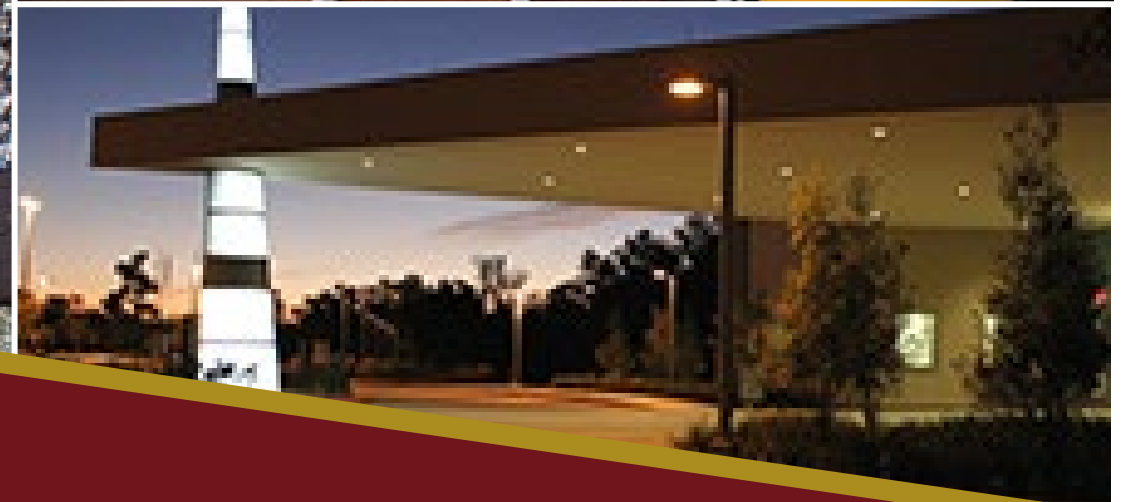# High-Level Utility Billing Overview and Pearland Background

