THE VISTALOGIX GOVERNMENT GUIDE TO

REDUCING COSTS, NOT SERVICE

PORTFOLIO®

WORKFORCE OPTIMIZATION SOFTWARE

Vistalogix's web-based Workforce Optimizer software allows an organization to define all activities necessary to its operations and monitor the costs to perform those activities.

CHALLENGE: BUDGET vs. SERVICES

In today's increasingly open "Glass House" environment, government offices are being asked to simultaneously be flexible enough to provide the highest level of service possible *and* minimize spending. These challenges can strain resources that are needed to satisfy current and new service requirements, while still managing the complexity of an open-for-the-world-to-see budget and resource allocation process. As a result, managers are increasingly being asked to make across-the-board cuts, especially in personnel, without a complete understanding of how the cuts will impact service delivery.

The truth of the matter is that managers are better served by analyzing the true activities involved in delivering services and adjusting not only human resources, but also equipment and other resources necessary to provide a given service. Enter the concept of workforce optimization. To effectively accomplish this, however, several things are necessary, such as:

- **The ability to collect information from the bottom up.**
- **Information that is easily accessible for in-depth analysis.**
- **Reports that can be effortlessly retrieved and presented to Board members, Commissioners, Managers and oversight agencies in a simple, consistent and comprehensible way.**
- **Ability to make budget, policy and personnel decisions based on provable, factual data.**
- **Creating and documenting procedures and controls based on policy.**
- **Reviewing those controls to determine outcomes against policy, including performance, value and cost.**
- **Providing a complete picture of all activities and related costs for every service provided per department throughout an entity.**
- **Having a clear understanding of all requirements and skills needed to perform or manage all tasks throughout the organization, allowing for easy implementation of plans for succession and/or hiring.**

Proactively optimizing an organization's workforce depends on effectively managing relevant activities. An organization must define, assess and monitor the status of all activities to maintain desired levels of cost and performance.

An effective workforce optimization framework should help address elements such as:

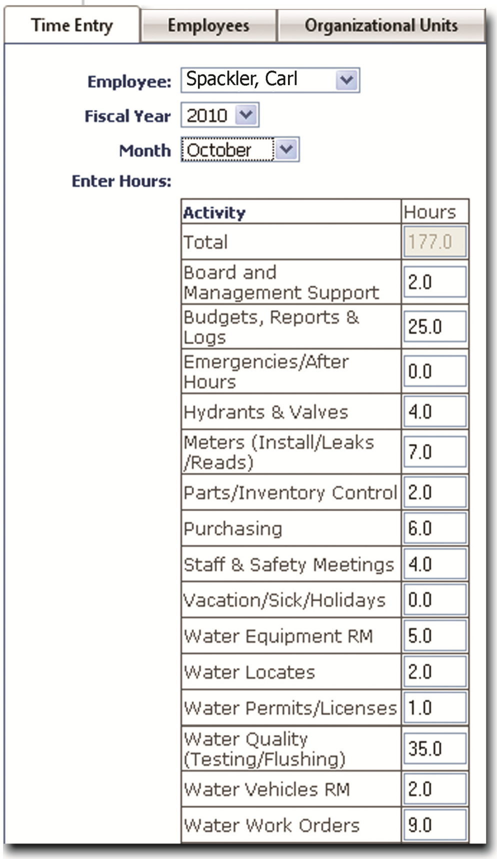
- **Integrity. Safeguard the accuracy and completeness of information being accumulated.**
- **Availability. Make information and vital services available when required.**
- **Performance. Provide information and services with a high level of efficiency.**

Vistalogix's Workforce Optimizer software allows an organization to define all activities necessary to its operations and monitor the costs to perform those activities. With just a few easy steps the system is set up and ready to receive information. Employees work as they always have and track the tasks they are responsible to perform as well as any additional tasks they have been given on a particular day. The activities are entered the same as their weekly time sheets are currently entered. Once it is in the system it is available for reports, budgeting or any other form of analysis a manager desires.

This paper describes how Vistalogix's Workforce Optimizer can help a Government Agency address budget and service issues by providing a sustainable strategy for job function and cost management.

EASIER, MORE ACCURATE BUDGETING

One of the main challenges facing government entities implementing an activity management solution is gathering and accessing factual data. Traditional activity management is performed at the field level by a manager and left to them to manage the process. Directors and Boards have been left to budget and plan based in large part on assumptions and "guess-timates". Not providing the benefit of factual information to allow executives to make "hard-data" conclusions. As a result, organizations are having a difficult time applying what is being told compared to what is actually happening.



