



STRATEGIC PLAN

Fiscal Year 2026

CITY COUNCIL

Dr. Debi Lux, Mayor (District 3)
Greg Julian, Vice Mayor (District 2)
Jeannine Polk, Council Member (District 1)
Janis Denton, Council Member (District 4)
Melissa Lockhart, Council Member (District 5)

CITY OFFICIALS

Melissa Reichert, City Manager
Steven Leskovich, Interim City Attorney
Sara Welch, City Clerk

DEPARTMENT DIRECTORS and MANAGERS

Pam Smith, Police Chief
Holden Gibbs, Fire Chief
Michael Bonasera, Assistant City Manager
Ron Everts, Public Works Director
Boyd Lawrence, Planning Director
Jeff Payne, Human Resources Manager
Tom Spencer, Utilities Director
Brad Schuette, Information Technology Manager
Kristin Simeone, Finance Director
Ashley Omelanski-Carney, Assistant to the City Manager
Odalys Valdes, Legal Assistant

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City Manager Melissa Reichert Message

The adopted millage rate is 3.8686 mills, matching the proposed budget and presented at public hearing. This is the rolled-back rate and a decrease of .0814 mills from the prior fiscal year.

The final adopted budget approved September 24, 2025 was \$203,669,943. Net of interfund transfers, the approved budget is \$186,176,573. This was a decrease of \$1.6 million (\$2.3 million net of interfund transfers). \$1.5 million was an adjustment to financing and transfers that were updated in the Utilities funds and \$0.1 million to move the Public Safety Fencing to FY 2025 to begin the project.

The Strategic Plan for 2026 was also adopted on September 24, 2025. It is the City's roadmap for the future. It outlines the community's shared vision, priorities, and measurable goals, ensuring that resources are aligned with what matters most to residents and businesses. The Strategic Plan included key milestone dates for accountability, and Council will review the progress quarterly. Financial status reports will also be provided quarterly as a part of furthering transparency.

Negotiations with the police officer bargaining unit have been ongoing and we have now reached an agreement that will be brought to Council for approval. That is one of the unbudgeted costs that we plan for with use of additional reserves.

The FY 2026 priorities include long-term infrastructure planning and funding, growth management, impact fee adjustments, investment in water, sewer, and drainage systems, and maximizing grant opportunities to offset local costs.

I am proud to work alongside an actively engaged City Council, a talented and committed workforce, and a community that values careful stewardship of its resources. Our approach combines a practical, data-driven budget with a strategic vision—positioning Punta Gorda to maintain service excellence, meet infrastructure needs, and continue building a bright future.

Strategic Plan Priorities



Five Year Staffing Plan

FUND	Division	FUND NAME Department/Division	Amended Authorized FY 2025	Requested FY 2026 positions	FY 2027 Planning Requests	FY 2028 Planning Requests	FY 2029 Planning Requests	FY 2030 Planning Requests	FY 2030 Planning Totals
001	01-00	CITY COUNCIL	5.00						5.00
001	02-00	City Manager	3.25						3.25
001	02-18	Human Resources	5.00						5.00
001	03-00	City Clerk	5.00						5.00
001	06-00	Legal	0.75						0.75
001	04-00	Finance	9.50						9.50
001	04-05	Procurement	9.50						9.50
001	09-01	Public Works Admin	3.00	1.00					4.00
001	09-08	Engineering	5.00	2.00					7.00
001	15-15	Facilities Maintenance	6.00	2.00	1.00				9.00
001	09-16	Right of Way Maintenance (mid-year +5)	21.00						21.00
001	09-19	Parks & Grounds	13.00	1.00	1.00	1.00	1.00	1.00	18.00
001	12-00	POLICE	70.00		2.00	1.00	2.00		75.00
001	13-00	FIRE	37.00	2.00	2.00	2.00			43.00
001	15-00	Planning	8.00						8.00
001	15-10	Zoning & Code Compliance	8.00						8.00
		GENERAL FUND	209.00	8.00	6.00	4.00	3.00	1.00	231.00
502	02-51	INFORMATION TECHNOLOGY	9.00	1.00	1.00	0.00	0.00	0.00	11.00
		¹ Employee count includes 5 City Council members as 5 FTEs							
		² Mid-Year FY 2022 adjustment - Legal/admin position split was updated to 75% Legal/25% City Manager (1) full-time CHNEP restoration specialist							
		³ Mid-Year FY 2023 adjustment - (1) School Resource Officer, (1) Urban Design Manager, (1) Playground and Fountain Technician reduction of (6) Firefighter/EMTs (grant not awarded)							
		⁴ Mid-Year FY 2024 adjustment - Reduction of (3) Firefighter/EMTs (grant not awarded)							
		⁵ FY 2025 changes explained in the proposed and adopted budget messages and each divisions' budget narrative							



Florida's Harborside Hometown

City of Punta Gorda Strategic Plan FY 2026

Vision

Continue to preserve our small-town character while promoting diversity, economic development, and sustainability.

Mission

To preserve and enhance Punta Gorda's identity as a vibrant waterfront community, unique in character and history, and as a desirable place to live, work, and visit.

Core Values

Community engagement, partnerships, and transparency
Respect, customer service, and ethical governance
Stewardship of historical and natural resources
Local business support and fair treatment

Strategic Framework Overview

The Strategic Plan includes the following core components:

- **Strategies and Action Items:** Aligned to department priorities and funded through the City's Budget and Capital Improvements Program.
 - **Key Performance Indicators (KPIs):** Metrics that track the effectiveness and progress of strategic initiatives.
 - **Plan Evaluation:** Ongoing, with quarterly progress reports and annual reviews to adapt to emerging needs and opportunities.
 - **Financial Plan:** A multi-year Long-Range Financial Forecast presented annually in January to ensure financial sustainability and informed decision-making.
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Strategic Priorities

The Strategic Plan includes the following key focus areas:

Infrastructure Sustainability: Infrastructure sustainability means building and taking care of the systems our community relies on—like roads, water, parks, and public buildings—in a way that works for us today and will still work for future residents.

- Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery.
- Apply best management practices and systems in infrastructure maintenance.
- Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the Plan on an annual basis.
- Continue planning and implementing change strategies that: 1) protect significant natural resources, 2) support economic growth, and 3) improve protection of life and property in hazardous areas.
- Meet all water quality standards (primary and secondary).

Financial Sustainability: Financial sustainability is the ability of a city to manage its resources responsibly so it can meet current needs, deliver essential services, and invest in the future without placing an unfair burden on taxpayers.

- Maximize use of technology in applicable areas through capital budgeting procedures and investment in learning opportunities for staff.
- Encourage strategic commercial development.
- Strengthen and diversify the City's tax base to increase the commercial base, for example, through annexation by annexing a minimum of three properties per year over the next five years.
- Identify sustainable spending policies and appropriate technologies to support business operations through operational audits and investments in new technology that connects the City with the community.
- Continue best management practices in financial planning and appropriate reserves policies to maintain the national standard of 16.7%.

Quality of Place: Quality of place refers to the overall character, feel, and livability of a community—how welcoming, safe, attractive, and functional it is for residents, businesses, and visitors.

- Maintain the City's high safety rating, emergency response, and storm preparedness.
- Support and facilitate the marketing of Punta Gorda's assets as a core to a vibrant downtown.
- Continue to seek community input in decision-making processes.

- Continue Universal Accessibility transition plan efforts within the City.
- Support, promote, and maintain the City's historic character.
- Emphasize transparency in City operations, reporting, and activities.
- Coordinate with stakeholders in promoting Punta Gorda as a boating, fishing, and bicycle-friendly destination.

Strategic Priorities & SMART Goals by Department

Utilities Department – Infrastructure Sustainability

Goal 1: Implement AMI Water Meter System

By April 2027, fully implement an Advanced Metering Infrastructure system to cover 100% of the City's water meters to provide accurate, timely utility bills.

September 2025 – Council Approval & Authorization

October-December 2025 – Specifications Development

January-March 2026 – Procurement & Bid Process

March-April 2026 Council Award & Purchase

April-September 2026 – Order / Lead Time

October-March 2027 – Installation Phase

Goal 2: Expand Water Production & Conservation

RO Plant Expansion & Surface Water Plant Rehab – Engineering & Design (Design-Bid-Build)

October-December 2026 – Secure Funding

October-December 2026 – Prepare Scope for Procurement

December 2026-February 2026 – Procurement Selection Process

March 2026 – Council Award

March-April 2026 – Pre-Design / Scoping

May 2026 – 30% Design Submittal

July 2026 – 60% Design Submittal

October 2027 – 90% Design Submittal

January-April 2027 – 100% Design & Bid Documents

April 2027-March 2028 – Regulatory Approvals & Permitting

Or

RO Plant Expansion & Surface Water Plant Rehab – Design-Build

Industry experience shows 20–30% time savings versus DBB on projects of this type

October 2025 – Secure Funding

October 2025 – Prepare Scope for Procurement

October 2025-January 2026 – Procurement Selection & Council Award

January-March 2026 – Preliminary/Concept Design & Scoping
April- September 2026 – 60% Design Development (early construction packages may begin)
October 2026 – 90% Design Development (construction well underway)
January 2027 – Final Design & Construction Documents (remaining work bid out)
January-September 2027 – Ongoing Construction Activities (parallel with design completion)
January 2028 – Final Construction, Commissioning, and Regulatory Approvals

Conservation Program – 10% Per-Capita Use Reduction

2026 – Program Development & Baseline

- *Establish baseline per-capita use (gpcd)*
- *Identify major indoor vs outdoor end-uses*
- *Draft conservation plan: ordinances, incentives, education*

2027–2028 – Initial Launch

- *Public education campaigns*
- *Distribute free water-saving kits, leak detection outreach*
- *Pilot irrigation audits / landscape ordinances*
- *Early adoption incentives (rebates for fixtures, smart irrigation)*

2028–2030 – Scaling Up

- *Expand rebate and audit programs*
- *Integrate conservation curriculum in schools / partnerships*
- *Provide annual progress reporting to Council*

2030–2035 – Performance Tracking & Optimization

- *Annual evaluations of progress toward 10% reduction*
- *Adjust incentives or regulations where needed*
- *Achieve 10% reduction goal by FY32–FY35 (industry norm = 1–2% per year reduction if well-funded)*

Goal 3: Improve Wastewater Reliability

Rehabilitate Lift Station 30 and sewer basin; complete Wastewater Treatment Plant construction.

Rehabilitate Lift Station 30 and Sewer Basin

September 2025 – March 2026

- *Complete design and engineering*
- *Secure permits and approvals*
- *Prepare construction documents*

April 2026 – March 2027

- *Replace 8,296 LF of VCP sewer mains with durable materials*
- *Rehabilitate 24 manholes*
- *Repair/replace 28 service connections*
- *Upgrade lift station capacity and reliability*

April 2027

- *Conduct final inspections and testing*
- *Commission upgraded lift station and sewer basin*

September 2027 – September 2028

- *Warranty and performance monitoring phase*

The Wastewater treatment plant completion is targeted for June 2026

Goal 4: Enhance Predictive Maintenance

Deploy GIS-Based Infrastructure Assessment & Tracking Tools

September 2025 – January 2026

- *Prepare scope of work for professional services*
- *Procurement and selection process for engineering/GIS consultant*
- *Council award of contract*

January-March 2026

- *Conduct systemwide GIS data audit (identify errors, outdated attributes, duplicates)*
- *Establish data standards for accuracy, condition ratings, and updates*
- *Define integration needs with asset management, SCADA, and customer service*

January-March 2026

- *Correct and update existing GIS layers (pipe material, install year, diameter, status)*
- *Validate against as-builts, field verification, and CCTV where available*
- *Configure QA/QC workflows for ongoing updates*

