

LONG RANGE STRATEGIC PLAN SUMMARY
FISCAL YEARS FY 2025 – 2029



Punta Gorda

FLORIDA

Adopted 8/21/2025

CITY COUNCIL

Lynne Matthews, Mayor (District 4)

Melissa Lockhart, Vice-Mayor (District 5)

Donna Peterman, Council Member (District 1)

Bill Dryburgh, Vice-Mayor (District 2)

Debi Lux, Council Member (District 3)

CITY OFFICIALS

Gregory B. Murray, City Manager

David Levin, City Attorney

Sara Welch, City Clerk

DEPARTMENT DIRECTORS and MANAGERS

Pam Smith, Police Chief

Holden Gibbs, Fire Chief

Dr. Melissa Reichert, Assistant City Manager

Rick Kenney, Public Works Director

Lisa Hannon, Planning Director

Jeff Payne, Human Resources Manager

Tom Spencer, Acting Utilities Director

Brad Schuette, Information Technology Manager

Kristin Simeone, Finance Director

Kylee McGloin, Assistant to the City Manager

Odalys Valdes, Legal Assistant

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City Manager Gregory B. Murray Message

Through hard work and sound decision making, we are fortunate to be able to present to you a budget that allows the City of Punta Gorda to maintain our reserves and accomplish our strategic plan objectives without raising the millage rate. The millage rate remains unchanged from the previous three years at 3.95 mils.

With the taxable values from the Charlotte County Property Appraiser coming in at higher than previous conservative estimates of five percent, the revenue allows the City to increase the dollars invested in infrastructure projects and fund additional needed personnel without taking the funds from reserves. This includes hiring public safety personnel to enhance services and reduce overtime hours spent currently and other essential personnel consistent with the overall personnel management plan presented to Council.

The FY 2025 budget prepares the City to keep projects moving forward as we continue to work through recovery from Hurricane Ian. We also continue our focus on accessing FEMA funds and finalizing insurance payouts as a result of the hurricane. It also programs 33.7% for reserves in the general fund, some of which is programmed for one time costs based on current needs, never falling below the 16.7% national standard. This is vitally important to keep the City fiscally sound to be able to weather the next hurricane or other disaster.

Salary and enhanced benefits, consistent with surrounding jurisdictions, has been a budgetary focus for several years based on the previous wage and benefits study. Employee retention and attraction is also still a key consideration for delivering a high level of service to residents. The budget for the upcoming fiscal year includes a wage and compensation study. Competitive and fair compensation is a key factor in employee satisfaction and retention. The study helps align compensation with employee expectations and market trends.

Each year I present to you a focus for the upcoming year. In FY 2025, we will piggyback on the first phase one (first five year) plan. The focus is on long-term planning for infrastructure with necessary funding, along with long-term growth management. This includes adjusting impact fees, investing in water and sewer infrastructure, planning for drainage projects, and seeking funding for projects through grant opportunities.

I take great pride in being a member of the team contributing to the City of Punta Gorda. We are fortunate to have an actively involved Council, a dedicated group of employees, and a wealth of expertise. Our approach includes a practical and prudent budget along with meticulous, data-driven long-term planning. This prepares us to manage necessary improvements to our City facilities, ensures adequate staffing levels, and equips us to face future challenges. We have a bright future ahead.

Strategic Plan Priorities

**FINANCIAL/ECONOMIC
SUSTAINABILITY**

**INFRASTRUCTURE
SUSTAINABILITY**

**PARTNERSHIPS,
COMMUNICATION AND
COLLABORATION**

**STRATEGIC
COMMUNICATIONS
POSITIONING**

QUALITY OF LIFE



Five Year Staffing Plan General Fund Employees

FUND NUMBER	FUND NAME Department/Division	Amended Authorized FY 2021	Position Requests FY 2022	FY 2023 Planning Requests	FY 2024 Planning Requests	FY 2025 Planning Requests	FY 2026 Planning Requests	FY 2026 Estimated Positions
001 01-00	CITY COUNCIL ¹	5.00						5.00
001 02-00	City Manager	3.00						3.00
001 02-18	Human Resources	3.00		1.00				4.00
001 03-00	City Clerk	4.00		1.00				5.00
001 06-00	Legal	1.00						1.00
001 04-00	Finance	8.50		0.00	1.00			9.50
001 04-05	Procurement	7.50		1.00		1.00		9.50
001 09-01	Public Works Admin	3.00						3.00
001 09-08	Engineering	4.50	0.50					5.00
001 15-15	Facilities Maintenance	3.00	1.00	1.00		1.00		6.00
001 09-16	Right of Way Maintenance	13.00	1.00	1.00		1.00	1.00	17.00
001 09-19	Parks & Grounds	10.00	1.00		1.00			12.00
001 12-00	POLICE	56.00	2.00	2.00	1.00		2.00	63.00
001 13-00	FIRE	30.00	2.00	7.00				39.00
001 15-00	Urban Design	6.00		1.00	1.00		1.00	9.00
001 15-10	Zoning & Code Compliance	6.00		1.00	1.00			8.00
	GENERAL FUND	163.50	7.50	16.00	5.00	3.00	4.00	199.00
502 02-51	INFORMATION TECHNOLOGY	7.00	1.00	1.00			1.00	10.00

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 the future development and direction of the organization. The Plan provides a realistic view of the organization's and community's expectations. The diagram below shows how the pieces of the Plan fit together.



On April 27, 2005, the City Council approved moving forward with the development of its first strategic Plan by soliciting input from residents, civic groups, ad-hoc boards, committees, and staff on priorities to be addressed. Since 2005, the City has annually adopted a strategic plan. The FY 2021 Plan, which was developed after soliciting input and engagement from the entire community, followed by two workshops focusing on all elements of a strategic plan, formed the base from which future action items evolved. Preparation of the FY 2021 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 FY 2022 Strategic Plan includes the new five-year staffing plan, forward-looking action items, and a message from the City Manager addressing the Budget necessary to implement the Strategic Plan. The FY 2023 Plan included a strong technology focus. The FY 2024 Plan created a sustainable structure and a renewed focus on accountability. The FY 2025 Plan is focused on Public Safety and Resident Engagement.

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

- ✓ *Strategies*: The Plan document contains the strategies the City will pursue and action items for achieving the strategies. Strategies and action items are funded through the annual Budget, a 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 each year in January.

