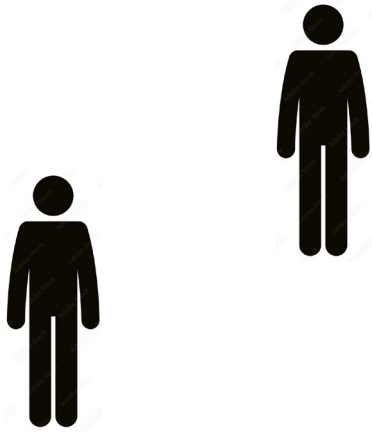
Proposed



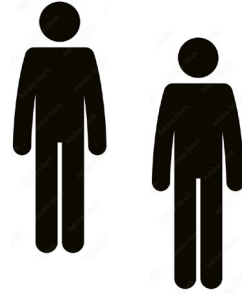
Information Systems Security Manager

- Industry best practice to separate Security group from other IT functions
- Strategically improve the reliability and security of IT projects
- Continual improvement of confidentiality, integrity, and availability of County data and IT systems
- Avoid conflicts of interest in development and enforcement of cybersecurity policy through separation of duties

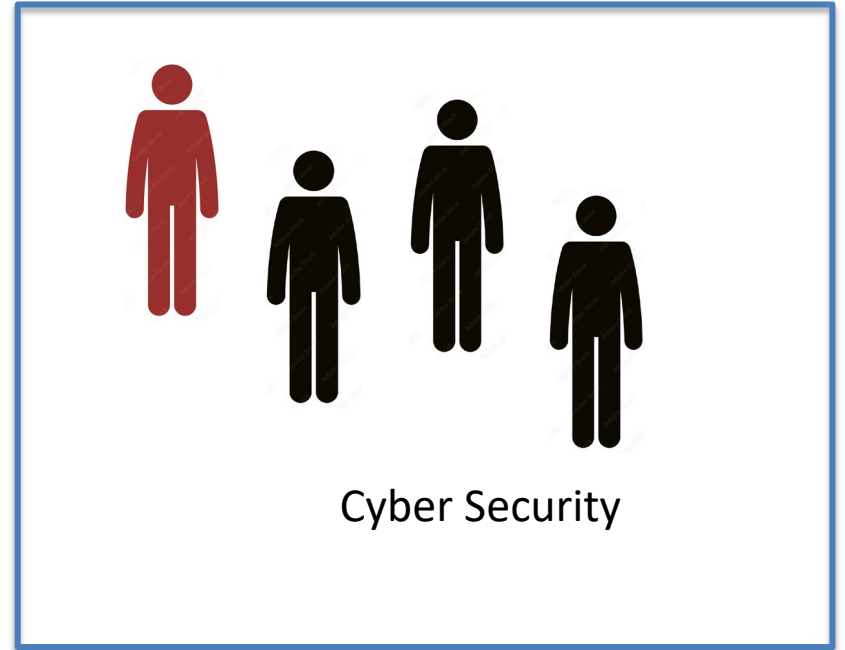




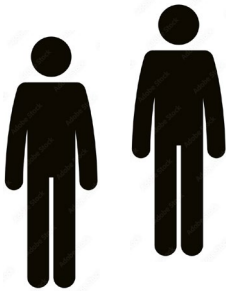
SCADA



Storage & Servers



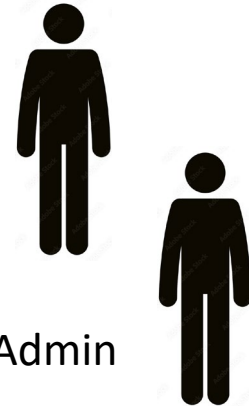
Cyber Security



Telecom



Microsoft Admin



Network Admin

GIS Analyst (1)

- Growing GIS demands from other departments because of their shrinking GIS staff base
- Addition of more GIS centric groups like CHNEP and Water Quality Management
- Increasing demands for more Field/mobile GIS data collection workflows (City Works)

GIS Coordinator (1)

- Coordination of the growing various GIS entities throughout the county
- Implementation and oversight of county standards and policies
- Maintain open communication with departments