July-September 2026 – October-December 2027

- *Integrate GIS with work order/asset management system for real-time service response*
- *Develop proactive maintenance dashboards (break history, I&I risk, age-based prioritization)*
- *Train staff across utilities divisions on standardized field data entry*

January-July 2027

- *Implement predictive modeling (pipe risk scoring, lift station vulnerability, I&I hotspots)*
- *Launch condition-based capital planning workflows from GIS*
- *Begin quarterly reporting to Council and leadership on proactive service improvements*

September 2027 and beyond

- *Maintain continuous data correction & validation cycle*
- *Annual performance tracking (response time, avoided failures, reduced SSOs/I&I)*
- *Evolve GIS into a core decision-support tool for resiliency and CIP prioritization*

Public Works – Infrastructure

Goal 1: Increase Staffing Levels

Hire 15% more staff by March 2026 to improve infrastructure maintenance response times.

October 2025 – Launch recruitment campaign; advertise vacancies.

November 2025 – Begin first-round interviews.

December 2025 – Make conditional offers; initiate background checks.

January 2026 – Onboard first wave of new hires.

March 2026 – Target met: full 15% staffing increase.

Goal 2: Launch Proactive Stormwater Planning

Inspect and rate 100% of high-priority stormwater pipes by April 2026; develop phased replacement plan.

October 2025 – Finalize priority list of stormwater assets.

November–December 2025 – Deploy inspection teams; begin data collection.

March 2026 – 50% inspection completion checkpoint.

June 2026 – Inspections substantially complete; begin rating and condition scoring.

September 2026 – 100% inspections complete; phased replacement plan finalized and presented.

Goal 3: Complete Boca Grande Project

Finish all phases by September 2027 to improve drainage conditions.

October 2025 – Prepare Bid Documents (30 days)

November 2025 – Specifications and Bid Items Schedule (15 days)

November 2025 – Submit Bid Documents to Procurement for Review (0 days milestone)

December 2025 – Procurement Review / Update Bid Documents (15 days)

December 2025 – Submit Final Bid Documents (0 days milestone)

January–June 2026 – Bidding and Contract Award (approx. 6 months / 130 days)

Biweekly Meetings Task 5.0 (111 days)

Biweekly Meetings Task 5.1 (360 days, overlapping construction period)

July 2026–July 2027 – Construction (1 year / 260 days)

Record Drawings and Construction Certification (approx. 3 months / 5 days milestone closeout)

September 2027 – Final Project Closeout; all phases complete

Goal 4: Modernize GIS Infrastructure Data

Digitize and verify 50% of Public Works infrastructure data by September 2026; launch field for staff by Q2 2026

October 2025 – Begin digitization and verification effort; prioritize high-use assets (roads, stormwater, roadway signage, and street lights).

December 2025 – 20% verification completion checkpoint.

March 2026 – 35% verification completion checkpoint.

April–June 2026 – Rollout of GIS field tool for PW staff (parallel to verification).

September 2026 – 50% of PW infrastructure data digitized and verified.

Goal 5: Plan for Future Infrastructure & Facility Needs

Develop GIS-integrated asset maps using Survey123 for maintenance planning by September 2026.

November 2025 – Define data requirements; configure Survey123 templates.

January 2026 – Pilot Survey123 integration with selected assets (e.g., buildings, signage, Gen Sets).

March 2026 – Expand data capture to broader asset categories.

June 2026 – 75% of assets mapped; preliminary integration review.

September 2026 – Final delivery of GIS-integrated asset maps for maintenance planning.

City Clerk's Office – Quality of Place

Goal 1: Host 2nd Annual Neighborhood Fall Festival

Deliver event in October 2025 with 20% increased attendance over 2024.

August 2025 – Convened committee to strategize for sponsorship proposals, social media campaign, and event elements. Met with co-host Charlotte County Library.

September 2025 – Sponsorship deadline

October 2026 – Promote event through social media posts, stories, and reels, FGCU Media Inquiry intern Alexandra Porter assisting with media contacts for Fall Festival, planning to work with FGCU student Mayra Palafox to assist as nonprofit/non-City staff volunteer coordinator for Fall Festival as part of her required service-learning hours.

November 2025 – Evaluate event and plan for 2026

Goal 2: Improve Citizens Summit

Evaluate and redesign for FY26 based on FY25 feedback by February 2026.

November 2025 – Convene staff planning group.

December 2025 – Develop presentation on 2025 Summit to be provided as we approach the 2026 Summit to be presented 3 months prior to event in order to garner public interest.

Goal 3: Finalize Records Management Training

Launch citywide staff training on public records by August 2026.

November 2025 – Assess Departmental Records Clerks' (DRCs) knowledge of records management topics upon upcoming software becoming available.

December 2025 – Develop training materials based on results of assessment (anticipate within 1 month of assessment).

January 2026 – Deliver targeted training to DRCs (anticipate within 1 month of development of materials).

February – August 2026 – Follow up individually with each DRC in their own department and review application of knowledge to real-life records management (begin scheduling sessions immediately after targeted training).

Fire Department – Quality of Place

Goal 1: Expand Emergency Staffing with nine additional firefighters to bring PGFD apparatus staffing levels to the NFPA national standards

Secure SAFER Grant or FY26 budget funding for 9 firefighter/EMTs by June 2026.

Goal 2: Add Emergency Response Vehicle to reduce response times and reduce wear and tear on truck one

Purchase and staff vehicle for Station 1 with 6 new personnel by September 2026.

October 2025 – Hire two firefighters

October 2026 – Hire two firefighters

October 2027 – Hire two firefighters

October 2027 – Purchase Emergency Response Vehicle to handle EMS calls for zone

Goal 3: Install Tiger Dams to prevent repetitive flood damage

Complete installation at four key City facilities and evaluate success if deployed.