Time Entry | Employees | Organizational Units

Employee: Spackler, Carl
Fiscal Year 2010
Month October
Enter Hours:

Activity	Hours
Total	177.0
Board and Management Support	2.0
Budgets, Reports & Logs	25.0
Emergencies/After Hours	0.0
Hydrants & Valves	4.0
Meters (Install/Leaks /Reads)	7.0
Parts/Inventory Control	2.0
Purchasing	6.0
Staff & Safety Meetings	4.0
Vacation/Sick/Holidays	0.0
Water Equipment RM	5.0
Water Locates	2.0
Water Permits/Licenses	1.0
Water Quality (Testing/Flushing)	35.0
Water Vehicles RM	2.0
Water Work Orders	9.0

The Workforce Optimizer allows:

- **The collection of accurate data down to the field-level. Going beyond merely showing that an employee worked a day, the employee lists time spent on a pre-defined set of activities.**
- **Executive management and boards to have factual data and not base decisions on "guess-timates" or assumptions.**
- **Employees to feel empowered to show what they actually do with their time.**

DETAILED INSIGHT INTO SERVICE ACTIVITIES

There are many different activities which are important and measurable in an organization. Each of these activities plays a particular role in the overall service provided. Management being able to review and analyze performance and its related cost helps any government entity maximize operational efficiency in the execution of services.

Using the Workforce Optimizer to capture details:

- **Makes the many different services and their related activities measurable and visible.**
- **Identifies obstacles to employee productivity such as outdated equipment or inefficient processes.**

Why It's Important

Board:

- **Complete picture of all services and costs.**
- **Justify allocation of funding.**
- **Self-service information in real time.**

Executives:

- **Make decisions based on provable, factual data.**
- **Identify obstacles to staff productivity.**
- **Improves decision making year-round.**

Managers:

- **Enables proactive management at the dept. level.**
- **Reduces workload.**
- **Simplifies data collection.**

CURRENT DATA, AT YOUR FINGERTIPS

In most organizations, budgeting is a once-a-year, labor-intensive, time-consuming process involving numerous employees, spreadsheets and mounds of paperwork. By automating the collection of employee activity data year-round, budget analysis can be reduced to a few clicks, rather than weeks of information sifting.

- **See instantly updated totals for employees, activities, costs, hours, and comparative data for budgets, prior months, years, etc.** (See example report on page 5.)
- **Adjust processes on-the-fly to accommodate changing economic and operational requirements.**

JUSTIFYING NECESSARY FUNDING

With budget cuts happening at all levels, funding for various services is constantly being brought into question. Therefore, it has become increasingly important to justify funding not only to funding sources, but to the interested public as well. Tracking detailed activities as part of a workforce optimization strategy can prove invaluable by:

- **Shedding light on true costs of delivering services which may sometimes be hidden in other areas or line items.**
- **Demonstrating that provision of a service actually costs what has been allocated for it.**
- **Allowing quick response to requests for funding justification without overburdening staff or wasting excessive time.**

FINDING HIDDEN MONEY

Often, the process of analyzing and optimizing personnel job functions can reveal excess funding in one area that may be utilized in other areas. Using a sound workforce optimization strategy can:

- **Identify hidden funds or areas of waste that may be "traded" for cuts in other, more crucial areas.**
- **Recoup costs or find economies of scale by providing services such as vehicle maintenance to other agencies.**
- **Simplify seeking of grant funds or donations by packaging services, such as senior or child care for specific funding.**

EASILY MANAGE GRANT FUNDS

For many organizations, keeping accurate track of grant funds received for special projects can be a daunting and laborious task. Several smaller organizations have reported refusing to apply for grant funds because they fear being unable to handle the record-keeping and reporting requirements. By using a flexible means of categorizing activities, your organization can become more effective at managing grants:

- **Separate tasks associated with grant projects from those associated with day-to-day operations.**
- **Reduce or eliminate the need for employees to keep additional records for time spent on grant and non-grant related activities.**
- **Integrating the tracking of grant-related activities allows generation of grant-specific reports in minutes, as opposed to hours or weeks of sifting through spreadsheets and paperwork.**
- **Solid record-keeping assures significantly easier audits or inquiries and provides accurate demonstration of results or required outcomes.**

IN PRACTICE: Securing Outside Funding

A community in Central Florida provides mowing and spraying services of medians and other property owned by the county and other utility companies. Using the Workforce Optimizer, they are able to show the county and utility companies that the true cost involved in maintaining those properties exceeds $50,000 annually. With that knowledge it has been easier for the county and utilities to justify providing drainage and other special projects for the community—without charging extra. As the executive director explains, "**being able to view and show what it costs to provide these services has allowed us to not only prevent funding cuts, but develop excellent relationships with our county and local utilities**. Now, when we need something from them, it's not viewed so much like we are asking for something as much as it is a tradeoff. The county has its property maintained at a high level and we have had some drainage and other projects done for us that have helped our community tremendously."