Cityworks

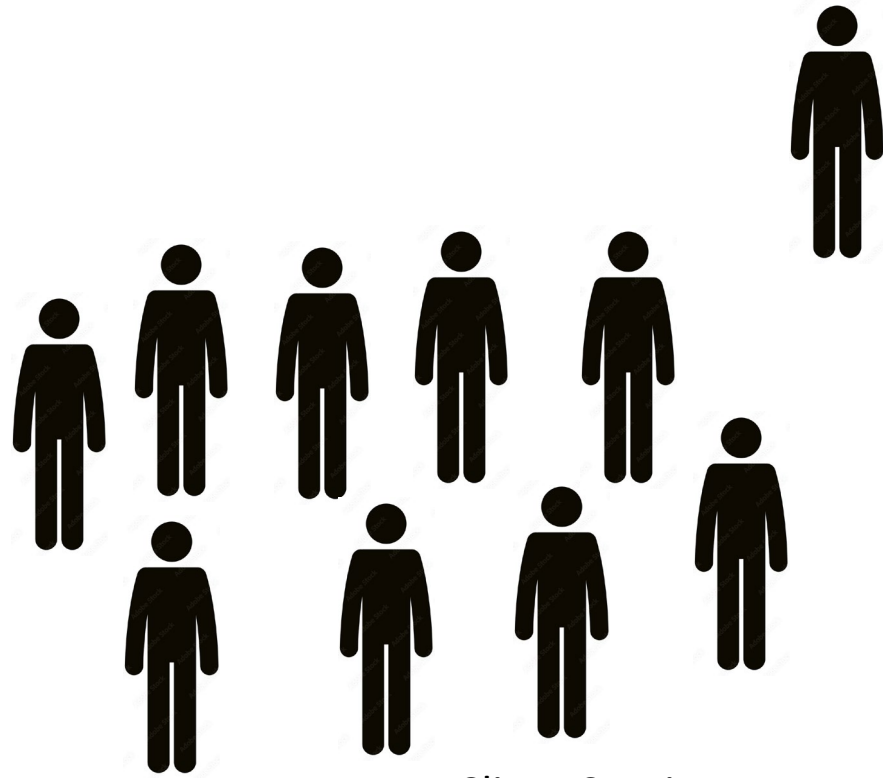


GIS Dev & Main

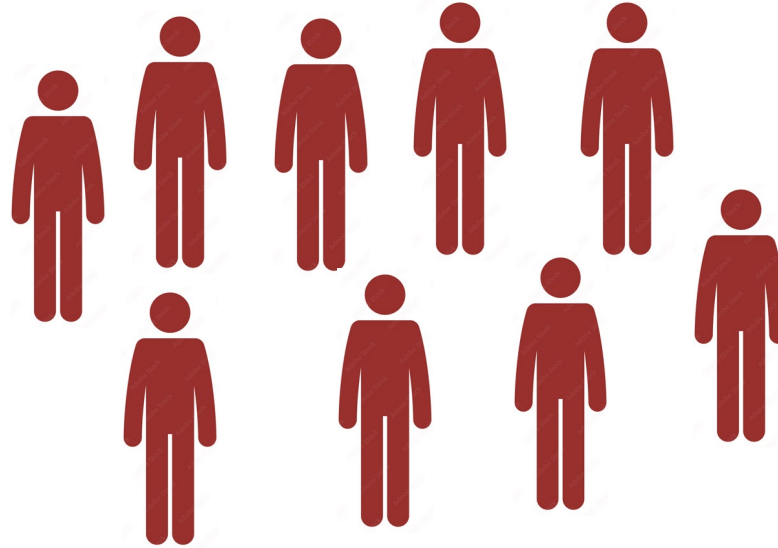


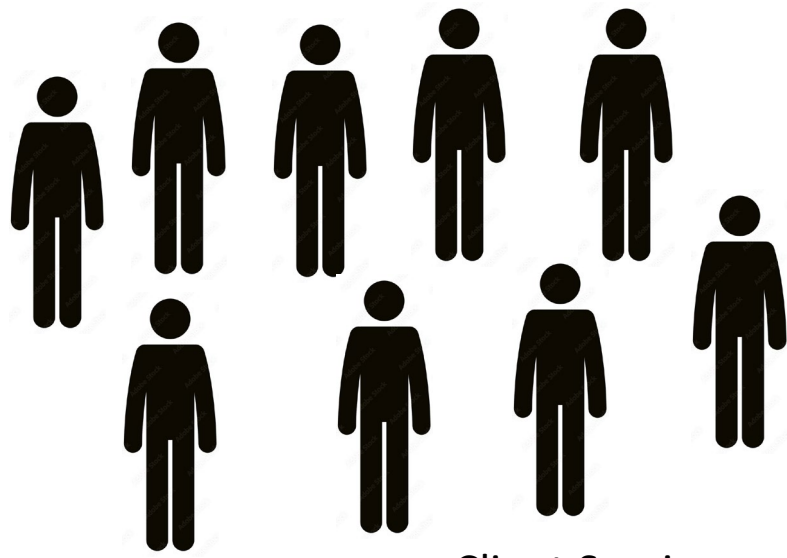
Plats / Developments



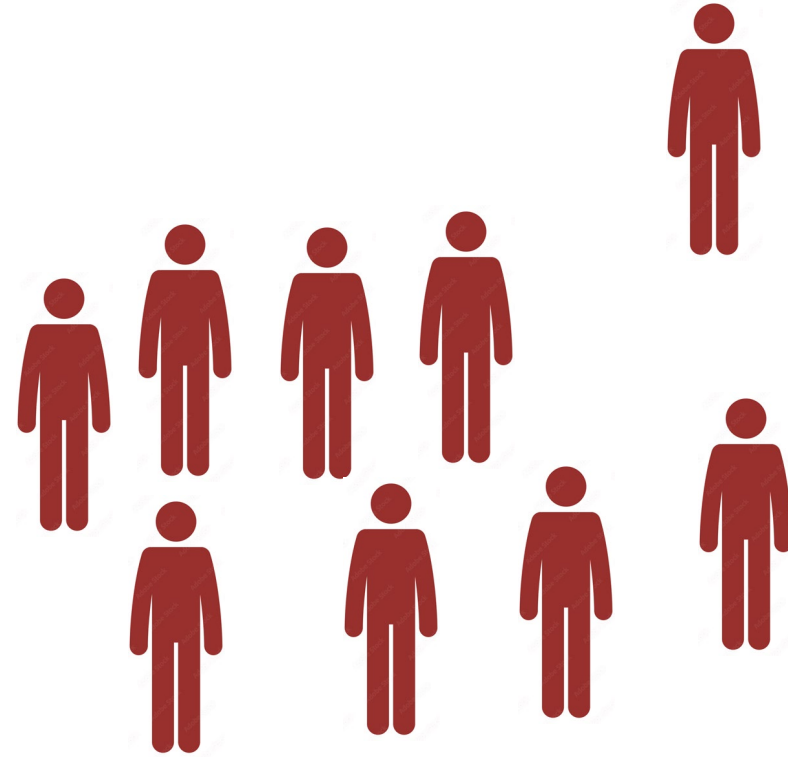


Client Services





Client Services



Business Relations

Survey Results

- Do you know the best way to evaluate your process, define metrics, and design a plan to improve that process? **10% said yes**
- If offered, would you accept assistance mapping out and evaluating your current processes? **90% said yes**

Survey Results

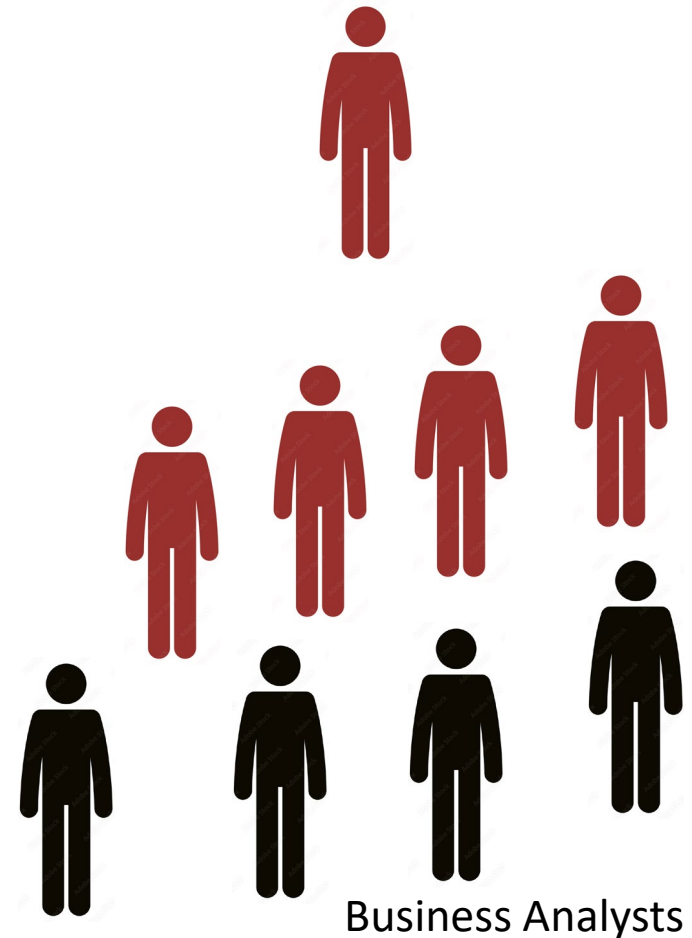
- Does anyone in your team do repetitive manual data entry? **68% said yes**
- Does anyone in your team take data from one system and manually input it into another system? **65% said yes**

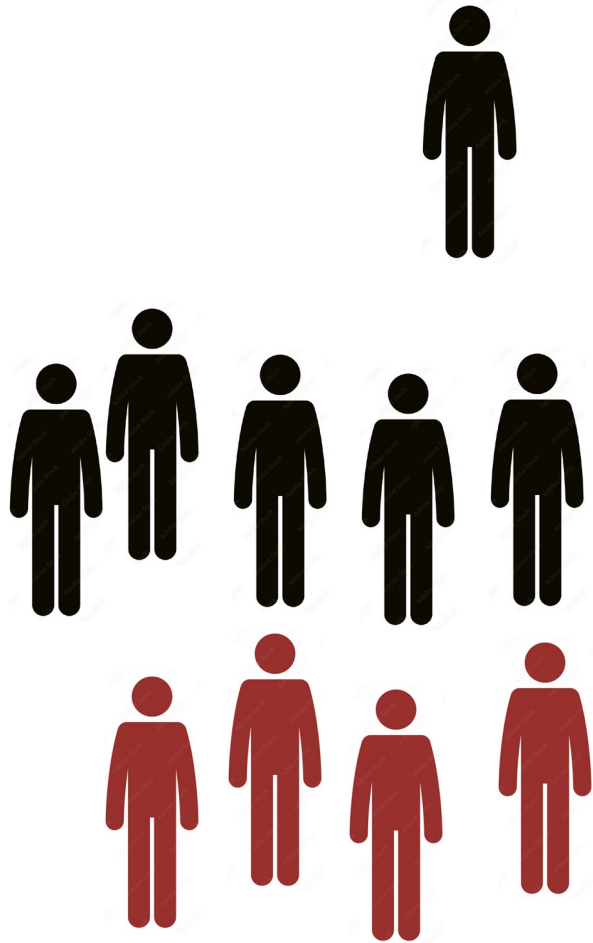
Survey Results

- Does anyone in your team regularly gather data from different sources and manually create a “report”? **77% said yes**
- Is anyone in your team assigned the task of process improvement? **68% said no**

4 new BA's and Business Relationship Manager

- Assist departments with process mapping
- Provide consultation and training service to departments on IT technologies
- Work with departments to define key metrics and reflect those metrics in BI dashboards
- Lead requirements gathering efforts when requesting a new software or change to existing software
- Understand the departments core services, strategic goals, and plans for the future