The plan helps us stay focused on our near-term objectives and tasks while still keeping an 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 essentially describes 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 often manifests in perceived tradeoffs between having sufficient financial resources and preserving the values. A vision can help decision-makers identify the "bottom line" of what is truly important. Based on public input, the City's overall vision is:

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

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 a long-term view and respect for people and places through policy and practices. The sustainable community will assess the 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 ensuring that disparaging treatment for any sector of the community will not be created. Sustainable communities 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 the quality of life

Environmental sustainability

- ✓ Safeguard the water supply, open space, and 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 the 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 the quality of life
- ✓ Retain our unique character

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

"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."

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 community surveys 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, transparent, and accountable city government

Strategic Priorities and 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 the achievement of these strategies. Each section includes goals that specify how the general policy directions of the organization's mission will be carried out, as well as action items that aim to accomplish the desired goals. Based on input received during the community engagement sessions, the City Council has established five strategic priorities, which are identified below, and the goals are highlighted within each priority area.

- Financial/Economic Sustainability
- Infrastructure Sustainability
- Partnerships, Communication and Collaboration
- Strategic Communications Positioning
- Quality of Life

As mentioned earlier, key performance indicators will 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 with the public.

Priority 1: Financial/Economic Sustainability - Advance and promote local business development and long-term financial and economic sustainability

Long-term financial sustainability is a critical component of 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, notably I-75 and US 41. The Punta Gorda Airport is a valuable resource located outside of the City. The community's diversity and mix of income levels provide 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 recruiting and retaining high-skill, high-wage, diversified industries. 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 that are compatible with the demands and desires of the community. Traditionally, business development is market-driven, based on population and household demand, and generally occurs through 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 focuses on growing and nurturing local businesses that can create spin-off businesses 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 the 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
- Local businesses tend to give more support to non-profits

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 and appropriate reserves policies to reach the national standard of 16.7% by increasing reserves by 0.5% or more per year.
- Goal:** 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.
- Goal:** 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.
- Goal:** Support Charlotte County efforts to facilitate and nurture high-priority economic development projects through monthly one one-on-one meetings with the Council and City Manager.
- Goal:** Ensure the competitiveness of Punta Gorda's business climate through continuous participation in the Economic Development Partnership, Punta Gorda Chamber of Commerce, and conducting studies as needed.
- Goal:** Enhance workforce development and diversity in the City organization through intentional succession planning and investment in employee training programs.
- Goal:** Encourage strategic commercial development through the implementation of new Land Development Regulations and Codes put into place in FY2024.

Specific Action	Department(s)	Measure of Success	Timeframe	Cost (if applicable)
Proactively hold ten meetings through the course of the year with property owners that might have an interest in annexation	Urban Design	Three properties annex into the City that are a benefit to the City and the property owner.	Annually	Staff Time
Digital Plans Review (Avolve) (UD) software	Urban Design Building/IT	Plans review will be done digitally rather than on paper, improving processing efficiency. Build a model to quantify the value of the efficiency for use in FY 2026.	FY 2025	\$85,000
Digital Plans Review (UD/FIRE) hardware (\$5K per license)	Urban Design Fire	Building and Fire Inspectors will be able to review plans electronically rather than on paper, making operations more efficient.	FY 2025	\$15,000 (\$5K per license)
Improve the ability of all departments to manage their records in compliance with State requirements.	City Clerks' Office	The Records Coordinator will train all Departmental Records Clerks (DRC), review the department's records with the DRC, and develop a plan to address deficiencies.	FY 2025	Staff Time
Customer Service Training	All Departments	Department heads offer Customer Service training opportunities to their staff, resulting in staff members' increased ability to serve the needs of the public.	FY 2025	Total investment based on # of

				employees that take part in the training
Impact fee study implemented	Finance	Impact fees are in alignment with study recommendations	FY 2025	Staff Time
Utility rate study implemented	Finance	Utility fees are in alignment with study recommendations	FY 2025	Staff Time
FY 2026-FY 2029 Preliminary Action Items				
Proactively hold ten meetings through the course of the year with property owners that might have an interest in annexation	Urban Design	Three properties annex into the City of Punta Gorda	FY 2026-FY 2028	Staff Time

Key Performance Indicator	Actual FY 2023	Projected FY 2024	Proposed FY 2025
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	114%	94%	98%
Unqualified Audit Opinion	Achieved	To Be Determined	To Be Determined
% compliance with financial management policies	100%	100%	100%
Tax base diversity (goal 75% residential and 25% commercial)	89.0% res. 11% comm.	To Be Determined	
Annexation (acreage and type)	No annexations	No annexations	50 acres: vacant, residential, developed commercial
% of space leased in Herald Court Centre	100%	100%	100%
Cost per capita – General Fund services	\$1,291	\$1,650	\$1,699
Utility rates in relation to 16 SWFL communities	2 nd lowest	2 nd lowest	2 nd lowest

Solid waste rates in relation to 11 SWFL communities	2 nd highest	3 rd highest	4 th highest
Minorities in City workforce	12.9%	16.1%	16.5%
Females in Managerial/Supervisory Positions	7.2%	7.6%	7.6%
City employees per 100/Population	1.6	1.6	1.6
Taxable sales Punta Gorda MSA (monthly average)	\$385 Million	\$394 Million	\$398 Million
# of new businesses	124	120	130
# of closed businesses	54	98	75

Priority 2: 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 a historic district, 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 is not very visible nor always appreciated. Maintenance is never a problem until it is. The City's insurable 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:

- 14 public buildings - City Hall, City Hall Annex, Public Works/Utilities Campus, Public Safety, Fire Stations 2 and 3, Fire Training Tower, Water and Wastewater Treatment Plants, Bayfront Center, Freeman House, Cooper Street Center, Lashley Park Marina, and Herald Court Centre
- 121 miles of streets, 2886 streetlights including 1270 streetlights maintained by the City and 1616 FPL maintained lights, 19 traffic signal intersections, four (4) bridges and 110 miles of seawall
- 269 miles of water mains, 129 miles of sanitary sewer, two (2) storage tanks, master pumping station, booster pumping facility, 122 lift stations and Hendrickson Dam (reservoir)
- 23 parks totaling 130 acres and nine (9) miles of Pathways (harborwalk, linear park, multi-use recreational trails)
- 393 motorized pieces of equipment (fleet, cranes, boats, compactors)
- 103 Windows Servers (95 virtualized), four (4) virtual server hosts (four-node VMware ESXi cluster.), four-node VMware Virtual Desktop Interface (VDI) ESXi cluster, four datacenter switches, twenty-one access switches, eight (8) firewalls, (six (6) are state of the art next-generation firewalls), two (2) Storage Area Networks (SANs). Thirty-five wireless access points, VoIP phone system with 250 phone sets, two (2) miles of dark fiber, a total of 320 PC's, laptops, and tablets

Issues to be addressed to ensure sustainable infrastructure include:

- How can the City best maintain its infrastructure stock in addition to procuring needed new assets?
- How can the City fund its open space (active and passive park system) and waterfront maintenance?
- What is a livable level of traffic and how do new 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 through collaboration with applicable granting agencies and City investment in pathways by June FY2028.