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Today's Presentation

- Staff Intros

- Finance Department Org Chart

- Billing Process Review

- Pearland Utility Billing History

Utility Billing Staff Intros

Nancy Massey, Utility Billing Manager

Dara Eng, Assistant Utility Billing Manager

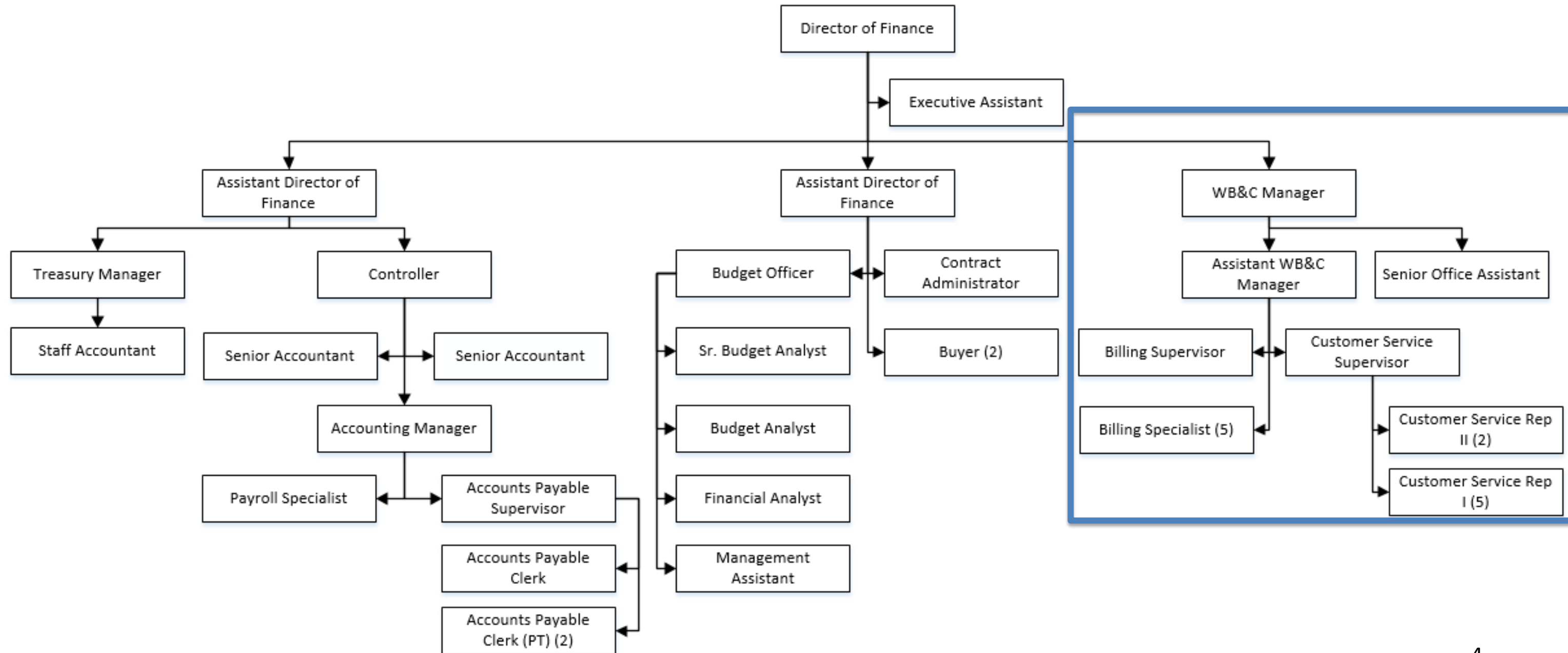Lori Flores, Customer Service Supervisor

Jennifer Quiroga, Billing Supervisor

John McCarter, Interim Finance Director

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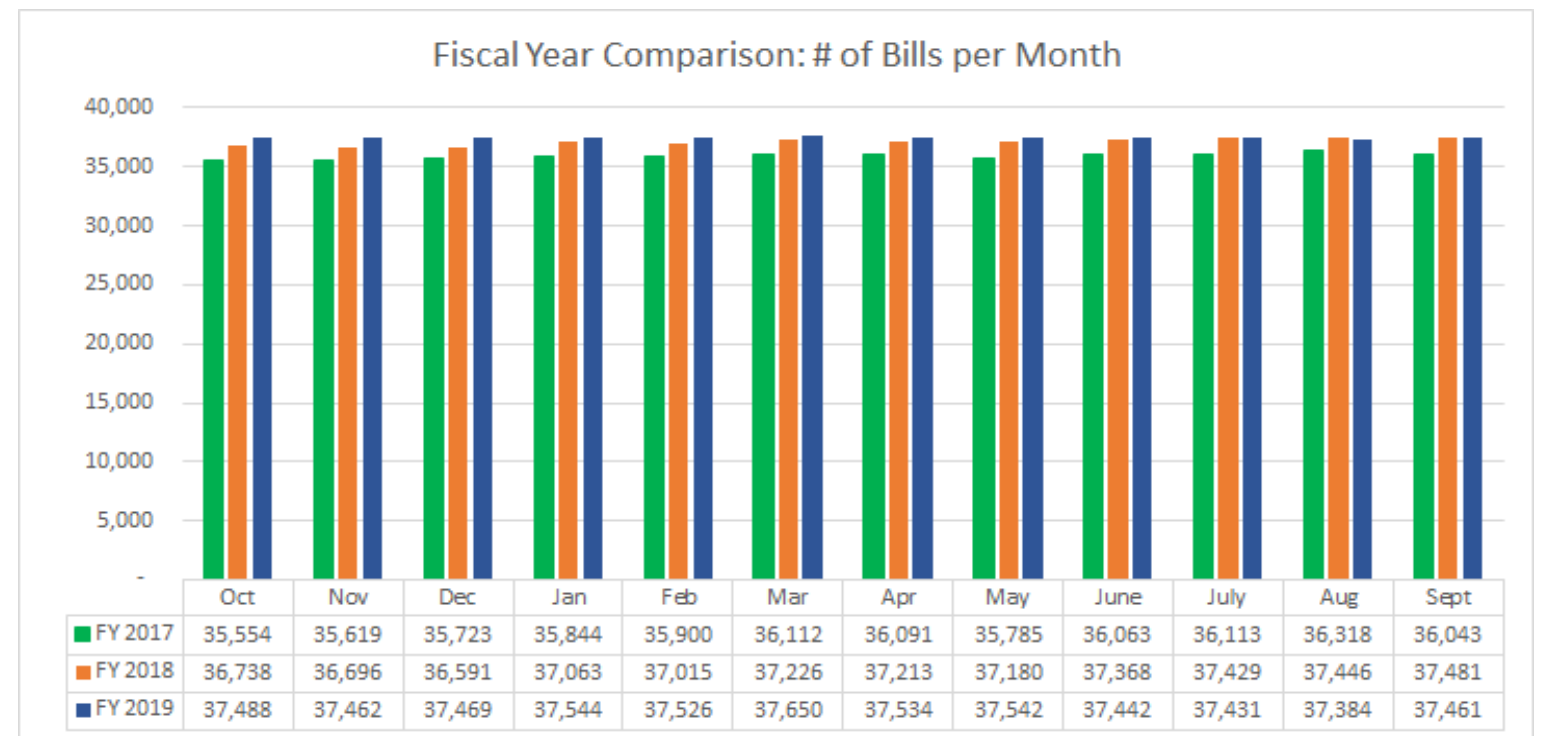
Finance Department Org Chart

Billing

- Billing of 4 cycles – approximately a total of 38,133 accounts
  - Cycle 11 – 12,746
    - East Pearland
  - Cycle 12 – 8,029
    - Old Pearland
  - Cycle 13 - 7,681
    - Between Old Pearland and West Pearland
  - Cycle 14 - 9,677
    - West Pearland

  *as of December 2020

- Exception Bills
  - Move out bills – Final statements
  - Out of Cycle bills – Accounts that required verification before billing

Fiscal Year Comparison: # of Bills per Month

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
FY 2017	35,554	35,619	35,723	35,844	35,900	36,112	36,091	35,785	36,063	36,113	36,318	36,043
FY 2018	36,738	36,696	36,591	37,063	37,015	37,226	37,213	37,180	37,368	37,429	37,446	37,481
FY 2019	37,488	37,462	37,469	37,544	37,526	37,650	37,534	37,542	37,442	37,431	37,384	37,461

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Billing Summary

- Maintenance
  - Meter and register exchanges
- Work Orders
  - Turn on/off
  - Re- read per customers request
  - Profiles
  - Recheck on billing
  - Exchanges (meter/register)
  - Delinquency cut off/on
  - Consumption on inactive accounts
      (16 additional work orders)
- Reports
  - Billing registers
  - Work orders count
- Rates Entry
  - Water and sewer
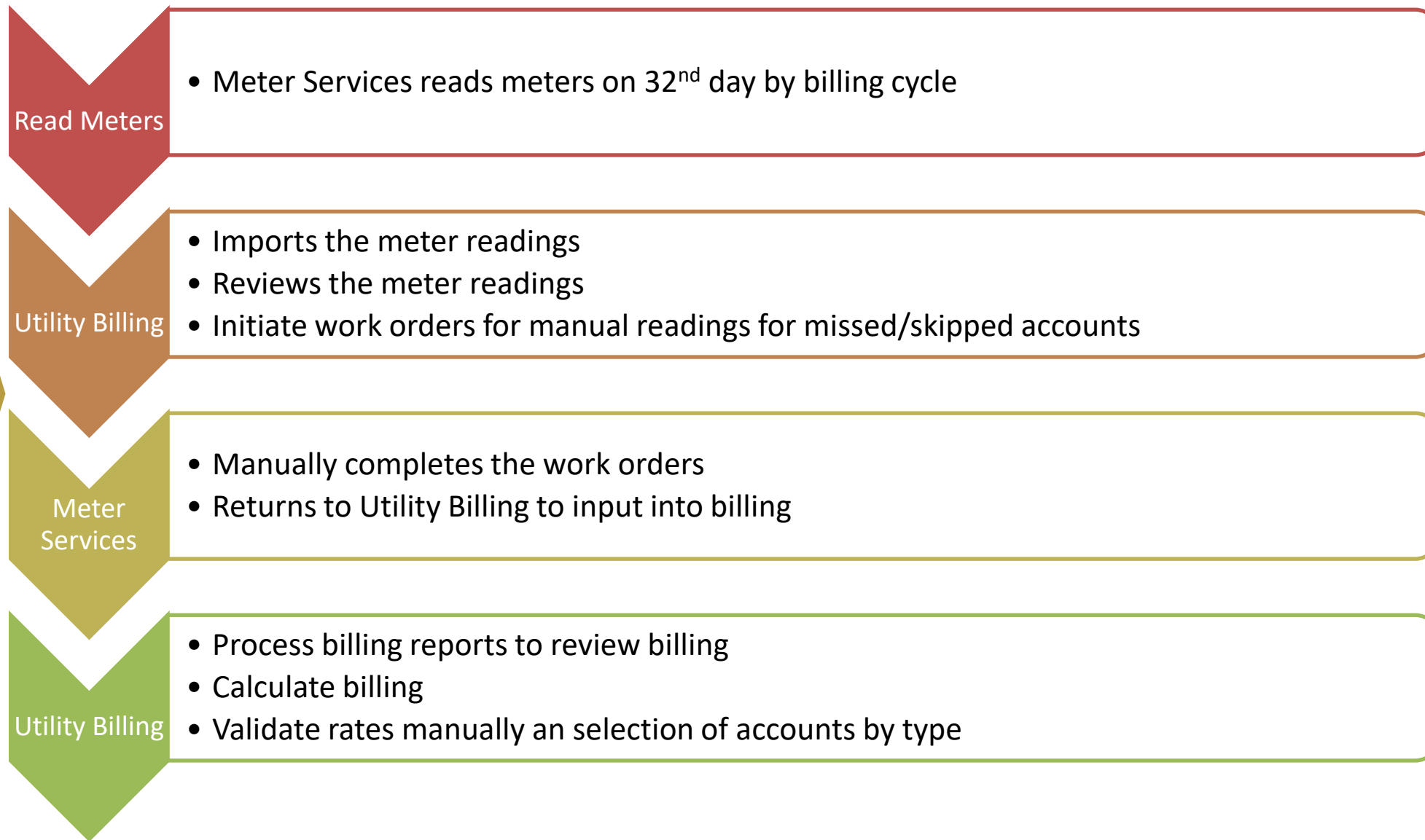 - Waste Management

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Delinquency/Collections Summary

- Run Delinquency process
- Add Late fees
- Run campaign-First Delinquency Notification phone calls for delinquent accounts
- Process delinquent letters
- Run campaign for shut off notification phone calls
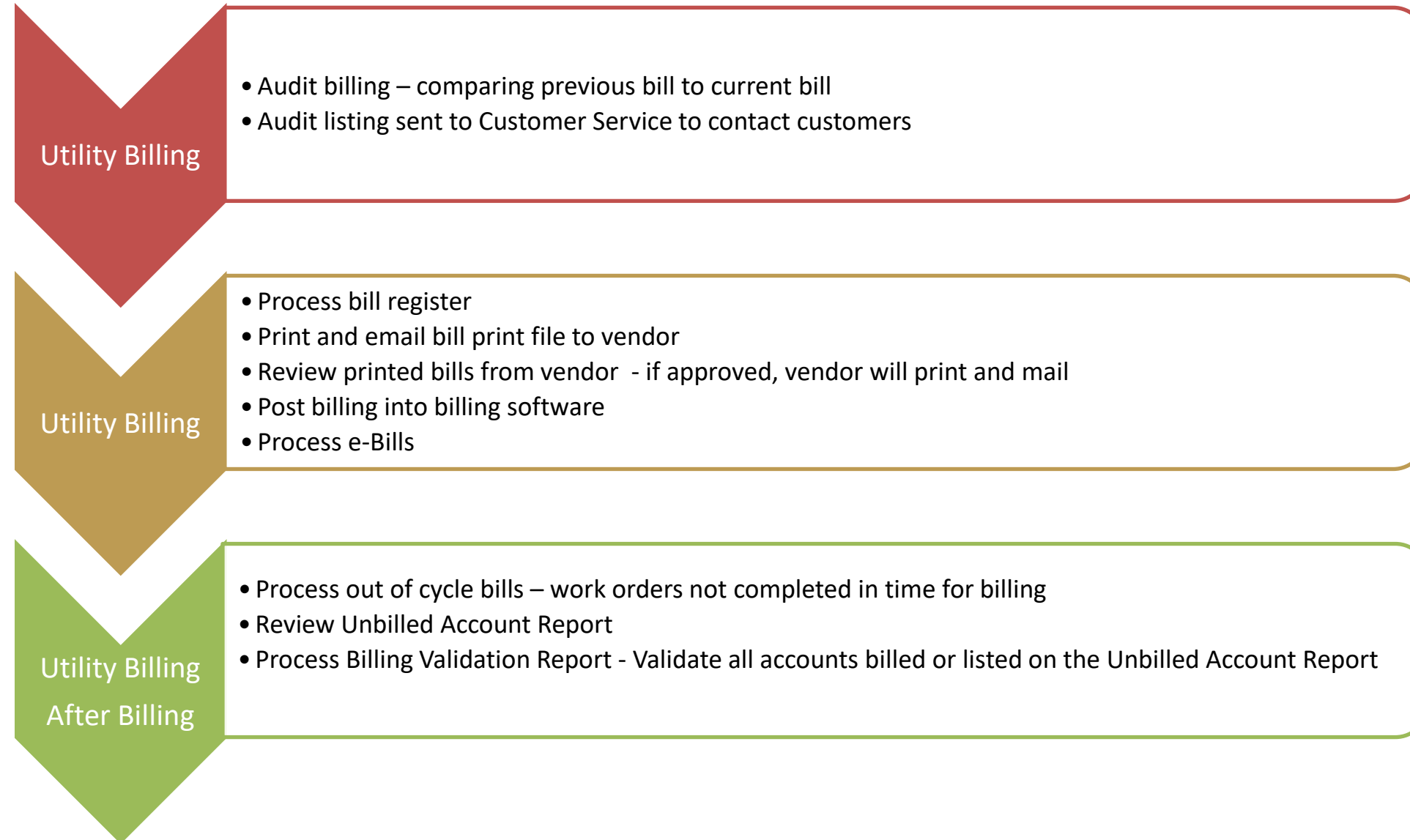- Create delinquency cut off/reconnect work orders

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Billing Process

Read Meters
- Meter Services reads meters on 32nd day by billing cycle

Utility Billing
- Imports the meter readings
- Reviews the meter readings
- Initiate work orders for manual readings for missed/skipped accounts

Meter Services
- Manually completes the work orders
- Returns to Utility Billing to input into billing

Utility Billing
- Process billing reports to review billing
- Calculate billing
- Validate rates manually an selection of accounts by type

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Billing Process - Continue

Utility Billing

- Audit billing – comparing previous bill to current bill
- Audit listing sent to Customer Service to contact customers

Utility Billing

- Process bill register
- Print and email bill print file to vendor
- Review printed bills from vendor - if approved, vendor will print and mail
- Post billing into billing software
- Process e-Bills

Utility Billing After Billing

- Process out of cycle bills – work orders not completed in time for billing
- Review Unbilled Account Report
- Process Billing Validation Report - Validate all accounts billed or listed on the Unbilled Account Report

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Pearland Utility Billing History
Key Operational Dates

- April 2017 – Go Live for new billing system (New World System)

- March 2018 – Advanced Meter Infrastructure (AMI) contract approved by Council

- July 2018 – First 28 day read cycle (billing remained monthly)

- December 2019/January 2020 – Arrearage issue discovered & reported to City Council

- February to April 2020 – City Council Utility Billing Discussions
  - Suspension of delinquent processing

- April 2020 – 32-30 Plan Approved by City Council

- August 2020 – First Utility Billing Quarterly Update to City Council & award of Raftelis UB Systems & Management Review

- October 2020 – Resumption of delinquent processing

- November 2020 – Second Utility Billing Quarterly Update

- December 2020 – Raftelis Report completed

- January 2020 – Ad Hoc Committee approved by City Council
  - Raftelis report presented to City Council
  - Installation of AMI meters completed

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Pearland Utility Billing History

Staffing Changes

- The biggest challenge faced by this division in the last several years has been staffing changes

- Since Spring 2020, every Utility Billing supervisory position has turned over; Customer Service Supervisor, Assistant Manager, Manager, Finance Director (filled with interim) and Deputy CM (Finance now reports directly to the CM)

- Billing division re-organized with latest budget
  - Lead Billing Specialist reclassified to Billing Supervisor, creating a dedicated manager for this unit responsible for all billing processes
  - Two additional Billing Specialist added. Now one for each cycle.
  - Billing Delinquency Specialist moved onto Billing Team (was reporting to Assistant Manager).

- High turnover in Customer Service Representatives.

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Pearland Utility Billing History

Recent Changes & Progress

Mandate: Despite turnover in all leadership positions, the Utility Billing Division must **continuously and proactively seek out ways to improve processes**, both internally and externally, to provide exceptional services. Status quo, which is based on past practices is not acceptable.

- Culture changes
  - Tightly integrated into the Finance Department. No siloed operations.
  - Weekly Status updates for all division shared with entire department.
  - Cross-communication between Customer Service (outward-facing) and Billing (internal).
  - Centralized "Knowledge Center" for all Staff
  - Monthly team meetings with weekly leadership meetings

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Pearland Utility Billing History
Recent Changes & Progress

Process changes

- Schedule of major processes in New World to eliminate overtaxing the system.

- Standard protocol regarding posting of transactions to ensure accurate billing.

- Additional "check-points" in Billing process.

- Streamlined chain of command for escalated issues

Customer-centered changes to policies

- Proration of base rates for move-ins/move-outs

- Mailing bills at least one day in advance to billing date

- Updated billing adjustment policy to provide for latency in billing.

- Providing extensions and payment plans

- Waive new account deposits with Good Payment history

- After each meter reading, contact the 25 highest consumption accounts based on previous "unbilled" month's usage

- Provide meter profiles for customers to view recent 40-day Hourly/Daily chart usage.

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Questions?

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