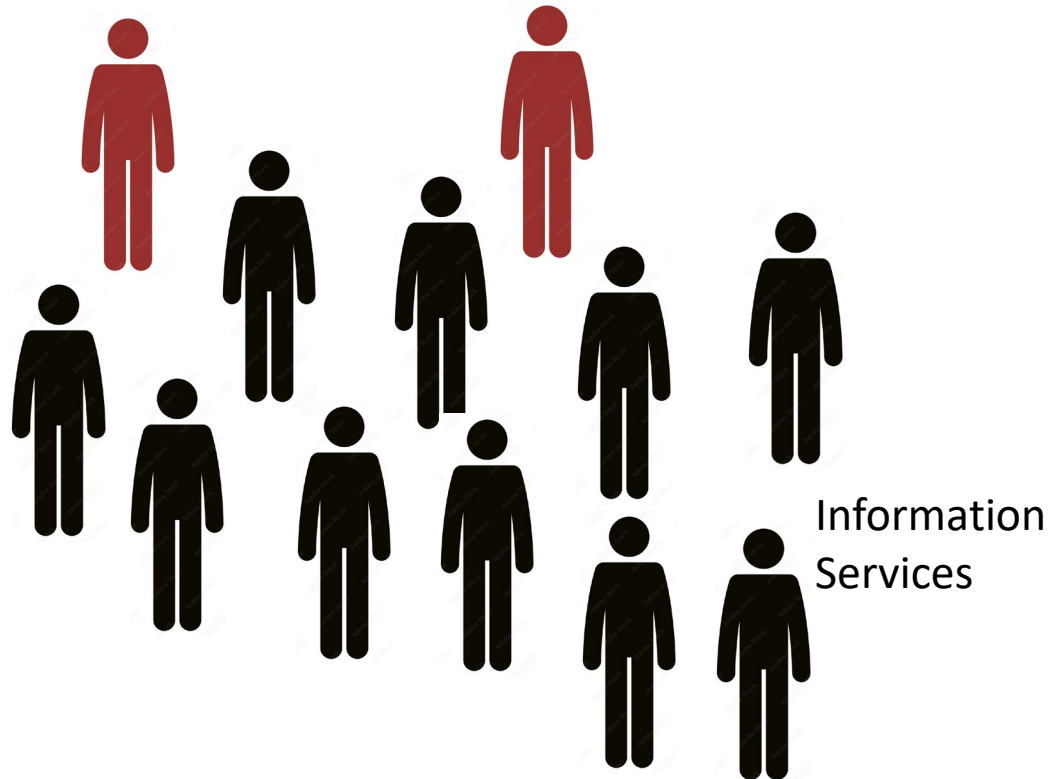


4 new Enterprise Application Support Administrator

- Ability to more effectively manage the over 60 software packages that our current Business Analysts try and support
- Provide better Level 2(advanced) application support
- Track updates/replacement options
- Documentation/training

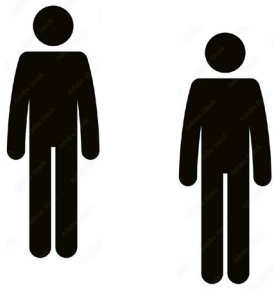
Business Intelligence Administrator (1)

- Assume some of the duties the Business Intelligence Analyst currently performs so Analyst can focus on developing training and the influx of integration requests that will be generated by major upcoming software projects (Munis, Kronos, etc.)
- Proactively engage with staff to see how dashboards can help them
- Take one on one meetings with staff needing assistance

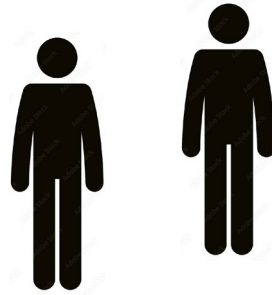


Prog/Analyst (1)

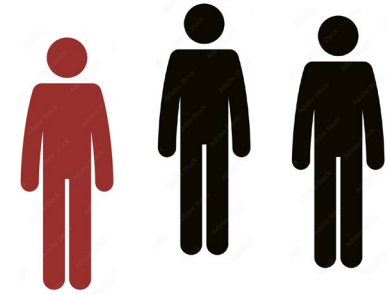
- 30+ custom applications already developed that need support/updating
- Allow more training to power users in the departments enabling them to automate some of their own processes
- Develop new solutions and assist in developing a self-service app development program similar to our successful BI self-service program.



