



# **2015/16 – 2016/17 Budget Workshop**

May 19, 2015



# Agenda

- Strategic Focus Areas
  - Efficient & Effective Government
    - Online Citizen Input
    - Customer Service Initiative
  - Fiscal & Financial Planning



# Online Citizen Input

- Same methodology and timeframe for 2009, 2010, 2011, 2013 and 2015
- On-line or paper copies at libraries and County buildings
- Notifications through County website, CCTV, Charlotte Sun and WINK radio.
- 1,850 responses in 2009, 828 in 2010, 701 in 2011, 460 in 2013, 660 in 2015
- Purpose is prioritization of services



# Online Citizen Input

- Increase level of service 4.0
- Maintain current level of service 3.0
- Reduce below current level of service 2.0
- Eliminate service 1.0



# Citizen Survey Service Rating Comparison

SERVICE	2009 Rating Average	2010 Rating Average	2011 Rating Average	2013 Rating Average	2015 Rating Average
Fire Rescue/EMS Services	3.25	3.25	3.20	3.20	3.28
Roads	2.91	2.90	2.90	3.12	3.25
Water Quality of Charlotte County Bodies of Water	2.92	2.95	2.99	3.18	3.23
Veteran Services	2.97	3.02	3.01	3.00	3.11
Park Facilities	2.46	2.66	2.69	2.94	3.11
Mosquito Control Services	2.77	2.78	2.91	3.08	3.10
Emergency Preparedness	3.00	2.89	2.84	2.96	3.08
Nature Preserves	2.37	2.56	2.55	2.78	3.04
Recycle Services	2.68	2.69	2.72	2.92	3.03
Sidewalks	2.38	2.61	2.53	2.87	3.02
Animal Control	2.62	2.63	2.67	2.90	3.00
Environmental Parks	2.28	2.46	2.45	2.73	2.99
Library Hours	2.65	2.81	2.94	2.90	2.98
Library Services	2.64	2.84	2.86	2.87	2.97
Recreation Programs	2.46	2.53	2.58	2.73	2.97
Garbage Collection Services	2.84	2.81	2.84	2.97	2.95



# Citizen Survey Service Rating Comparison

SERVICE	2009 Rating Average	2010 Rating Average	2011 Rating Average	2013 Rating Average	2015 Rating Average
Sheriff (Law Enforcement)	3.07	2.81	2.89	2.89	2.92
Family, Senior, and Housing Services	2.78	2.71	2.70	2.77	2.92
County Website	2.67	2.69	2.60	2.78	2.89
Code Enforcement (Zoning & Safety Issues)	2.46	2.50	2.51	2.65	2.89
Environmental Education	2.18	2.23	2.32	2.61	2.88
Summer Camps for Youth	2.58	2.62	2.56	2.66	2.86
Stormwater	2.45	2.61	2.55	2.76	2.86
Traffic Signals	2.79	2.71	2.72	2.77	2.85
Beach Renourishment	2.31	2.47	2.39	2.72	2.82
Tourism Promotion	2.43	2.66	2.65	2.74	2.81
Dial-a-Ride Services	2.32	2.41	2.58	2.61	2.77
Growth Management Planning	2.27	2.36	2.40	2.58	2.76
Homeless Services	2.34	2.43	2.54	2.69	2.75
Swimming Pools	2.38	2.51	2.49	2.55	2.75
Permitting Services	2.32	2.38	2.38	2.47	2.73



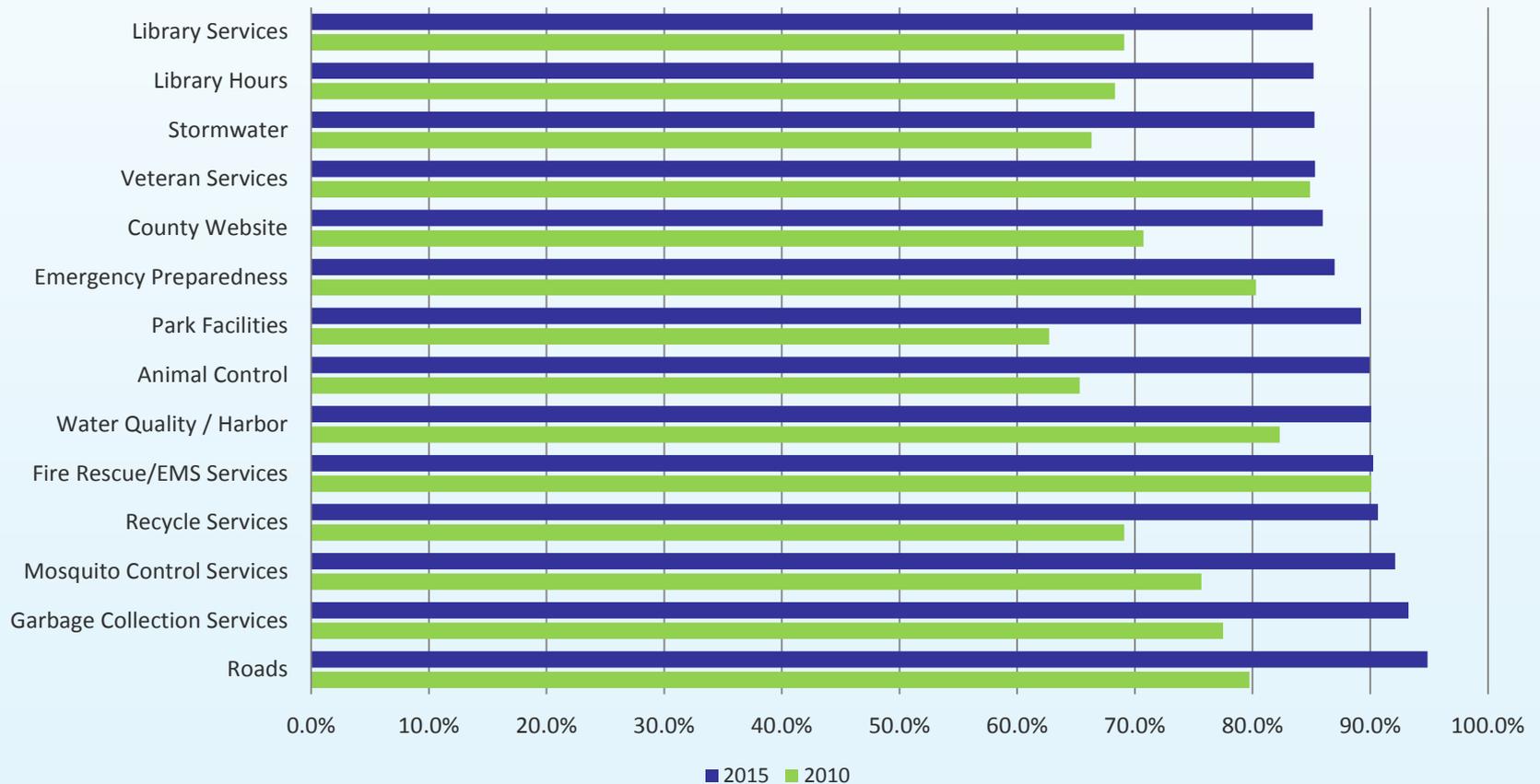
# Citizen Survey Service Rating Comparison

SERVICE	2009 Rating Average	2010 Rating Average	2011 Rating Average	2013 Rating Average	2015 Rating Average
Economic Development Promotion	2.40	2.59	2.49	2.56	2.72
Sports Parks	2.39	2.45	2.43	2.57	2.71
Economic Incentives to Businesses	2.53	2.72	2.64	2.62	2.70
Historic Preservation and Programs	2.13	2.37	2.38	2.51	2.70
Town Hall & Community Meetings	2.40	2.52	2.49	2.54	2.69
Lifeguards	2.38	2.47	2.46	2.59	2.67
Sunshine Ride Services (need-based)	2.29	2.39	2.43	2.55	2.66
Horticulture Programs	1.95	2.10	2.17	2.39	2.59
Blueway Trails Maintenance	2.00	2.18	2.06	2.29	2.56
Fertilizer Ordinance & Regulation	1.91	2.07	2.03	2.27	2.51
GIS Map Services	2.08	2.15	2.17	2.41	2.50
Stump Pass Dredging	1.91	2.19	2.04	2.27	2.49
4-H Programs	2.23	2.31	2.21	2.26	2.47
CCTV-20 Live Commission Meetings	2.27	2.31	2.18	2.24	2.31
CCTV-20 Other Programming, Military News, etc.	2.00	2.08	1.98	2.10	2.16



# Citizen Input Comparison 2010 vs 2015

## Services with 85% of responses at maintain or increase





# Customer Informed Organization

Charlotte County



# Process

- Mystery shopper
- Phone calls
- Community interviews and focus groups
- Review of customer survey data
- Staff work group from all departments



# Goal #1: Personalizing the County for the public

- Call Center
- FAQ document
- Ombudspersons



## **Goal #2: Increasing staff knowledge and skills**

- Re-structured Ambassador Program
- Supportive Training
  - Managing conflict
- Periodic networking meetings



## **Goal #3: Enhanced technology for faster response, better accuracy and employee productivity**

- IT staffing
  - Apps (internal and external)
- Phone system
  - Examine re-structuring to enable a quicker human response

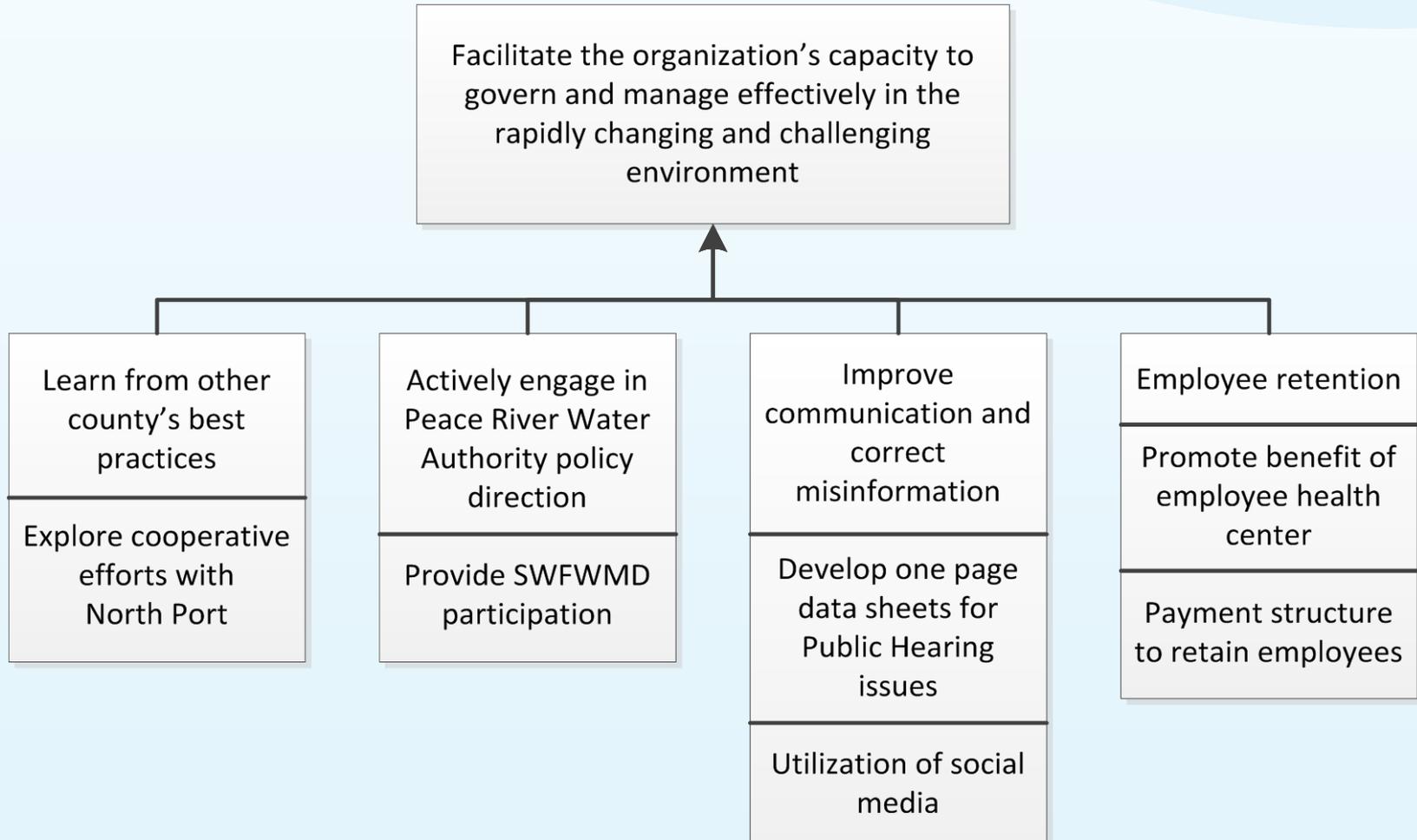


## **Goal #4: Accountability & Feedback**

- Standardize core customer survey questions
- Incorporate in budget performance information



# Efficient and Effective Gov





# Learning From Others / Partnerships

- Commissioners and County Administrators Regional Summit
- FAC Affiliate – County Managers
- Florida City & County Management Assoc.
- Florida Benchmarking Consortium
- City of North Port



# Cooperative Efforts with North Port

- Fleet Operations
- Aquatic Weed
- Mowing contracts



# Improving Communication

- Creation of Communications Manager position
- Deep Creek MSBU Public Hearing
- Transparency page vs Agenda



# Social Media Policy

- Adopted March 25, 2010
- Updates to the policy are in progress
- From the policy:

## **PURPOSE:**

Charlotte County departments may utilize social media and social network sites to further enhance communications with various stakeholder organizations in support of County goals and objectives. County officials and county organizations have the ability to publish articles, facilitate discussions and communicate information through various media related to conducting County business. Social media facilitates further discussion of County issues, operations and services by providing members of the public the opportunity to participate.



# Social Media Accounts

									
	Facebook	Twitter	YouTube	Pinterest	flickr	Google+	LinkedIn	WordPress	Storify
Animal Control	✓								
CC-TV			✓						
CCU	✓								
Charlotte County IT			✓						
Economic Development	✓	✓	✓						
Emergency Management	✓	✓					✓	✓	
Extension Service	✓								
Historical Center	✓								
Human Services	✓	✓							
Libraries	✓								
Parks and Recreation	✓								
Public Works		✓							
Tourism	✓	✓	✓	✓	✓	✓		✓	✓

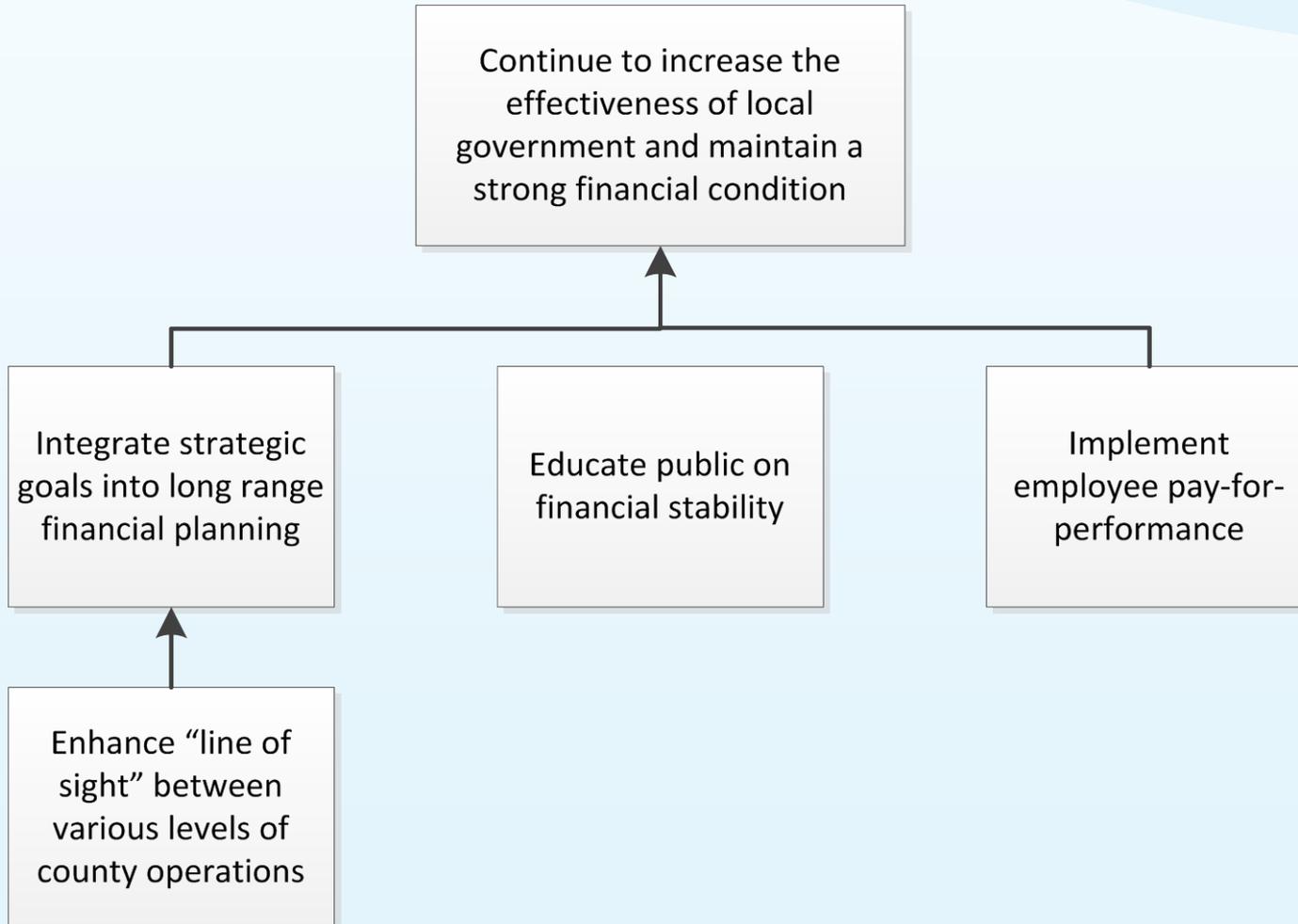


# Summary of Usage

- Facebook accounts are the most used, with Animal Control, CCU, Emergency Management and Libraries regularly posting content relevant to their services
- Tourism is the most prolific user of social media, using the extended reach of social media as a valuable and now commonly-expected (by travelers) marketing tool
- Departments post/tweet messages for Admin/PIO when strategically beneficial



# Fiscal/Financial Planning





# Enhance “Line of Sight”

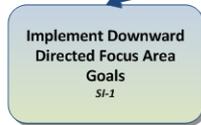
- New hire orientation
- Department orientations
- Evaluation discussions re: goal setting & linkage
- Ambassador Program
- Job shadowing in other departments
- Cross-functional focus groups
- Departmental field trips
- Strategic Plans



**Strategic Focus Areas  
Charlotte County BCC  
(SFA)**



**Information  
Technology Strategic  
Initiatives  
(SI)**



Supports SFA 2 & 4



Supports SFA 2



Supports SFA 2

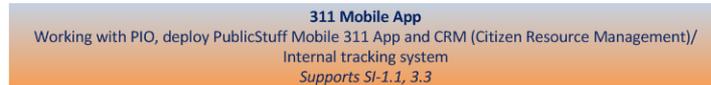
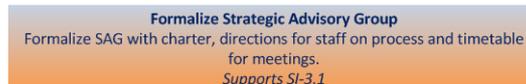


Supports SFA 2



Supports SFA 4

FY15



# Charlotte County, Florida

Government Portal

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77°F  
Port Charlotte Weather

- HOME
- NEWS
- TRANSPARENCY**
- WORKING
- LIVING
- PLAYING
- QUESTIONS
- SEARCH

**COMMUNITY HEALTH SURVEY**



## Healthy

### CHARLOTTE



TAKE THE SURVEY

- Popular Links**
- > BCC Agendas
  - > Boards & Committees
  - > CC-TV
  - > City of Punta Gorda
  - > Community Redevelopment Agencies (CRAs)
  - > County Commission
  - > Flood Information
  - > Garbage & Recycling
  - > Job Opportunities
  - > Know Your Zone
  - > Library
  - > MSBUs/MSTUs
  - > Parks
  - > Permitting & Licensing
  - > Project Status Updates
  - > Purchasing Bids
  - > Sustainability
  - > Water & Sewer
- Hot Topics**
- Departments**
- Elected Officials**
- Department Listing**

**Budget Process 2013/14 - 2014/15**

Transparency Home > Budget Process 2013/14 - 2014/15

This area provides highlights of the budget process, issues and initiatives.

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**2013/14 – 2014/15 Budget**

Our budget process this year is a transitional budget and represents a shifting of the County's focus to the future. For the past several years Charlotte County has been in a crisis state and, out of necessity, has become very adept at dealing with crises. With this year's budget process, we have made a very conscious effort to shift our focus from being reactive to proactive.

**Current Budget Information**

- > Second Quarter Departmental Projections
- > Second Quarter Projection Summary - General Fund

**FY2014/15 Budget Update**

- > Fund Descriptions with Totals
- > 5-Year Budget History
- > FY2013/14 Progress on Department Goals
- > Focus Areas Update 2013-14 Update on the goals
- > Adopted Line Item Book  
Adopted FY2014/15 line item budget by function as of October 1, 2014
- > Tentative Budget Presentation - July 2014  
Presentation to BCC. This presentation updated the BCC on the FY14/15 Planned Budget (second year of the two-year budget) and presented tentative millage rates based on the July 1, 2014 certified valuations from the Property Appraiser
- > Summary of Updates to FY14/15 Planned Budget  
Summary of changes made to the FY14/15 Planned Budget since September 2013 Final Public Hearing
- > Summary of Budget

**Revenues**

- > Ad Valorem Taxes  
Where does my tax dollar go?
- > Major Revenues  
Presentation to BCC on Feb. 20, 2013
- > Overview of Funding Sources  
Major revenues by sources and by functional/financial structure
- > Grant Sources  
Charlotte County grant revenue for FY13/14
- > Beginning Balances
- > Overview of Funding Sources by Fund

**Departmental Information**

- > Performance-Based Budget Summaries  
Details core functions, budget, and positions for each department
- > Performance Measures  
Key metrics by department
- > Line Item Budget Report  
Line item budget by function
- > Organization Charts  
Organization charts for each department



# Superior Performance in Customer Experience and Service: the Customer Informed Organization

Final

## **The Result:**

The desired result of this work plan is a shift in organizational culture that emphasizes, encourages and rewards delivering an excellent customer experience. Customer in this plan is defined as anyone who depends upon your work to complete their work or objectives. As such it both encompasses and redefines the traditional internal-external customer approach. As this culture becomes stronger in Charlotte County Government we expect a higher level of citizen and staff satisfaction, a higher level of performance and a growing reputation for excellent services. As this culture develops, certain behaviors and practices become routine. Among those that would initially be emphasized are:

- Policies are followed consistently
- Expectations are regularly communicated clearly
- Regular staff meetings are held which review and reinforce customer service
- New positions, promotions, and transfers or other position changes including departures are announced in the newsletter

## **The Goals:**

There are eight goals in this plan. These goals overlap and reinforce each other. As these goals have been analyzed, five pathways of various action steps have been determined to be the key means through which the desired culture can be reinforced, fostered and developed and through which progress on the eight goals can be made. As these goals are achieved, the desired culture is created.

## **The Pathways.**

Pathways represent the major avenues through which the desired culture and goals can be achieved. Pathways can be termed strategies. The pathways consist of a number of objectives which as they are completed create movement toward the goals.

## **The Logic Model**

A logic model is simply a high level summary of the reasoning underlying the plan. The model described above is graphically shown below as figure 1. Figure 2 illustrates the point that a single pathway can lead to multiple goals.

Figure 1: The Logic Model



Figure 2: A single pathway can support multiple goals



## Goals & Outcomes

### **Goal #1:** Know who our customer is

Outcome: Each county employee can define the person or persons who depend upon their work being accurate, timely and complete.

### **Goal #2:** Increase the personalized experience

Outcome: All customers, whether internal or external, experience personalized customer service through which they experience being heard and understood, respected and solution-orientation.

### **Goal #3:** Increase consistency of the customer's experience

Outcome: The brand and reputation of the County are enhanced as a place/source of dependable and reliable information. The practice of "shopping" for an answer is diminished.

### **Goal #4:** Create on-going feedback loops about the customer experience

Outcome: The County is more aware of the experiences customers are having in a format that enables trend analysis, identification of emerging problems, comparison across units, and identification of highly effective practices. It was also recommend that surveys of various formats not be the only methodology used for feedback. One on ones and focus groups like the ones we are in are excellent formats for certain customers.

### **Goal #5:** Connect the Dots

Outcomes

- An increased understanding by County staff of how the work of the County fits together and how each person's work contributes to larger goals.
- Employees will have an understanding of the overall goals of the organization
- Employees will develop an understanding of the County structure
- Employees will develop a sense of empathy and will deliver better internal customer service
- Employees will feel more connected to the organization and to each other

### **Goal #6:** Provide support tools that would assist with providing a superior customer experience

Outcome: Staff have assistive tools, be that scripts, technology, additional training, and/or support networks that will assist them in helping meet the needs and expectations of customers

**Goal #7:** Provide training to enhance the ability to provide a superior customer experience

Outcome: Staff have the skills to interact with customers in a manner that leads to a better customer experience

**Goal #8: Utilize technology to improve the customer experience**

Outcomes:

- Technology enables customers to obtain information more quickly and directly with less staff involvement
- Technology supports the goals of consistency and reliability
- Technology enables staff to find answers more quickly
- Technology support to the goals of increased feedback and dot connecting

## Pathways

### **Pathway 1: Technology**

This pathway recognizes that in today's world, the ability to provide an excellent user experience is highly dependent upon technology. Technology enables us to answer questions with greater accuracy and greater speed. It enables us to "see" the issue in real time. Technology enables us to communicate quicker and keep everyone in the proverbial loop. Technology enables us to provide all the various analyses that enable better decision-making and problem-solving. Finally, technology enables us to meet the ever growing expectations of the public for rapid responses.

#### Priority Objectives with Leader:

- Implement Office 365 (Gordon)
  - Review for legal implications of public records
  - Develop an instant messaging and live chat capacity
- Implement "Public Stuff" app (Gordon)
  - Mobile phone apps
- Improve scorecards and metrics (Gordon)
  - Develop standard as well as department specific metrics and a customer service scorecard
  - Develop a toolkit of consistent feedback methods
- Research search word optimization options (Gordon)
  - Search word optimization so that a searcher can enter a familiar word to them and locate what that service may be called in Charlotte County
  - Conduct a website redesign from a user-friendly perspective that uses commonly understood terms

#### Objectives for future consideration

- Place pictures of and direct phone numbers for customer service representatives on the web
- Institute a 311 program
- Develop virtual tours of county facilities
- Examine feasibility of technology cadres

## **Pathway 2: Call Center/Website/Customer Maps**

This pathway seeks to make access to the county easier and more personal in order to lessen the frustration of those seeking information or attempting to access a county service. A key component of this pathway is each employee understanding their own customer network, i.e. who is dependent upon your work.

Priority Objectives with Leads:

- Determine the feasibility, costs, and alternatives of a call center (Vicki)
  - Determine the feasibility of eliminating phone trees and replacement with a live person as 1<sup>st</sup> responder.
  - Develop a summary guide of who does what in the departments that all staff have access to for their use in their work and in responding to public request.
  - Develop and institute a process to keep the summary guide up to date and accurate.
  - Examine moving the switchboard function out of facilities and into the PIO office
- Determine the value and feasibility of ombudsman positions in additional departments. (All directors)

Objectives for future consideration

- Develop customer maps for each department
- Institute a modern voice mail system for all departments
- Use commonly known names on the web-site for county functions
- Improve the hold music

## **Pathway 3: Policy for Customer Service (SOPs)**

The purpose of this pathway is to ensure that is both clear and consistent guidance to staff with respect to customer service. This would involve a set of standard operating procedures, adapted to the distinct services of each department.

Priority Objective with Leads:

- Review revised policy (Directors)

## **Pathway 4: Training**

This pathway is designed to provide the knowledge and skill base that will assist employees to interact with customers in a professional and productive manner.

### Priority Objectives with Leads:

- Establish a task team to study expansion and improvement of the Ambassador Program to include consideration of the following actions (Heather):
  - Hold the program for all new hires within 1<sup>st</sup> year
  - Make an On-line version available (refresher course once/year)
  - Keep materials current
  - Offer more frequently (a minimum of 3 times a year)
  - Establish a system by which each graduate have the opportunity to become a presenter
  - Make it mandatory that managers/supervisors participate in the program
  - Make the program available at the department level
  - Extra points on evaluation for attending
  - Directors support employees attending
  - Review the tying of the Ambassador program to performance ratings
- Review the hiring process to determine legitimate ways to identify customer service traits during the interview process with consideration given to: (Heather)
  - Promote internally for customer service positions
- Develop support systems, such as backups, for frontline customer service representatives to provide needed breaks from particularly stressful interactions. (Claire, Joan, Cassie)
- Develop commonly asked question “scripts” (all directors to identify most frequently asked questions as first step) (Vicki & David)
  - Provide updated department summary sheets re: information and frequently asked questions

### Future Objectives

- Develop a job shadowing system.
- Provide frontline customer service representatives with additional training about each department prior to start of position
- Provide uniformed and consistent training for customer service representatives including:
  - Networking with similar staff from other departments to share information & support
- Secure commitment for training by Directors/Managers/Supervisors
- Offer additional training in conflict resolution and anger management
- Provide training in shorter durations and at various locations
- Provide regular re-training for updates
- Offer refresher orientation after a period of time

## **Pathway 5: Networking/Peer Review**

This pathway seeks to support the desired culture by establishing systems to increase networking and peer feedback. In effect it seeks to build a “team” attitude by fostering team supports and expectations. It recognizes that culture cannot be imposed solely via policy or external standards but is something that develops as a result of interactions among the organization’s members.

### Priority Objectives with Leads (Danny & Terri)

- Establish a networking program
- Improve cross departmental communications
- Cross training similar functions across departments

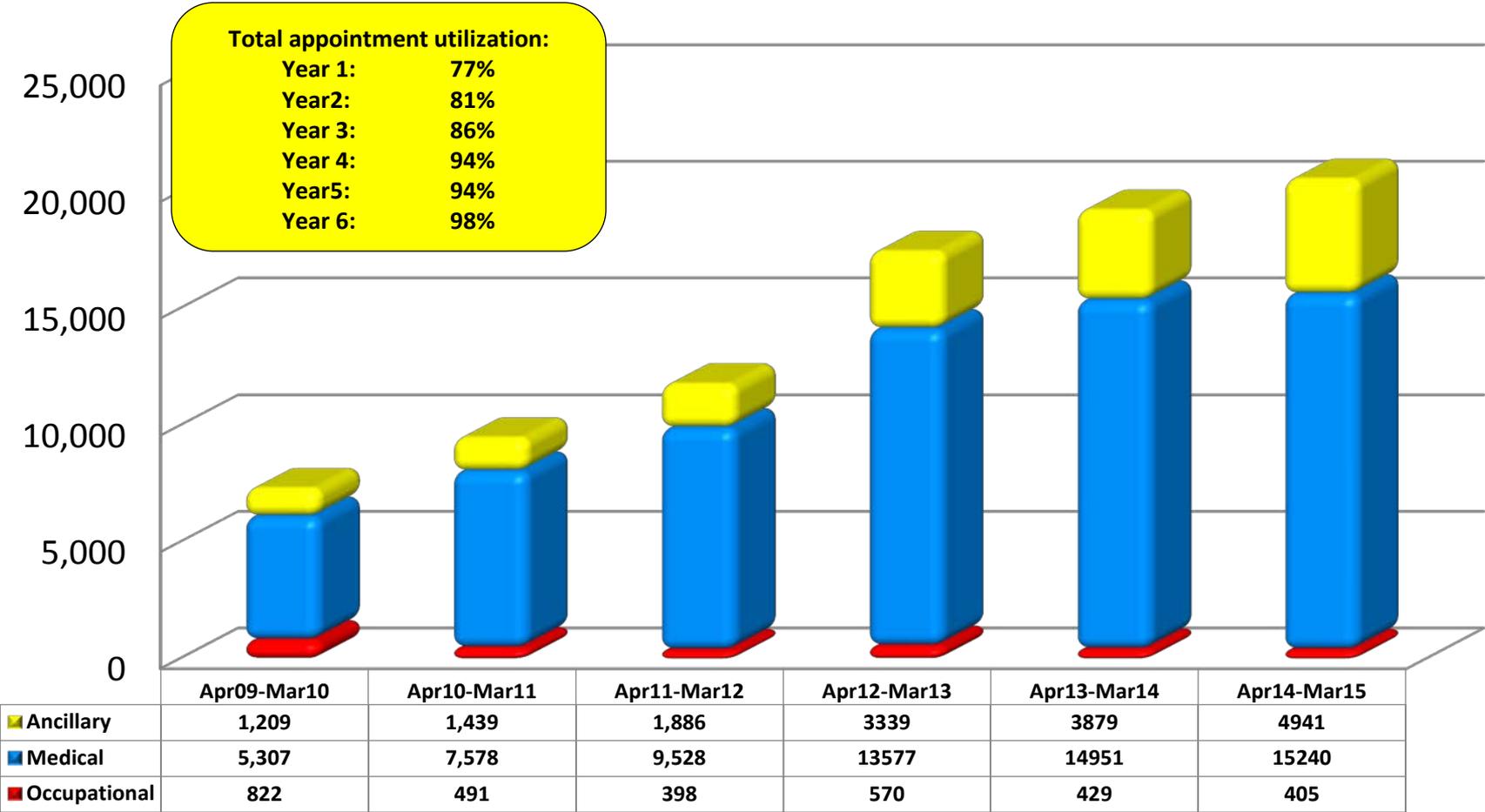
### Future Objectives:

- Establish a peer development and department review that examines customer feedback, successes, and failures so as to improve quality
- Host monthly networking meetings:
  - For employees in similar positions
  - Cross-department collaboration meetings on projects
- Have Administration and Directors attend quarterly staff meetings of other departments

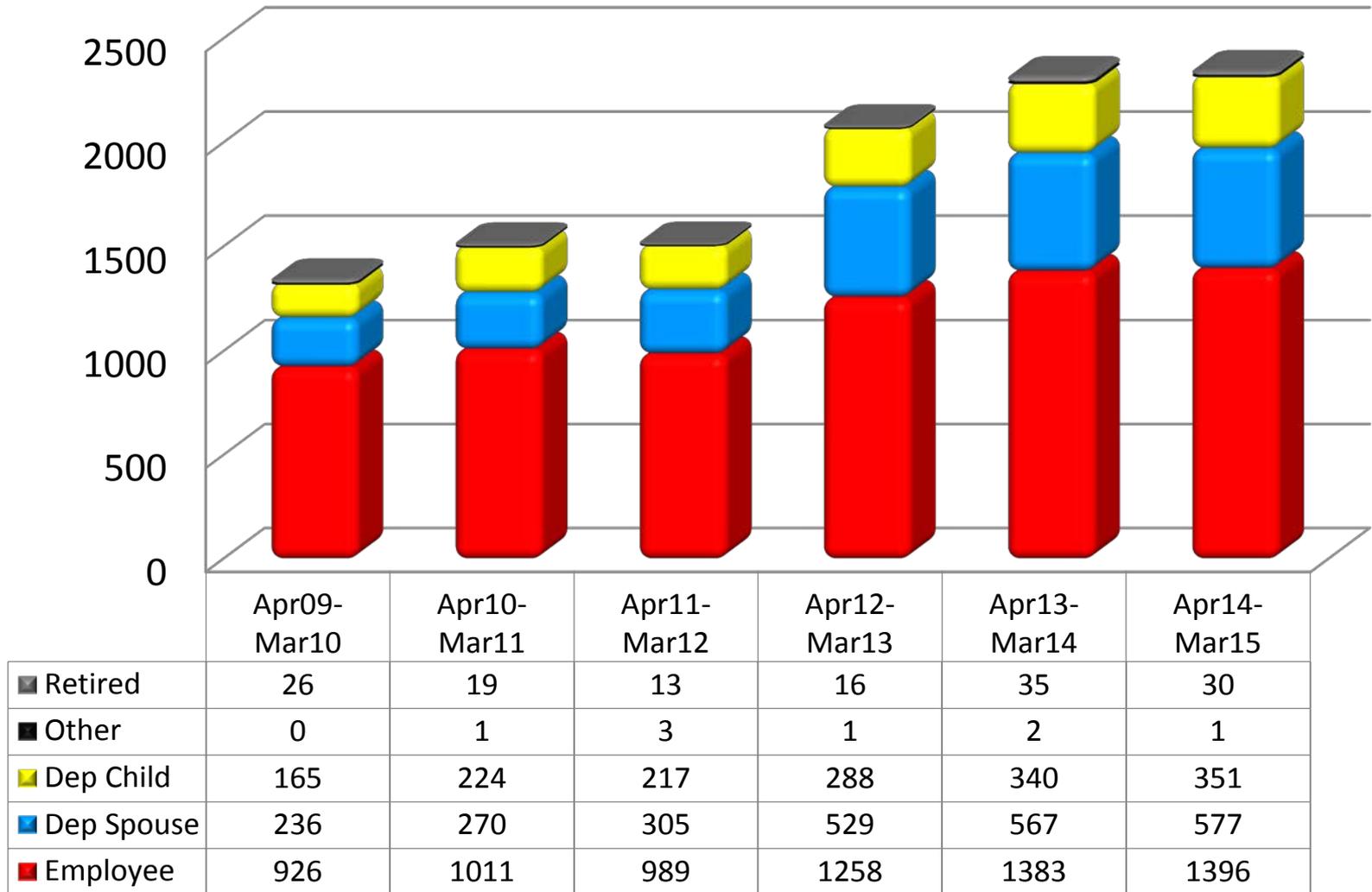


## Bob Pryor Employee Health Center Update

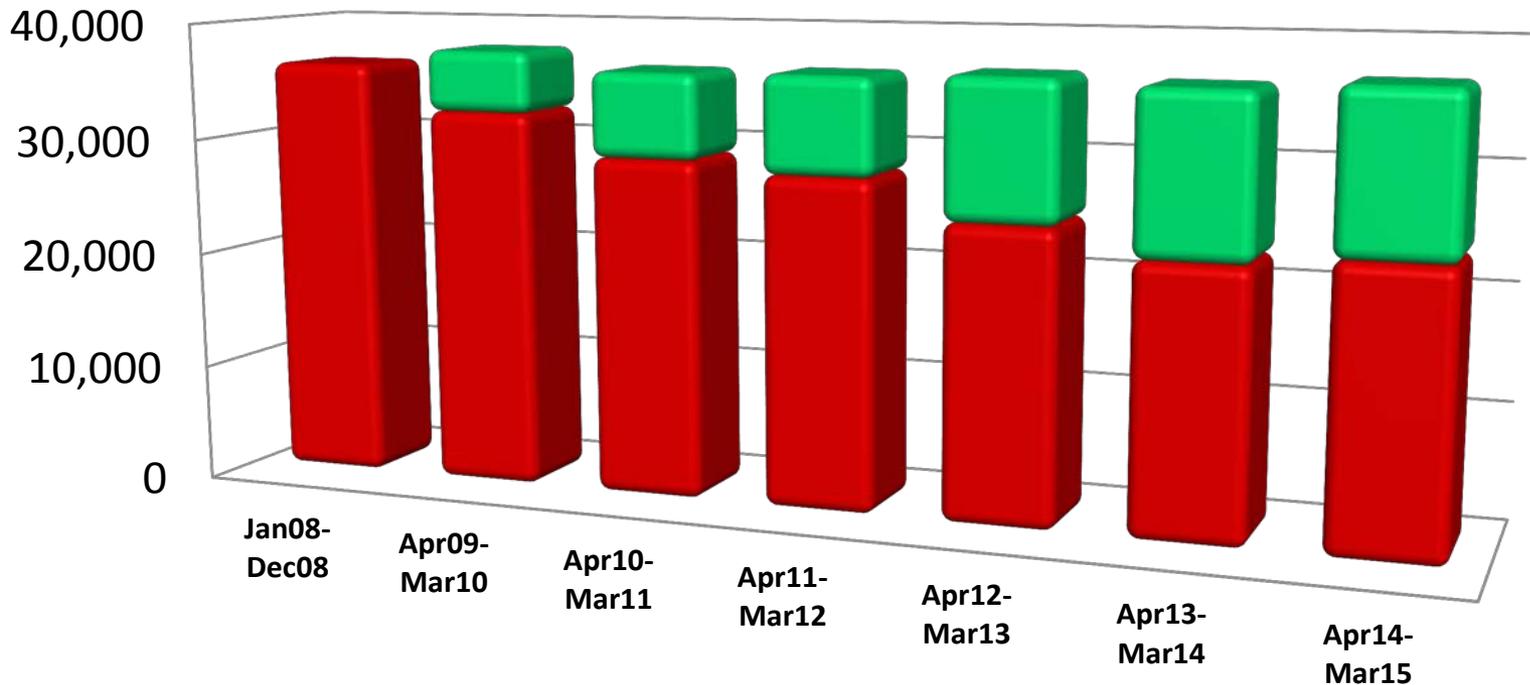
# Appointment Breakdown Trend



# Unique Patient Participation Analysis



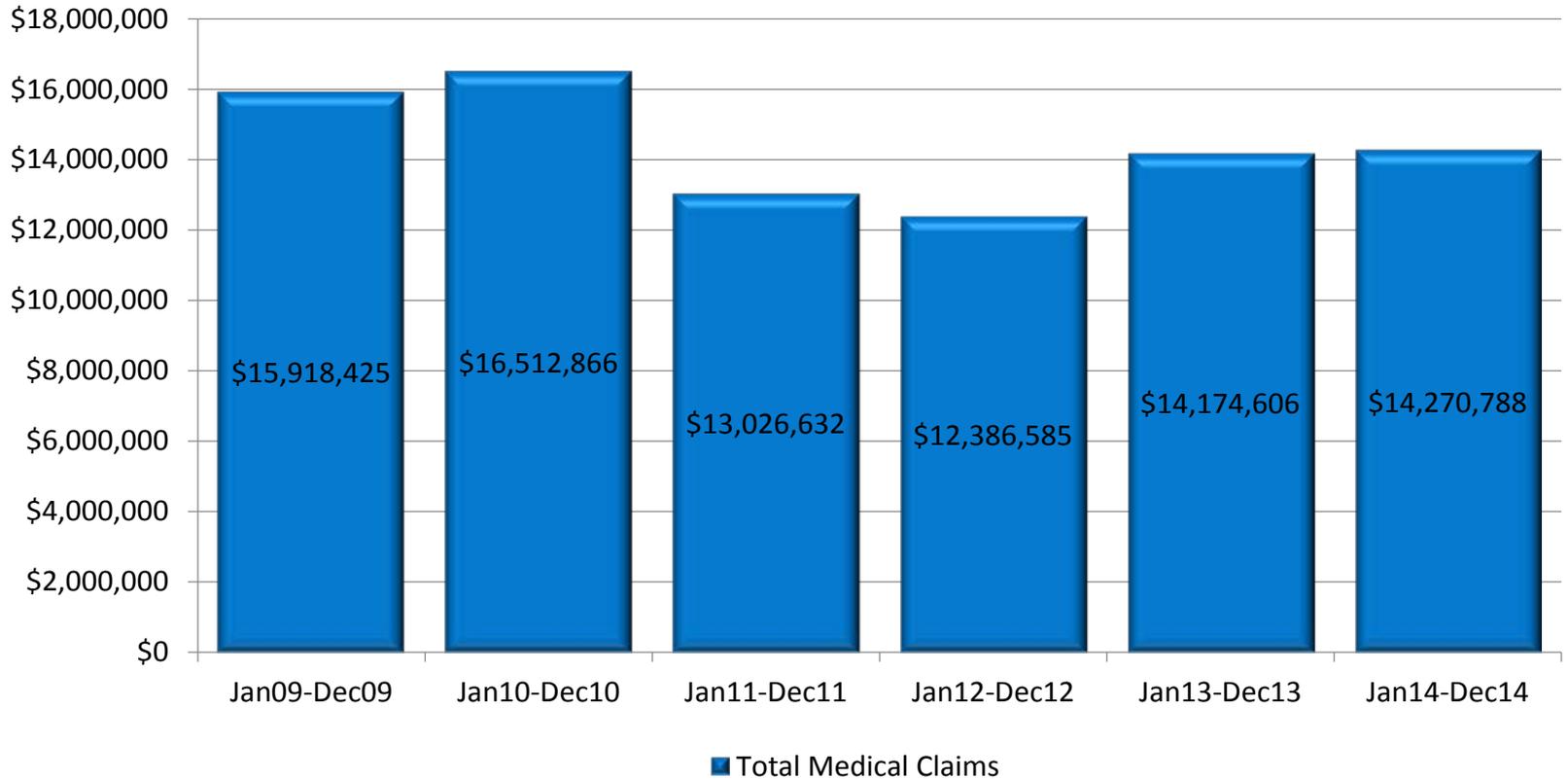
# Rx Utilization Trends: Health Plan and Employee Health Center