September 2025 – install hardware for anchoring Tiger Dams

September 2025-November 2025 – evaluate success of Tiger Dams if deployed

December 2025-January 2026 – determine if Tiger Dams would be effective if purchased for additional City facilities and budget for the additional need

June-August 2026 – Retrain staff on deployment of Tiger Dams

Human Resources – Quality of Place & Infrastructure Sustainability

Goal 1: Improve ADA Tracking & Compliance

Implement new software and update ADA transition plan by March 2026.

January 2026 – Reappropriation of funds approved

February 2026 – RFP process starts and concludes

March 2026 – Staff training begins

April 2026 – Entry of inventory in to system and set up of users and issuance of any needed devices by IT

May 2026 – Entry of previous transition plan

June 2026 – Inspections begin

August 2026 – Enough inspections and project data collected to update transition plan

Goal 2: Implement Safety Protocols

Publish 10 standardized safety procedures by May 2026.

December 2025 – Update SMS city wide

January 2026 – publish evacuation plans for each city facility

February 2026 – Select departments to use for first safety procedures, work with them to establish needs

March 2026 – Work with internal and external experts on safety processes

April 2026 – Review drafts

May 2026 – Publish parts of safety manual

Goal 3: Launch Learning Management System Training Platform

Introduce and complete five modules by June 2026.

January 2026 – Reappropriation of funds

February 2026 – Begin RFP process

March 2026 – Work with IT on cloud based system

April 2026 – Work with departments on training needs

May 2026 – Input users and begin assigning courses

Police Department – Quality of Place

Goal 1: Deploy License Plate Reader Software

October 2025 – All CJIS documentation and with full system up and running

November 2025 – Policy and procedures finalized

Goal 2: Upgrade Firearms

October 2025 – JAG grants secured

October-November 2025 – Begin procurement of 9mm pistols

January 2026 – Training with the 9mm pistols begins

June 2026 – all sworn personnel trained and utilizing 9mm pistols

Goal 3: Enhance Radio System for Public Safety

Upgrade current public safety portable and mobile (vehicle) radios to have encryption features and ensure interoperability with Charlotte County Public Safety by September 2026.

March 2026 – Secure funding for purchase of radios (grants, potential appropriation)

September 2026 – New radios in place

Goal 4: Procure Equipment for Safer Response and Rescue During Weather Related High Water Incidents

Obtain funding and purchase Bearcat G3 with Water Fording Upgrade to traverse through high water.

September-October 2025 – Gather grant documentation and sign contract

October 2025 – Order vehicles

January 2026 – Take delivery of vehicles and train personnel

Finance Department – Financial/Economic Sustainability

Goal 1: Implement Invoice Automation

Citywide automation system live by September 2027, reducing processing time by 30%.

October 2025-April 2026 – Develop scope of software requirements through team of IT, AP, Finance, Procurement, and division inputs and procure.

May 2026-September 2027 – Implementation of software and process flows 12-18 months.

Goal 2: Improve FEMA Documentation

Use contractor support to process hurricane projects and documentation for five past storms and future storms. On going support that will decrease demands on finance staff due to the increase in storms being experienced by the City.

September 2025 – Solicitation out for bid

October 2025 – Award of contract

December 2025 – Utilization of contractor services

Goal 3: Launch CIP Planning Software

Transition to annual CIP updates through software by May 2027.

October 2025 March 2026 – Develop scope of software requirements through team of IT, Finance, Procurement and CIP managers and procure.

April 2026 – May 2027 – Implementation of software and process flows.

Procurement Department – Financial Sustainability

Goal 1: Integrate with Invoice Automation System

Fully trained by in collaboration with Finance.

November 2025 – Assess procurement’s roll in invoicing system and provide to Finance to assist in solicitation preparation

December 2025 – Obtain system integration requirements from Information Technology Department

January 2026 – Release RFP in collaboration with Finance and Information Technology

April 2026 – Schedule training session for Procurement

Goal 2: Streamline Procurement Processes

Review and update procurement procedures by March 2026.

November 2025 – Release solicitation for review of policies, procedures, and technology working in conjunction with City Manager office and Finance Department. Award and work with vendor to gather procedures and documentation.

January 2026 – Review and identify improvement opportunities with Management.

March 2026 –Release solicitation for updated processing system and submit to City Council for approval.

Goal 3: Expand Staff Training

Deliver three training sessions on new procedures by June 2026.

May 2026 – Work with Vendor to implement new system and develop procedures.

June 2026 – Schedule Training Sessions for new procedures along with new system-training.

Planning Department – Quality of Place

Goal 1: Construct Living Shoreline

December 2025 – RFP for Design (Finance has questions about the funding in coordination with CHNEP)

October 2026 – RFP for Construction

September 2027 – Project Completion

Goal 2: Improve Bayfront Center

September 2025 – City Council Approval of Concept

November 2025 – Scope and RFP for Design

April 2026 – RFP for Construction by April 2026

June 2026 – Construction Commencement by June 2026

Goal 3: Complete Historic District Improvements

October 2025 – Phase 1 – Ongoing, which includes crosswalk improvements, missing sidewalk connections and street lighting

October 2026 – Phase 2 – To be completed

October 2027 – Phase 3 - To be completed

**Drainage and Stormwater improvements TBD based on Kimley-Horn Flood Stormwater Study (Per Bryan)*

Goal 4: Historic City Hall Rehabilitation

September 2025 – Coordinate with Parker, Mudgett, Smith, Architects for an updated Assessment

February 2026 – Present a Scope of Work and Estimate to the City Council

April 2026 – If Council approves, complete a scope and RFP for design

June 2026 – RFP for Construction

September 2026 – Commence Construction

Goal 5: Building Permit Software System

September 2025 – Complete Scope and RFP

November 2025 – Select a Vendor

January 2026 – Implementation

IT Department – Financial Sustainability

Goal 1: Automate processes for Finance, Building, Utilities and Police Department

February 2026 – Travel request management in place

March 2026 – Invoice management in place

July 2026 – Permitting management in place

September 2026 – Other management in place

**This timeline is reflective of time to make operational*

Goal 2: Security at campus gates and facilities for Utilities, Public Works and Police Department

January 2026 Cooper Street Campus in place

March 2026 Police Department in place

June 2026 Utilities in place

Goal 3: Phase one of Automatic Vehicle Location for Public Works, Utilities, Fire and Code Compliance

May 2026 – Basic location management and some routing management to efficiently plan routes.

Goal 4: Call tracking and citywide work order solutions

February 2026 – Work order solution in place

May 2026 – Call Center tracking

City Manager’s Office – Financial Sustainability

Goal 1: Complete and implement Procurement action plan to facilitate the successful delivery of projects in a timely and cost-effective manner.

November 2025 – Project out to bid and Vendor Selected.

November 2025-February 2026 – Vendor audits policies, staffing and makes recommendations on those issues as well as software needs

March 2026 – Findings presented to City Council with a plan for implementation.

Goal 2: Produce additional multimedia content to inform the public about city initiatives and projects.

October 2025 – Create plan of educational needs

November 2025-January 2027 – Create video content, brochures and web content to enhance the launch of the new website

January 2027-May of 2027 – Focus on storm preparedness content development

June 2027-September 2027– Supplement and enhance content created by individual departments

Goal 3: Create Artificial Intelligence Policy

October 2025 – Research to gather policies from other municipalities

November 2025 – Convene meeting of department heads to determine individual needs and uses of AI

December-January 2025 – Write policy and have IT and legal review

February 2026 – Adopt policy

Performance Management

The City uses Key Performance Indicators to assess outcomes.

Key Performance Indicators (KPIs)

Utilities

Indicator	Actuals FY 2023	Actuals FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
No. of Project Reviews	154	129	154	154
Utility Relocation Projects - Thousand \$	\$0	\$0	\$0	\$0
Capital Projects - Million \$	\$8.4	\$8.1	\$42.3	\$55.7
Efficiency:				
Annual Cost of Administration per Customer Account (Budget Basis)	\$48.67	\$49.64	\$55.20	\$60.09
Service Quality:				
Strategic Plan Projects accomplished on schedule	Yes	Yes	Yes	Yes
Outcome:				
Water Customer Accounts	14,179	14,305	14,540	14,702
Wastewater Customer Accounts	10,405	10,525	10,738	10,889
Water ERUs	24,079	24,322	24,727	25,277
Wastewater ERUs	18,397	18,566	18,988	19,488

Public Works

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
# of Resident Service Requests Engineering	138	35	45	52
# of Resident Service Requests Right-of-Way	967	283	330	386
# of Resident Service Requests Parks and Grounds	393	166	185	216
# of Resident Service Requests Sanitation	6,278	2393	2800	3289
# of Resident Service Requests Canal Maintenance	1,761	1074	1256	1469
# of Resident Service Requests Facilities	111	227	265	310
Total	9,648	4,178	4881	5722
Efficiency:				
Cost per capita (excl. capital)	\$18.12	To be added	To be added	To be added
Service Quality:				
# of service requests completed within establ timeline	4,437	3302	To be added	To be added
Outcome:				
% of service requests completed in fiscal year	46%	79%	To be added	To be added

City Clerk's Office

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
Hours of Council/CRA Meetings*	72.75	77.25	112.5	97.57
Number of Council/CRA Minutes Produced*	35	33	50	62
Hours of Board Meetings	75.25	62.25	82.25	73.05
Number of Board Minutes Produced	77	68	83	76
Efficiency:				
Cost per capita Council/CRA Meetings	\$1.08	\$0.90	\$1.08	\$1.12
Cost per capita Board Meetings	\$0.69	\$0.42	\$0.52	\$0.49
Annual cost to produce Council/CRA Meetings	\$22,013	\$16,875.81	\$22,011.53	\$22,855.77
Annual cost produce Board Meetings	\$14,159	\$8,660.73	\$10,660.30	\$9,969.57
Service Quality:				
Hours to Produce Council/CRA	368.25	429.75	487	377.14
Hours to produce Boards	379	322.75	412.75	371.16
Outcome:				
% Minutes ready for approval for Council/CRA in FY	98%	94%	93%**	90%
% Minutes ready for approval for Boards in FY	93%	97%	99%	95%

*The CRA sunset in FY 2024.

** Changes to agenda publishing deadlines do not allow September 2025 minutes to be approved in same FY.

Fire Department

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
Total number of calls	4,633	4,811	5,350	5,511
Total number of calls in jurisdiction	4,575	4,726	5,238	5,395
Emergency Calls in jurisdiction	3,546	3,725	4,150	4,274
Non-Emergency Calls in jurisdiction	1,121	1,001	1,088	1,120
Efficiency:				
Cost per capita (excl. capital)	\$235	\$270	\$282	\$316
Service Quality:				
Average fire response time for calls for service	4:40	3:16	3:36	3:53
Number of emergency calls with a response time of 5 minutes and 20 seconds or less	2,383	2,324	3,100	3,193
Outcome:				
Percentage of emergency calls with a response time of 5 minutes and 20 seconds or less	67%	62%	75%	77%

Human Resources

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
Total positions filled	70	74	81	85
Efficiency:				
Cost per position filled	\$450	\$475	\$650	\$725
Service Quality:				
Average number of days to fill a vacancy	90	80	88	85
Outcome:				
Percentage of positions filled within 50 days	40%	35%	42%	47%
Minorities as a percentage of the City's workforce	16.5%	16.18%	18%	18%
Females and minorities in managerial roles	7.2%	7.2%	7.2%	7.2%

Police Department

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
Total Calls for Service	61,014	49,275	47,800	48,000
Total No. of ring events on administrative lines	30,546	27,345	27,900	27,000
Total No. of ring events on emergency 911 lines	11,624	9,535	9,800	10,000
Efficiency:				
Cost per capita (Excl. Capital)	\$411.05	\$473.86	\$437.37	\$541.74
City Population est.	20,227	21,886	22,545	22,861
Service Quality:				
Average patrol response time for calls for service	6:09	6:37	8:04	7.17
Monthly Quality Assurance Survey Rating of 95%	99.8%	99.4%	99.3%	99.8%
Average administrative line ring duration in seconds	2.15	2.08	2.16	2.00
Average emergency 911 line ring duration in seconds	2.24	2.50	2.91	2.25

Finance Department

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
Annual Comprehensive Financial Report	1	1	1	1
Financial Reports	12	12	12	12
Long Range Financial Plan	1	1	1	1
Annual Operating Budget and Capital Imprv. Plan	1	1	1	1
No. of Funds	27	27	26	26
General Fund Budget (excludes debt & transfers)	\$24.5 Million	\$27.4 Million	\$36.4 Million	\$36.0 Million
Efficiency: Population	20,389	20,608	20,851	20,929
Departmental Cost per Capita	\$50.91	\$52.51	\$59.35	\$63.79

Indicator	Actuals FY 2023	Actuals FY 2024	Projected FY 2025	Proposed FY 2026
Service Quality:				
GFOA ACFR Award	Yes	Submitted	To be submitted	To be submitted
GFOA Budget Award	Yes	Yes	Yes	To be submitted
Unqualified Audit Opinion	Yes	Yes	TBD	TBD
Outcome:				
% Financial Management policies met	100%	100%	TBD	TBD
General Fund recurring revenues aligned with recurring expenditures	114% Revenue vs. Expense	100% Revenue vs. Expense	107% Revenue vs. Expense	103% Revenue vs. Expense

Procurement Department

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
Monthly Reports	12	12	12	12
Contracts and solicitations \$5,000+ processed and contract renewals	357	330	302	300
Seminars/Events for Vendors	8	4	5	5
Efficiency:				
Cost per Capita	\$32.59			
Value of Inventory issued	\$317,881	\$375,162	\$400,000	\$385,000
Service Quality:				
Maintaining NIGP Outstanding Agency Accreditation	Yes	Ongoing	Ongoing	Ongoing
Obtaining/Maintaining Professional Staff Certification	Yes	Yes	Yes	Yes
Outcome:				
% of Contracts and Solicitations \$5,000+ processed and contract renewals	91%	97%	91%	95%
% of inventory accuracy	100%	100%	100%	100%
# Purchase Orders issued	742	752	756	750
# PCard Transactions	4,470	4731	4700	4700

Planning Department

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
# Inspections	18,796	16,296	13,845	12,000
# Residential new const. permits issued	86	83	124	100
# Commercial new const. permits issued (*includes new business build-outs)	5	4	7	10
# Other building permits issued	7,674	4,473	3,739	3,000
# Elect/Plumb/A-C permits issued	2,078	2,000	1,747	1,400
# Contractor Licenses	2,596	2,546	2,400	2,000
Efficiency:				
% inspections performed by next working day	99.9%	99.9%	99.9%	99.9%
# days permitting turnout time: Residential	2	2	2	2
# days permitting turnout time: Commercial	2	2	2	2
Service Quality:				
% Residential Permits within 15 days	99%	99%	99%	99%
% Commercial Permits within 15 days	99%	99%	99%	99%
Outcome:				
% Residential permits meeting service quality target. (90%)	97%	97%	98%	98%
% Commercial permits meeting service quality target. (90%)	97%	97%	98%	98%

IT Department

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
# of Users	295	310	335	350
# of Applications	200	215	218	225
# of Projects	12	9	12	10
# of Work Orders Open per month (avg)	182	160	175	190
Efficiency:				
% System Availability				
Network	99.9%	99.9%	99.9%	99.9%
Telecommunications	99.9%	99.9%	99.9%	99.9%
Service Quality:				
% Work Orders Closed	99%	98%	95%	98%
Avg days response to Urgent Requests	.5	.5	.25	.25
Outcome:				
% projects completed	50%	70%	85%	95%
Improve use of training credits available through our enterprise license	YES	YES	YES	YES
Establish regular meetings of internal GIS user group to guide City's use of GIS	YES	YES	YES	YES
Formation of regional GIS users group with members from several area jurisdictions that meets at least annually (number of meetings)	YES	YES	YES	YES
Improved presence of interactive GIS mapping on the new City website (Number of maps)	YES	YES	YES	YES

City Manager's Office

Indicator	Actual FY 2023	Actual FY 2024	Projected FY 2025	Proposed FY 2026
Output:				
City Communications (Information Sharing, Week Highlights, Action Register, Targeted Newsletters)	164	164	164	174
Citizen Social Media Interaction	465,000	480,000	485,000	490,000
Website Visits	377,000	405,000	417,000	420,000
Efficiency:				
Cost per capita (excluding capital)	\$30.41	\$30.67	\$39.53	\$36.74
Service Quality:				
Council Review of City Manager's Performance out of 40.0 points	38.98	34.1	51.6*	38.0
Outcome:				
# Action Register items completed (by calendar year)	5	4	4	4
% of infrastructure projects completed within timeframe & estimated cost	100%	100%	TBD	100%

