

City of Punta Gorda, Florida

# *STRATEGIC PLAN*

FY 2016



## **CITY COUNCIL**

Carolyn Freeland, Mayor (District 3)  
Kim Devine, Vice Mayor (District 1)  
Rachel Keesling, Council Member (District 2)  
Tom Cavanaugh, Council Member (District 4)  
Nancy Prafke, Council Member (District 5)

## **CITY OFFICIALS**

Howard Kunik, City Manager  
David Levin, City Attorney  
Karen Smith, City Clerk

## **DEPARTMENT DIRECTORS**

Dave Drury, Finance  
Ray Briggs, Fire Chief  
Rick Keeney, Public Works  
Tom Jackson, Utilities  
Tom Lewis, Interim Police Chief

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## Overview

The Strategic Plan (herein referred to as the “Plan”) is used to set the overall goals for the City, provide direction to City departments, and create the basis for each year’s annual budget. The plan provides a tool for more effective and economical operations and demonstrates to the public that careful consideration has been given to future development and direction of the organization. The Plan provides a realistic view of the expectations for the organization and community at-large. The diagram below shows how the pieces of the Plan fit together.



On April 27, 2005, City Council approved moving forward with development of its first strategic plan and solicited input from residents, boards and committees, civic groups and staff on priorities to be addressed. Since 2005, the City has now completed seven strategic plans. The FY 2013 Plan, which was developed after solicitation of input and engagement from the entire community followed by two workshops focusing on all elements of what make up a strategic plan, formed the base from which future action items evolved. Preparation of the FY 2014 Plan took a slightly different direction than the previous year, which involved a more thorough review of the City’s mission, values, vision and goals.

The Plan has different elements that help transform the City’s vision into reality. They are:

- ✓ **Strategies:** The Plan document contains the strategies that the City will pursue and action items on how to achieve the strategies. Strategies and action items are funded through the annual budget, five year capital improvements program and partnerships with other public, non-profit and private organizations.
- ✓ **Key Performance Indicators:** Metrics that the City uses as sources of evidence to determine if its strategies are having their intended impact.
- ✓ **Financial Plan:** The City performs multi-year fiscal forecasting to show the long term impacts of its decisions, model different scenarios and identify/address financial issues well before they are realized. The forecasts are included in the Long Range Financial Plan presented to City Council in January of each year.

The plan helps us stay focused in our near term objectives and tasks, while still keeping our eye on the long range perspective of our actions. Our strategic plan is dynamic and can be adjusted or molded from time to time as needed. It is a working document that evolves as development takes place. Throughout the year, we will provide status reports on our progress. In this way, it is a document by which we can measure our success and by which the community can evaluate our performance.

## Vision

A vision statement is essentially a description of what a community should look like once it has successfully implemented its strategies and achieved its full potential. An achievable vision is compromised between what an organization wants and what it can have. In Punta Gorda, this contrast is often manifested in perceived tradeoffs between having sufficient financial resources and preserving the values. A vision can provide guidance to help decision-makers identify the “bottom line” of what is truly important. Based on the public input process, the City’s overall vision is:

**“Punta Gorda is the model for small cities in the U.S. to live, work and play.”**

### Vision Elements:

- Punta Gorda will preserve and enhance its historic small town, self-sufficient community character.
- Punta Gorda will be an economically sustainable four season community and cultural hub of Charlotte County.
- Punta Gorda will continue to be a safe and secure community.
- Punta Gorda will be a place where residents and visitors recognize the significance and character of its waterfront amenities, natural resources, and vibrant downtown.
- Strong partnerships and collaboration between the City government and all sectors of the community will embody Punta Gorda’s ability to sustain its small-town, self-sufficient character.
- Punta Gorda will have a financially-sustainable city government.
- Punta Gorda will position itself as the best small town to live, work and visit.

As shown above, the core of the City’s vision includes elements of sustainability. Sustainability is the ability of communities to consistently thrive over time as they make decisions to improve the community today without sacrificing the future. Sustainability can provide an organizing framework for building better and stronger communities. Building sustainable communities is at the core of the leadership responsibilities of local government leaders. A sustainable community demonstrates through policy and practices a long-term view and respect for people and for place. The sustainable community will assess impact on the following three areas - ensuring a positive effect on the environment, establishing that there will not be a drain on community resources, and making certain that disparaging treatment for any sector of the community will not be created.

Sustainable communities are those that maintain a reliable economic base, practice sound financial management, provide a stable environment for their residents, and act as stewards of their land and other environmental resources. These actions are defined as follows:

- Economic sustainability
  - ✓ Maintain a sound economic base
  - ✓ Provide reliable public services
  - ✓ Create an environment conducive to businesses
  - ✓ Become and remain competitive in the marketplace
- Financial sustainability
  - ✓ Remain financially viable
  - ✓ Establish and maintain professionally recognized, transparent budgeting and financial management practices and systems

- Social sustainability
  - ✓ Provide a stable environment for citizens
  - ✓ Ensure public safety
  - ✓ Offer an environment that encourages job creation
  - ✓ Engage the community in local decision making
  - ✓ Provide amenities that enhance quality of life
  
- Environmental sustainability
  - ✓ Safeguard the water supply, open space & other physical assets by preparing for and mitigating natural disasters and by employing environmentally responsible methods for energy generation, waste reduction and disposal and other services

## Mission

A mission statement clarifies an organization’s purpose and philosophy. It should:

- Specify the reason for the organization’s existence
- Establish the scope of the organization
- Identify the organization’s unique characteristics
- Provide the overall direction for the organization
- Act as a foundation for development of general and specific objectives as well as program plans

A summary of public input responses revealed that the City’s mission should incorporate the following ideals:

- Become a desired, waterfront destination
- Be a better place to live, work and play
- Deliver a high level of service
- Enhance quality of life
- Retain our unique character

Based on the above public comments, including City Council input, the mission of the City is:

**“To enhance Punta Gorda’s identity as a vibrant waterfront community, unique in character and history, and one of the most desirable places to live, work and visit.”**

## Values

Values identify the philosophical guidelines for an organization's activities and:

- Identify the values held by constituents
- Establish guidelines upon which all initiatives will be based
- Provide the basis for assessing the organization's strategic objectives and plans
- Respect constituent needs and expectations

Through public input garnered from the community survey and workshops, Punta Gorda's residents and leaders value the City's small town, self-sufficient, community-partnerships nature. In this vein, the City should pursue policies and actions that enhance these elements. Revised, key values of the City organization are:

- Maintain a culture of community engagement, teamwork, partnerships, transparency, respect, customer service, and stewardship.
- Sustain pride in Punta Gorda's history and well-preserved historical areas and natural resources.
- Support and promote local businesses.
- Value a high level of openness, and the fair and equitable treatment of all residents.
- Ensure an ethical and accountable city government.

## Strategic Priorities & Goals

While the City's vision has set the course for the future, the strategic priorities highlighted below provide the roadmap that encompasses governing policies and strategies, operational approaches to implementing the strategies and performance measures/timelines to ensure achievement of these strategies. Included in each section are goals that specify how the general policy directions of the organization's mission will be carried out, and action items that aim to accomplish desired goals.

Based on input received during the community engagement sessions, City Council has established five strategic priorities identified below and goals highlighted within each priority area.

- Financial/Economic Sustainability
- Infrastructure Sustainability
- Partnerships, Communication & Collaboration
- Marketing
- Quality of Life

As mentioned earlier, key performance indicators will be used to summarize progress toward achieving strategic priorities. These outcomes form a scorecard of the City's progress and will facilitate ongoing monitoring of Plan implementation and communication to the public.

## **Priority: Financial/Economic Sustainability - Advance and promote local business development and long-term financial and economic sustainability**

Long term financial sustainability is a critical component to the ultimate success of a strategic plan. This section of the Plan provides a basis for future budgets and guides workforce planning and other efforts to improve the effectiveness and efficiency of City services. Long term financial sustainability can only be achieved when recurring revenue and expenses are aligned. How well the City achieves sustainability is reflected in its ability to address financial issues identified in multi-year fiscal forecasts. It also means providing valued public service as efficiently as possible.

An integral part of a community's financial sustainability is to be an economically sustainable community and to enhance the economic well-being of its residents. The City has excellent access to two major roadways, most notably I-75 and US 41, and Punta Gorda Airport. The community's diversity and mix of income levels provides a range of tastes for the business community to serve. Diversity also results in a variety of housing options for prospective residents and provides the community with an array of talents to draw on. The downtown and waterfront areas enhance the City's economic environment. The success of its business sector is through a combination of economic and business development.

Economic development involves the recruitment and retention of high-skill, high-wage diversified industry. Diversified industry means companies that bring wealth to a community by exporting their goods and services to customers outside of the local market, and do not rely on the local economy for income.

Business development encourages a variety of small businesses, retail stores, restaurants, entertainment centers, medical facilities and service oriented businesses within a city's boundaries, compatible with the demands and desires of the community. Traditionally, business development is market driven, based on population and household demand, and generally occurs by developers and private property owners marketing to fill planned and existing retail and office space. Its premise is that local entrepreneurs and public/private strategies create the environment that can bring economic growth to a community in the form of jobs, increased revenues, a vibrant business sector and healthy life attributes. It seeks to focus on growing and nurturing local businesses that can create spin off business and employment, rather than hunting for the large corporation outside the area. One study on the subject identified the following premises to encourage shopping and promoting locally owned businesses:

- More money re-circulates in your community when one buys from locally owned businesses as opposed to nationally owned businesses;
- Local businesses provide most new jobs;
- One-of-a-kind businesses are an integral part of a community's distinct character;
- Local business owners invest in the community;
- Customer service is, in many instances, better;
- Competition and diversity lead to more choices;
- Local businesses have less environmental impact;
- Local businesses' public benefits outweigh their public costs;
- Local businesses encourage investment in the community; and
- Local businesses tend to give more support to nonprofits.

The City's strategic priorities focus more on business development initiatives, while Charlotte County concentrates its efforts on economic development opportunities for both Punta Gorda and unincorporated areas of the County.

- Goal:** Continue best management practices in financial planning
- Goal:** Identify sustainable spending policies and appropriate technologies to support business operations and connect the City with the community
- Goal:** Strengthen & diversify the City’s tax base to increase the commercial base.
- Goal:** Support Charlotte County efforts to facilitate and nurture high priority economic development projects
- Goal:** Ensure the competitiveness of Punta Gorda’s business climate
- Goal:** Enhance workforce development and diversity in the City organization

Action Item	Timeframe	Cost
<b>Internal</b>		
Update the Long Range Financial Plan as the framework for setting annual budget guidelines including an annual assessment of the City’s financial management policies with national standards adopted by the Government Finance Officers Association	January 2016	
Conduct a budget workshop based on financial trends and fiscal forecasts included in the long range financial plan, program of service overviews and alternatives to eliminate any projected budget gaps	April 2016	
Continue assessment of ordinances and land development regulations that impact business development and recommend amendments, where appropriate, to enhance development opportunity	Ongoing	
Explore a business development reserve to attract new business and meet requests that address overall business development objectives within defined criteria.	2016	
<b>External</b>		
Achieve progress of annexations along US 41 corridor, Jones Loop Road, Burnt Store Road, US 17 corridor and other areas as deemed appropriate	Ongoing	
Support public/private efforts that facilitate development of undeveloped commercial properties to include LOOP, former City Marketplace and former U-Save property, among others	Ongoing	
Seek to grow local economy from within by nurturing local business opportunities that create spin off employment, i.e. community garden business venture in east Punta Gorda	Ongoing	\$45,000
Seek new technology and applications that will help connect the City and the community and deliver services and information in a timely, cost-effective manner to include new web site implementation; voice over phone system replacement; server upgrades; geographic information systems enhancements; mobile device management; wireless network in city facilities	Ongoing	\$363,000 FY 2016 plus carryover funds from FY 2015 for projects still in progress
Market remaining public space at former Public Works/Utilities site on West Henry since new Punta Gorda Library land area has been set aside	2016	

<b>Key Performance Indicator</b>	<b>Actual FY 2014</b>	<b>Projected FY 2015</b>	<b>Proposed FY 2016</b>
GFOA Certificate of Conformance in Financial Reporting	Submitted	To Be Submitted	To Be Submitted
GFOA Distinguished Budget Presentation Award	Awarded	Awarded	To Be Submitted
General Fund recurring revenues aligned with recurring expenditures	Revenue 102% versus Exp.	Revenue 97% versus Exp.	Revenue 100% versus Exp.
Unqualified Audit Opinion	Yes	Pending Review	Pending Review
% compliance with financial management policies	100%	Budgeted 100%	Budgeted 100%
Tax base diversity	84% residential 16% commercial	89% residential 11% commercial	TBD
Properties annexed	1	1	4
% space leased in Herald Court Centre	47%	64%	100%
Cost per capita – General Fund services	\$917	\$964	\$952
Utility rates in relation to 16 SWFL communities	3 <sup>rd</sup> lowest	2 <sup>nd</sup> lowest	2 <sup>nd</sup> lowest
Solid Waste rates in relation to SWFL communities with comparable service area	+16.00%	+16.00%	+7.25%
Minorities in City workforce	9.2%	10.7%	10%
Females in Non-Traditional Roles in City workforce	6.1%	5.5%	6%
City employees per capita	1:67	1:66	1:67
Taxable sales (Monthly Ave. PG MSA)	\$188 million	\$217 million	\$230 million
# of new businesses	110	80	100
# of closed businesses	70	70	70
Shreve Street Property Sold	No	No	TBD

**Priority: Infrastructure Sustainability – Maintain and enhance the City’s capital assets and quality municipal services**

As an older community and one with its own water and wastewater utility, canal/seawall system as well as historic districts, infrastructure takes on particular importance in Punta Gorda. While new infrastructure projects are well publicized and generally well received, ongoing maintenance of a city’s assets are not very visible nor always appreciated. Maintenance is never a problem until it is. The City’s capital assets (i.e. infrastructure) are valued at \$120 million and consist of two components – city infrastructure and internal infrastructure, defined below.

City infrastructure is the physical system of roads, bridges, sidewalks, seawalls, drainage, water and sewer facilities. Internal infrastructure refers to infrastructure used in the provision of municipal services (i.e. fleet, information technology, facilities, office services, radio services, telecommunications, etc.). A snapshot of the City’s infrastructure is:

- Twelve public buildings - City Hall, City Hall Annex, Public Works/Utilities Campus, Public Safety Building, Fire Stations 2 and 3, Water & Wastewater Treatment Plants, Bayfront Center, Freeman House, Cooper Street Center, Laishley Park Marina Building
- 116 miles of streets, 849 streetlights, 19 traffic signal intersections, 4 bridges and 109 miles of seawall. The City’s Canal systems are unique in that the City provides maintenance of the seawalls and canals through Canal Maintenance Districts.
- 237 miles of water mains, 129 miles of sanitary sewer, 2 storage tanks, master pumping station, booster pumping facility, 107 lift stations and Hendrickson Dam (reservoir)
- 13 parks totaling 130 acres
- 208 motorized pieces of equipment (fleet, cranes, boats, compactors)
- 50 windows servers, 1 IBM midrange server, 1 core data switch, 25 access switches, 8 routers, 5 security appliances, 4 voice cabinets (PBX), 5 miles of dark fiber, 320 pc’s and laptops, 250 phone sets

Issues to be addressed to ensure sustainable infrastructure include:

- How can the City best maintain its stock of infrastructure in addition to procuring needed new assets?
- How can the City fund maintenance of its open space (active and passive park system) and waterfront?
- What is a livable level of traffic and how do proposed traffic-generating projects fit within the City’s comprehensive traffic safety/circulation plan?
- Does the City have a long range plan that ensures infrastructure is in place to meet projected growth demands?
- As technology changes and more smartphones are being used, the City must develop mobile apps as a way to connect the City to the community.

**Goal:** Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal

**Goal:** Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods

**Goal:** Maximize use of new technology in applicable areas

**Goal:** Apply best management practices and systems in infrastructure maintenance

**Goal:** Establish a long-range plan that ensures infrastructure is in place to meet projected growth demands

Action Item	Timeframe	Cost
Undertake through design, permitting and/or construction a myriad of ongoing infrastructure improvements including: Street Resurfacing Corto Andra/Boca Grande Drainage Engineering 800 MHZ Radio System Groundwater Reverse Osmosis Water Treatment Plant – well field testing, permitting and design Harborwalk behind Marina Building and Crab House Centre Harborwalk-US 41SB Bridge Underpass Widening Harborwalk West Seawall – Gazebo to Bayfront Harborwalk/Gilchrist Park – Waterfront Hotel to Gazebo Madrid Sidewalk Baynard/Vasco Sidewalk Shreve Street MURT Lighting Additional Harbor Access in Punta Gorda Isles – engineering and permitting Burnt Store Isles Perimeter Rim Canal Dredging – permitting and construction Canal Maintenance Staging on Vacant Lots– develop new process for Burnt Store Isles & Punta Gorda Isles seawall maintenance	2015/2016 2016 2015 2016 2016 2016 2016 2016/2017 2016 2016 2016 2015-2017 2015/2016 2012-2018	\$721,000 \$100,000 \$520,000 \$3,900,000 \$200,000 \$280,000 \$1,000,000 \$1,800,000 \$100,000 \$172,000 \$225,000 \$100,000-\$200,000 \$570,000 TBD
Update plan for all major infrastructure categories to include fleet, equipment, buildings, grounds, complete streets and utilities. Assess use of CNG technology as part of fleet plan development.	May 2016	Included in FY 2017-2021 Capital Improvements Program and Road Resurfacing Program

<b>Key Performance Indicator</b>	<b>Actual FY 2014</b>	<b>Projected FY 2015</b>	<b>Proposed FY 2016</b>
% of projects completed within timeframe & estimated cost	75%	100%	100%
Fuel use (gallons)	151,656	171,469	172,000
Five year capital improvements program that identifies infrastructure needs with funding source	Yes	Yes	Yes
Funding approved by State Legislature (RO/Pipeline Projects)	\$0	\$900,000	\$4 Million
Funding approved by Southwest Florida Water Management District (RO Project)	\$0	\$0	\$16 Million
Other Grant Funding (for infrastructure only)	\$1.5 million	\$50,000 (CHNEP \$972,000)	TBD

**Priority: Partnerships, Communication & Collaboration – Continue to promote partnerships, communication and transparency with all stakeholders**

Partnership and collaboration opportunities have been an integral part of the City’s strategic planning priorities for some time and embody how the organization delivers services to the community. While a city government doesn’t necessarily have to provide all services; it should be a catalyst for action. In this vein, the City works with numerous public, private and non-profit agencies that provide a wide variety of recreational, cultural, educational, administrative and operational services to the community.

**Goal:** Promote partnership opportunities with public, private and non-profit organizations

**Goal:** Emphasize transparency in City operations, reporting, and activities

**Goal:** Continue to seek community input in decision making process

**Goal:** Support and assist community efforts to address City priorities through recognition and process initiatives

Action Item	Timeframe	Cost
Continue communications programs through neighborhood meetings, weekly reporting, televise Council meetings, customer surveys, and use available technology to find new ways to provide information in a cost-effective and timely manner	Ongoing	
Optimize relationships at all levels with the City’s partners through a proactive presence (Congress, State Legislators, Charlotte County, Airport Authority, Charlotte County School District, Charlotte County-Punta Gorda Metropolitan Planning Organization, Enterprise Charlotte Economic Council, Charlotte County Tourism Bureau, Southwest Florida Water Management District, Peace River/Manasota Regional Water Supply Authority, Charlotte Harbor Estuary organizations, TEAM Punta Gorda, Punta Gorda and Charlotte County Chambers of Commerce, Downtown Merchants Association, Homeowners’ Associations, Punta Gorda Historical Society, Punta Gorda Historic Mural Society, Punta Gorda History Center, Punta Gorda Housing Authority, ADA Advisory Committee, etc.) which lead to effective collaboration	Ongoing	
Continue participation/partnership with Enterprise Charlotte Economic Council, Punta Gorda Chamber of Commerce Business Development Committee, Economic Development Working Group, Downtown Merchants Association and TEAM Punta Gorda to enhance business development initiatives	Ongoing	
Emphasize transparency in operations through Citizen’s Academy, aforementioned communications programs, posting of financial information on the City’s website and thru other available technology	Ongoing	
Continue to garner input from Land Development Committee, consisting of representation from the City’s neighborhoods, as part of ordinance review process	Ongoing	

<b>Key Performance Indicator</b>	<b>Actual FY 2014</b>	<b>Projected FY 2015</b>	<b>Proposed FY 2016</b>
City Communications (Weekly Highlights Reports, Information Sharing Reports and Action Registers)	135	150	156
Citizen Interaction through Social Media	n/a	500	1,000
Citizen's Academy customer satisfaction rating	100%	100%	100%
Financial information on City website	Yes	Yes	Yes
Civic involvement – volunteer hours provided to City service delivery (Police and Fire)	13,656	16,913	17,450
Civic involvement – volunteer hours provided by nonprofit groups (TEAM Punta Gorda & PGI Green Thumbs)	22,600	23,500	23,000
Business Satisfaction Survey results - % excellent rating	n/a	100%	100%

**Priority: Marketing – Develop and promote the waterfront and City through creation of public/private partnerships that diversify the tax base and enhance the area as a visitor destination**

In the public sector, marketing can be referred to as the management process responsible for identifying, anticipating and satisfying stakeholder requirements and in so doing serves to facilitate the achievement of the organization’s objectives. While the City of Punta Gorda does not have a funded, marketing program within its financial plan, there are a number of partners within the City environs that deliver such service, to include:

- ADA Advisory Committee
- Charlotte County Airport Authority
- Charlotte County Chamber of Commerce
- Charlotte County Economic Development Office
- Charlotte County/Punta Gorda Board of Realtors
- Charlotte Harbor Visitor & Convention Bureau
- Enterprise Charlotte Economic Council
- Fishermen’s Village
- Homeowner Associations (Punta Gorda Isles Civic Association, Burnt Store Isles Association, Seminole Lakes Property Owner’s Association, Burnt Store Meadows Property Owner’s Association, Trabue Woods Neighborhood Associations, Emerald Lakes Homeowner’s Association)
- Punta Gorda Boaters Alliance
- Punta Gorda Chamber of Commerce
- Punta Gorda Downtown Merchants Association
- TEAM Punta Gorda

The goals identified below illustrate the City’s efforts to market its lifestyle and infrastructure qualities with the assistance of its many partners.

**Goal:** Develop a cost effective marketing plan for the City

**Goal:** Optimize waterfront, bicycle and pedestrian assets of the City

**Goal:** Coordinate with stakeholders in promoting Punta Gorda as a boating, fishing and bicycle-friendly destination

**Goal:** Support and facilitate the marketing of Punta Gorda’s assets as a core to a vibrant downtown

**Goal:** Optimize expertise of regional and local partners (i.e. Charlotte Harbor Tourism Bureau, Chambers of Commerce, Realtor Association, tourism-oriented private sector) to achieve stated objectives

Action Item	Timeframe	Cost
Market City’s assets to include private/public building and infrastructure improvements, downtown amenities, heritage tourism, and festivals by partnering with public, private & non-profit agencies through the One Community One Message (OCOM) initiative and other partner organizations	Ongoing	
Partner with Boater’s Alliance and TEAM Punta Gorda Maritime Committee to market Punta Gorda as a waterfront destination, including the City’s canal system.	Ongoing	
Continue cost effective marketing plan in partnership with Fishermen’s Village, Punta Gorda Chamber of Commerce, TEAM Punta Gorda and Charlotte County Tourism Bureau. Include City seed money set aside for marketing for an initial three-year period.	2016-2018	TBD

<b>Key Performance Indicator</b>	<b>Actual FY 2014</b>	<b>Projected FY 2015</b>	<b>Proposed FY 2016</b>
New website visitor (average per week)	349	401	TBD
Return website visitor (average per week)	122	114	TBD
Marketing pieces specific to Punta Gorda	19	19	19
Hotel room occupancy rates (Fishermen's Village)	85%	86%	88%
Marina visits (Fishermen's Village)	2285	2300	2325
Liveboards boats in Laishley Marina	8	12	18
Occupancy Rate Laishley Marina	96.46%	88.76%	89.65%
# of boats in Laishley Mooring Field	25	40	60
# of day only boat visitations to Laishley Marina	125	125	200
Restaurant sales - % increase/decrease (Fishermen's Village)	+10%	+12%	+13%
# of sporting events (bicycle, runs, walks)	18	18	20
# of fishing/boating events	14	12	12
# of festivals/parades	56	69	75

**Priority: Quality of Life – Enhance and promote Punta Gorda’s attractive neighborhoods and working environment, heritage tourism, cultural opportunities, healthy eco-system and outdoor lifestyle, and its vibrant, safe City status**

Quality of life is an all-inclusive term that includes such elements as economic prosperity, an affordable home, gainful employment, clean air and water, quality healthcare, safe and attractive neighborhoods and working environments, ample education and recreational opportunities, convenient transportation systems, and an active and diverse community which is rich in art and cultural amenities. The following elements embody Punta Gorda’s quality of life:

- ✓ The City has three separate historic districts, each with their own varying level of preservation interest; a burgeoning waterfront and planned 18-mile Punta Gorda Pathways linking all neighborhoods with a pedestrian/bicycle pathway; and numerous festivals promoting the arts, culture and outdoor recreational activities.
- ✓ Within Punta Gorda are such arts and cultural facilities as the Charlotte County Event & Conference Center, Charlotte Performing Arts Center, Visual Arts Center, Artisan’s Atelier, Historic Women’s Club & Train Depot, and numerous private art galleries/shops.
- ✓ The Charlotte Harbor ecosystem supports abundant recreational and research opportunities.
- ✓ Punta Gorda’s public safety component has achieved a ranking of being the second safest city in Florida for communities with a population between 15,000 and 20,000, and a recently initiated advanced life support program to compliment County-provided emergency medical services.
- ✓ The City places an emphasis on land development regulations that are modeled after new urbanism, mixed-use building standards, strong code compliance and aesthetic considerations.
- ✓ The City’s potable water supply comes from the Shell Creek/Prairie Creek Watershed which flows into the Hendrickson Dam. With the exception of Total Dissolved Solids (TDS), a secondary non-health related standard for which the City has received an exemption, the City meets all primary and other secondary treatment standards. A future project will construct a groundwater reverse osmosis plant to further enhance the quality of the water supply by addressing TDS and increasing capacity when demand warrants such an investment.
- ✓ Punta Gorda has a diverse housing mix that is now affordable and attainable for all income levels, racial backgrounds, life stages and abilities.

**Goal:** Support, promote & maintain the City’s historic character

**Goal:** Maintain the City’s high safety rating and emergency response

**Goal:** Improve the City’s water quality

**Goal:** Achieve status as a waterfront destination for land and water visitors

**Goal:** Support and promote a pedestrian & bicycle friendly community

**Goal:** Ensure a diversity of housing stock that is attainable for all income levels, racial backgrounds, life stages and abilities

Action Item	Timeframe	Cost
Partner with TEAM Punta Gorda and cycling groups to develop a bicycle plan that meets the requirements of Bicycle Friendly Community, and incorporate enhanced pedestrian amenities as part of the effort. Focus plan on the five E’s – engineering, education, encouragement, enforcement and evaluation/planning. Consider bicycle friendly strategies as part of the annual road resurfacing program.	2015/2016	
Partner with Vietnam Wall Committee to design, permit and construct the Wall in Laishley Park Veterans Garden	2015/2016	\$508,000

Assess and enhance, where appropriate, pedestrian friendly amenities in the central business district to include re-bricking, landscaping, street furniture, waste receptacles, decorative lighting, street trees and intersection access. Focus effort on Taylor Street and Olympia between the two US 41's.	Ongoing	
Ensure City's Development Review Process and event planning are seamless and a positive experience for concerned parties	Ongoing	
Develop a community garden on City property adjacent to History Park through partnership with TEAM Punta Gorda	2016	
Promote transportation and job initiatives that enhance ability of neighborhoods east of US 41 to reach employment centers, community activities and daily needs	Ongoing	
Replace the Welcome to Historic Punta Gorda signage with a more historic design and material	2016/2017	
Encourage location of a Performing Arts Center in the City outside the purview of the School District	Ongoing	
Develop plan to enhance Ponce de Leon Park amenities and incorporate Peace River Wildlife Center needs into plan design.	2016	\$591,250
Initiate strategic planning for a waterfront amenity focused on community and visitor boaters	2016	
Establish a plan to provide additional shade trees throughout the community	2016	
Continue initiatives to engage our community's youth to work together to ensure a safe, drug-free environment	Ongoing	

Key Performance Indicator	Actual FY 2014	Projected FY 2015	Proposed FY 2016
Uniform Crime Index	295	306	309
Average patrol response time for calls for service (minutes)	3:20	3:37	3:32
Clearance rate	39%	35%	34.4%
Quality Assurance Review results - % satisfied with service provided by police officer	98.7%	98.9%	99.1%
% fire emergency calls with response time less than 5 min	79.6%	85%	87%
Average fire response time for calls for service (min)	4:05	4:00	3:55
% Waste diverted from landfill due to recycling (tons)	35% (5,020)	37% (5,160)	40% (5,418)
Stormwater (NPDES) compliance with state standards	100%	100%	100%
Achievement of water quality standards (excluding TDS)	Yes	Yes	Yes
State Appropriation for Vietnam Wall	N/A	N/A	\$150,000

## Appendix: Multi-Year Fiscal Forecasts FY 2016-2020

In January 2008, the City published its first Business Plan which incorporated economic and financial strategies and key performance measures into a single document. In order to augment the financial strategy component of the Plan, a long-range financial plan was developed in January 2009 to assist management in the planning and allocation of resources to achieve the City Council's goal of maintaining fiscally responsible decision making within all sectors of the organization. The Plan provided the organization with an opportunity to change or influence current policies and practices before they created critical fiscal strains on the budgetary fabric. The Long Range Financial Plan continues to present multi-year fiscal forecasts for the City's major fund groups and provides a baseline for action items contained in the financial/economic sustainability element of the Strategic Plan. The proformas presented in the Long Range Financial Plan, published in January 2013, have been updated to reflect FY 2016 proposed budget through FY 2020.

### General Fund

	Proposed FY 2016	Proforma FY 2017	Proforma FY 2018	Proforma FY 2019	Proforma FY 2020
Change in Taxable Value of Property	4.8%	4%	4%	4%	4%
<b>Revenues:</b>					
Ad Valorem Taxes	\$7,716,200	\$8,024,800	\$8,345,800	\$8,679,600	\$9,026,800
Other Revenue	10,020,350	10,113,410	10,225,880	10,363,507	10,503,336
Use of Prior Year's Reserves	266,800	341,000			
<b>Total Revenues</b>	<b>18,003,350</b>	<b>18,479,210</b>	<b>18,571,680</b>	<b>19,043,107</b>	<b>19,530,136</b>
<b>Expenditures:</b>					
Personnel Expenditures	12,735,411	13,132,555	13,475,401	13,899,365	14,341,250
Operating Expenditures	3,851,161	3,922,230	4,034,722	4,150,929	4,270,977
Capital	379,100	378,000	378,000	378,000	378,000
Transfers to other Funds	563,678	572,425	611,922	612,199	653,287
Transfers for Roads	459,000	459,000	459,000	459,000	459,000
Contingency	15,000	15,000	15,000	15,000	15,000
<b>Total General Expenditures</b>	<b>18,003,350</b>	<b>18,479,210</b>	<b>18,974,045</b>	<b>19,514,493</b>	<b>20,117,514</b>
<b>Expenditures in Excess of Revenue</b>	<b>\$0</b>	<b>\$0</b>	<b>(\$402,365)</b>	<b>(\$471,386)</b>	<b>(\$587,378)</b>
<b>Minimum Reserve (6.5% to 8.5%)</b>	<b>\$1,171,000</b>	<b>\$1,294,000</b>	<b>\$1,423,000</b>	<b>\$1,562,000</b>	<b>\$1,710,000</b>

**Community Redevelopment Agency**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
<b>Debt Service Division</b>					
Assessed Property Valuation change	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>
Tax Increment Financing (TIF) Revenue	\$1,392,387	\$1,434,158	\$1,477,183	\$1,521,499	\$1,567,144
CRA Lease Payments (Debt Service)	1,310,790	1,338,314	1,379,439	1,423,924	1,471,648
Revenues in Excess of Debt Svc	81,597	95,844	97,744	97,575	95,496
Reserve - TIF for Debt Svc (Beg)	128,698	210,295	306,139	403,883	501,458
<b>Reserve - TIF for Debt Svc (End)</b>	<b>\$210,295</b>	<b>\$306,139</b>	<b>\$403,883</b>	<b>\$501,458</b>	<b>\$596,954</b>

<b>Herald Court Operations Division</b>					
Herald Court Revenues	\$199,424	\$223,538	\$249,238	\$249,938	\$250,638
Herald Court Operating Expenditures	163,300	176,025	189,216	197,486	206,004
Revenues in Excess of Herald Ct Operations	36,124	47,513	60,022	52,452	44,634
Reserve - Herald Ct (Beg)	33,456	69,580	117,093	177,115	229,567
<b>Reserve - Herald Ct (End)</b>	<b>\$69,580</b>	<b>\$117,093</b>	<b>\$177,115</b>	<b>\$229,567</b>	<b>\$274,201</b>

<b>CRA Operations Division</b>					
Other CRA Revenues	\$107,724	\$108,652	\$109,588	\$110,533	\$111,486
Other CRA Operating Expenditures	129,000	159,100	161,263	163,491	165,786
Revenues in Excess (Shortfall) of Other Operations	(21,276)	(50,448)	(51,675)	(52,958)	(54,300)
Reserve - Other Operations (Beg)	1,040,761	1,019,485	969,037	917,362	864,404
<b>Reserve - Other Operations (End)</b>	<b>\$1,019,485</b>	<b>\$969,037</b>	<b>\$917,362</b>	<b>\$864,404</b>	<b>\$810,104</b>

**Utilities OM&R Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
Proposed Rate Change	<b>4%</b>	<b>4%</b>	<b>4%</b>		
<b>Revenues:</b>					
Chg for Service - Water	\$8,855,494	\$9,292,147	\$9,749,561	\$9,835,290	\$9,921,020
Chg for Service - Sewer	6,692,333	7,029,839	7,383,638	7,456,244	7,528,849
Other Revenue	1,444,805	668,283	669,290	670,328	671,397
<b>Total Revenues</b>	<b>16,992,632</b>	<b>16,990,269</b>	<b>17,802,489</b>	<b>17,961,862</b>	<b>18,121,266</b>
<b>Expenses:</b>					
Operations	12,003,568	12,175,177	12,661,504	13,154,219	13,613,947
Renewal & Replacement of Infrastructure	1,120,000	1,153,600	1,188,320	1,224,160	1,261,120
Transfer for Capital Improvement Projects	635,000	334,750	265,250	191,275	191,420
Existing Debt Service	782,956	200,000	200,000	200,000	200,000
New Debt Service - CIP	1,060,000	1,060,000	2,941,000	2,941,000	2,941,000
<b>Total Expenses</b>	<b>15,601,524</b>	<b>14,923,527</b>	<b>17,256,074</b>	<b>17,710,654</b>	<b>18,207,487</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>1,391,108</b>	<b>2,066,742</b>	<b>546,415</b>	<b>251,208</b>	<b>(86,221)</b>
<b>Operating Reserves-Beg</b>	<b>3,665,140</b>	<b>5,056,248</b>	<b>7,122,990</b>	<b>7,669,405</b>	<b>7,920,613</b>
<b>Operating Reserves-End</b>	<b>\$5,056,248</b>	<b>\$7,122,990</b>	<b>\$7,669,405</b>	<b>\$7,920,613</b>	<b>\$7,834,392</b>

**Sanitation Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
Single, Multifamily, Yardwaste, Recycling growth rate		1%	1%	1%	1%
<b>Revenues:</b>					
Chg. for Service - Refuse Collection	\$3,136,830	\$3,162,678	\$3,188,785	\$3,215,152	\$3,241,784
Other Revenue	25,710	25,710	25,710	25,710	25,710
Capital Lease/Purchase					300,000
<b>Total Revenues</b>	<b>3,162,540</b>	<b>3,188,388</b>	<b>3,214,495</b>	<b>3,240,862</b>	<b>3,567,494</b>
<b>Expenses:</b>					
Operations	2,855,352	2,947,137	3,042,482	3,141,560	3,244,548
Capital	1,091,400				900,000
Debt Service					58,000
<b>Total Expenses</b>	<b>3,946,752</b>	<b>2,947,137</b>	<b>3,042,482</b>	<b>3,141,560</b>	<b>4,202,548</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>(784,212)</b>	<b>241,251</b>	<b>172,013</b>	<b>99,302</b>	<b>(635,054)</b>
<b>Operating Reserves-Beg</b>	<b>1,296,058</b>	<b>411,846</b>	<b>553,097</b>	<b>625,110</b>	<b>624,412</b>
<b>Capital Outlay Reserves-Beg</b>	<b>0</b>	<b>100,000</b>	<b>200,000</b>	<b>300,000</b>	<b>400,000</b>
<b>Capital Outlay Reserves-End</b>	<b>100,000</b>	<b>200,000</b>	<b>300,000</b>	<b>400,000</b>	<b>0</b>
<b>Operating Reserves-End</b>	<b>\$411,846</b>	<b>\$553,097</b>	<b>\$625,110</b>	<b>\$624,412</b>	<b>\$389,358</b>

**Building Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
<b>Revenues:</b>					
Permits, Fees & Special Assmnts.	\$792,500	\$827,500	\$849,500	\$871,500	\$894,500
Other Revenue	20,000	20,000	20,000	20,000	20,000
<b>Total Revenues</b>	<b>812,500</b>	<b>847,500</b>	<b>869,500</b>	<b>891,500</b>	<b>914,500</b>
<b>Expenses:</b>					
Operations	749,431	770,903	793,174	816,278	840,249
Capital	20,000	20,000	20,000		
<b>Total Expenses</b>	<b>769,431</b>	<b>790,903</b>	<b>813,174</b>	<b>816,278</b>	<b>840,249</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>43,069</b>	<b>56,597</b>	<b>56,326</b>	<b>75,222</b>	<b>74,251</b>
<b>Operating Reserves-Beg</b>	<b>707,478</b>	<b>750,547</b>	<b>807,144</b>	<b>863,470</b>	<b>938,692</b>
<b>Operating Reserves-End</b>	<b>\$750,547</b>	<b>\$807,144</b>	<b>\$863,470</b>	<b>\$938,692</b>	<b>\$1,012,943</b>

**PGI Canal Maintenance Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
Rate	\$550	\$550	\$590	\$590	\$590
<b>Revenues:</b>					
Operating Assessment	\$2,861,750	\$2,861,750	\$3,062,180	\$3,062,180	\$3,062,180
Other Revenue	1,500	1,500	1,500	1,500	1,500
<b>Total Revenues</b>	<b>2,863,250</b>	<b>2,863,250</b>	<b>3,063,680</b>	<b>3,063,680</b>	<b>3,063,680</b>
<b>Expenditures:</b>					
Operations	882,670	912,723	944,109	976,901	1,011,177
Inlet Dredging	40,000	40,000	40,000	40,000	40,000
Seawalls, Caps and Stabilization	1,711,930	1,760,000	2,093,700	2,144,700	2,197,200
Capital	50,000				
<b>Total Expenditures</b>	<b>2,684,600</b>	<b>2,712,723</b>	<b>3,077,809</b>	<b>3,161,601</b>	<b>3,248,377</b>
<b>Revenues in Excess (Shortfall) of Expenditures</b>	<b>178,650</b>	<b>150,527</b>	<b>(14,129)</b>	<b>(97,921)</b>	<b>(184,697)</b>
<b>Operating Reserves-Beg</b>	<b>333,647</b>	<b>512,297</b>	<b>662,824</b>	<b>648,695</b>	<b>550,774</b>
<b>Operating Reserves-End</b>	<b>\$512,297</b>	<b>\$662,824</b>	<b>\$648,695</b>	<b>\$550,774</b>	<b>\$366,077</b>

**BSI Canal Maintenance Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
Operating Rate	\$460	\$460	\$460	\$460	\$460
Proforma Dredging Rate		\$120	\$120	\$120	\$120
<b>Revenues:</b>					
Operating Assessment	\$474,800	\$474,800	\$474,800	\$474,800	\$474,800
Dredging Assessment		119,460	119,460	119,460	119,460
Other Revenue	250	250	250	250	250
Financing		560,000			
<b>Total Revenues</b>	<b>475,050</b>	<b>1,154,510</b>	<b>594,510</b>	<b>594,510</b>	<b>594,510</b>
<b>Expenditures:</b>					
Operations	87,832	89,738	91,708	93,744	95,848
Inlet Dredging	33,000		42,000	42,000	42,000
Seawalls, Caps and Stabilization	356,000	356,000	356,000	356,000	356,000
Rim Dredging Project	10,000	560,000			
Debt Service		107,000	107,000	107,000	107,000
<b>Total Expenditures</b>	<b>486,832</b>	<b>1,112,738</b>	<b>596,708</b>	<b>598,744</b>	<b>600,848</b>
<b>Revenues in Excess (Shortfall) of Expenditures</b>	<b>(11,782)</b>	<b>41,772</b>	<b>(2,198)</b>	<b>(4,234)</b>	<b>(6,338)</b>
<b>Operating Reserves-Beg</b>	<b>55,681</b>	<b>43,899</b>	<b>85,671</b>	<b>83,473</b>	<b>79,239</b>
<b>Operating Reserves-End</b>	<b>\$43,899</b>	<b>\$85,671</b>	<b>\$83,473</b>	<b>\$79,239</b>	<b>\$72,901</b>

**Lashley Park Marina Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
<b>Revenues:</b>					
Slip & Mooring Rentals	\$330,300	\$331,500	\$332,820	\$334,272	\$335,869
Intergovernmental Revenue	18,100	19,364	19,945	20,543	21,159
Other Revenue	29,385	31,715	31,715	31,715	31,715
<b>Total Revenues</b>	<b>377,785</b>	<b>382,579</b>	<b>384,480</b>	<b>386,530</b>	<b>388,743</b>
<b>Expenses:</b>					
Lashley Park Marina Expenses	158,015	162,485	167,240	172,304	177,704
Marina Park Contract Expenses	210,750	217,816	223,844	229,538	235,403
<b>Total Expenses</b>	<b>368,765</b>	<b>380,301</b>	<b>391,084</b>	<b>401,842</b>	<b>413,107</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>9,020</b>	<b>2,278</b>	<b>(6,604)</b>	<b>(15,312)</b>	<b>(24,364)</b>
<b>Operating Reserves-Beg</b>	<b>140,326</b>	<b>149,346</b>	<b>151,624</b>	<b>145,020</b>	<b>129,708</b>
<b>Operating Reserves-End</b>	<b>\$149,346</b>	<b>\$151,624</b>	<b>\$145,020</b>	<b>\$129,708</b>	<b>\$105,344</b>

**Six Cent Gas Tax Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
<b>Revenues:</b>					
Local Option Gas Tax	\$570,000	\$575,700	\$581,457	\$587,272	\$593,144
Other Revenue	217,486	217,597	221,241	221,746	222,256
<b>Total Revenues</b>	<b>787,486</b>	<b>793,297</b>	<b>802,698</b>	<b>809,018</b>	<b>815,400</b>
<b>Expenditures:</b>					
Operating Expenditures	784,480	804,415	824,948	846,092	867,879
<b>Total Expenditures</b>	<b>784,480</b>	<b>804,415</b>	<b>824,948</b>	<b>846,092</b>	<b>867,879</b>
<b>Revenues in Excess (Shortfall) of Expenditures</b>	<b>3,006</b>	<b>(11,118)</b>	<b>(22,250)</b>	<b>(37,074)</b>	<b>(52,479)</b>
<b>Operating Reserves-Beg</b>	<b>200,635</b>	<b>203,641</b>	<b>192,523</b>	<b>170,273</b>	<b>133,199</b>
<b>Operating Reserves-End</b>	<b>\$203,641</b>	<b>\$192,523</b>	<b>\$170,273</b>	<b>\$133,199</b>	<b>\$80,720</b>

**Additional Five Cent Gas Tax Fund**

	<b>Proposed FY 2016</b>	<b>Proforma FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>
<b>Revenues:</b>					
Local Option Gas Tax	\$262,000	\$267,000	\$272,000	\$277,000	\$282,000
Transfer from General Fund					
Ad Valorem	459,000	459,000	459,000	459,000	459,000
Other Revenues	300				
<b>Total Revenues</b>	<b>721,300</b>	<b>726,000</b>	<b>731,000</b>	<b>736,000</b>	<b>741,000</b>
<b>Expenditures:</b>					
Paving	721,000	726,000	731,000	736,000	741,000
<b>Total Expenditures</b>	<b>721,000</b>	<b>726,000</b>	<b>731,000</b>	<b>736,000</b>	<b>741,000</b>
<b>Revenues in Excess (Shortfall) of Expenditures</b>	<b>300</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Operating Reserves-Beg</b>	<b>15,817</b>	<b>16,117</b>	<b>16,117</b>	<b>16,117</b>	<b>16,117</b>
<b>Operating Reserves-End</b>	<b>\$16,117</b>	<b>\$16,117</b>	<b>\$16,117</b>	<b>\$16,117</b>	<b>\$16,117</b>