	Jan08-Dec08	Apr09-Mar10	Apr10-Mar11	Apr11-Mar12	Apr12-Mar13	Apr13-Mar14	Apr14-Mar15
■ Total EHC Prescriptions Dispensed		5,267	7,312	8,342	11,899	13,678	13,431
■ Total Health Plan Prescriptions	36,329	32,494	29,003	28,133	24,887	22,638	23,465

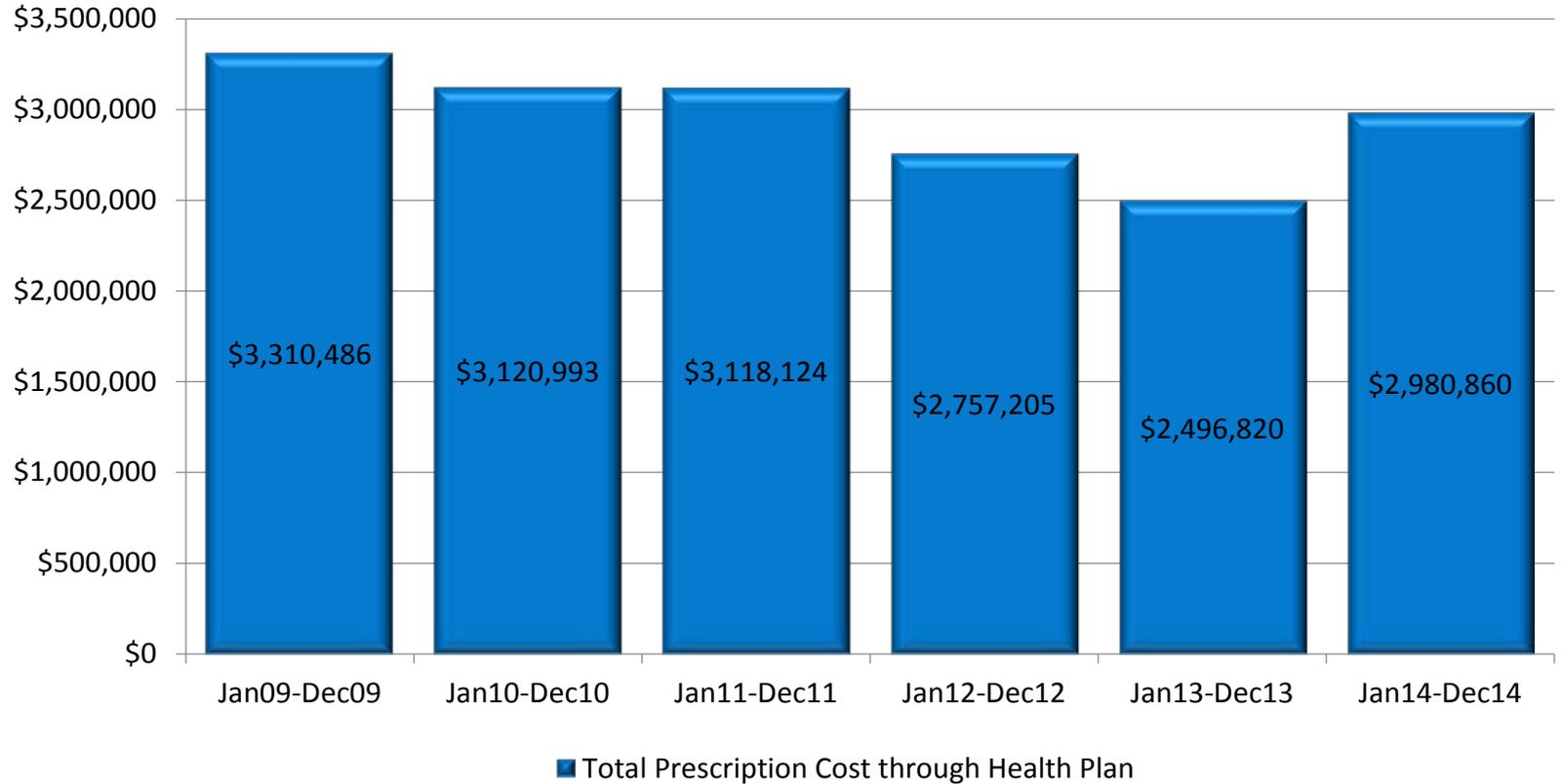
Over the past 6 years; prescription utilization of the health plan has decreased while dispensed medications through the EHC have increased reflecting a shift in filling patterns

# CIGNA Gross Health Plan Costs

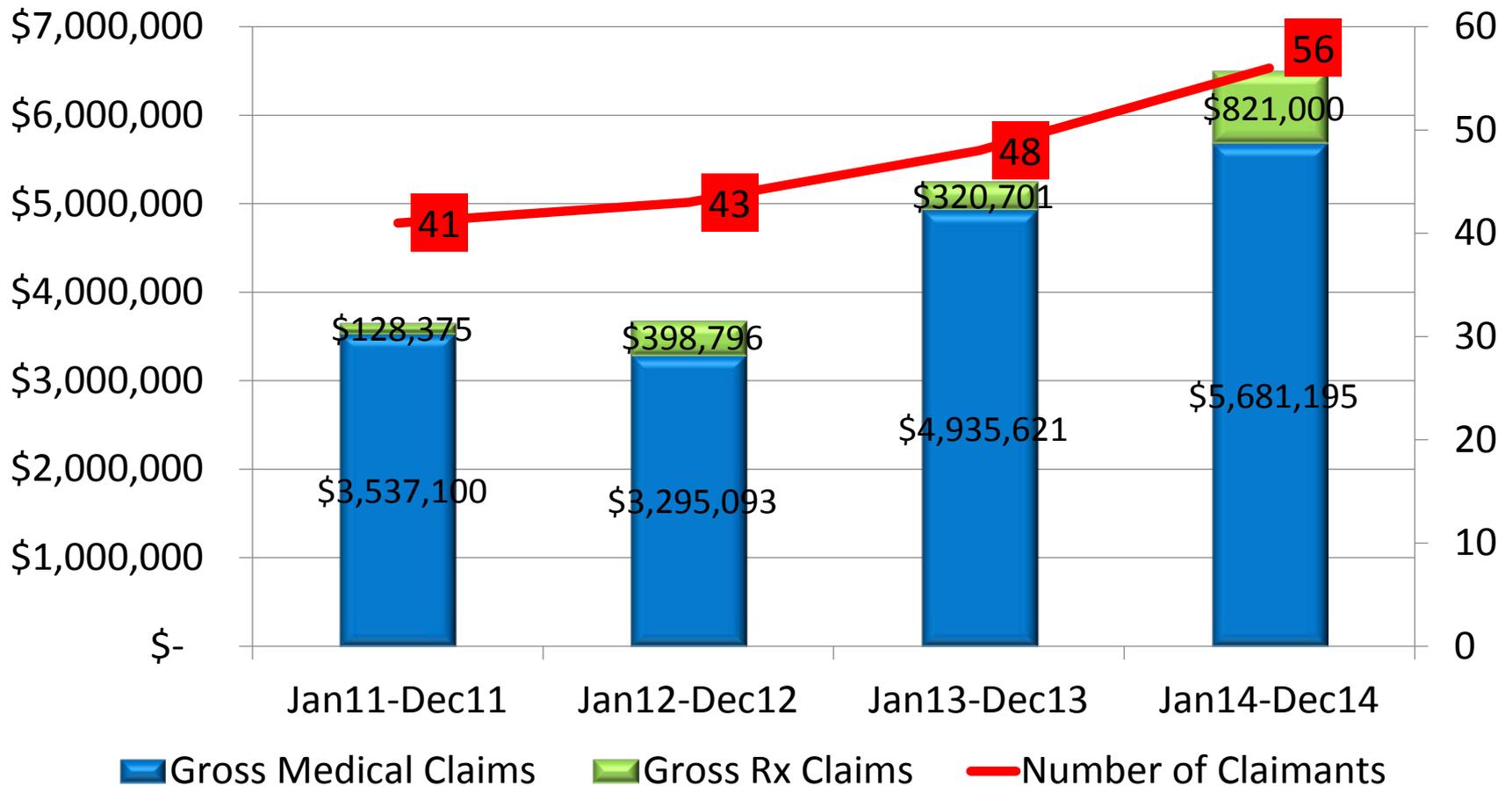


The past two years have been dramatically impacted by high cost claimants

# Health Plan Rx Costs

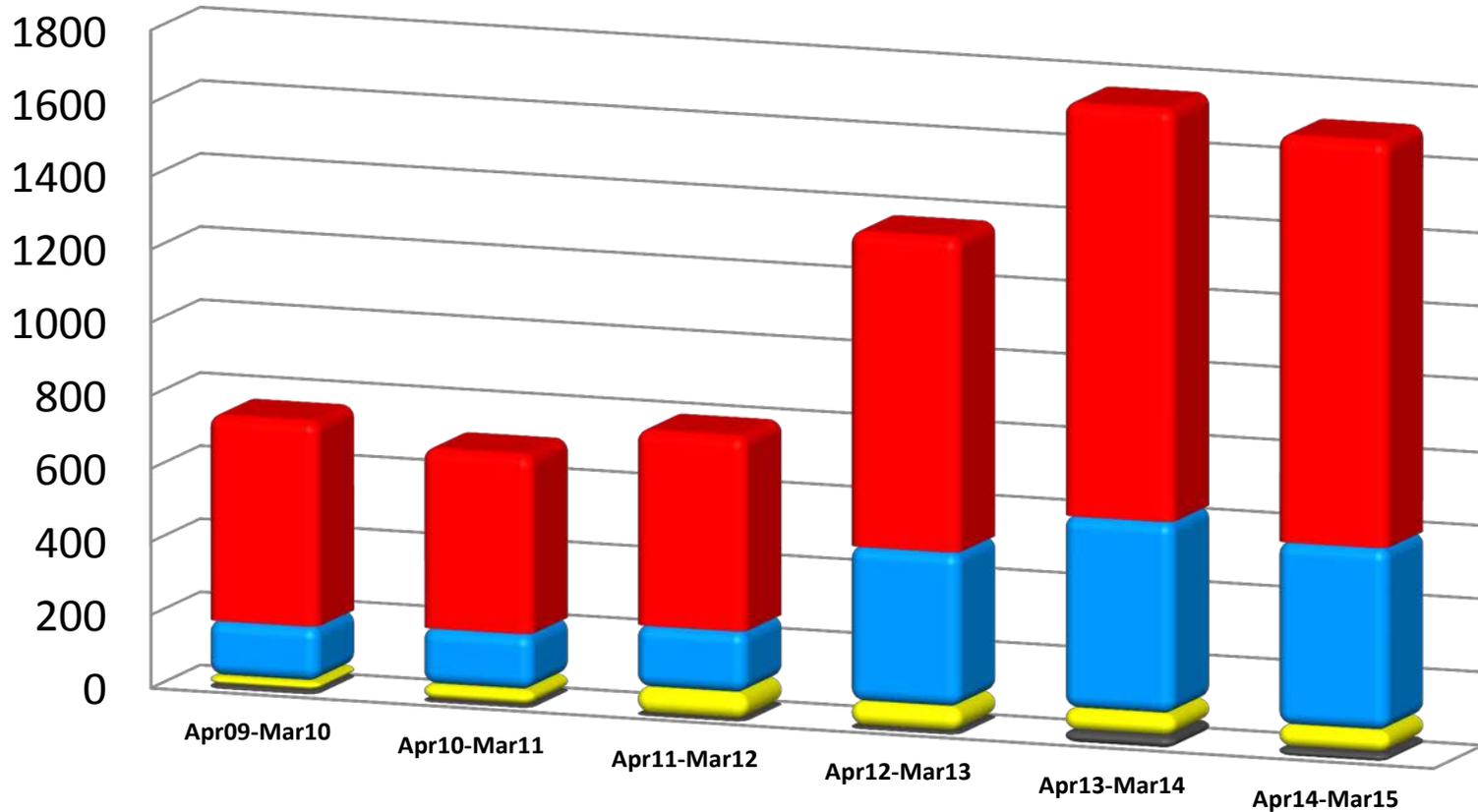


# High Cost Claimants (Medical and Prescription Claims)



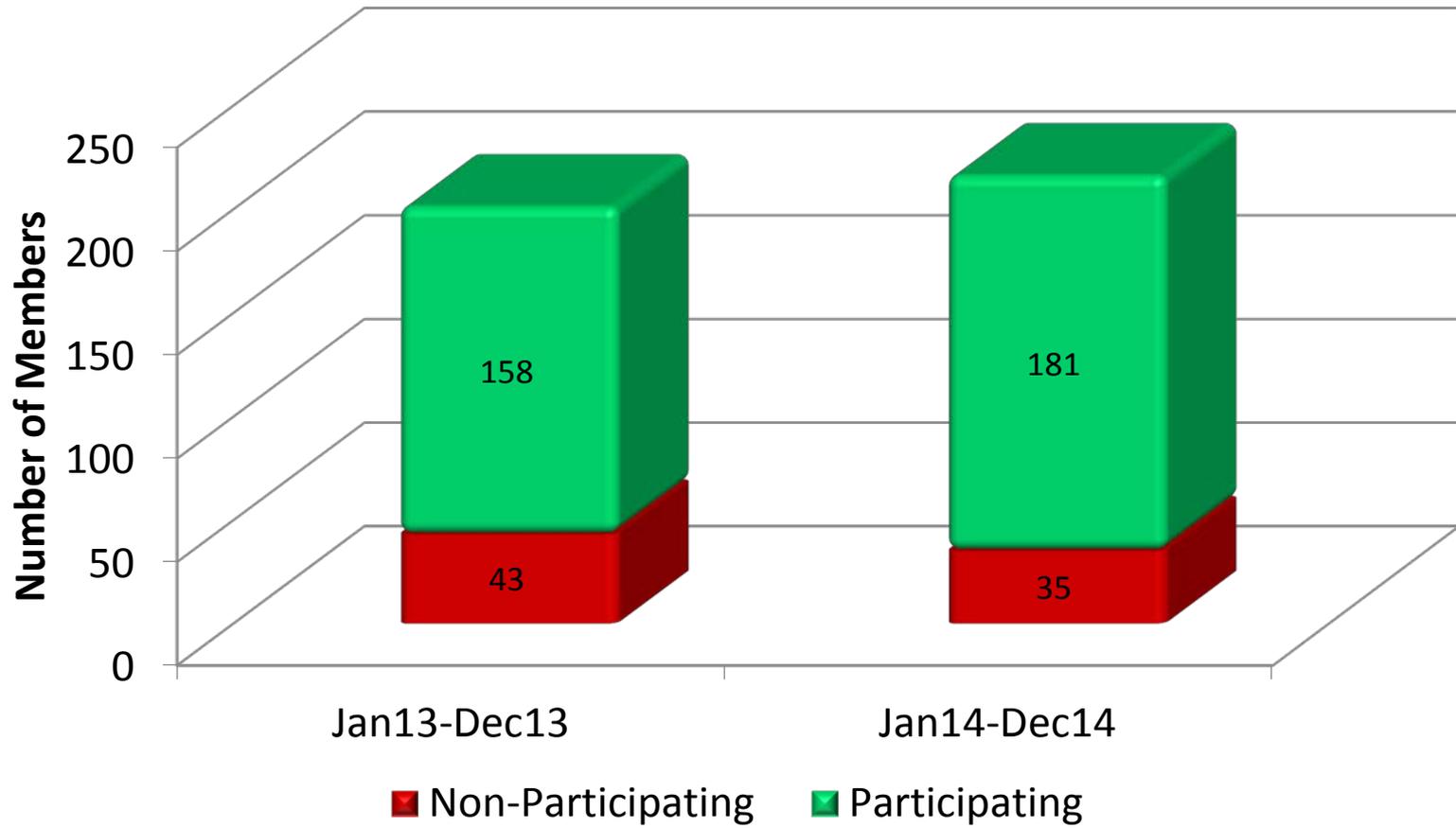
Total gross claimants >\$50k has increased sharply over the past 2 years driven by chronic conditions

# HRA Participation

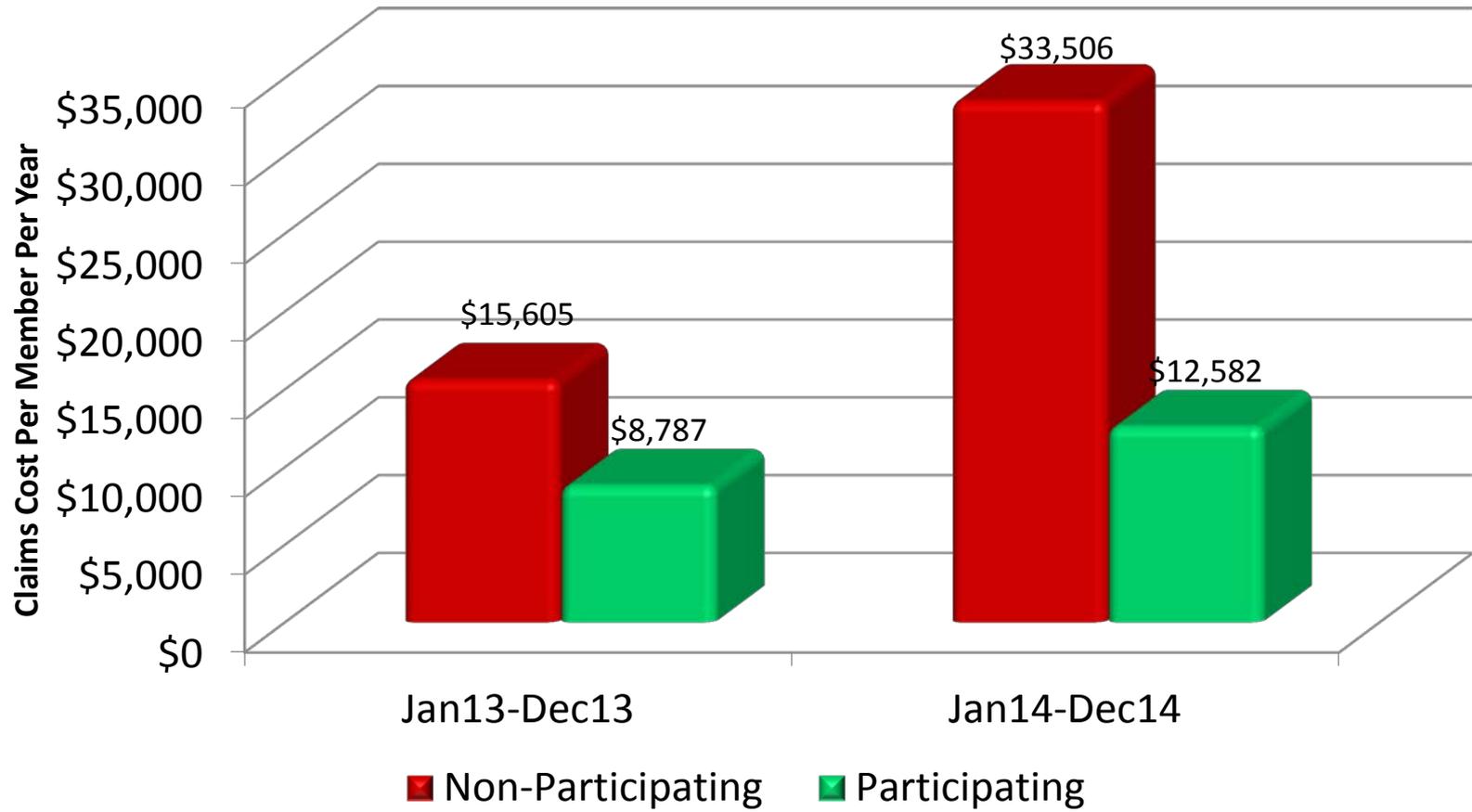


	Apr09-Mar10	Apr10-Mar11	Apr11-Mar12	Apr12-Mar13	Apr13-Mar14	Apr14-Mar15
Employee	562	491	534	862	1130	1113
Dependent Spouse	151	154	170	424	526	500
Dependent Child	24	41	71	66	60	60
Retired	13	9	7	10	34	25

