DATE: July 5, 2022
TO: Ty Lasher, City Manager
FROM: Ted Henry, Director of Finance and Administration
RE: Staffing Report

Over the past two years, a handful of employees have weathered a dramatic increase in growth, development, and economic activity within the city. In summary:

- 100s of acres of residential and commercial land have been sold
- 8 active residential developments (many in phase 1)
- Permit revenues year-to-date are up 173% from last year
- Permit revenues last year were 53% above the year before.
- 127 new permits have been issued year-to-date
- 38 new permits have been issued since the June workshop.
- 263 new ~~housing units~~ families will soon be establishing utility services and become ~~customers~~ neighbors.
- 780 platted lots will soon be developed and added to the total.
- 1,000s of unplatted lots are being planned.

Staffing Issues

By design, the front-line staff members specialize in one area of expertise but have the knowledge, skills, and ability to cover for other members in a time of need. If our utility clerk called in sick or needs a vacation, the planning and zoning clerk will answer the utility phone and provide an acceptable level of service. This type of strategy works well when demand is at 2016 levels, but the city has grown by 919 ~~housing units~~ families.

In times of growth, front-line utility staff get bombarded by utility billing questions on water usage, payments, service starts, service stops, service changes, requests for meter installs, new account setups, service problems that require work orders, water leaks, trash questions, trash complaints, utility locate flags in yards, seasonal backflow testing questions, voting, police reports, utilities, potholes, community room rentals, garage sale permits, information on city services such as rec, pool, animal control etc.

At the same time, front-line planning and zoning staff get bombarded by building, plumbing, and mechanical permit applications, new contractor's licenses, renewal contractor's licenses, inspection questions, homeowners wanting to build a deck, fence, or shed, their neighbors complaining about said deck, fence, or shed.

This type of demand forces staff to only address their specialization because the workload is too great to assist other areas. If anyone's son or daughter gets sick, we are forced to assist the positions with our City Treasurer or Director of Finance. Even this would work (if it was rare) but over the past 8 months, our City Treasure has spent over 50% of her time assisting the frontlines to maintain an acceptable level of service. This type of staffing maneuver creates increased overtime, stress, and (if not address) turnover.

Day in the Life on the Utility/ Front Desk

Monday June 28, 2022
- ~~3 employees~~ 2.5 employees (1 had a doctor's appointment in the morning)
- Phone Calls Received: 207 Calls
    - Note: the city averages 165 hours a month on the phone or 8.25 hours per day.
- Check payments entered: 147
- Credit Card Payments during office hours: 18; of which 50% were made via phone call.
- Garage Sale Permit: 1
- Room Reservation: 1
- Court Payments: 3
- Requested Police for walk-in residents: 2
- Create Utility Payment Agreements: 7
- Request to Discontinue Services: 8 (Month of June-57)
- Request for New Services: 4 (Month of June-77)
- Request to update services/account: 5
- Work Orders: 2 (Month of June-27)
- Work Order for new meter service: 0 (Month of June-52)

Bel Aire Staff
1. Utility Clerk I~~/ Senior Coordinator~~ (Senior Coordinator duties moved to Rec due to workload)
2. Utility Clerk II
3. P&Z Clerk~~/ help cover Utility Clerk~~ (P&Z Clerk moved to back office due to workload)
4. Court Clerk II / PD Clerk
5. Front Desk Clerk/ helps cover P&Z Clerk (daily AR transactions, closeout, general inquires)
6. City Treasurer
7. Assistant City Manager/ Director of Finance

Valley Center Staff
1. Utility Billing Clerk
2. Public Works Administrative Assistant
3. Community Development Assistant
4. PD Records Clerk
5. Court Clerk
6. Accounting Clerk II
7. City Treasurer
8. Assistant City Administrator/ Director of Finance
9. Community Development Assistant (*VC adding in 2023 to help with growth*)

Fiscal Impacts

In 2022, the City Engineer's salary was moved from our Water and Sewer Funds to the General Fund. The addition of (1) Utility Clerk and (1) Equipment Operator I will take the place of the City Engineer's salary. Both Water and Sewer Funds expenses are not increased due to these additions.

The General Fund receives an administrative fee for each project that is special assessed. This fee and others will fund the City Engineer's salary out of the General Fund.

Technology Options

The replacement of the citywide utility billing, finance and human resource management system should be a priority over the next two years. (ARPA eligible) The decision is how far we want to go.

Option 1 (Gworks):
Our current system is called "Gworks" and the company is slowing upgrading with better tools. They have a public interface upgrade available for a little over $10,000. This solution will allow customers to view historical usage online and provide a better online payment experience. (slides included)

Option 1 Staff Impacts: This upgrade will save about an hour per week of known staff time. The online payment software is fully integrated and will not require the file download/ file upload steps. This upgrade should deter some calls into city hall, but time savings are unknown at this time.

Option 2 (Other Provider)
NOTE: This solution will require a competitive bid process and full review of bids. I'm using Tyler Technologies product for this report for discussion purposes only. (slides included) This type of purchase would be in the $250,000- $300,000 range. Both solutions come with a higher "transaction fee" for credit/debit cards.

Option 2 Staff Impacts: Most providers we would move to would have fully integrated online forms, payments, real time customer metering reports, communications, and simplified back-end processing. I would expect/ require an upgrade of this magnitude to eliminate the need for adding additional frontline staff over the next seven years. Switching to a providers would be a major project and would take up to 1 year of the staff time for setup, transition, and training.

Viewing Utilities & Submitting Service Requests

Investment Summary: City of Bel Aire KS | FrontDesk Standard

City of Bel Aire KS
Bel Aire, KS

Ted Henry
Director of Finance & Administration
thenry@belaireks.gov
316-744-2451

Reference: 20220218-085246883
Quote created: February 18, 2022
Quote expires: July 15, 2022
Quote created by: Megan McKeon
Account Executive
megan@gworks.com

Products & Services

Item & Description	SKU	Quantity	Unit Price	Total
FrontDesk Standard - Professional Onboarding Professional Onboarding of FrontDesk Standard	FDS-PO	1	$3,000.00	$3,000.00
FrontDesk Standard - Annual Subscription Annual Subscription for FrontDesk Standard: 1400 Public Users	FDS-A	1	$7,320.00 / year	$7,320.00 / year for 1 year
gWorks Payments with ACH Pass-through Addition of gWorks Payments to FrontDesk No cost for implementation. Ongoing charges-- - Credit Card/Debit Card processing: 2.49% plus $1.00 per transaction with a $2 minimum - ACH Pass-through processing fees: $1.30 per transaction up to $50,000.00; $3.00 per transaction greater than $50,000.00 - Account updater service: $5.00 per month - Account updater fees: $0.70 per update - Per Chargeback: $25.00 - Per Retrieval Request Processed: $25.00	GPAY	1	$0.00	$0.00

- Per Arbitration Case: $15.00
- Per eCheck Return: $10.00
- Per eCheck Refund: $1.00
- Per Merchant Disbursement
Failure: $25.00

Subtotals

Annual subtotal	$7,320.00
One-time subtotal	$3,000.00
Total	**$10,320.00**

Questions? Contact me

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Omaha, NE 68144
USA

Utilities Pro

IMPROVE UTILITY BILLING AND ENHANCE CUSTOMER SERVICE

Powerful Technology Increases Productivity

Utilities Pro uses the most up-to-date and proven technology platform to ensure optimum performance today and into the future. With unprecedented flexibility, customization, and scalability to meet your changing needs, you've never had so much power in your utility system — and it's never been easier.

Intuitive enough for basic users and strong enough to keep up with your power users, your staff will be able to do their jobs faster and help more citizens in less time.
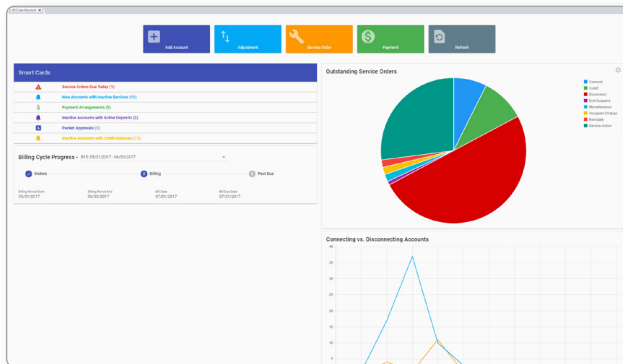
Role-Based Dashboard
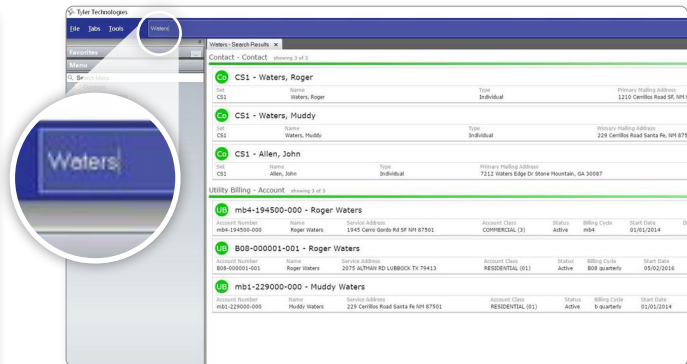
Global Search

A Customized Experience

We understand every utility organization is unique in their approach to workflow and staff responsibilities. Utilities Pro offers a customized experience to meet your unique needs through client-defined codes, fields, and processes, while also allowing management to assign program, data, and functionality permissions based on specific job functions and roles within your organization. Through role-based workspaces and security, you'll increase staff productivity and keep the focus on the information relevant to each job — whether you're a billing clerk, service manager, or utility director.

Workspaces can include data processing shortcuts and custom widgets like upcoming service orders, delinquent notifications, revenue statistics, key performance indicators, and more. In addition, online dashboards are also available to allow non-software users, such as elected officials, to access certain information, reports, and decision-making data.

Information at Your Fingertips With Dynamic Search Functionality

Utilities Pro provides quick, on-demand access to key information with an easy-to-use global search.

- Search data throughout the entire ERP Pro platform and other Tyler products.
- Search directly for customers, parcels, meters, accounts, and services.
- Filter, sort, select, and export data easily using search result grids.
- Save and share your most common search queries and results.

Integrated Reporting and Content Management

Utilities Pro is equipped with a variety of reporting options designed to minimize steps and provide you with quick access to the data you need — in a format you can use to make important business decisions.

- Access data through dynamic links that drill down into the application.
- Create and edit reports on the fly.
- Export reports into more than a dozen formats including Adobe® PDF, Microsoft® Word, and Excel.
- Schedule reports to run, print, and deliver automatically to one or many users.
- Share reports effortlessly by placing on workspaces, emailing, or posting online.

Simple Yet Powerful Billing

Next to keeping your customers' services up and running, billing for those services and collecting the revenue your community relies upon is a top priority. The enhanced billing services available through Utilities Pro handle the most complex rate scheduling for single or multi-unit residential or commercial applications including:
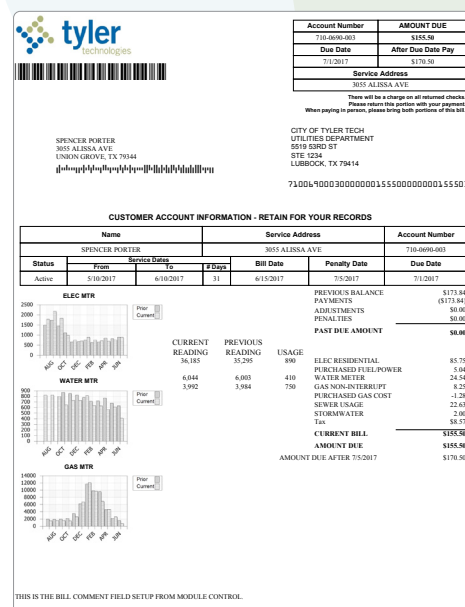
- Support for water, sewer, electric, gas, solid waste billing, and more
- Flexible rate engine to calculate complex and simple rates without the need for customization
- Billing based on consumption, flat rate, assessment, installation agreements, and miscellaneous charges
- Imported meter reading data from any third-party system through configurable integration
- Streamlined bill and notification distribution and management
- Flexible bill generation options including email bills and online presentment

Auto-billing processing ensures each account is billing and delinquent notifications are provided in a timely manner with little operator intervention.

Centralized Revenue Collection and Cashiering

Utilities Pro includes an easy-to-use, centralized cashiering product that accepts multiple payment types and offers reporting, auditing, and payment entry

capabilities including barcode-enabled bills that streamline data capture for your billing clerks. This powerful tool enables automatic, real-time inquiries; on-demand management reports; and detailed tracking of cash collections for maximum transaction efficiency. PCI-DSS certification gives you peace of mind while allowing credit card processing over the phone, in person, or on a recurring basis,

Sample Bill

while built-in cash drawer reconciliation, batch reporting, and end-of-day processing reduces errors and makes managing collections easier.

Work Smarter, Faster With Integrated Service Orders

Utilities Pro is designed to help you get work done quickly and efficiently. Scheduling, tracking, and billing for service orders has never been easier with at-a-glance visibility, email alerts, and in-system notifications. Through user-customized workspaces, service clerks can drill into individual accounts and service orders before approving or dispatching service calls to initiate, modify, or discontinue service — all without leaving the Utilities Pro workspace.

Additionally, a mobile service orders application empowers field technicians with the tools they need to do their jobs anytime, anywhere. Its robust functionality allows users to initiate, view, assign, modify, complete, and void service orders from any Apple iOS® device without ever going back to the office. Notes, meter reads, and other critical details are entered directly into the application and updated in Incode in real time, increasing staff efficiency.

- View and pinpoint open service orders on a map using GIS data.
- Assign new service orders, which can be received in the field.
- View relevant contact, service address information, notes, and instructions.
- Search service orders using the map, service address, or service order number.
- Enter meter information, readings, and field notes.

Unparalleled Customer Access

Utility Access

Your customers are accustomed to viewing account information and paying their bills online — utilities are no exception. Utilities Pro delivers the functionality your customers demand.

Through a powerful online portal, customers can view transaction and payment histories, bill due dates, deposits on file, current balances, and more. Through secured and non-secured access, you control what information your account holders can see and what actions they can take — request service, pay a bill, or change account information. With Utility Access, your organization can reduce phone inquiries, shorten lobby lines, increase staff efficiency, and empower your customers with 24/7/365 access to their accounts.

Connect Data and Maximize Efficiency With Integrated Applications

With the broadest range of integrated software applications and services in the market today, Tyler Technologies is uniquely positioned to deliver the tools you need to revolutionize your operations and citizen services.

Utilities Pro is designed to work with the systems your organization uses every day. In one central location, users can — based on permissions — access and edit citizen information. Once a citizen or a parcel record is recorded in the ERP Pro system, it is accessible throughout the software. Additionally, data sharing between departments enables the flow of utility revenue into Financial Management Pro. Seamless integration means processes are smooth and you always have access to the data and functionality you need, when you need it.

Whether you implement Utilities Pro as a stand-alone product or maximize the benefits by using it in multiple departments, you will enjoy simplified workflow, increased access to information, and a more engaged citizenry.

Integrated Modules

ERP Pro
- Accounts Payable
- Bank Reconciliation
- Budgeting
- Building Projects
- Business Licenses
- Employee Access
- Fixed Assets
- General Ledger
- Human Resources
- Interactive Voice Response
- Inventory Control
- Payroll
- Project Accounting
- Property Tax
- Purchasing
- Work Orders

Content Manager

Notify

We're With You for the Road Ahead

At Tyler, we believe clients succeed when they have a technology partner they can rely on. As you travel the road from idea and installation to product training and ongoing technical support, Tyler is with you every step of the way with superior services that recognize your unique needs and challenges.

Our public sector experience helps you navigate to the right solution.

It's our job to know and understand the solutions that will make you the most efficient — an understanding that comes from our staff, many of whom held public sector positions prior to joining Tyler. When you're unsure of the right combination of software that can help, we're here to provide you with in-depth product and service knowledge — all backed by industry experience — to drive you to the best decision for your organization.

Get operations off to a good start with proper training.

The right training for your solution equips you to serve citizens on a different level. Learn how your software works using a structured curriculum, including a combination of one-on-one and self-paced instruction, with an extensive library of utility billing-specific help videos built into the software.

For ongoing training and support, Tyler provides interactive resources:

Tyler University

Tyler's continuing education portal is a one-stop shop for your organization's continuing education needs. Get access to specific Utilities Pro courses, Microsoft® software training, and other courses complementary to your daily work 24/7/365 from the convenience of your computer. Tyler U is designed to help improve your skills, reduce new employee training costs, and keep up with the latest technology or procedures.

Tyler Community

We understand that some of the most valuable support and product information can be found in the minds of you — our clients — who use the product every day. Tyler Community is a user-driven online support community designed to foster interaction with more than 30,000 public sector peers to get free advice, discuss best practices, troubleshoot issues, and share ideas for software improvement.

We go the extra mile when it comes to implementation.

It's not just anyone's software implementation experience. It's yours, and we take your trust seriously. Tyler's implementation and conversion experts will do whatever it takes to make sure your project runs smoothly, on time, and on budget while keeping your data accurate and secure.

Ongoing software support for the miles ahead...

Think of our toll-free hotline, email access, and website dedicated to Tyler's client support as "roadside assistance" when there is trouble along the way. Tyler's dedicated Certified Support Professionals can quickly answer questions and get you back on the road to serving customers.

CALL
800.646.2633

EMAIL
info@tylertech.com

VISIT
tylertech.com

About Tyler Technologies, Inc.

Tyler Technologies (NYSE: TYL) provides integrated software and technology services to the public sector. Tyler's end-to-end solutions empower local, state, and federal government entities to operate more efficiently and connect more transparently with their constituents and with each other.

By connecting data and processes across disparate systems, Tyler's solutions are transforming how clients gain actionable insights that solve problems in their communities. Tyler has more than 37,000 successful installations across more than 12,000 locations, with clients in all 50 states, Canada, the Caribbean, Australia, and other international locations.

Tyler was named to Government Technology's GovTech 100 list five times and has been recognized three times on Forbes' "Most Innovative Growth Companies" list. More information about Tyler Technologies, an S&P 500 company headquartered in Plano, Texas, can be found at **tylertech.com**.

info@tylertech.com I tylertech.com

tyler technologies

Empowering people who serve the public®

Enhance Efficiency and Customer Service With Interactive Voice Response

BRIEF DESCRIPTION:

Is your utility billing office being inundated with calls from customers needing to check the status of their account or make a payment? With Utilities Pro Interactive Voice Response (IVR), customers have the ability to conduct their business by phone, bringing new meaning to customer service while simultaneously increasing staff efficiency.

BENEFITS OF IVR:

- Reduce lobby lines and customer wait times
- Increase access to customer information
- Boost staff efficiency by decreasing customer service calls
- Improve customer response times and increase collections
- Access up-to-date account information through integration with ERP Pro Cashiering

HOW IT WORKS:

1. The utility billing customer calls a dedicated phone number and is prompted to enter their account information using their phone's keypad, including account number and address.

2. Account information including balance and due date is given and the customer is prompted to make a payment.

3. The customer is prompted to enter credit card information and receives a confirmation number.

4. Payment transaction results are pushed in real time to ERP Pro Cashiering.

Note: IVR is available only to users of ERP Pro 10 and Utilities Pro 10.

Interested in learning more? Email **info@tylertech.com** or call **800.646.2633.**

Input   Request

Payment   Transaction

CALLER   **INTERACTIVE VOICE RESPONSE**   **UTILITIES PRO**

Information   Response

ERP-ERPP-FO-7978-22304-BE-0222