CHARLOTTE COUNTY

Proposed Performance Based Budget
Summary Sheets

Levels of Service

Department Goals

FY26 & FY27

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Administration

Administration

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions	FY 26 - First Year Operating Budget		
County Administration --- The County Administrator is appointed by the Charlotte County Board of County Commissioners. It is the responsibility of the county administrator to implement all decisions, policies, ordinances and motions made by the Board. This is done through the department directors and administrative personnel who report directly to the County Administrator.	State Mandated	100%	$2,888,567
	Operating Budget	**100%**	**$2,888,567**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 1,808,475	$ 2,151,990	$ 2,888,567	$ 2,965,673
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 1,808,475**	**$ 2,151,990**	**$ 2,888,567**	**$ 2,965,673**

FY 26 Budgeted Revenue

■ BCC General Revenues 100% ■ ■

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,642,850	$ 2,057,400	$ 2,149,469	$ 2,225,306
Services & Charges	$ 89,829	$ 58,372	$ 681,448	$ 682,717
Operating Expenses	$ 75,797	$ 36,218	$ 57,650	$ 57,650
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	**$ 1,808,475**	**$ 2,151,990**	**$ 2,888,567**	**$ 2,965,673**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	11	11	11	11
Part Time	0	0	0	0
Total	**11**	**11**	**11**	**11**
Proposed New Positions	0	0	1	1

FY 26 Budgeted Expenditures

■ Salaries & Benefits 75%

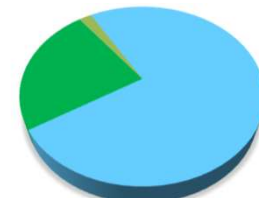■ Services & Charges 24%

■ Operating Expenses 1%

■

Notes

The variance in Salaries & Benefits reflects adjustments made to align with current salary levels. The increase in the Services & Charges variance is primarily due to the inclusion of the Water Quality budget for the first time. Similarly, the rise in Operating Expenses variance is attributed to the addition of Water Quality appropriations.

ADMINISTRATION								
Levels of Service - 6 Year Metrics								
Who is your primary Customer?	The Board of County Commissioners							
What is the primary service they receive from you?	Information, recommendations, policy suggestions, execution of policies and programs							
What is the main aspect of the service they care about?	Did it get done, timing, truth and transparency, cost							
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Completion of Tasks	Administrator's Evaluation Scores	Administrator's evaluation and report	37.40	36.05	36.97	40.00	37.17	36.79

Budget and Administrative Services

Mission

Continue to increase the effectiveness of local government and maintain a strong financial condition.

Division Summary	FY 26 - First Year Operating Budget	
- Fiscal Services Division --- Provide professional, financial advice necessary to maintain fiscal stability and transparency in government.	5%	$4,564,351
- Information Technology Division --- Promotes, manages and supports information technology solutions and services which facilitate the vision, goals and objectives of the Board of County Commissioners.	16%	$13,175,149
- Purchasing Division --- Acquire at the best possible price, consistent with specific quality, the goods, and services necessary for proper and efficient operations of County Government, at the least overall cost to the taxpayer.	1%	$1,638,817
- Real Estate Services Division --- Provides expertise in County acquisitions, disposals, leases, easements, and BCC approved projects.	1%	$706,334
- Risk Management Division --- To provide active direction and leadership in the planning, development, and administration of programs and processes.	62%	$53,761,851
- Fleet Division --- To establish efficient and effective delivery of Charlotte County Fleet Management services (with a blend of outsourcing and in-house work) by providing customer agencies with safe, reliable, economically and environmentally sound transportation and related support services that are responsive to the needs of customer departments and that conserve vehicle value and equipment investment.	8%	$7,484,809
-	7%	$5,273,819
Transit Division --- Charlotte County Transit provides public transportation that is a high quality, low cost curb-to-curb bus service that is safe, convenient and available to all. It also offers transportation to individuals who cannot do so for themselves due to economic, mental, or physical disability.		
Operating Budget	**100%**	**$86,605,130**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 17,087,343	$ 16,141,787	$ 19,548,217	$ 20,416,955
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 3,203,843	$ 3,258,050	$ 4,578,941	$ 3,531,501
Charges for Services	$ 52,319,484	$ 51,445,620	$ 58,690,212	$ 60,666,126
Misc	$ 2,292,282	$ 650,000	$ 725,000	$ 725,000
Transfers	$ 1,442,366	$ 618,461	$ 1,940,586	$ 2,225,913
Beginning Balances	$ -	$ 22,696,853	$ 23,330,710	$ 19,586,082
Total	**$ 76,345,318**	**$ 94,810,771**	**$ 108,813,666**	**$ 107,151,577**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 13,014,852	$ 14,386,124	$ 15,938,146	$ 16,453,605
Services & Charges	$ 56,178,555	$ 57,751,620	$ 64,026,416	$ 67,286,118
Operating Expenses	$ 5,979,964	$ 5,145,769	$ 6,640,568	$ 6,146,631
Capital	$ 145,380	$ 1,793,568	$ 2,145,708	$ 1,185,562
Other	$ -	$ -	$ -	$ -
Debt	$ 2,328,391	$ 15,228	$ 15,228	$ 15,228
Transfers	$ 44,877	$ 44,877	$ 57,514	$ 51,313
Reserves	$ -	$ 15,673,585	$ 19,990,086	$ 16,013,120
Total	**$ 77,692,019**	**$ 94,810,771**	**$ 108,813,666**	**$ 107,151,577**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	145	151	151	151
Part Time	1	2	2	2
Total	**146**	**153**	**153**	**153**
Proposed New Positions	0	0	12	9

Notes

FY 26 Budgeted Revenue

- BCC General Revenues 17%
- State & Federal Revenue 4%
- Charges for Services 54%
- Misc 1%
- Transfers 2%
- Beginning Balances 22%

FY 26 Budgeted Expenditures

- Salaries & Benefits 14%
- Services & Charges 58%
- Operating Expenses 6%
- Capital 2%
- Debt 1%
- Transfers 1%
- Reserves 18%
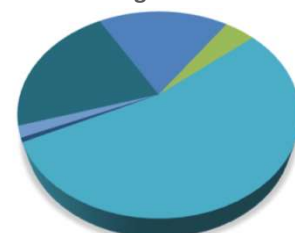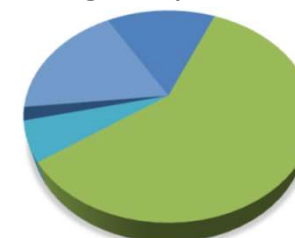
Budget and Administrative Services
Fiscal Services

Mission

Fiscal Services Division --- Provide professional, financial advice necessary to maintain fiscal stability and transparency in government.

Linkage to Strategic Goals

Efficient and Effective Government	Infrastructure

Core Functions

|	FY 26 - First Year Operating Budget		
Operations Support Provides oversight of the two-year budget cycle including TRIM (truth in millage), budgetary public hearings, cost allocations, and departmental budget preparation and monitoring.	State Mandated	24%	$1,104,573
Capital Improvement Program Provides oversight of capital budgets, 6-yr CIP and MSBUs including database, rates and certification of assessment roll.	State Mandated	24%	$1,109,137
Grants Support Provides financial oversight including maintaining the grant in the financial system, compliance and audits.	Critical	13%	$593,366
AP/AR Support Provides processing, tracking, reporting and support of procurement functions, accounts payable and accounts receivable. Additionally, this group supports the other Fiscal Services core sections and Board Departments.	Critical	25%	$1,131,959
Disaster Recovery The department manages disaster response finances and compliance, guiding FEMA Public Assistance efforts to ensure efficient recovery and maximize funding.	Critical	14%	$625,316
Operating Budget	100%		$4,564,351

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 3,788,700	$ 3,950,900	$ 4,579,579	$ 4,703,466
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 2,524	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 1,300	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 3,792,524	$ 3,950,900	$ 4,579,579	$ 4,703,466
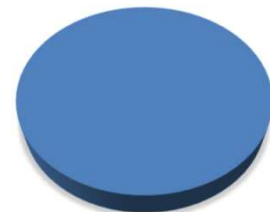
Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 3,676,017	$ 3,839,476	$ 4,435,459	$ 4,574,695
Services & Charges	$ 83,527	$ 76,406	$ 105,082	$ 91,203
Operating Expenses	$ 32,133	$ 19,790	$ 23,810	$ 22,340
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 846	$ 15,228	$ 15,228	$ 15,228
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	$ 3,792,524	$ 3,950,900	$ 4,579,579	$ 4,703,466

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	44	48	48	48
Part Time	0	0	0	0
Total	44	48	48	48
Proposed New Positions	0	0	0	0

Notes

Salaries and Benefits increased due to pay for performances. Disaster Recovery Core Service was created with two FTE's added. Grant compliance was also moved under Fiscal Services.

FY 26 Budgeted Revenue

- BCC General Revenues 100%

FY 26 Budgeted Expenditures

- Salaries & Benefits 96%
- Services & Charges 2%
- Operating Expenses 1%
- Debt 1%

Budget and Administrative Services
Fleet

Mission

Fleet Division --- To establish efficient and effective delivery of Charlotte County Fleet Management services (with a blend of outsourcing and in-house work) by providing customer agencies with safe, reliable, economically and environmentally sound transportation and related support services that are responsive to the needs of customer departments and that conserve vehicle value and equipment investment.

Linkage to Strategic Goals

Efficient and Effective Government

| Core Functions	FY 26 - First Year Operating Budget		
Fleet Management Fleet Management is responsible for "Cradle to Grave" diverse collection of vehicles and equipment, repairs and maintenance totaling 1,140 units, and 71 divisions.	Critical	90%	$6,706,389
Fuel Service Fleet Management staff is also responsible for two fueling sites with a total capacity of fuel of almost 48,000 gallons county-wide. With a total usage for FY18 at approximately 750,000 gallons, for unleaded and diesel. With over 860 plus vehicles and equipment using the fuel sites and both of them being a 24/7 site.	Critical	10%	$778,420
Operating Budget	100%		$7,484,809

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 7,803,672	$ 6,845,328	$ 8,371,050	$ 8,371,050
Misc	$ 24,307	$ -	$ -	$ -
Transfers	$ 44,000	$ -	$ -	$ -
Beginning Balances	$ -	$ 381,815	$ 491,234	$ 471,348
Total	$ 7,871,979	$ 7,227,143	$ 8,862,284	$ 8,842,398

FY 26 Budgeted Revenue

- Charges for Services 95%
- Beginning Balances 5%
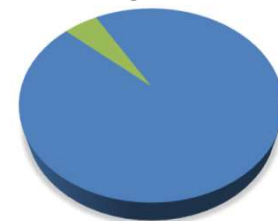
Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,127,413	$ 1,194,498	$ 1,303,121	$ 1,341,477
Services & Charges	$ 454,751	$ 507,460	$ 652,483	$ 661,391
Operating Expenses	$ 5,528,468	$ 4,580,068	$ 5,529,205	$ 5,527,705
Capital	$ -	$ 870,000	$ 870,000	$ 870,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 29,691	$ 29,691	$ 36,127	$ 36,127
Reserves	$ -	$ 45,426	$ 471,348	$ 405,698
Total	$ 7,140,323	$ 7,227,143	$ 8,862,284	$ 8,842,398
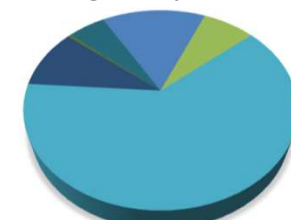
Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	14	14	14	14
Part Time	0	0	0	0
Total	**14**	**14**	**14**	**14**
Proposed New Positions	0	0	4	1

FY 26 Budgeted Expenditures

- Salaries & Benefits 14%
- Services & Charges 7%
- Operating Expenses 62%
- Capital 10%
- Transfers 1%
- Reserves 6%

Notes

Salaries & Benefits increased due to pay for performance increases. Services & Charges increased due to GPS fees. Operating Expenses increased due to inflationary increases in vehcile/equipment maintenance & repairs, fuel costs.

Budget and Administrative Services
Information Technology

Mission

Information Technology Division --- Promotes, manages and supports information technology solutions and services which facilitate the vision, goals and objectives of the Board of County Commissioners.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions

	FY 26 - First Year Operating Budget		
Client Services Serves as the first point of contact for IT issues, providing desktop support, enterprise application support, project support, and needs analysis for software/hardware requests.	Critical	21%	$2,714,081
Network Services Supports the implementation and maintenance of voice and data communications, and delivers third-level support for network. server. and telecom issues.	Critical	21%	$2,766,781
GIS Manages enterprise GIS infrastructure, data, systems and application services, providing coordination and support for county departments, constitutional offices, and the residents	Critical	12%	$1,581,018
Information Services Provides services such as application development and support, business intelligence, system integration, database administration. and workflow automation.	Critical	20%	$2,635,030
Security Oversee cybersecurity infrastructure, enforce data security policies, maintain documentation, and provide advanced technical support to protect County data confidentiality and integrity.	Critical	7%	$948,611
Business Analysis	Critical	19%	$2,529,629
Process Improvement, Process Management and Project Management	**Operating Budget**	**100%**	**$13,175,149**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 11,826,216	$ 10,502,899	$ 13,189,556	$ 13,859,272
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 7,380	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 11,833,596	$ 10,502,899	$ 13,189,556	$ 13,859,272

FY 26 Budgeted Revenue

■ BCC General Revenues 100%

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 5,110,369	$ 5,668,845	$ 6,245,234	$ 6,453,856
Services & Charges	$ 4,328,161	$ 4,753,655	$ 6,627,387	$ 7,239,282
Operating Expenses	$ 111,958	$ 72,193	$ 302,528	$ 157,928
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 2,274,901	$ -	$ -	$ -
Transfers	$ 8,206	$ 8,206	$ 14,407	$ 8,206
Reserves	$ -	$ -	$ -	$ -
Total	$ 11,833,596	$ 10,502,899	$ 13,189,556	$ 13,859,272

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	54	56	56	56
Part Time	0	0	0	0
Total	**54**	**56**	**56**	**56**
Proposed New Positions	0	0	4	2

FY 26 Budgeted Expenditures

■ Salaries & Benefits 47%

■ Services & Charges 50%

■ Operating Expenses 2%

■ Transfers 1%

Notes

FY25 IT assumed the record's divison (2 FTE's). Salaries & Benefits increased due to pay for performance increases. Services and charges line increased due to telephone charges being covered by IT going forward expect for the Sheriff, SOE, Fine & Forfeiture and E911 which will be included in the cost allocation plan in the future .

Budget and Administrative Services
Purchasing

Mission

Purchasing Division --- Acquire at the best possible price, consistent with specific quality, the goods, and services necessary for proper and efficient operations of County Government, at the least overall cost to the taxpayer.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions

	FY 26 - First Year Operating Budget		
Procurement Activities	State Mandated	91%	$1,489,685

**Procurement Activities**
Purchasing deals with Process coordination for Request for Bids, Quotes and Proposals; Accounts Payable Coordination; Training and Assistance to departments; Procurement Card Program Oversight.

Fixed Asset Oversite and Coordination
Oversight of the tangible property inventory records, physical inventories and redistribution or disposal of surplus tangible property.

Core Function	FY 26 - First Year Operating Budget	%	Amount
Procurement Activities	State Mandated	91%	$1,489,685
Fixed Asset Oversite and Coordination	Locally Mandated	9%	$149,132
	Operating Budget	**100%**	**$1,638,817**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 1,136,987	$ 1,330,139	$ 1,413,817	$ 1,468,028
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 245,952	$ 175,000	$ 225,000	$ 225,000
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 1,382,939	$ 1,505,139	$ 1,638,817	$ 1,693,028

FY 26 Budgeted Revenue

- BCC General Revenues 87%
- Misc 13%

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,355,320	$ 1,478,691	$ 1,606,779	$ 1,659,852
Services & Charges	$ 17,044	$ 12,923	$ 15,743	$ 16,881
Operating Expenses	$ 10,575	$ 13,525	$ 16,295	$ 16,295
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	$ 1,382,939	$ 1,505,139	$ 1,638,817	$ 1,693,028

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	11	11	11	11
Part Time	1	1	1	1
Total	**12**	**12**	**12**	**12**
Proposed New Positions	0	0	1	1

Notes

Salaries & Benefits increased due to pay for performance increases.

FY 26 Budgeted Expenditures

- Salaries & Benefits 98%
- Services & Charges 1%
- Operating Expenses 1%

Budget and Administrative Services
Real Estate Services

Mission

Real Estate Services Division --- Provides expertise in County acquisitions, disposals, leases, easements, and BCC approved projects.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions	FY 26 - First Year Operating Budget		
Land Acquisition Real Estate Services acquires land and property interests for BCC approved sales tax and capital projects (Roads, