

City of Punta Gorda, Florida

# *STRATEGIC PLAN*

FY 2017



## **CITY COUNCIL**

Rachel Keesling, Mayor (District 2)  
Kim Devine, Vice Mayor (District 1)  
Tom Cavanaugh, Council Member (District 4)  
Nancy Prafke, Council Member (District 5)  
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## **CITY OFFICIALS**

Howard Kunik, City Manager  
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Karen Smith, City Clerk

## **DEPARTMENT DIRECTORS**

Dave Drury, Finance  
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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
- Strategic Communications Positioning
- 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 2017	
Conduct budget updates and/or workshops 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 through September 2017	
Continue assessment of ordinances and land development regulations that impact business development and recommend amendments, where appropriate, to enhance development opportunity	Ongoing	
Develop plan for use of one-time land sales and BP oil spill revenues	April 2017	
<b>External</b>		
Support public/private efforts that facilitate development of undeveloped commercial properties to include LOOP, 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. fresh market/garden business venture in east Punta Gorda	December 2016	\$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 Voice over IP phone system upgrade; server upgrades; geographic information systems enhancements; mobile device management	Ongoing	\$84,000 FY 2017 plus carryover funds from FY 2016 for projects still in progress
Research method to require pre-annexation agreements for all new water & wastewater customers with commitment to annex once contiguous and implement such, if feasible	January 2017	

<b>Key Performance Indicator</b>	<b>Actual FY 2015</b>	<b>Projected FY 2016</b>	<b>Proposed FY 2017</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 104% versus Exp.	Revenue 99% versus Exp.	Revenue 97% versus Exp.
Unqualified Audit Opinion	Yes	Pending Review	Pending Review
% compliance with financial management policies	100%	Budgeted 100%	Budgeted 100%
Tax base diversity (goal 75% residential & 25% commercial)	89% residential 11% commercial	90.4% residential 9.6% commercial	TBD
Properties annexed	1	1	2
% space leased in Herald Court Centre	83%	83%	100%
Cost per capita – General Fund services	\$955	\$952	\$982
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	9.1%	9.1%	9.1%
Females in Non-Traditional Roles in City workforce	6.1%	6.0%	6.0%
City employees per 100/Population	1.5	1.5	1.5
Taxable sales (Monthly Ave. PG MSA)	\$203 million	\$235 million	\$250 million
# of new businesses	94	110	100
# of closed businesses	61	70	60

## **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:

- Thirteen 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, Lashley Park Marina Building, and Herald Court Centre.
- 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).
- 90 Windows Servers, 5 virtual server hosts (three-node VMware ESXi cluster. Two Hyper-V servers), 1 IBM midrange server, three-node VMware Virtual Desktop Interface (VDI) ESXi cluster, four datacenter switches, twenty-one access switches, three firewalls (1 a state of the art next-generation firewall), two Storage Area Networks (SANs). Thirty-five wireless access points, 4 voice cabinets (PBX), 5 miles of dark fiber, 320 pc’s and laptops, and 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?
- With more people using the web and social media the City must continue to find new ways 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	2016/2017	\$720,000
Corto Andra/Boca Grande Drainage	2016/2017	\$1,100,000
800 MHZ Radio System	2017	\$520,000
Groundwater Reverse Osmosis (RO)Water Treatment Plant – well field testing, permitting and design	2016	\$3,900,000
RO Plant Deep Injection Well	2016/2017	\$4,200,000
RO Plant Construction	2017-2019	\$19,200,000
Harborwalk-US 41SB Bridge Underpass Widening	2016/2017	\$280,000
Harborwalk East Mary Street Connection	2017	\$45,000
Harborwalk/Gilchrist Park – Waterfront Hotel to Gazebo	2016/2017	\$1,800,000
Madrid Sidewalk	2016/2017	\$100,000
US 41 Decorative Lighting – Aqui Esta to Airport	2017	\$100,000
Ponce Park Redesign	2017	\$125,000
Additional Harbor Access in Punta Gorda Isles – engineering, permitting and assessment methodology	2015-2017	\$125,000
Burnt Store Isles Perimeter Rim Canal Dredging – permitting and construction	2016/2017	\$570,000
Canal Maintenance Seawall Maintenance Alternatives- explore and review alternatives of products, methodology and staging sites due to the ever decreasing vacant lots.	Ongoing	TBD
Taylor re-bricking west side Marion to Harborside	TBD	\$72,000
Wastewater Force Main (Jones Loop Road) – design and permitting	2016/2017	\$300,000
Update plan for all major infrastructure categories to include fleet, equipment, buildings, grounds, streets, utilities and lighting.	May 2017	Included in FY 2018-2022 Capital Improvements Program and Road Resurfacing Program
Address stormwater (drainage) issues through enhanced service level and consider funding program within General Fund or stormwater utility fee	September 2017	\$500,000
Develop plan to transition from septic to sewer in Utility Service Area, primarily Charlotte Park	2017	

