



Town Council Meeting
August 2025 Work Session
August 19, 2025 | 3:30 PM
Apex Town Hall | 73 Hunter Street, Apex, NC
3rd Floor Training Rooms A and B

1. Call to Order | Pledge of Allegiance

Mayor, Jacques K. Gilbert

2. Utility Billing Program Update

Shawn Purvis, Deputy Town Manager, Town Manager's Office
Jessica Murphy Rhem, Interim Director, Finance Department

3. Adjournment

English	Spanish	Chinese (Simplified)
ANNOUNCEMENTS Members of the public can access and view the meeting on the Town's YouTube Channel https://www.youtube.com/c/TownofApexGov or attend in-person. The meeting date, start time, and location details are included at the top of this agenda document.	ANUNCIOS Las personas interesadas pueden acceder y ver la reunión a través del canal de YouTube de la Ciudad en https://www.youtube.com/c/TownofApexGov o asistir en persona. En la parte superior de este documento de agenda se indican la fecha, la hora de inicio y la ubicación de la reunión.	公告 公众可通过镇政府的YouTube频道 https://www.youtube.com/c/TownofApexGov 在线旁听会议，或选择现场参与。会议日期、开始时间及地点详情见本议程文件顶部。
Accommodation Statement: Anyone needing special accommodations to attend this meeting and/or if this information is needed in an alternative format, please contact the Town Clerk's Office. The Town Clerk is located at 73 Hunter Street in Apex Town Hall on the 2nd Floor, (email) allen.coleman@apexnc.org or (phone) 919-249-1260.	Aviso sobre adaptaciones: Si necesita adaptaciones especiales para asistir a esta reunión o requiere esta información en un formato alternativo, comuníquese con la Oficina del Secretario Municipal, ubicada en el segundo piso del Ayuntamiento de Apex, en 73 Hunter Street, por correo electrónico a través de allen.coleman@apexnc.org o llamando al 919-249-1260.	便利服务声明: 如需特殊便利服务以参加本次会议，或需要将本信息提供为其他格式，请联系镇书记官办公室。 办公地址：Apex镇政务厅二楼（Hunter街73号） 邮箱： allen.coleman@apexnc.org 电话：919-249-1260



August 19, 2025

Billing & Collections Update

Jessica Rhem, CPA | Interim Finance Director

AGENDA

- Third Party Review Update
- New Software Overview
- Solar Program
- Return to Normal Operations
- Staffing Update



Third Party Review Update



How We Got Here

- Cyber security event – July 2024
 - Billing resumed August 2024
 - Customer concerned over high bills
 - Engaged Berry Dunn
 - Berry Dunn presented preliminary findings May 2025
 - Overall Town underbilled customers
 - 100 individual accounts analyzed
 - Customer account review request
- 

Customer Account Reviews

- Request period ended 7/31/25
- 179 customers requested review
- Individual accounts go through multiple levels of review
- Website updates weekly
- Next steps
 - Aug – Conclude analysis
 - Sept – Notify residents
 - Oct – Update customer accounts



Customer Account Reviews Statistics

	Customer Owes Town	Town Owes Customer
Average amount owed	\$35.44	\$9.52
Highest due	\$73.07	13.67
Lowest due	\$3.16	\$1.44
% Reviewed	88%	12%

20% have gone through the entire review process

Third Party Review Summary of Key Findings

CYCLE 1	CYCLE 2
Base charges paused for customers billed 9/1/24 (approx. 3-month bill)	Base charges paused for customers billed 8/15/24 (approx. 2-month bill)
Non-metered services billed for 3 months	Non-metered services billed for only 1 month
Electric load management credits applied	Electric load management credits not applied

- Resource & staffing constraints
- Impact of concurrent projects
- Billing system simulation resulted in approx. underbill of \$300k

Third Party Review Key Recommendations

Technology recommendations	• Conduct regular system upgrades • Establish clear protocols for system access and troubleshooting
Process Recommendations	• Document key business processes that are particularly complex, variable, or not well understood • Clearly define and communicate special project plans
Organizational Recommendations	• Provide cross-functional training between Billing & Collections and metered service staff • Review policies to ensure alignment with new system configurations and operational realities

Total Service Accounts
41,022

Total Customers
35,421

Total Users
19,182

New Software Overview

Total Transactions

25528



ACH

5150



Credit Card / Debit Card

18125



Google Pay

344



Apple Pay

1108



Venmo

56



PayPal

745



Summary

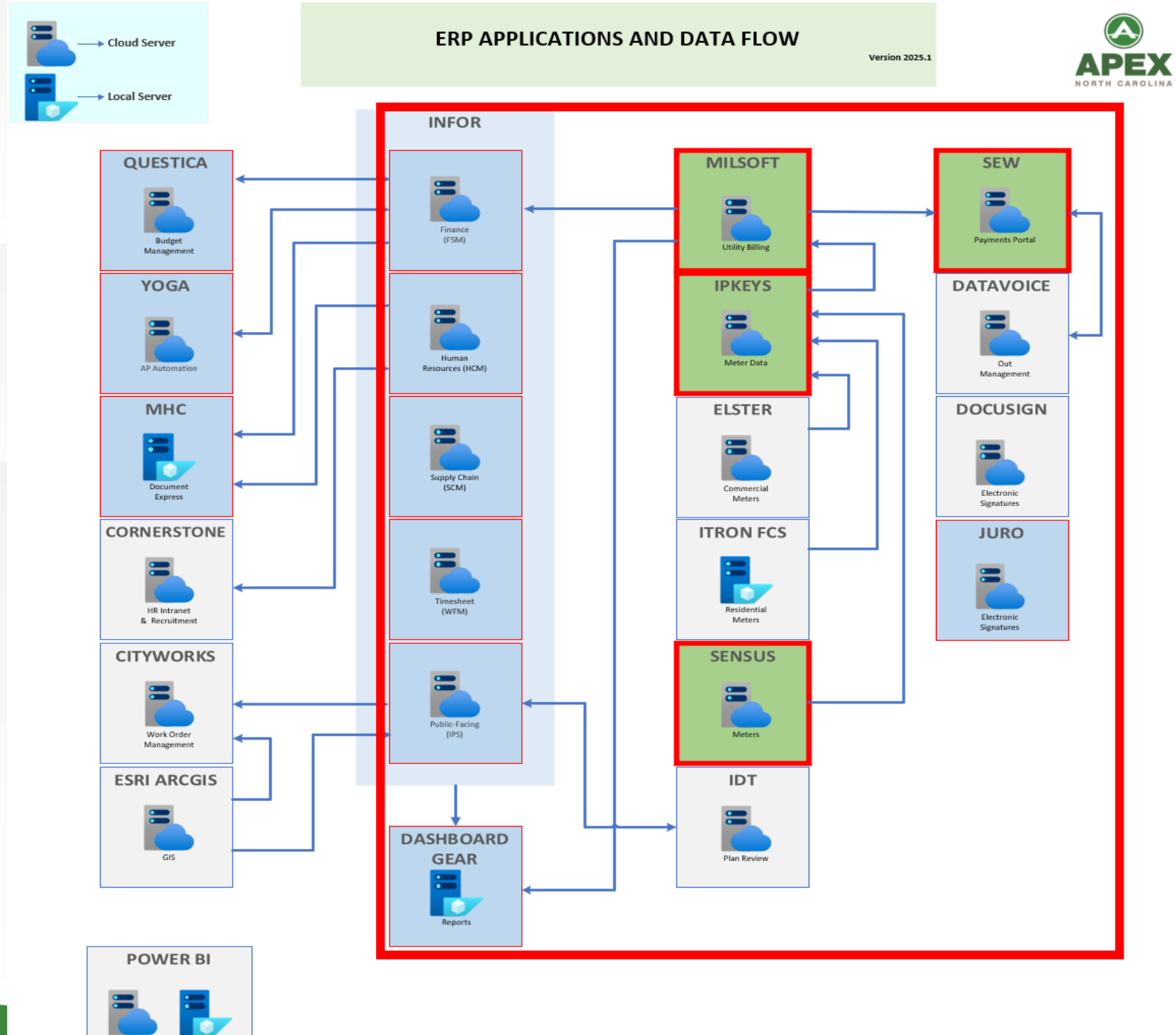
SEW's Utility Billing Experience

- **Smarter Ways to Pay:** Budget billing level-pay options that smooth out seasonal spikes, customers can choose what fits their budget best including multiple ways to pay (Venmo, PayPal, Apple & Google Pay...)
- **Total Flexibility:** Whether it's a one-time payment or a scheduled autopay, managing bills is effortless and on your terms.
- **Stay in the Know:** Real-time alerts, reminders, and customizable preferences keep customers informed and in control.
- **Instant Connection:** Built-in forms and direct contact tools make it easy to ask questions, request support, or update account details all in one place.