Banner



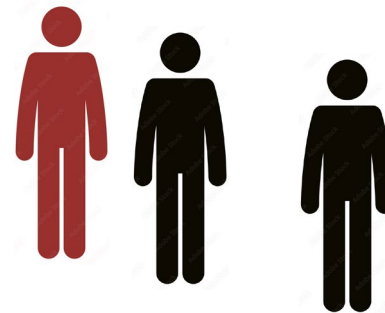
Accela



BI / DBA



SharePoint



Development

Optimizing Organization Based on Levels of Service - Other Positions

Data Coordinator	1	Parks Maintenance & Natural Resources
Asset Management Coordinator	1	Parks Maintenance & Natural Resources
Design Technician	1	Facilities
Financial Assessment & Compliance Analyst	1	Fiscal Services
Fleet Technician	2	Fleet

Resiliency

- Emergency Management - New Positions
 - 1 Emergency Management Coordinator
 - 1 Emergency Management Specialist

A large, stylized graphic in the background features a yellow sun with rays on the left, a green leaf on the right, and a light blue curved shape at the bottom, all with white outlines. The word "Achievements" is centered over the sun.

Achievements



Efficiencies

- Sample of activities from the Annual Report
 - My Neighborhood web page – PIO
 - Expanded use of social media – countywide
 - Adjusted the Capital Improvement Project process – Fiscal
 - Enhancements in Preventative Maintenance process – Fleet
 - Vuspex Virtual inspections – Community Development
 - E911 efficiencies – IT and Community Development
 - Workforce development for teens and young adults – Community Services
 - Strategically Targeted Talent Aligned for Retention (STARR) Program – Human Resources
 - Small Projects and work order efficiencies – Facilities
 - Integrated Client Services model – Human Services
 - Organizational Study – Public Safety
 - Airport Rescue & Fire Fighter Training Facility – Public Safety
 - Mosquito Species Heat Map – Public Works
 - Cityworks Enterprise Asset Management System – Various Departments
 - Tourism social media presence - Tourism
 - Capacity Management Operations and Maintenance Program (CMOM) - Utilities

2023 NACo Achievement Awards

- “What Would YOU Do?” Training
- Akimeka LIS / E-911 Address Match Project
- Annual Recreation Division Planning Session
- Art for All Ages
- Budget SharePoint Site
- Camp Operation Guidelines
- Community Services Connection Podcast
- Damage Assessment Surveys
- Damage Assessment Tracker Dashboard
- Emergency Shelter Operations

2023 NACo Achievement Awards

- Fall Fest Backpack Giveaway
- Family Services Center – Lunch and Learn Program
- Family Services Center – Partners Annual Outcomes Reporting Process
- Family Services Center Virtual Tour One-Take Video
- Grant Tracking Dashboard
- Guided Painting
- H.E.L.P. spay and neutering Program
- Hurricane Ian Regional Water Quality Monitoring
- Hurricane Ian Resource Guide
- Hurricane Ian Social Media Crisis Communication Response

2023 NACo Achievement Awards

- Internally Developed Computer Training Classes
- Introduction to Pickleball
- Lifeguard Training Scholarship Program
- Line of Sight Tours
- Mini Mondays
- My Neighborhood Webpage
- Operations Manuals and Plans
- Post-Storm Site Planning & Usage
- Princess Tea Party
- Projections Workbook

2023 NACo Achievement Awards

- Recreation Division Training Guidelines
- Recreation Management Activities
- RV Program After Hurricane Ian
- Summer Camp Counselor Character Trait Program
- Teleworking Program
- Ukrainian Embroidery Celebration
- VUSPEX Project-Virtual Inspections
- Walking Fitness

A large, stylized graphic in the background features a yellow sun with rays on the left, a light green leaf on the right, and a light blue wave-like shape at the bottom. The word "Questions?" is centered over the sun.

Questions?



CHARLOTTE COUNTY
FLORIDA