Activity Name	Clarke, Jason	Kemp, Joe	Eaglen, Bill	Hall, James	Maine, Jack	Olsen, Randy	Shaw, Brian	Powers, Clay	Days	Total	Prior Year
TOTALS	$ 14,065.71	$ 40,190.34	$ 19,514.54	$17,655.50	$ 6,073.73	$ 23,053.35	$ 13,171.92	$ 28,919.66	1,046.4	$ 217,259.13	$219,076.22
Administration											
Vacation/Sick/Holidays	$ 1,715.88		$ 1,359.16	$ 591.54	$ 473.82	$ 2,643.89	$ 661.90		70.1	$ 11,884.87	$ 12,221.42
Accounting & Data Entry		$ 6,563.75	$ 4,902.68			$ 2,884.25			84	$ 21,695.47	$ 26,423.76
Planning & Development		$ 7,826.01		$ 73.94		$ 180.27			35.1	$ 11,586.38	$ 14,722.56
Billing & Collections			$ 1,990.20						10.3	$ 1,990.20	$ 2,742.15
Permits & Licensing			$ 4,830.77						7.8	$ 6,462.95	$ 6,824.54
Board Support		$ 6,563.75						$ 548.61	22.3	$ 8,140.03	$ 14,762.11
Purchasing		$ 706.87						$ 1,253.97	5.8	$ 1,960.84	$ 2,872.43
Budgets, Reports & Logs		$ 8,128.95		$ 129.40	$ 28.43	$ 3,905.75		$ 5,760.42	87	$ 23,174.82	$ 22,483.76
Engineering & Legal		$ 4,392.66							10.9	$ 4,392.66	$ 6,213.45
Community Newspaper		$ 454.41							3.4	$ 1,058.91	$ 1,283.71
Customer Service	$ 496.70		$ 4,174.56						24.3	$ 4,671.26	$ 4,315.82
Staff & Safety Meetings	$ 45.15	$ 1,413.73	$ 24.27	$ 36.97	$ 18.95	$ 360.53	$ 33.10	$ 744.54	9.5	$ 2,837.61	$ 3,245.17
Work with Outside Agencies		$ 4,140.21				$ 600.88		$ 1,841.77	28.1	$ 8,880.00	$ 9,710.22
Special Projects			$ 194.17						1	$ 194.17	$ 4,565.13
Parks & Recreation											
Grounds Maintenance				$ 277.28	$ 3,145.51	$ 1,051.55	$ 1,356.90		86	$ 12,868.13	$ 9,843.56
Lot Mowing				$ 924.28			$ 1,340.36		47	$ 6,576.64	$ 6,843.57
Medians & Boulevard				$ 36.97	$ 1,108.74	$ 120.18	$ 628.81		22.6	$ 2,189.91	$ 2,314.87
Parks Facility Maintenance			$ 303.38	$ 1,164.59	$ 426.44	$ 660.97	$ 99.29		27.6	$ 3,792.94	$ 4,235.17
Parks Equipment RM				$ 1,793.10		$ 420.62	$ 165.48		25.9	$ 3,903.54	$ 1,214.56
Parks Vehicles RM				$ 1,295.77		$ 520.18			3.4	$ 1,919.27	$ 512.34
Water Management											
Canal/Drainage Maintenance				$ 1,053.68		$ 2,313.41	$ 7,876.66		126.4	$ 17,901.83	$ 10,432.74
Pump Station	$ 1,964.23			$ 961.25	$ 293.77	$ 1,682.48	$ 231.67	$ 6,191.47	62.7	$ 12,882.69	$ 12,235.63
Aquatic Weed Control				$ 2,606.47		$ 1,892.79	$ 66.19		51.5	$ 8,076.11	$ 9,128.72
Drainage Facility Maintenance				$ 2,883.75	$ 407.49	$ 1,231.81	$ 579.17	$ 5,211.81	63.4	$ 12,021.40	$ 6,852.75
Water Equipment RM	$ 6,208.79			$ 2,070.38		$ 1,862.74	$ 132.39	$ 3,879.47	74	$ 14,690.83	$ 15,270.79
Water Vehicles RM	$ 451.55			$ 388.20				$ 666.17	7.3	$ 1,505.92	$ 1,823.42
Water Work Orders	$ 2,551.25		$ 1,735.35	$ 92.43	$ 170.58	$ 30.04		$ 2,821.43	35.1	$ 7,401.08	$ 3,214.57
Emergencies/After Hours	$ 632.16								3.6	$ 632.16	$ 412.11
Mosquito Control											
Mosquito Spraying				$ 961.25		$ 420.62			7.6	$ 1,381.87	$ 1,478.92
Mosquito Equipment RM		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	$ 623.15
Mosquito Vehicles RM		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	$ 253.12

Why It's Important

Board:

- Provides detail behind the numbers.
- Fosters community relationships.
- Easily identifies changes or trends.

Executives:

- Justify needed funding.
- Speeds up the budgeting process.
- Helps find hidden funds.
- Simplifies grant management and audits.

Managers:

- Provide services at highest level of efficiency.
- Complete picture of field staff activities.

THE TRUTH BEHIND JOB DESCRIPTIONS

An alarming number of government managers surveyed report that the duties their employees perform are often far out of alignment with the original job description they were hired for. Furthermore, many high-level managers report only being vaguely familiar with the tasks many of their organizations' employees perform.

Using the Workforce Optimizer, management can easily:

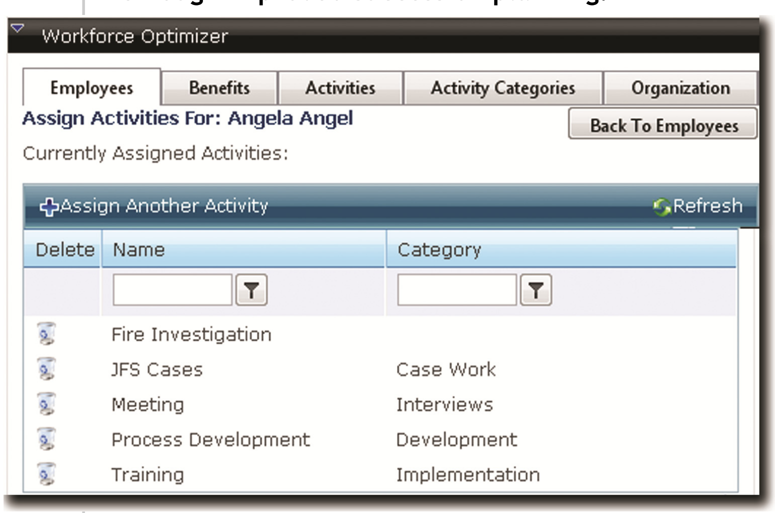
- **Capture an accurate picture of the detailed tasks involved in each employee's job.**
- **Cross-reference duties, tasks and funding .**
- **Helps facilitate Targeted Selection process by giving clear understanding of the functions any candidate must perform.**

MANAGING TURNOVER

In the old days, when an employee left or was fired, organizations just went out and replaced that person immediately. Now, they are able to run a report to see what that person did every day and how long those tasks took. After reviewing their activities and those of some of the other employees in related positions, organizations are sometimes able to give a couple of activities to the other individuals and hire a seasonal or part-time worker. "We have often, inadvertently, shown a hard dollar savings, sometimes in excess of $40,000, when a person left."

Utilize workforce optimization and activity tracking to:

- **Maintain better control and avoid reactive personnel decisions brought on by unforeseen events such as departures, accidents, or upper-level management.**
- **Avoid bad press associated with layoffs by proactively modifying positions and duties as natural turnover occurs.**
- **Demonstrate preparedness for promotions and departures through improved succession planning.**



IN PRACTICE: Improving Efficiency

"Our board was requesting that our field personnel increase maintenance on the canals because they were receiving complaints from residents that the grass and aquatic weeds were growing faster than our cycle of maintenance. Of course, there was not any additional budget approved to accomplish this. The problem was that it took our crews 26 days to complete maintenance on all of the district's canals. **By running a few simple reports on activities, and working with the crews, I was able to identify several roadblocks to their productivity.** By analyzing, and making some changes to, their procedures, such as reducing the number of times they had to return to the shop to refuel or refill their herbicide tanks, we were able to significantly improve their productivity. Initially, we were able to cut the maintenance time from 26 days to 17 days. However, after some additional tweaking, **we were able to get the process down to only 6 days!** Not only has this led to happier residents, but the crews are happier because they don't have to spend as much time on canal maintenance, in spite of the requested increases."

INFORMATION AT YOUR FINGERTIPS

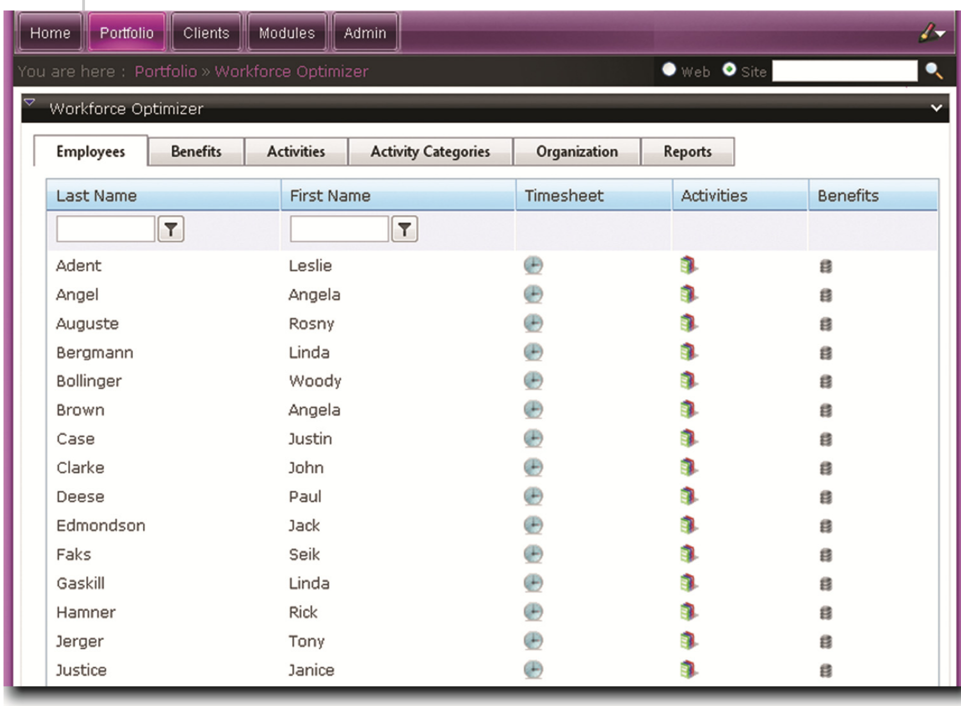
Taking a proactive approach to activity management and governance can give an organization the agility it needs to respond to a variety of challenges it faces — both today and in the future. A centralized, automated approach not only enables government entities to effectively control information and rapidly make it available to meet audit and budgeting requirements, but also facilitates enforcement that helps protect the integrity of the entire Government entity — and can enhance the public and employee relationships.

Vistalogix's Workforce Optimizer solution helps governments maximize their existing and future personnel investments. Establishing a robust activity management infrastructure that will help provide the flexibility required to quickly adapt to changing economic requirements and capitalize on new opportunities.

In addition, workforce optimization from Vistalogix:

- **Reduces reliance on management by empowering employees to improve how services are provided.**
- **Can be easily adopted by every worker, due to easy-to-use online data entry process.**
- **Ability to customize reports to meet an organization's unique requirements.**
- **Directors can immediately utilize the recorded activity data with common, out-of-the-box reports.**

The Workforce Optimizer is designed to achieve a balance between the richness of accurate activity tracking and the simplicity necessary to gather the data unintrusively. This approach enables the broad participation in activity tracking while protecting data integrity resulting in overall improvement in budgeting and service completion.