Current State

JURO Special Projects / Contracts
AMI Project / Meter Change Outs
ERP Phase 1-Jan 25, 2-Jul 25





Addressing Challenges

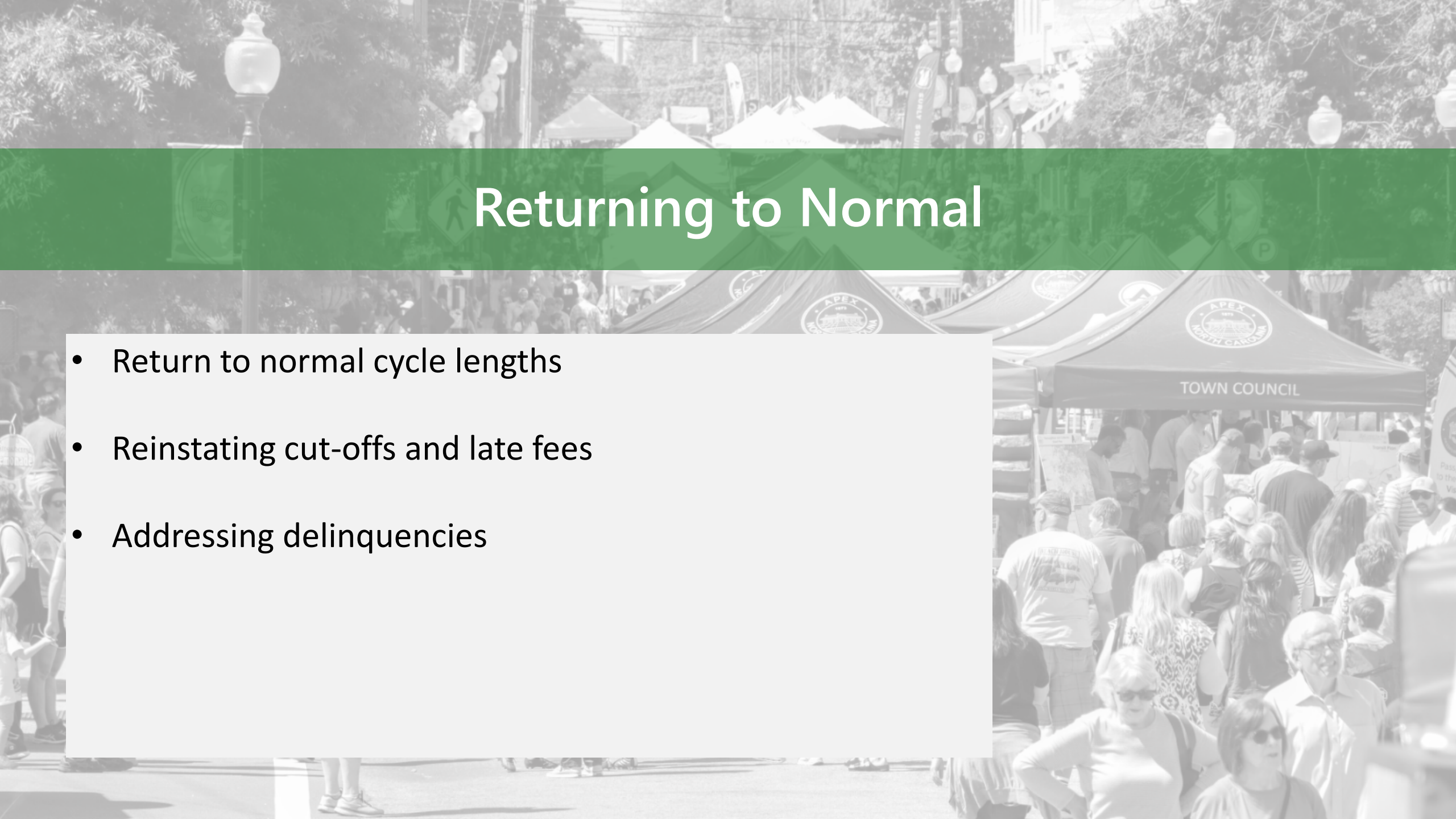
- Multiple system integrations
 - Missing reads
 - Meters not in CIS inventory
 - Configuration of meters
 - Mass meter change out
 - Summer busiest time of year for B&C
 - Bill print provider suddenly closing
- 

Solar Program

Solar Program

- Program always intended to offset Electric
- New World couldn't support the program
- Milsoft able to run program properly
- Accounting implications



The background image shows a crowded outdoor event, likely a fair or festival. In the foreground, there are several white tents with logos, including one for 'APEX NORTH CAROLINA' and another for 'TOWN COUNCIL'. A large crowd of people is walking around, and there are trees and street lamps in the background. The image is partially obscured by a green horizontal band and a white text box.

Returning to Normal

- Return to normal cycle lengths
- Reinstating cut-offs and late fees
- Addressing delinquencies

Finance Staffing Update



Finance Staffing Update

Finance Director – interviews concluded

Assistant Finance Director – recruit when director onboard

Billing & Collections Manager – Robert Taylor started 8/4/25

Senior Billing & Collection Specialists – recruiting 3 positions

Contracted temporary staff – currently 4, considering 2 more