Goal: Maximize use of technology in applicable areas through capital budgeting procedures and investment in learning opportunities for staff.

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

Goal: 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.

Specific Action	Department(s)	Measure of Success	Timeframe	Cost (if applicable)
Historic City Hall Rehabilitation Project	Urban Design	Completion of 100% construction and architectural plans and commencement of construction	FY 2025	\$15,775,674.00 (Total project cost)
Bayfront Center	Urban Design Public Works	Demolish existing structure, Design and Construct replacement of Hurricane damaged facility	FY 2025	TBD
A C Freeman Rehabilitation Project	Urban Design	Seal the envelope and stabilize the structure	FY 2025	\$872,747.00
Hurricane Ian Seawall Repairs	Public Works	Replacement of approximately 7.25 miles of seawalls damaged by Hurricane Ian in PGI and BSI. Work is being completed in eight (8) zones by three contractors. Panels are being constructed by canal maintenance staff and project management is to be done by a consultant.	FY 2025	\$26,711,349
Hurricane Ian Facilities Repairs	Public Works	Preparing scopes of work and bidding out the necessary repairs to the buildings and park equipment that Hurricane Ian damaged. Working with contractors to complete repairs.	FY 2025	Staff Time
Boat Club Channel & Basin	Public Works	Dredging the channel and basin that have silted which limits access to the public, boating, and sailing club. Permits for the maintenance dredging have been received. Staff will apply for a Mac Grant.	FY 2025	\$240,000
Bridge Repair Program	Public Works	Bridge repairs resulting from FDOT bridge inspections. Work program based on FDOT report. The documented repairs that were recommended are continuing to be completed. Ongoing program	FY 2025	\$10,000
Drainage Improvements – Boca Grande Area	Public Works	Final bid plans and bid documents are in progress. Grant reporting has begun. Anticipate starting construction in FY2025 with completion in FY2026.	FY 2025/2026	\$6,525,333
Drainage Improvements – City Wide	Public Works	Regrading of drainage swales City-wide, based on video observations of standing water after 72 hours and selection of the most severe locations. This is an ongoing project.	FY 2025/FY 2028	\$1,500,000
Henry Street Crosswalk Program	Public Works	Have an engineering study done to evaluate the locations for installing signalized pedestrian crossings in the area from Coldeway Drive to Linear Trail bound by Marion, Olympia, and Henry Street. Additionally, as part of the study	FY 2025	\$539,000

		recommendations for crosswalk placement and removal and pedestrian refuge islands will be made as well as identifying segments of sidewalk for installation or removal to improve the network of sidewalks in this area. Signalized pedestrian crossings may include Hawk systems as well as Rectangular Rapid Flashing Beacons (RRFB).		
Henry Street Sidewalk	Public Works	Installation of sidewalk on Henry Street between Shreve and SR 41.	FY 2025	\$156,000
Herald Court Centre Maintenance Program	Public Works	Hire a consultant to inspect and determine necessary repairs to the Herald Court Centre. Information/scope of work provided to Procurement to hire a consultant. Traffic Coating, sealing, and packing of seams on landings and ramps and other repairs as identified by the consultant.	FY 2025	\$1,407,905
King Street Improvements Program	Public Works	Design and construction of King Street due to growth and safety concerns. Complete design and move to construction.	FY 2025	\$550,000
Laishley Park Marina Dock Service Dredging	Public Works	Funding for a dock maintenance fund and future marina dredging.	FY 2025/ FY2028	\$1,020,000
Laishley Park Marina Dock Sidewalk	Public Works	Funding for Laishley Park Marina dock sidewalk and fishing pier repair. The inspection is complete. Funding request in FY 24/25 budget.	FY 2025	\$1,000,000
National Pollutant Discharge Elimination System Program	Public Works	Requirements are related to the Federal Clean Water Act for stormwater. Ongoing program	FY 2025/ FY2028	\$208,184
Railroad Crossing Rehabilitation	Public Works	Seminole Gulf Railway requested that the Elizabeth Street crossing be moved to FY 2025\26. Ann Street crossing repairs were delayed until FY26\27 at the request of the railroad.	FY 2025/FY 2027	\$1,075,000
Storm Sewer Reconstruction	Public Works	Storm drainage pipe lining or replacement of the defective pipe. Ongoing program	FY 2025	\$75,000
Wooden Composite Pathways Pier & Docs	Public Works	The City's wooden boardwalks and pier pilings have deteriorated over the years and need to be repaired as needed. Ongoing program	FY 2025	\$100,000
BSI Channel Corner Widening (Unfunded)	Public Works	Widening and dredging the perimeter canal at 90-degree corners (five (5) locations) so a barge can maneuver through. Ongoing program. Part of the BSI budget process. To be discussed with Advisory Board/Committee meetings.	FY 2025/FY 2028	\$725,000

BSI Inlet Widening Removal of South Side Lock Infrastructure	Public Works	Design and permitting completed to remove a portion of the south side of the lock to allow barges to maneuver through. To be rebid FY 2024 with construction to follow. Permits have been received. Ongoing program	FY 2025/2026	\$1,430 ,000
BSI Land Acquisition for Staging	Public Works	Begin saving funds to acquire land for staging construction materials within the BSI Community. Ongoing program	FY 2025/FY 2028	\$500,000
PGI Spoil Site Channel	Public Works	A feasibility study was completed. Consultant in the process of obtaining permits to dredge a channel from Ponce De Leon Inlet through the shallow basin. To be discussed with the Advisory Board/Committee meeting. Ongoing program.	FY2025/2027	\$1,124,000
Street Resurfacing (citywide)	Public Works	Resurface approximately five (5) miles of city streets (length varies, dependent on petroleum market pricing). Brick streets and asphalt rejuvenation.	FY 2025	\$750,000
Study to evaluate flood mitigation options for the Historic District	Public Works	Completed study with alternatives and cost estimates to mitigate flooding the Historic District. Alternatives presented to City Council for prioritization and funding.	FY 2025	TBD minimum of \$150,000 included in FY 2025 budget
Replace four (4) year old computers as part of our Annual Replacement Cycle	IT	All units deployed	July 2025	\$121,275
Refresh all monitors over six (6) years old due to technology changes	IT	All units deployed	September 2025	\$10,000
Replace Aged out VMWare Host Server	IT	New server in place	January 2025	\$26,250
Implement ISP Aggregation Switch	IT	Switch connected and functioning properly	February 2025	\$3,000
Replace aging Server Room UPS	IT	New UPS is up and running	May 2025	\$25,000
Add three (3) more Starlink setups for disaster recovery	IT	All units subscribed and deployable	November 2024	\$16,500
Upgrade or update network core switches	IT	All units Deployed	June 2025	\$120,000

Upgrade or update network Edge switches	IT	All units deployed	June 2025	\$25,000
MS O365 Backup/DR	IT	Products in place	November 2025	\$30,000
Patch Management for Servers	IT	Product deployed and protecting all servers	December 2024	\$25,000
Data Loss Prevention	IT	Product deployed	January 2025	\$30,000
PowerDMS Enterprise	IT	Product deployed for citywide use	June 2025	\$26,000
Riverside Drive Force Main Extension	Utilities	Complete extension of Riverside Dr force main.	FY 2025	\$500,000
E Henry Street 20" Force Main Replacement @ I-75	Utilities	Design and construct new 20" force main under I-75	FY 2025	\$2,250,000
Septic to Sewer (Area 1)	Utilities	Begin engineering, design and permitting.	FY 2025	\$5,000,000
Lift Station 30 Gravity Sewer Rehabilitation	Utilities	Complete design and construction of new gravity sewer mains that flow into LS 30	FY 2025	\$600,000
Bal Harbor Water Main Replacement Upgrade	Utilities	Complete replacement of water main from Aquí Esta to Albatross. Increased water pressure throughout sections 12 and 14.	FY 2025	\$1,000,000
Aquí Esta Water Main Replacement Upgrade	Utilities	Complete replacement of water main on Aquí Esta From Bal Harbor to La Salina	FY 2025	\$1,000,000
Socorro Water Main Replacement	Utilities	Complete replacement of water main on Socorro from Aquí Esta to Via Veneto	FY 2025	\$1,000,000
Airport Road Water Main Replacement	Utilities	Complete replacement of water main on Airport Road from Waterford Pkwy. to Florida St.	FY 2025	\$1,000,000
Via Tripoli Water Main Replacement	Utilities	Complete replacement of water main on Via Tripoli from Magdalena to Spanish Cay	FY 2025	\$1,000,000
Burnt Store Rd Booster Station Riser Pipe Replacement & Pumps	Utilities	Completion of rise pipe replacement and design for addition of high service pumps to the booster station.	FY 2025	TBD
Shell Creek Water Treatment Plant Reverse Osmosis Expansion	Utilities	Completion of each phase: the design phase, the conversion of existing wells, the addition of new wells, and the installation of 4MGD RO process equipment	FY 2025-28	\$30,000,000
Water Treatment Plant Evaluation/ Rehabilitation (Filters, SCU & Alum Tank)	Utilities	Obtain Design-Build services for the rehabilitation and construction of surface water treatment facilities at the Shell Creek Water Treatment Plant	FY 2025	\$30,000,000
Waste Water Treatment Plant Bio-Solids Off-Site Disposal	Utilities	Complete engineering to identify a cost-effective method to meet new bio-solids regulations in FAC 62-640.	FY 2025-26	\$2,300,000

WWC SCADA System Upgrade	Utilities	Complete successful upgrade of SCADA system at lift stations.	FY 2025	\$300,000 (grant funded)
Water Treatment Plant – Hydro Biological Monitoring Plan (HBMP)	Utilities	Complete required report document biological conditions of Shell Creek to maintain the water use permit and remain in compliance with regulatory standards of SWFWMD	FY 2025	\$150,000
Water Treatment Plant – RO Brine Disposal Well Mechanical Integrity Testing (MIT)	Utilities	Complete mechanical integrity testing for the required period regulated by the underground injection permit.	FY 2025	\$150,000
Water Treatment Plant – Alum Tank Storage Upgrade	Utilities	Complete the replacement of existing alum tanks.	FY 2025	\$300,000
Water Treatment Plant – Hendrickson Dam Inspection Program and Management	Utilities	Complete a comprehensive inspection of the dam concluding with a report documenting conditions of dam components and recommending maintenance and rehabilitation.	FY 2025	\$90,000
Waste Water Treatment Plant Deep Injection Well Mechanical Integrity Testing (MIT)	Utilities	Perform MIT for the required permit. MIT must be performed by May 2025 PRIOR to deep injection well permit renewal.	FY 2025	\$14,000
Waste Water Treatment Plant Master Pump Facility Upgrade	Utilities	Upgrade and replace three pumps, piping, and electrical VFD and motor controls to provide improved reliability and performance.	FY 2025	\$200,000
Waste Water Treatment Plant Booster Pump Facility Generator Replacement	Utilities	Replacement of existing generator at BPF with modern generator to improve efficiency and reliability	FY 2025	\$400,000
Water Distribution – Vacuum Trailer	Utilities	Eliminate reliance on waste water collections department for vector truck enabling distribution to make timely repairs.	FY 2025	TBD
Water Distribution – 2 AMI Technicians	Utilities	Additional AMI techs to repair and maintain the AMI water meters	FY 2025	Salaries and benefits

				\$69,575 each, one-time costs for vehicle and equipment \$57,000 each. Total \$139,150 for salaries and benefits and \$114,000 for vehicles and equipment
Evaluation of solutions to water meter/network issues	Utilities	Options presented to Council with cost estimates.	FY 2025	TBD
Vehicle mounted Tough Book style laptops	Utilities / IT	Work with IT to up-cycle tough book laptops for utilities field staff.	FY 2025	TBD

FY 2026-FY 2029 Preliminary Action Items				
Solona Water Main Replacement	Utilities	Complete replacement of 50-year-old cast iron water main on Marion Ave from Cooper to Florida St.	FY 2027	\$3.3M
Water Treatment Plant – Water Use Permit (SWFWMD)	Utilities	Complete review of permitting requirements and date, close out aquifer storage and recovery underground injection control, create a ground water model, develop a wellfield management plan, and implement continuous wellfield data monitoring program.	FY 2026	\$200k
Water Treatment Plant – RO Brine Disposal Well (DIW) Permit Renewal	Utilities	Completion of DIW permit renewal as required by Florida Department of Environmental Protection (FDEP)	FY 2026	\$85k
Waste Water Treatment Plant Tank Coating	Utilities	Replace interior coating system in wastewater tanks at master and booster. Coating replacement is on rotational schedule.	FY 2027	\$1M