Why It's Important

Board:

- **In-depth understanding of job requirements.**
- **Streamlines process for personnel committees.**
- **Aids succession planning of management.**

Executives:

- **Facilitates Targeted Selection of new hires.**
- **Proactively manage personnel changes.**
- **Seamlessly distribute responsibilities of departing employees.**

Managers:

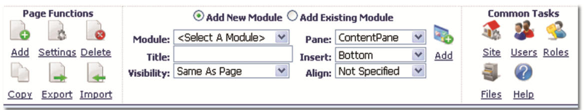
- **Manage staff without defined responsibilities.**
- **Empowers employees to show what they really do.**
- **Facilitates team building.**

Vistalogix

PORTFOLIO® TECHNICAL DETAILS

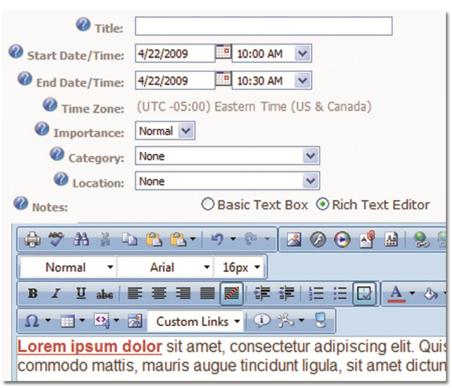
FAST, EASY DEPLOYMENT

A well designed portal solution should not only be up and running quickly, but should provide you with usable functionality straight out of the box, with little customization required. Many Enterprise Information Portals found on the market attempt to address every possible scenario in every possible environment. In doing so, deployment of these solutions often requires hundreds of hours of consulting and planning, then requires months, or even years, of time to install and configure their software.



Because of its simplicity and reliance on well-supported, industry standards, Portfolio may be installed and configured in a matter of weeks, instead of months or years. Furthermore, its simple, intuitive design and layout require a minimal amount of training to become familiar.

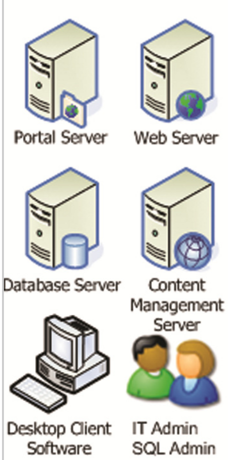
NON-TECHNICAL MANAGEMENT



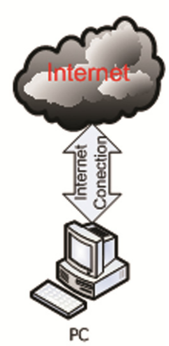
Portfolio is designed from the ground up to be easy to deploy, easy to manage and easy to use, requiring only the skills necessary to surf the web and use a word processor. Learning curves are reduced by using Portfolio's 1-page laminated **EZReference Guides** for end-users or admins.

LESS RESOURCE-INTENSIVE

Typical Portal Requirements



Portfolio Requirements



Other portal products require numerous servers and complex configurations to operate. Additionally, they require your organization to have expert skills either on staff or readily available.

Portfolio simply requires a few days of setup time. Because Portfolio is entirely web-based, management is simple and may be done by your existing personnel, even if they only have minimal IT expertise.

Content in Portfolio is managed through the use of various modular elements for information like contacts, calendars, static web content and so on. The government bundle provides a number of unique elements specifically designed for the needs of municipalities:

SECURE PUBLIC INFORMATION ACCESS

Our software allows for self-service public access of documents, recordings, and videos, thus reducing labor costs and the burden on your staff. Modules such as online calendars make information readily accessible to anyone, from anywhere and make it easy to keep up-to-date.

STRETCH & JUSTIFY THAT BUDGET

Portfolio® WorkForce Optimizer module allows you to track the function and activities of your personnel so that you can make informed decisions about the most effective allocation and budgeting for them. Additionally, this data can also help generate funding.

AUTOMATE WORKFLOW

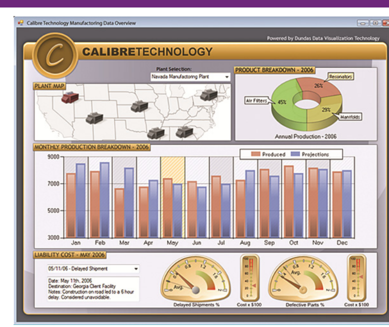
Several of the modules in Portfolio® help automate workflow to streamline management processes, such as **issue tracking**, **online payments**, **public requests**, **enrollments**, and **satisfaction surveys**.

RELIABLE, MANAGED EMAIL

Portfolio® email provides a secured, segregated alternative to shared email accounts or costly infrastructure and can automatically archive inbound/outbound emails for public review.

COMPREHENSIVE REPORTING

The Reporting and Dashboard modules allow for easy access of reports as well as inexpensive consolidation of data from multiple systems. This data can be available to you in real-time so you can quickly make informed decisions.



OTHER BENEFITS

- Can provide personalized agency websites.
- Municipality-wide sharing of information and resources.
- Cross-agency workflow management capabilities.

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Contract GS-35F-0551U