*Evaluation was based on Department Head Objectives

Appendix: Multi-Year Forecasts FY 2026-2030 Financial Plan

General Fund Proforma Schedule of Revenues and Expenditures Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Change in Taxable Value of Property	2.3%	0%	0%	0%	0%
Revenues:					
Ad Valorem Tax	\$19,340,100	\$19,340,100	\$19,340,100	\$19,340,100	\$19,340,100
Other Revenue	17,065,430	16,893,075	16,833,060	16,885,395	16,951,820
Total Revenues	36,405,530	36,233,175	36,173,160	36,225,495	36,291,920
Expenditures:					
Personnel Expenditures	25,947,520	27,537,835	29,177,310	30,772,830	32,217,745
Operating Expenditures	8,157,980	8,375,080	8,636,425	8,900,580	9,173,700
Capital Outlay	1,883,200	1,322,280	1,412,280	1,338,000	1,200,000
Transfers to other Funds	0	0	0	0	0
Transfers for Tax Increment Financing	0	0	0	0	0
Transfers for Capital Projects	310,000	560,000	245,000	245,000	245,000
Transfers for Roads	709,000	709,000	709,000	709,000	709,000
Transfers for Drainage	0	0	0	0	0
Council Contingency	15,000	15,000	15,000	15,000	15,000
Total General Expenditures	37,022,700	38,519,195	40,195,015	41,980,410	43,560,445
Estimated Beginning Reserves	\$15,159,977	\$14,542,807	\$12,256,787	\$8,234,932	\$2,480,017
Estimated Ending Reserves	\$14,542,807	\$12,256,787	\$8,234,932	\$2,480,017	(\$4,788,508)
Minimum Reserve 16.7%	\$6,182,800	\$6,432,800	\$6,712,600	\$7,010,800	\$7,274,600

Utilities OM&R Fund
Proforma Schedule of Revenues and Expenses
Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Revenues:					
Chg for Serv - Water	\$15,739,685	\$17,707,145	\$19,911,095	\$22,379,910	\$23,573,795
Chg for Serv - Sewer	11,063,760	12,446,730	14,147,925	15,901,550	16,749,265
Other Revenue	981,790	1,922,715	1,923,665	1,924,645	1,955,655
Annual Assessments - Septic to Sewer-Area 1	0	0	350,000	350,000	350,000
Total Revenues	27,785,235	32,076,590	36,332,685	40,556,105	42,628,715
Expenses:					
Operations	21,110,545	21,575,880	22,880,135	22,851,270	23,886,640
Renewal & Replacement of Infrastructure	1,120,000	1,120,000	1,120,000	1,120,000	1,120,000
Transfer for Capital Improvement Projects	9,235,000	6,250,000	2,585,000	4,500,000	600,000
Existing Debt Service - RO SRF Loan	999,595	999,595	999,595	999,595	999,595
Transfer to SRF Fund-reserve incr(decr)	0	1,500,000	0	0	0
Est. new debt service WWTP	0	1,750,225	3,500,450	3,500,450	3,500,450
Est. new debt service AMI Equipment Replacement	0	0	1,223,135	1,223,135	1,223,135
Est. new debt service WTP Filtration Rehab	0	0	1,705,550	3,411,100	3,411,100
Est. new debt service WTP RO Expansion	0	0	1,705,550	3,411,100	3,411,100
Est. new debt service Septic to Sewer-Area 1	0	0	0	344,000	688,000
Total Expenses	32,465,140	33,195,700	35,719,415	41,360,650	38,840,020
Revenues in Excess (Shortfall) of Expenses	(4,679,905)	(1,119,110)	613,270	(804,545)	3,788,695
Operating Reserves-Beg	8,882,542	4,202,637	3,083,527	3,696,797	2,892,252
Operating Reserves-End	\$4,202,637	\$3,083,527	\$3,696,797	\$2,892,252	\$6,680,947

Sanitation Fund
Proforma Schedule of Revenues and Expenses
Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Revenues:					
Chg for Serv - Refuse Collection	\$5,347,415	\$5,603,975	\$5,860,865	\$6,153,335	\$6,447,370
Other Revenue	74,100	55,600	55,600	55,600	55,600
Total Revenues	5,421,515	5,659,575	5,916,465	6,208,935	6,502,970
Expenses:					
Operations	5,100,115	5,227,110	5,388,690	5,627,895	5,878,275
Capital	405,000	200,000	405,000	405,000	405,000
Total Expenses	5,505,115	5,427,110	5,793,690	6,032,895	6,283,275
Revenues in Excess (Shortfall) of Expenses	(83,600)	232,465	122,775	176,040	219,695
Operating Reserves-Beg	861,250	777,650	1,010,115	1,132,890	1,308,930
Operating Reserves-End	\$777,650	\$1,010,115	\$1,132,890	\$1,308,930	\$1,528,625

PGI Canal Maintenance Fund
Proforma Schedule of Revenues and Expenditures
Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Assessment Rate	\$1,350	\$1,500	\$1,650	\$1,800	\$1,950
Revenues:					
Operating Assessment	\$7,020,415	\$7,800,030	\$8,579,650	\$9,359,265	\$10,138,880
Other Revenue	158,000	143,000	128,000	105,500	105,500
Total Revenues	7,178,415	7,943,030	8,707,650	9,464,765	10,244,380
Expenditures:					
Operations	1,866,560	1,928,405	2,013,745	2,082,145	2,174,360
Inlet Dredging	60,000	60,000	60,000	60,000	60,000
Seawalls and Stabilization	6,199,700	6,910,690	7,643,010	8,397,300	9,174,220
Capital Outlay & Special Projects	339,200	310,000	267,000	0	0
Reserve for Contingencies	50,000	50,000	50,000	50,000	50,000
Total Expenditures	8,515,460	9,259,095	10,033,755	10,589,445	11,458,580
Revenues in Excess (Shortfall) of Expenditures	(1,337,045)	(1,316,065)	(1,326,105)	(1,124,680)	(1,214,200)
Operating Reserves-Beg	5,522,176	4,410,131	3,319,066	1,992,961	868,281
Reserve Seawall Replacement-Beg	450,000	225,000	0	0	0
Reserve Seawall Replacement-End	\$225,000	\$0	\$0	\$0	\$0
Operating Reserves-End	\$4,410,131	\$3,319,066	\$1,992,961	\$868,281	(\$345,919)

BSI Canal Maintenance Fund
Proforma Schedule of Revenues and Expenditures
Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Operating Rate	\$920	\$945	\$970	\$995	\$1,020
Special Project Rate	\$90	\$90	\$90	\$0	\$0
Revenues:					
Operating Assessment	\$948,560	\$974,335	\$1,000,110	\$1,025,885	\$1,051,660
Special Project Assessment	92,795	92,795	92,795	0	0
Miscellaneous Revenue	42,000	42,000	42,000	42,000	42,000
Total Revenues	1,083,355	1,109,130	1,134,905	1,067,885	1,093,660
Expenditures:					
Operations	173,710	178,420	173,300	188,360	183,610
Seawalls and Stabilization	717,505	739,160	761,470	784,450	808,115
Barge Access/Lock Removal Proj Debt Service	91,200	91,200	91,200	0	0
Land Acquisition for staging	100,000	100,000	100,000	100,000	100,000
Channel Corner Widening	100,000	100,000	300,000	325,000	0
Reserve for Contingencies	50,000	50,000	50,000	50,000	50,000
Total Expenditures	1,232,415	1,258,780	1,475,970	1,447,810	1,141,725
Revenues in Excess (Shortfall) of Expenditures	(149,060)	(149,650)	(341,065)	(379,925)	(48,065)
Operating Reserves-Beg	1,524,349	1,375,289	1,225,639	884,574	504,649
Reserve Seawall Repl & Spec.Proj-Beg	200,000	200,000	200,000	200,000	200,000
Reserve Seawall Repl & Spec.Proj-End	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Operating Reserves-End	\$1,375,289	\$1,225,639	\$884,574	\$504,649	\$456,584
Projects Requiring Approval & Funding:					
Lock Wood Railing Improvement	160,000	375,000	0	0	0
Est. Beg. Reserves with projects	1,724,349	1,415,289	890,639	549,574	169,649
Est. End. Reserves with projects	\$1,415,289	\$890,639	\$549,574	\$169,649	\$121,584

Laishley Park Marina Fund
Proforma Schedule of Revenues and Expenses
Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Revenues:					
Slip & Mooring Rentals	\$131,395	\$135,150	\$135,150	\$449,650	\$449,650
Intergovernmental Revenue	12,000	12,000	12,000	12,000	12,000
Other Revenue	25,155	24,645	24,885	25,125	25,365
Total Revenues	168,550	171,795	172,035	486,775	487,015
Expenses:					
Laishley Park Marina Expenses	170,135	171,585	177,220	278,740	285,860
Marina Park Contract Expenses	233,105	239,415	246,290	307,675	316,545
Capital Outlay	0	0	0	6,000	6,000
Total Expenses	403,240	411,000	423,510	592,415	608,405
Revenues in Excess (Shortfall) of Expenses	(234,690)	(239,205)	(251,475)	(105,640)	(121,390)
Operating Reserves-Beg	248,755	14,065	(225,140)	(476,615)	(582,255)
Operating Reserves-End	\$14,065	(\$225,140)	(\$476,615)	(\$582,255)	(\$703,645)

Building Fund
Proforma Schedule of Revenues and Expenses
Proposed FY 2026 through Proforma FY 2030

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Revenues:					
Permits, Fees & Spec.Assessments	\$1,327,000	\$1,427,000	\$1,427,000	\$1,427,000	\$1,427,000
Other Revenue	159,000	147,000	126,000	108,000	93,000
Total Revenues	1,486,000	1,574,000	1,553,000	1,535,000	1,520,000
Expenses:					
Operations	2,199,455	1,933,995	2,011,165	2,091,655	2,175,625
Capital	0	45,000	0	45,000	0
Total Expenses	2,199,455	1,978,995	2,011,165	2,136,655	2,175,625
Revenues in Excess (Shortfall) of Expenses	(713,455)	(404,995)	(458,165)	(601,655)	(655,625)
Operating Reserves-Beg	3,165,789	2,452,334	2,047,339	1,589,174	987,519
Operating Reserves-End	\$2,452,334	\$2,047,339	\$1,589,174	\$987,519	\$331,894

**Six Cent Gas Tax Fund
Proforma Schedule of Revenues and Expenditures
Proposed FY 2026 through Proforma FY 2030**

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Revenues:					
Local Option Gas Tax	\$704,240	\$718,325	\$732,690	\$747,345	\$762,290
Other Revenue	365,650	366,600	369,095	375,460	382,415
Total Revenues	1,069,890	1,084,925	1,101,785	1,122,805	1,144,705
Expenditures:					
Operating Expenditures	1,165,535	1,189,500	1,214,185	1,239,615	1,265,810
Total Expenditures	1,165,535	1,189,500	1,214,185	1,239,615	1,265,810
Revenues in Excess (Shortfall) of Expenditures	(95,645)	(104,575)	(112,400)	(116,810)	(121,105)
Operating Reserves-Beg	345,742	250,097	145,522	33,122	(83,688)
Operating Reserves-End	\$250,097	\$145,522	\$33,122	(\$83,688)	(\$204,793)

**Additional Five Cent Gas Tax Fund
Proforma Schedule of Revenues and Expenditures
Proposed FY 2026 through Proforma FY 2030**

	Proposed FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029	Proforma FY 2030
Revenues:					
Local Option Gas Tax	\$297,910	\$303,870	\$309,950	\$316,150	\$322,470
Transfer from General Fund Ad Valorem	709,000	709,000	709,000	709,000	709,000
Other Revenues	1,875	1,375	1,050	875	875
Total Revenues	1,008,785	1,014,245	1,020,000	1,026,025	1,032,345
Expenditures:					
Paving	1,030,000	1,030,000	1,030,000	1,030,000	1,030,000
Total Expenditures	1,030,000	1,030,000	1,030,000	1,030,000	1,030,000
Revenues in Excess (Shortfall) of Expenditures	(21,215)	(15,755)	(10,000)	(3,975)	2,345
Operating Reserves-Beg	85,381	64,166	48,411	38,411	34,436
Operating Reserves-End	\$64,166	\$48,411	\$38,411	\$34,436	\$36,781