<b>Key Performance Indicator</b>	<b>Actual FY 2015</b>	<b>Projected FY 2016</b>	<b>Proposed FY 2017</b>
% of projects completed within timeframe & estimated cost	100%	95%	100%
Fuel use (gallons)	171,469	160,000	165,000
Five year capital improvements program that identifies infrastructure needs with funding source	Yes	Yes	Yes
Funding approved by State Legislature (RO/Pipeline Projects)	\$4 Million	N/A	N/A
Funding approved by Southwest Florida Water Management District (RO Project)	\$16 Million	N/A	N/A
Other Grant Funding (for infrastructure only)	\$50,000	N/A	N/A

**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 2015</b>	<b>Projected FY 2016</b>	<b>Proposed FY 2017</b>
City Communications (Weekly Highlights Reports, Information Sharing Reports and Action Registers)	149	149	156
Citizen Interaction through Social Media	500	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)	16,913	17,450	17,500
Business Satisfaction Survey results - % excellent rating	100%	100%	100%

**Priority: Strategic Communications Positioning – Develop and promote the City through creation of public/private partnerships that diversify the tax base, enhance the area as a visitor destination, and secure the future of the City’s distinct quality of life through consistent messaging of the City’s brand**

Strategic communications positioning and 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. There exist 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 identify its brand and market its lifestyle and infrastructure qualities with the assistance of its many partners.

**Goal:** Develop a cost effective strategic communications/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 working with public, private and non-profit agencies/organizations to develop a consistent strategy and approach that can be leveraged across all community channels.	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	
Develop cost effective strategic communications/marketing plan in partnership with above mentioned organizations through selection of firm to undertake branding process.	April 2017	\$75,000

<b>Key Performance Indicator</b>	<b>Actual FY 2015</b>	<b>Projected FY 2016</b>	<b>Proposed FY 2017</b>
New website visitor (average per week)	2400	2331	2047
Return website visitor (average per week)	928	766	717
Marketing pieces specific to Punta Gorda	19	19	19
Liveaboards boats in Laishley Marina	12	17	18
Occupancy Rate Laishley Marina	88.8%	87.9%	88.2%
# of boats in Laishley Mooring Field	40	70	75
# of day only boat visitations to Laishley Marina	650	1040	1430
# of sporting events (bicycle, runs, walks)	18	20	25
# of fishing/boating events	12	12	12
# of festivals/parades	69	75	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, Blanchard House Museum of African American History & Culture, 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.	TBD	

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
Promote transportation and job initiatives that enhance ability of neighborhoods east of US 41 to reach employment centers, community activities and daily needs	Ongoing
Partner with TEAM Punta Gorda in its strategic planning effort for a waterfront amenity focused on community and visitor boaters	2016/2017
Continue initiatives to engage our community's youth to work together to ensure a safe, drug-free environment	Ongoing