Utilities Admin – Data Analyst	Utilities	Enable the utility department to make more data driven decisions by bringing together multiple data sources across the department's divisions.	FY 2026	TBD
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Replace four (4) year old computers as part of our Annual Replacement Cycle	IT	All units deployed	Annually	\$125,000
Refresh all monitors over 6 years old due to technology changes	IT	All units deployed	Annually	\$10,000
Replace Aged out VMWare Host Server	IT	New server in place	Annually	\$26,250
Replace four (4) year old computers as part of our Annual Replacement Cycle	IT	All units deployed	Annually	\$125,000
Refresh all monitors over six (6) years old due to technology changes	IT	All units deployed	Annually	\$10,000
Continue to implement the Historic District Infrastructure Initiative	Urban Design Public Works	Complete sections identified in the 2019 Plan	FY 2025	\$2,788,000
Continue to update and manage outstanding projects outlined in the City's ADA Transition Plan	Urban Design HR	Two Projects Completed	Ongoing	TBD

Key Performance Indicator	Actual FY 2023	Projected FY 2024	Proposed FY 2025
% of projects completed within timeframe and estimated cost	95%	All projects have increased in cost	95%
Fuel use (gallons)	169,180	166,035	169,355
Five-year capital improvements program that identifies infrastructure needs with funding source	Yes	Yes	Yes

Priority 3: Partnerships, Communication and 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.

Goal: Diversify Housing Types through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Specific Action	Department (s)	Measure of Success	Timeframe	Cost (if applicable)
Engage the community to determine which projects should be proposed for funding through an extension of the 1% local option sales tax.	City Managers' Office, City Clerks' Office	Convene a committee composed of community members and issue a call for project proposals from the community.	FY 2025	Staff Time
Promote board volunteerism through use of rack cards, business cards, and outreach at events to increase applications to the City's boards.	City Clerks' Office	A minimum of ten (10) new applications received by the September 30, 2025.	FY 2025	\$300
Emphasize transparency in operations through Citizens' Academy.	Public Works	20 participants in Citizens' Academy resulting in 100% of participants reporting an increase in understanding of government operations.	Citizens Academy January 2025 Through April 2025	\$1,200
Promote doing business in the City via engagement with local business owners and budding entrepreneurs via speaking and/or exhibiting at Punta Gorda Chamber of Commerce and Charlotte County Chamber of Commerce events.	City Clerks' Office	Business Tax Coordinator will attend eight (8) Chamber events to promote engaging in business in the City.	Fiscal Year 2025	\$80
Implement an annual and exit survey for board members to complete regarding their experience on City boards.	City Clerks' Office	Receive a minimum survey response rate of 20% from City board members.	Fiscal Year 2025	Staff time.
Facilitate representation and communication between Punta Gorda Housing Authority and Charlotte County Affordable Housing Advisory Council. Facilitate communication and collaboration between the City and Gulf Coast Partnership	Urban Design	Participate in bi-monthly meetings and provide meeting highlights resulting in partnership opportunities being brought to City Council.	Ongoing	Staff Time
Work in collaboration with TEAM Punta Gorda, Punta Gorda Green Thumbs, Punta Gorda in Bloom, and	Urban Design Public Works City	Participate in bi-monthly meetings and provide meeting highlights resulting in partnership opportunities being brought to City Council.	Ongoing	Staff Time

other organizations on City beautification projects	Managers' Office			
In person meetings held to discuss budget and strategic plan priorities	All Departments	Three community listening sessions are held.	FY 2025	Staff Time
Provide project updates on the City website	All Departments	Residents have accurate updated information about projects that affect them.	FY 2025	TBD
FY FY2026-FY 2029 Preliminary Action Items				
Continue outreach and partnerships with a willingness to create new programs and participate with both existing partners and those that emerge over time.	All	12 projects completed that enhance the City of Punta Gorda	FY FY2024 FY 2027	Staff Time

Key Performance Indicator	Actual FY 2023	Projected FY 2024	Proposed FY 2025
City Communications (Weekly Highlights Reports, Information Sharing Reports, Targeted Newsletters and Action Registers)	164	164	164
Citizen Interaction through Social Media	465,000	480,000	485,000
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	15,000	15,000	15,000

Priority 4: 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 the introduction and consistent communication of the new City 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
- Punta Gorda-Port Charlotte-North Port Board of Realtors
- Punta Gorda Historic Mural Society
- Charlotte Harbor Visitor and Convention Bureau
- Economic Development Partnership
- Fishermen's Village
- Homeowner Associations (Punta Gorda Isles, Burnt Store Isles, Seminole Lakes, Burnt Store Meadows, Emerald Point, Parkhill/Eagle Point, Historic District)
- Local Arts Organizations
- 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: Implement the 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, Economic Development Partnership, tourism-oriented private sector) to achieve stated objectives.

Goal: Make downtown a vibrant and attractive place through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Goal: Encourage strategic commercial development through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Specific Action	Department(s)	Measure of Success	Timeframe	Cost (if applicable)
Continue marketing of the City to include local information guide, advertising in partner publications, PGD in airport advertising, targeted business attraction, and Sunseeker Inflight Magazine marketing. Seek opportunities for partnerships in marketing. Publish bicycle guide and welcome to Punta Gorda guide.	City Managers' Office	3 % increase in visits to website	FY 2025	\$30,000
Create City Manager columns for Sun Newspaper	City Managers' Office	52 columns written	FY 2025	Staff Time
Create Isles Life Column	City Council (Mayor)	12 columns written	FY 2025	Mayors' Time
Web Site Redesign	IT City Managers' Office	New or updated site published	September 2025	\$10,000 (added to \$60,000 rolled from FY24)
Purchase and implement tool to engage residents in the budget and planning processes.	City Managers' Office	Resident input helps guide City Council decision making. Survey's indicate that residents feel their voices are being heard.	FY 2025	TBD
FY2026-FY2029 Preliminary Action Items				
Signage Replacements	Public Works	All City owned signs reflect branding and are in excellent conditions	FY2026	TBD

Key Performance Indicator	Actual FY 2023	Projected FY 2024	Proposed FY 2025
New website visits	377,000	405,000	417,000
Return website visits	7,500	8,000	8,500
Marketing Efforts to Support Punta Gorda	19	19	20
Liveboards at Laishley Marina (monthly average)	10	10	25
Laishley Marina Occupancy (monthly average)	77	65 (season) 50 (summer)	60
Mooring Field Occupants (monthly average)	12	1 (damaged)	(Depends on repairs)
Number of fishing/boating events	12	14	5
Number of festivals/parades	80	80	52
Number of sporting events (bicycle, runs, walks)	15	16	23