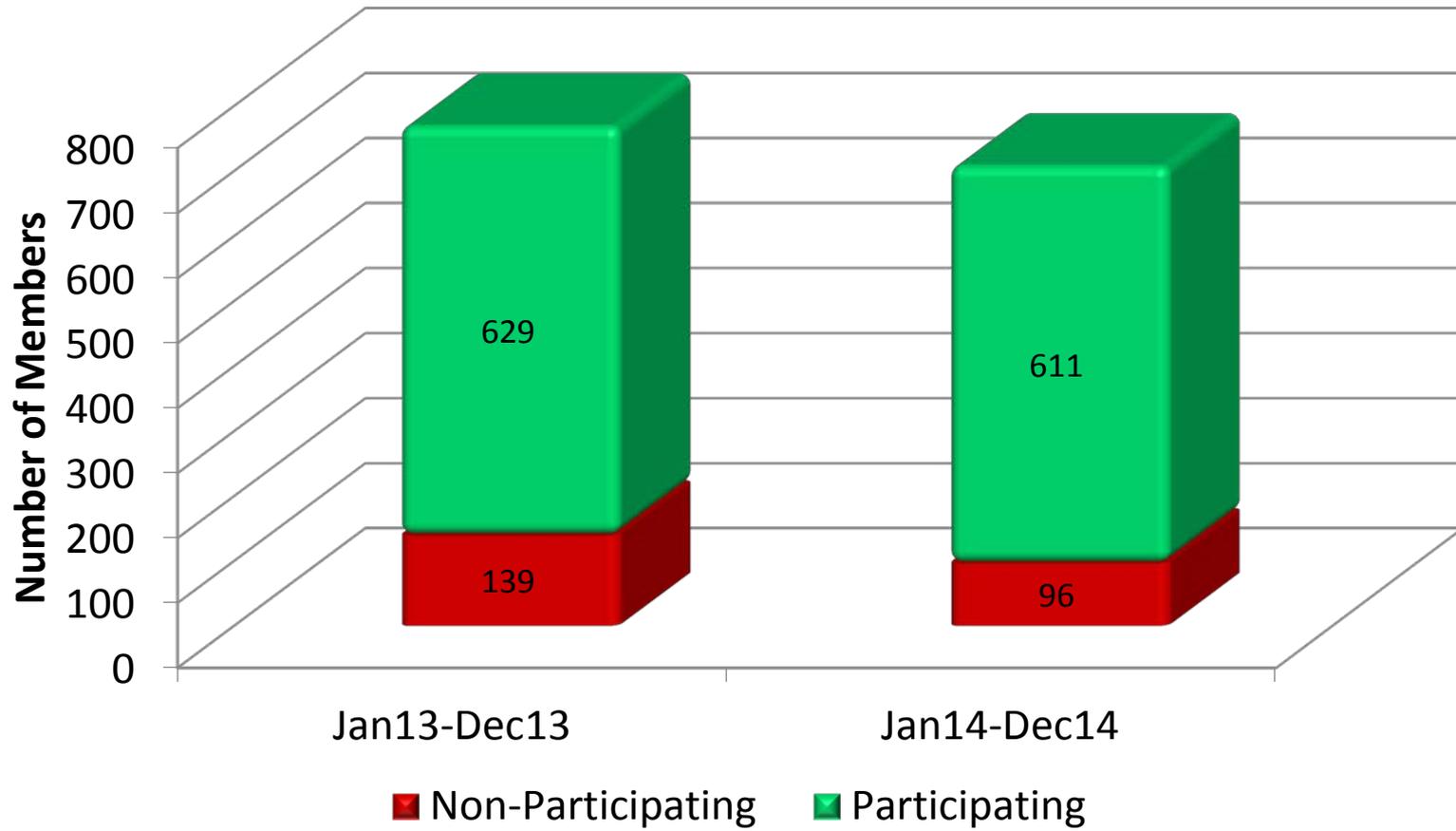
# Prevalence: Diabetes



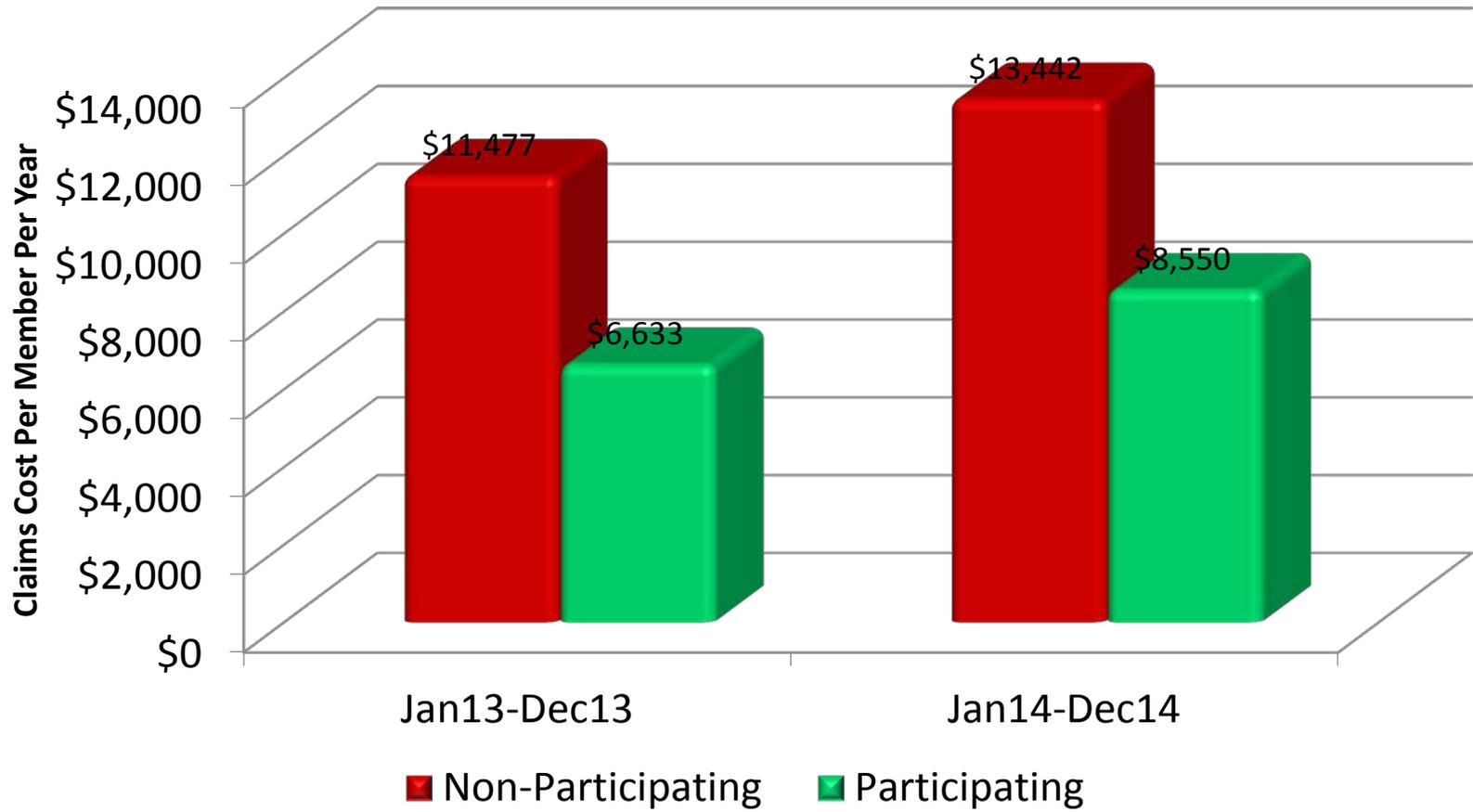
# Per Diagnosed Member Cost: Diabetes



# Prevalence: Hyperlipidemia



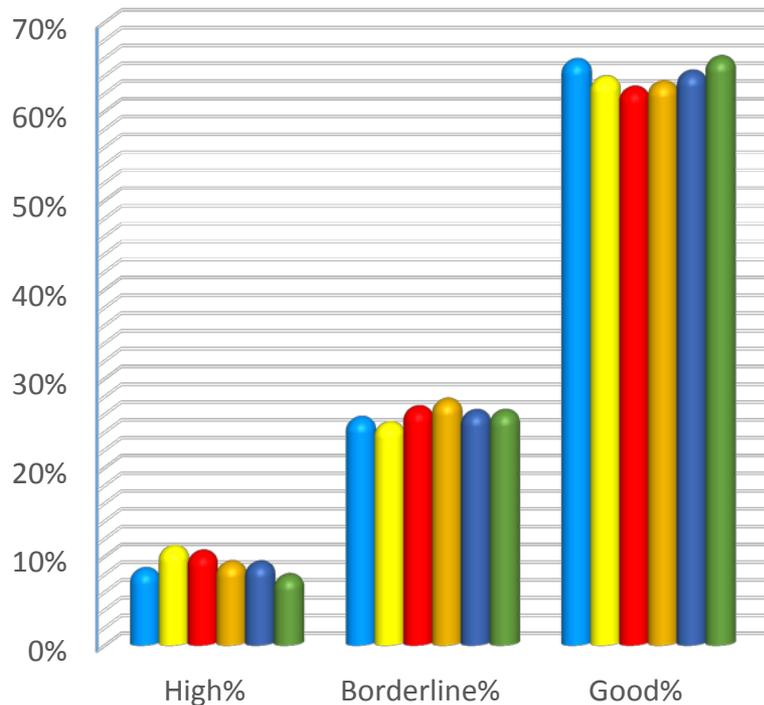
# Per Diagnosed Member Cost: Hyperlipidemia



Claims avoidance for diagnosed patients: \$2,307,432

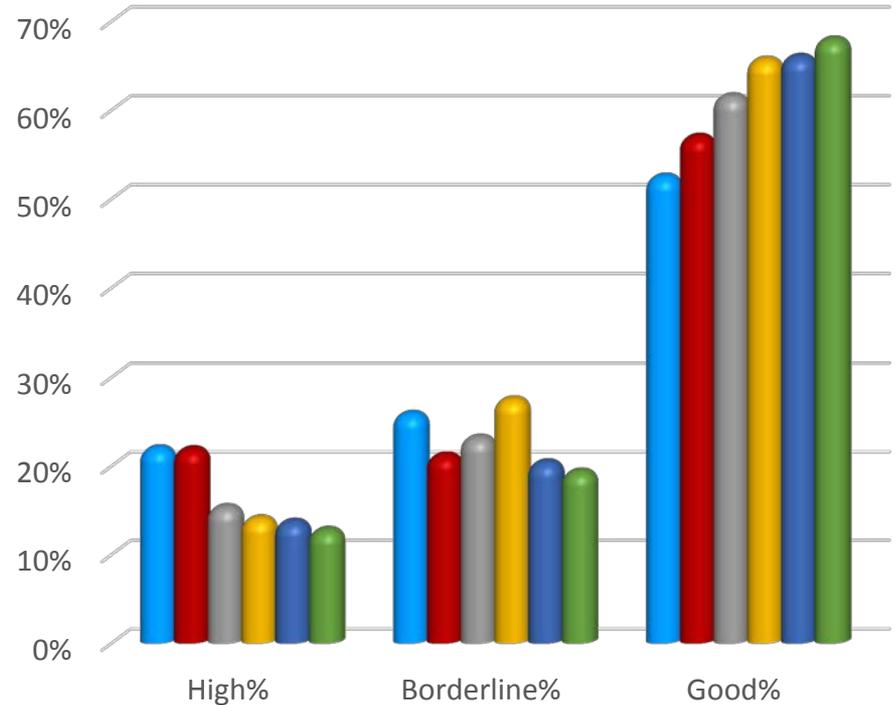
# HRA: Lab Insight Analysis

## Total Cholesterol



■ Apr09-Mar10 
 ■ Apr10-Mar11 
 ■ Apr11-Mar12  
■ Apr12-Mar13 
 ■ Apr13-Mar14 
 ■ Apr14-Mar15

## Total Cholesterol/HDL Ratio

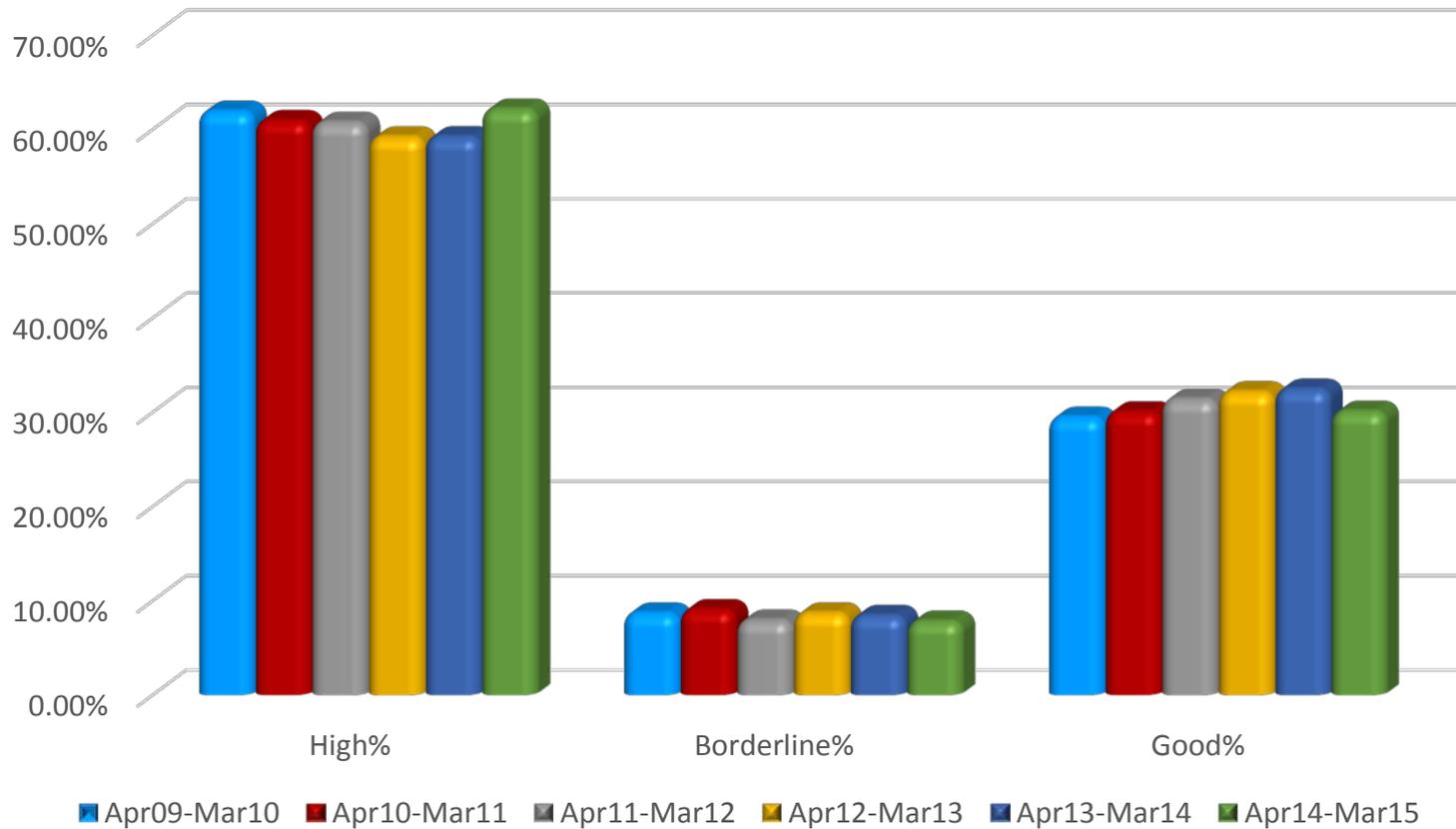


■ Apr09-Mar10 
 ■ Apr10-Mar11 
 ■ Apr11-Mar12  
■ Apr12-Mar13 
 ■ Apr13-Mar14 
 ■ Apr14-Mar15

Over time, the members categorized as High Risk have lowered their risk stratification as lab values have improved. First migrating to the category of Borderline and then to Good

# HRA: Lab Insight Analysis

## Body Mass Index (BMI)



# Employee Wellness

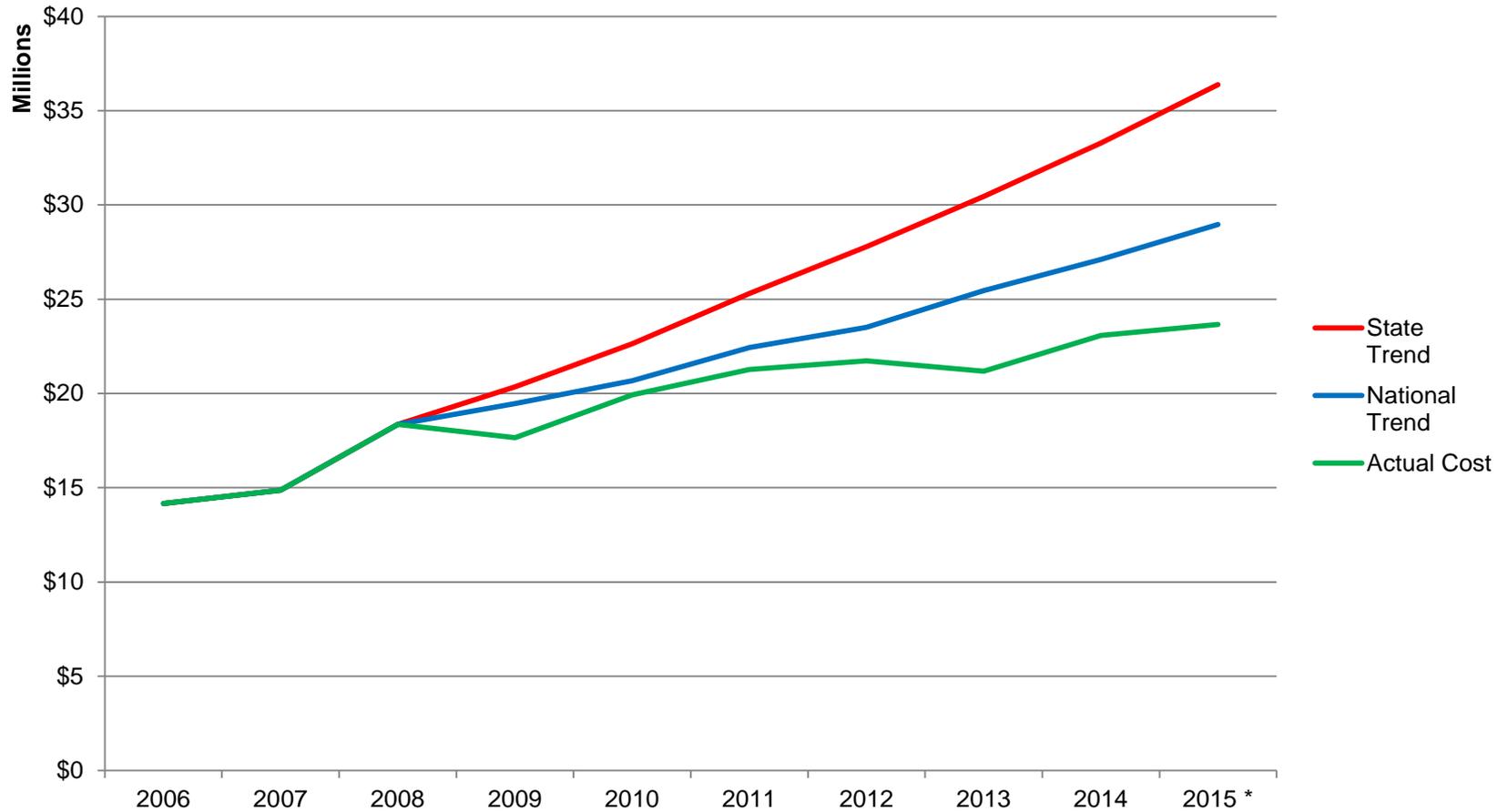


# Return on Investment through March 2015

Item	Through EHC	Average CIGNA Cost	Claims Avoidance	EHC Cost	Return on Investment
Medical Office Visits	66,181	\$191	\$12,640,571	\$10,218,394	
Rx (including mail)	65,196	\$90	\$5,867,640	\$2,254,483	
Subtotal			\$18,508,211	\$12,472,877	1.48:1
Insurance Renewal Credit (2010)			\$1,470,850		
Worker's Comp/Occ	3,115	\$191	\$594,965		
Total			\$20,574,026	\$12,472,877	1.65:1

**Over the past 6 years; conservative Return-On-Investment: \$1.65 in savings for each \$1 invested to operate the Bob Pryor Employee Health Center**

# Projected Savings



\* Projected costs

# Cadillac Tax

- Excise tax scheduled to take effect in 2018
- Elements included at this time:
  - Self-Funded Medical Plan
  - Flexible Spending Account (FSA)
  - Health Reimbursement Account (HRA)
  - Dental and Vision Coverage (when not offered stand-alone)
  - Onsite Medical Clinics

# Cadillac Tax

- Submitted comments to IRS in April
- Current limits (2010):
  - \$10,200 for single coverage (\$11,850 for high risk professions)
  - \$27,500 for family coverage (\$30,950 for high risk professions)
- One time adjustment to be made in 2018 and then annually adjusted by CPI-U

# Cadillac Tax

- Assuming a 3% annual increase to the medical plan - County would not exceed the Cadillac tax by 2023 for single or family coverage.
- Assuming a 5% annual increase to the medical plan - County would exceed the Cadillac Tax starting in 2023. Family coverage would not exceed the limits.
- Assuming a 10% annual increase to the medical plan - County would exceed the Cadillac Tax in 2018 for single coverage. Family coverage would exceed the Cadillac tax in 2020.