Key Performance Indicator	Actual FY 2015	Projected FY 2016	Proposed FY 2017
Uniform Crime Index	252	247	230
Average patrol response time for calls for service (minutes)	3:27	3:25	3:50
Clearance rate	42.1%	42.5%	44.5%
Quality Assurance Review results - % satisfied with service provided by police officer	99.3%	99.4%	99.1%
% fire emergency calls with response time less than 5 min	78.9%	81.4%	83.6%
Average fire response time for calls for service (min)	3:54	3:47	3:42
% Waste diverted from landfill due to recycling (tons)	55% 4915	54% 4712	58% 4900
Stormwater (NPDES) compliance with state standards	100%	100%	75%
Achievement of water quality standards (excluding TDS)	Yes	Yes	Yes
State Appropriation for Vietnam Wall	N/A	\$150,000	N/A

## Appendix: Multi-Year Fiscal Forecasts FY 2017-2021

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 proformas provided in the Long Range Financial Plan are updated during the budget process and then provide a baseline for action items contained in the financial/economic sustainability element of the Strategic Plan. The proformas presented have been updated to reflect FY 2017 proposed budget through FY 2021.

### General Fund

	Proposed FY 2017	Proforma FY 2018	Proforma FY 2019	Proforma FY 2020	Proforma FY 2021
Change in Taxable Value of Property	6.6%	4%	4%	4%	4%
<b>Revenues:</b>					
Ad Valorem Taxes	\$8,224,800	\$8,553,800	\$8,895,920	\$9,251,773	\$9,621,860
Other Revenue	10,324,190	10,452,185	10,570,281	10,713,460	10,858,922
Use of Prior Year's Reserves	636,953	846,626			
<b>Total Revenues</b>	<b>19,185,943</b>	<b>19,852,611</b>	<b>19,466,201</b>	<b>19,965,233</b>	<b>20,480,782</b>
<b>Expenditures:</b>					
Personnel Expenditures	13,136,785	13,671,790	14,172,383	14,694,868	15,240,365
Operating Expenditures	3,915,157	4,011,821	4,127,173	4,246,342	4,369,460
Capital	650,001	1,070,000	650,000	743,595	560,000
Transfers to other Funds	510,000	625,000	645,800	667,432	689,929
Transfers for Roads	459,000	459,000	459,000	459,000	459,000
Transfers for Drainage	500,000				
Contingency	15,000	15,000	15,000	15,000	15,000
<b>Total General Expenditures</b>	<b>19,185,943</b>	<b>19,852,611</b>	<b>20,069,356</b>	<b>20,826,237</b>	<b>21,333,754</b>
<b>Expenditures in Excess of Revenue</b>	<b>\$0</b>	<b>\$0</b>	<b>(\$603,155)</b>	<b>(\$861,004)</b>	<b>(\$852,972)</b>
<b>Minimum Reserve (7.0% to 9.0%)</b>	<b>\$1,342,000</b>	<b>\$1,490,000</b>	<b>\$1,606,000</b>	<b>\$1,771,000</b>	<b>\$1,929,000</b>

**Community Redevelopment Agency**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
<b>Debt Service Division</b>					
Assessed Property Valuation change	<b>4%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>
Tax Increment Financing (TIF) Revenue	\$1,482,031	\$1,526,492	\$1,572,287	\$1,619,455	\$1,668,039
CRA Lease Payments (Debt Service)	1,338,313	1,379,439	1,423,924	1,471,648	1,517,548
Revenues in Excess of Debt Svc	143,718	147,053	148,363	147,807	150,491
Reserve - TIF for Debt Svc (Beg)	216,384	360,102	507,155	655,518	803,325
<b>Reserve - TIF for Debt Svc (End)</b>	<b>\$360,102</b>	<b>\$507,155</b>	<b>\$655,518</b>	<b>\$803,325</b>	<b>\$953,816</b>

**Herald Court Operations Division**

Herald Court Revenues	\$236,775	\$240,196	\$241,196	\$241,596	\$246,646
Herald Court Operating Expenditures	181,476	193,431	202,061	210,319	219,013
Revenues in Excess of Herald Ct Oper.	55,299	46,765	39,135	31,277	27,633
Reserve - Herald Ct (Beg)	63,303	118,602	165,367	204,502	235,779
<b>Reserve - Herald Ct (End)</b>	<b>\$118,602</b>	<b>\$165,367</b>	<b>\$204,502</b>	<b>\$235,779</b>	<b>\$263,412</b>

**CRA Operations Division**

Other CRA Revenues	\$108,652	\$109,588	\$110,533	\$111,486	\$112,448
Other CRA Operating Expenditures	151,100	154,013	157,013	160,104	163,287
Expenditures in Excess of Revenue	(42,448)	(44,425)	(46,480)	(48,618)	(50,839)
Reserve - Other Operations (Beg)	560,192	517,744	473,319	426,839	378,221
<b>Reserve - Other Operations (End)</b>	<b>\$517,744</b>	<b>\$473,319</b>	<b>\$426,839</b>	<b>\$378,221</b>	<b>\$327,382</b>

**Utilities OM&R Fund**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
Rate Change Under Discussion	2%	2%			
<b>Revenues:</b>					
Chg for Service - Water	\$9,113,332	\$9,379,539	\$9,473,334	\$9,568,067	\$9,663,748
Chg for Service - Sewer	6,894,705	7,101,547	7,172,562	7,244,288	7,316,731
Other Revenue	412,600	686,012	686,951	687,919	688,915
<b>Total Revenues</b>	<b>16,420,637</b>	<b>17,167,098</b>	<b>17,332,847</b>	<b>17,500,274</b>	<b>17,669,394</b>
<b>Expenses:</b>					
Operations	12,412,625	12,919,715	13,417,606	13,882,730	14,349,913
Renewal & Replacement of Infrastructure	1,120,000	1,120,000	1,120,000	1,120,000	1,120,000
Transfer-Capital Improv. Projs.	540,000	490,000	215,000	170,000	1,225,000
Existing Debt Service	200,000	200,000	200,000	200,000	200,000
New Debt Service - CIP	202,000	1,572,000	1,572,000	1,572,000	1,572,000
Contribution to Pipeline Project	1,500,000				
Transfer to SRF Fund		1,370,000			
<b>Total Expenses</b>	<b>15,974,625</b>	<b>17,671,715</b>	<b>16,524,606</b>	<b>16,944,730</b>	<b>18,466,913</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>446,012</b>	<b>(504,617)</b>	<b>808,241</b>	<b>555,544</b>	<b>(797,519)</b>
<b>Operating Reserves-Beg</b>	<b>6,298,893</b>	<b>6,744,905</b>	<b>6,240,288</b>	<b>7,048,529</b>	<b>7,604,073</b>
<b>Operating Reserves-End</b>	<b>\$6,744,905</b>	<b>\$6,240,288</b>	<b>\$7,048,529</b>	<b>\$7,604,073</b>	<b>\$6,806,554</b>

### Sanitation Fund

	Proposed FY 2017	Proforma FY 2018	Proforma FY 2019	Proforma FY 2020	Proforma FY 2021
<b>Revenues:</b>					
Chg. for Service - Refuse Collection	\$3,297,700	\$3,408,294	\$3,519,152	\$3,630,275	\$3,741,668
Other Revenue	24,375	24,375	24,375	21,375	21,375
<b>Total Revenues</b>	<b>3,322,075</b>	<b>3,432,669</b>	<b>3,543,527</b>	<b>3,651,650</b>	<b>3,763,043</b>
<b>Expenses:</b>					
Operations	3,048,546	3,216,036	3,387,592	3,564,196	3,746,037
Capital				750,000	
<b>Total Expenses</b>	<b>3,048,546</b>	<b>3,216,036</b>	<b>3,387,592</b>	<b>4,314,196</b>	<b>3,746,037</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>273,529</b>	<b>216,633</b>	<b>155,935</b>	<b>(662,546)</b>	<b>17,006</b>
<b>Operating Reserves-Beg</b>	<b>671,386</b>	<b>744,915</b>	<b>736,548</b>	<b>667,483</b>	<b>754,937</b>
<b>Capital Outlay Reserves-Beg</b>	<b>100,000</b>	<b>300,000</b>	<b>525,000</b>	<b>750,000</b>	<b>0</b>
<b>Capital Outlay Reserves-End</b>	<b>\$300,000</b>	<b>\$525,000</b>	<b>\$750,000</b>	<b>\$0</b>	<b>\$250,000</b>
<b>Operating Reserves-End</b>	<b>\$744,915</b>	<b>\$736,548</b>	<b>\$667,483</b>	<b>\$754,937</b>	<b>\$521,943</b>

### Building Fund

	Proposed FY 2017	Proforma FY 2018	Proforma FY 2019	Proforma FY 2020	Proforma FY 2021
<b>Revenues:</b>					
Permits, Fees & Special Assmnts.	\$847,500	\$877,500	\$917,500	\$917,500	\$917,500
Other Revenue	28,000	26,000	26,000	26,000	26,000
<b>Total Revenues</b>	<b>875,500</b>	<b>903,500</b>	<b>943,500</b>	<b>943,500</b>	<b>943,500</b>
<b>Expenses:</b>					
Operations	849,661	874,888	1,032,911	1,065,029	1,098,384
Capital	25,000	25,000	25,000		
<b>Total Expenses</b>	<b>874,661</b>	<b>899,888</b>	<b>1,057,911</b>	<b>1,065,029</b>	<b>1,098,384</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>839</b>	<b>3,612</b>	<b>(114,411)</b>	<b>(121,529)</b>	<b>(154,884)</b>
<b>Operating Reserves-Beg</b>	<b>927,183</b>	<b>928,022</b>	<b>931,634</b>	<b>817,223</b>	<b>695,694</b>
<b>Operating Reserves-End</b>	<b>\$928,022</b>	<b>\$931,634</b>	<b>\$817,223</b>	<b>\$695,694</b>	<b>\$540,810</b>

**PGI Canal Maintenance Fund**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
Rate	\$550	\$550	\$550	\$550	\$550
Proforma Seawall Repl. Rsrv Rate		\$30	\$30	\$30	\$30
<b>Revenues:</b>					
Operating Assessment	\$2,861,750	\$3,011,750	\$3,011,750	\$3,011,750	\$3,011,750
Other Revenue	5,650	7,390	9,360	10,575	11,125
<b>Total Revenues</b>	2,867,400	3,019,140	3,021,110	3,022,325	3,022,875
<b>Expenditures:</b>					
Operations	899,997	918,602	949,741	982,221	1,016,116
Inlet Dredging	40,000	41,200	42,436	43,709	45,020
Seawalls & Caps R&M	1,760,000	1,812,800	1,867,210	1,923,220	1,980,910
Capital				35,000	
<b>Total Expenditures</b>	2,699,997	2,772,602	2,859,387	2,984,150	3,042,046
<b>Revenues in Excess (Shortfall) of Expenditures</b>	167,403	246,538	161,723	38,175	(19,171)
<b>Operating Reserves-Beg Resrv Seawall Replace-Beg</b>	604,205	621,608	718,146	729,869	668,044
<b>Resrv Seawall Replace-End Operating Reserves-End</b>	\$150,000	\$300,000	\$450,000	\$550,000	\$650,000
	\$621,608	\$718,146	\$729,869	\$668,044	\$548,873

**BSI Canal Maintenance Fund**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
Operating Rate	\$460	\$460	\$460	\$460	\$460
Dredging Rate	\$110	\$110	\$110	\$110	\$110
<b>Revenues:</b>					
Operating Assessment	\$474,800	\$474,800	\$474,800	\$474,800	\$474,800
Dredging Assessment	109,507	109,507	109,507	109,507	109,507
Other Revenue	1,150	1,740	2,180	2,600	3,000
Financing	451,000				
<b>Total Revenues</b>	1,036,457	586,047	586,487	586,907	587,307
<b>Expenditures:</b>					
Operations	91,327	93,350	95,442	97,605	99,842
Inlet Dredging		38,000	38,000	38,000	38,000
Seawalls & Caps R&M	311,000	311,000	311,000	311,000	311,000
Perimeter Dredging Project	560,000				
Debt Service		99,900	99,900	99,900	99,900
<b>Total Expenditures</b>	962,327	542,250	544,342	546,505	548,742
<b>Revenues in Excess (Shortfall) of Expenditures</b>	74,130	43,797	42,145	40,402	38,565
<b>Operating Reserves-Beg Resrv Seawall Replace-Beg</b>	34,363	63,493	62,290	59,435	54,837
<b>Resrv Seawall Replace-End Operating Reserves-End</b>	\$90,000	\$135,000	\$180,000	\$225,000	\$270,000
	\$63,493	\$62,290	\$59,435	\$54,837	\$48,402

**Laishley Park Marina Fund**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
<b>Revenues:</b>					
Slip & Mooring Rentals	\$436,600	\$438,000	\$439,540	\$441,234	\$443,097
Intergovernmental Revenue	11,649	7,000	7,000	7,000	7,000
Other Revenue	30,750	28,550	28,550	28,550	28,550
<b>Total Revenues</b>	<b>478,999</b>	<b>473,550</b>	<b>475,090</b>	<b>476,784</b>	<b>478,647</b>
<b>Expenses:</b>					
Laishley Park Marina Expenses	188,122	190,536	194,426	198,503	202,782
Marina Park Contract Expenses	238,500	239,515	245,710	252,092	258,665
Capital Outlay	18,000	6,000	6,000	6,000	6,000
<b>Total Expenses</b>	<b>444,622</b>	<b>436,051</b>	<b>446,136</b>	<b>456,595</b>	<b>467,447</b>
<b>Revenues in Excess (Shortfall) of Expenses</b>	<b>34,377</b>	<b>37,499</b>	<b>28,954</b>	<b>20,189</b>	<b>11,200</b>
<b>Operating Reserves-Beg</b>	<b>262,660</b>	<b>297,037</b>	<b>334,536</b>	<b>363,490</b>	<b>383,679</b>
<b>Operating Reserves-End</b>	<b>\$297,037</b>	<b>\$334,536</b>	<b>\$363,490</b>	<b>\$383,679</b>	<b>\$394,879</b>

**Six Cent Gas Tax Fund**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
<b>Revenues:</b>					
Local Option Gas Tax	\$575,000	\$577,000	\$579,000	\$581,000	\$583,000
Other Revenue	221,828	221,828	221,828	221,828	221,828
<b>Total Revenues</b>	<b>796,828</b>	<b>798,828</b>	<b>800,828</b>	<b>802,828</b>	<b>804,828</b>
<b>Expenditures:</b>					
Operating Expenditures	776,839	796,735	827,333	858,557	890,414
<b>Total Expenditures</b>	<b>776,839</b>	<b>796,735</b>	<b>827,333</b>	<b>858,557</b>	<b>890,414</b>
<b>Revenues in Excess (Shortfall) of Expenditures</b>	<b>19,989</b>	<b>2,093</b>	<b>(26,505)</b>	<b>(55,729)</b>	<b>(85,586)</b>
<b>Operating Reserves-Beg</b>	<b>219,430</b>	<b>239,419</b>	<b>241,512</b>	<b>215,007</b>	<b>159,278</b>
<b>Operating Reserves-End</b>	<b>\$239,419</b>	<b>\$241,512</b>	<b>\$215,007</b>	<b>\$159,278</b>	<b>\$73,692</b>

**Additional Five Cent Gas Tax Fund**

	<b>Proposed FY 2017</b>	<b>Proforma FY 2018</b>	<b>Proforma FY 2019</b>	<b>Proforma FY 2020</b>	<b>Proforma FY 2021</b>
<b>Revenues:</b>					
Local Option Gas Tax	\$271,000	\$271,000	\$272,000	\$274,000	\$276,000
Transfer from General Fund Ad Valorem	459,000	459,000	459,000	459,000	459,000
<b>Total Revenues</b>	730,000	730,000	731,000	733,000	735,000
<b>Expenditures:</b>					
Paving	730,000	730,000	731,000	733,000	735,000
<b>Total Expenditures</b>	730,000	730,000	731,000	733,000	735,000
<b>Revenues in Excess (Shortfall) of Expenditures</b>	0	0	0	0	0
<b>Operating Reserves-Beg</b>	21,042	21,042	21,042	21,042	21,042
<b>Operating Reserves-End</b>	\$21,042	\$21,042	\$21,042	\$21,042	\$21,042