Priority 5: 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 Punta Gorda Historic District includes three neighborhoods, 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
- ✓ Arts and cultural facilities and organizations such as the Charlotte Harbor Event and Conference Center, Punta Gorda Historic Mural Society, Charlotte Performing Arts Center, Visual Arts Center, Artisan's Atelier, Historic Women's Club and Train Depot, Blanchard House Museum of African American History and Culture, Cultural Heritage Center of SW Florida, Military Heritage Museum, Punta Gorda History Center and numerous private art galleries/shops are within Punta Gorda
- ✓ Charlotte Harbor ecosystem supports abundant recreational and research opportunities.
- ✓ 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. The groundwater reverse osmosis plant further enhances the quality of the water supply by addressing TDS and increasing capacity when demand warrants such investment
- ✓ Punta Gorda continues to work toward a diverse housing mix that is affordable and attainable for all income levels, racial backgrounds, life stages and abilities

Goal: Support, promote and maintain the City's historic character.

Goal: Maintain the City's high safety rating, emergency response and storm preparedness.

Goal: Meet all water quality standards (primary and secondary).

Goal: Achieve status as a waterfront destination for land and water visitors through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Goal: Support and promote a pedestrian and bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Goal: Ensure a diversity of housing stock that is attainable for all income levels, racial backgrounds, life stages and abilities through implementing recommendations selected in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Goal: Continue Universal Accessibility transition plan efforts within the City.

Goal: Continue planning and implementing climate change strategies that; 1) protect significant natural resources 2) support economic growth, improve protection of life and property in hazardous areas.

Goal: Diversify Housing Types through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.

Specific Action	Department	Measure of Success	Timeframe	Cost (if applicable)
W Henry Street Improvements and Connections	Urban Design Public Works	Complete phase one construction	FY 2024-2025	\$3,227,000 to be completed in phases (1,160,000 unfunded)
Purchase and implement a Park Rental Online Management System	Urban Design	Reduction in staff time and improvement in Customer Service for Park Rentals	FY 2025	TBD
FEMA SAFER Grant	Fire	Obtain nine (9) new personnel to increase staffing levels to become complaint with NFPA 1710	October 2024	(\$2,692,332) Grant funding for 3 years
Replacement Vehicle	Fire	Replace Operation Chief's vehicle with a ¼ ton diesel pickup to enhance response to flooded areas. Use current Ops vehicle for Fire Prevention personnel.	October 2024	\$70,000
Training Tower	Fire	Complete the Training Tower build process and utilize the structure to enhance the performance of fire ground tactics and knowledge	December 2024	\$250,000 (\$175k Grant)
Needs study for a new Police Department	Police	<p>Completion of a report to:</p> <ul style="list-style-type: none"> Understand the Departments policing strategies, and opportunities available in the design of a new facility to promote those strategies. Assess and identify the unique character of the City of Punta Gorda and the relative requirements of Policing. Assess the potential growth of the City of Punta Gorda and how this would affect the choice of a new Police Facility location. Determine current and future space needs, based on the specific requirements of the PGPD Determine important internal relationships of the department which would impact building layout, configuration and site requirements. 	FY 2025	TBD

Increase staffing to include addition of four sworn officer positions.	Police	Enhanced service level for police services.	FY 2025	\$448,560 plus vehicle and equipment costs of \$260,000
Increase staffing to include one public safety dispatcher position.	Police	Add Senior Public Safety Dispatcher to address scheduling stabilization and enhanced scheduling opportunities within Communications Section due to workload increases. Assignment of advanced job functions that require a higher level of involvement.	FY 2025	\$98,640 with one-time costs estimated at \$3,000
Implementation of career progression program for professional staff members.	Police	Implementation of career progression program for Public Safety Dispatchers/Supervisors, Records Specialists and Evidence/Crime Scene Technicians. Members achieve enhanced skill levels and certifications which results in a much higher qualified employee. Also allows for growth opportunities for employees in technical fields that have limited to no upward mobility.	FY 2025	TBD
Continue with Youth Public Safety Academy	Police/Fire	Youth attend weeklong class learning about police and fire operations.	Summer FY-2025	\$6,000 operating cost and staff time
Continue Police Department Citizens and Business Advisory Councils to enhance communication and address issues as they arise.	Police	Resolution of issues that are brought forward.	Ongoing	Staff time
Family Fun Day	Police/Fire	Annual event held in December at the Public Safety Building for families to come spend the morning with PD and FD and learn about public safety	Ongoing	Staff Time
Veterans Crisis Assistance Seminar	Police	Organizing a conference for all veteran services in Charlotte County and surrounding jurisdictions to share updated information and services for veterans. This event can also be held in a public forum for veterans to attend so they can learn about the services provided in the county	January 2025	Staff Time \$300 for refreshme

				nts for attendees
Explore a Public Safety Citizens Academy	Police/Fire	Police and Fire will consider implementing a four week (3 hours a week) public safety citizens academy to introduce residence to public safety responsibilities and programs	TBD	Staff Time
Bike Safety Presentation	Police	Have the bike team leader provide a presentation on bike safety tips and Bike Laws. Possibly team up with a local church to utilize their facility (i.e. new life church).	TBD	Staff Time
FY2026-FY2029 Preliminary Action Items				
Rebuild a sense of community and reestablish positive relationships through engagement in low-cost events.	All departments.	Post-event surveys will indicate an increase in positive feelings toward and satisfaction with the City government.	Fiscal Year 2027	Staff Time and TBD
Implement strategies from the Parks and Recreation Master Plan to develop a Strategic Parks Section within Urban Design	Urban Design Public Works	Develop an independent section within the division to assist with events and park rentals	FY 2025 - FY 2028	TBD

Key Performance Indicator	Actual FY 2023	Projected FY 2024	Proposed FY 2025
Uniform Crime Index*	*	*	*
Average patrol response time for calls for service (minutes)	7:39	8:28	1:19
Clearance rate*	*	*	*
Quality Assurance Review results (% satisfied with police officer service)	99.2%	99.6%	98.6%
% fire emergency calls with response time less than 5 min and 20 seconds	74%	64%	67%
Average fire response time for calls for service (minutes)	4:44	4:51	5:04
% Waste diverted from landfill due to recycling (tons)	38%	38%	38%
Stormwater (NPDES) compliance with state standards	100%	100%	100%
Achievement of water quality standards	Yes	Yes	Yes
General Fund invested in United Way programs	\$27,500	\$27,500	\$27,500

**Police data above is reported by calendar year and the Uniform Crime Index is being phased out as of 2020 based on reporting requirements by the Federal Bureau of Investigations. It will be replaced by the National Incident Based Reporting (NIBRS) system. Data will be changed. IT still working to get systems compatible to receive data.”*

Appendix: Multi-Year Fiscal Forecasts FY 2025-2029

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 2025 proposed budget through FY 2029.

General Fund Proforma Schedule of Revenues and Expenditures Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Change in Taxable Value of Property	10%	5%	5%	5%	5%
Revenues:					
Ad Valorem Tax	\$19,154,810	\$20,112,550	\$21,118,175	\$22,174,085	\$23,282,790
Other Revenue	15,618,135	15,789,125	15,745,270	15,911,095	16,080,360
Total Revenues	34,772,945	35,901,675	36,863,445	38,085,180	39,363,150
Expenditures:					
Personnel Expenditures	24,034,590	25,509,670	26,629,765	27,803,175	29,032,630
Operating Expenditures	8,288,295	8,207,435	8,388,350	8,644,045	8,908,395
Capital Outlay	896,000	1,915,000	989,000	940,000	940,000
Transfers to other Funds	187,000	0	0	0	0
Transfers for Capital Projects	505,000	580,000	255,000	255,000	255,000
Transfers for Roads	709,000	709,000	709,000	709,000	709,000
Transfers for Drainage	300,000	300,000	300,000	300,000	300,000
Council Contingency	15,000	15,000	15,000	15,000	15,000
Infrastructure and Unresolved Needs Contingency	500,000	500,000	500,000	500,000	500,000
Total General Expenditures	35,434,885	37,736,105	37,786,115	39,166,220	40,660,025
Estimated Beginning Reserves	\$12,606,029	\$11,944,089	\$10,109,659	\$9,186,989	\$8,105,949
Estimated Ending Reserves	\$11,944,089	\$10,109,659	\$9,186,989	\$8,105,949	\$6,809,074
Minimum Reserve (16.7%)	\$5,917,700	\$6,302,000	\$6,310,300	\$6,540,800	\$6,790,300

Utilities OM&R Fund
Proforma Schedule of Revenues and Expenses
Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Revenues:					
Chg for Serv - Water	\$13,431,505	\$14,308,585	\$15,238,645	\$16,224,860	\$17,270,610
Chg for Serv - Sewer	9,751,515	10,388,290	11,063,525	11,779,535	12,690,765
Other Revenue	1,178,395	1,354,550	1,810,740	1,811,965	1,813,230
Annual Assessments - Septic to Sewer-Area 1	0	0	0	350,000	350,000
Total Revenues	24,361,415	26,051,425	28,112,910	30,166,360	32,124,605
Expenses:					
Operations	20,334,205	19,985,455	20,701,065	21,847,810	22,220,995
Renewal & Replacement of Infrastructure	1,120,000	1,120,000	1,120,000	1,120,000	1,120,000
Transfer for Capital Improvement Projects	7,150,000	4,285,000	4,800,000	85,000	200,000
Existing Debt Service	999,595	999,595	999,595	999,595	999,595
Transfer to SRF Fund-reserve incr(decr)	1,500,000	0	0	0	0
Est. new debt service WWTP	0	1,525,000	3,050,000	3,050,000	3,050,000
Est. new debt service WTP Filtration Rehab	0	0	3,037,000	3,037,000	3,037,000
Est. new debt service WTP RO Expansion	0	0	0	1,161,000	2,322,000
Est. new debt service Septic to Sewer-Area 1	0	0	0	0	344,000
Total Expenses	31,103,800	27,915,050	33,707,660	31,300,405	33,293,590
Revenues in Excess (Shortfall) of Expenses	(6,742,385)	(1,863,625)	(5,594,750)	(1,134,045)	(1,168,985)
Operating Reserves-Beg	10,649,467	3,907,082	2,043,457	(3,551,293)	(4,685,338)
Operating Reserves-End	\$3,907,082	\$2,043,457	(\$3,551,293)	(\$4,685,338)	(\$5,854,323)

Sanitation Fund
Proforma Schedule of Revenues and Expenses
Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Revenues:					
Chg for Serv - Refuse Collection	\$4,881,560	\$5,206,015	\$5,535,225	\$5,864,740	\$6,194,565
Other Revenue	76,300	55,600	55,600	55,600	55,600
Total Revenues	4,957,860	5,261,615	5,590,825	5,920,340	6,250,165
Expenses:					
Operations	4,936,310	5,141,740	5,402,020	5,617,380	5,844,475
Capital	50,000	400,000	196,000	400,000	400,000
Total Expenses	4,986,310	5,541,740	5,598,020	6,017,380	6,244,475
Revenues in Excess (Shortfall) of Expenses	(28,450)	(280,125)	(7,195)	(97,040)	5,690
Operating Reserves-Beg	822,773	794,323	514,198	507,003	409,963
Operating Reserves-End	\$794,323	\$514,198	\$507,003	\$409,963	\$415,653

PGI Canal Maintenance Fund
Proforma Schedule of Revenues and Expenditures
Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Assessment Rate	\$1,200	\$1,350	\$1,500	\$1,650	\$1,800
Revenues:					
Operating Assessment	\$6,240,805	\$7,020,415	\$7,800,030	\$8,579,650	\$9,359,265
Other Revenue	141,500	158,000	143,000	128,000	105,500
Total Revenues	6,382,305	7,178,415	7,943,030	8,707,650	9,464,765
Expenditures:					
Operations	1,533,510	1,602,535	1,653,865	1,728,225	1,785,155
Inlet Dredging	85,000	85,000	85,000	85,000	85,000
Seawalls and Stabilization	2,930,320	6,201,480	7,039,225	7,902,100	8,790,865
Capital/Special Projects	306,000	225,000	225,000	0	0
Reserve for Contingencies	50,000	50,000	50,000	50,000	50,000
Total Expenditures	4,904,830	8,164,015	9,053,090	9,765,325	10,711,020
Revenues in Excess (Shortfall) of Expenditures	1,477,475	(985,600)	(1,110,060)	(1,057,675)	(1,246,255)
Operating Reserves-Beg	3,251,579	4,954,054	4,193,454	3,308,394	2,250,719
Reserve Seawall Replacement-Beg	675,000	450,000	225,000	0	0
Reserve Seawall Replacement-End	\$450,000	\$225,000	\$0	\$0	\$0
Operating Reserves-End	\$4,954,054	\$4,193,454	\$3,308,394	\$2,250,719	\$1,004,464

BSI Canal Maintenance Fund
Proforma Schedule of Revenues and Expenditures
Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Operating Rate	\$795	\$820	\$845	\$870	\$895
Special Project Rate	\$90	\$90	\$90	\$90	\$0
Reserve Rate	\$100	\$100	\$100	\$100	\$100
Revenues:					
Operating and Reserve Assessment	\$922,780	\$948,555	\$974,335	\$1,000,110	\$1,025,885
Special Project Assessment	92,795	92,795	92,795	92,795	0
Miscellaneous Revenue	36,000	39,000	42,000	42,000	42,000
Total Revenues	1,051,575	1,080,350	1,109,130	1,134,905	1,067,885
Expenditures:					
Operations	174,815	169,655	184,670	179,880	195,280
Seawalls and Stabilization	698,000	719,065	740,765	763,125	786,155
Barge Access/Lock Removal Proj Debt Service	91,200	91,200	91,200	91,200	0
Reserve for Contingencies	50,000	50,000	50,000	50,000	50,000
Total Expenditures	1,014,015	1,029,920	1,066,635	1,084,205	1,031,435
Revenues in Excess (Shortfall) of Expenditures	37,560	50,430	42,495	50,700	36,450
Operating Reserves-Beg	1,232,919	1,170,479	1,120,909	1,063,404	1,014,104
Reserve Seawall Repl & Spec.Proj-Beg	100,000	200,000	300,000	400,000	500,000
Reserve Seawall Repl & Spec.Proj-End	\$200,000	\$300,000	\$400,000	\$500,000	\$600,000
Operating Reserves-End	\$1,170,479	\$1,120,909	\$1,063,404	\$1,014,104	\$950,554
Projects Requiring Approval & Funding:					
Channel Corner Widening Proj	100,000	100,000	300,000	325,000	0
BSI Land Acquisition for Staging	100,000	100,000	100,000	100,000	100,000
Est. Beg. Reserves with projects	1,332,919	1,170,479	1,020,909	663,404	289,104
Est. End. Reserves with projects	\$1,170,479	\$1,020,909	\$663,404	\$289,104	\$225,554

**Laishley Park Marina Fund
Proforma Schedule of Revenues and Expenses
Proposed Budget FY 2025 through Proforma FY 2029**

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Revenues:					
Slip & Mooring Rentals	\$367,565	\$541,915	\$541,915	\$541,915	\$541,915
Intergovernmental Revenue	12,000	12,000	12,000	12,000	12,000
Other Revenue	34,470	24,690	24,910	25,140	25,370
Total Revenues	414,035	578,605	578,825	579,055	579,285
Expenses:					
Laishley Park Marina Expenses	225,100	292,365	299,875	307,650	315,695
Marina Park Contract Expenses	297,860	306,645	315,695	325,020	334,620
Capital Outlay	19,000	6,000	6,000	6,000	6,000
Total Expenses	541,960	605,010	621,570	638,670	656,315
Revenues in Excess (Shortfall) of Expenses	(127,925)	(26,405)	(42,745)	(59,615)	(77,030)
Operating Reserves-Beg	170,467	42,542	16,137	(26,608)	(86,223)
Operating Reserves-End	\$42,542	\$16,137	(\$26,608)	(\$86,223)	(\$163,253)

Building Fund
Proforma Schedule of Revenues and Expenses
Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Revenues:					
Permits, Fees & Spec.Assessments	\$1,542,000	\$1,542,000	\$1,542,000	\$1,542,000	\$1,542,000
Other Revenue	221,000	163,000	151,000	130,000	112,000
Total Revenues	1,763,000	1,705,000	1,693,000	1,672,000	1,654,000
Expenses:					
Operations	2,269,955	2,109,340	2,192,080	2,278,330	2,368,260
Capital	45,000	0	45,000	0	45,000
Total Expenses	2,314,955	2,109,340	2,237,080	2,278,330	2,413,260
Revenues in Excess (Shortfall) of Expenses	(551,955)	(404,340)	(544,080)	(606,330)	(759,260)
Operating Reserves-Beg	3,665,044	3,113,089	2,708,749	2,164,669	1,558,339
Operating Reserves-End	\$3,113,089	\$2,708,749	\$2,164,669	\$1,558,339	\$799,079

Six Cent Gas Tax Fund
Proforma Schedule of Revenues and Expenditures
Proposed Budget FY 2025 through Proforma FY 2029

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Revenues:					
Local Option Gas Tax	\$684,845	\$698,540	\$712,510	\$726,760	\$741,295
Other Revenue	359,750	358,230	361,785	368,010	374,355
Transfer from General Fund	187,000	0	0	0	0
Total Revenues	1,231,595	1,056,770	1,074,295	1,094,770	1,115,650
Expenditures:					
Operating Expenditures	1,398,630	1,235,080	1,259,220	1,284,095	1,309,715
Capital	180,000	0	0	0	0
Total Expenditures	1,578,630	1,235,080	1,259,220	1,284,095	1,309,715
Revenues in Excess (Shortfall) of Expenditures	(347,035)	(178,310)	(184,925)	(189,325)	(194,065)
Operating Reserves-Beg	496,109	149,074	(29,236)	(214,161)	(403,486)
Operating Reserves-End	\$149,074	(\$29,236)	(\$214,161)	(\$403,486)	(\$597,551)

**Additional Five Cent Gas Tax Fund
Proforma Schedule of Revenues and Expenditures
Proposed Budget FY 2025 through Proforma FY 2029**

	Proposed FY 2025	Proforma FY 2026	Proforma FY 2027	Proforma FY 2028	Proforma FY 2029
Revenues:					
Local Option Gas Tax	\$288,455	\$294,225	\$300,110	\$306,110	\$312,230
Transfer from General Fund Ad Valorem	709,000	709,000	709,000	709,000	709,000
Other Revenues	1,200	810	300	135	120
Total Revenues	998,655	1,004,035	1,009,410	1,015,245	1,021,350
Expenditures:					
Paving	1,020,000	1,020,000	1,020,000	1,020,000	1,020,000
Total Expenditures	1,020,000	1,020,000	1,020,000	1,020,000	1,020,000
Revenues in Excess (Shortfall) of Expenditures	(21,345)	(15,965)	(10,590)	(4,755)	1,350
Operating Reserves-Beg	56,103	34,758	18,793	8,203	3,448
Operating Reserves-End	\$34,758	\$18,793	\$8,203	\$3,448	\$4,798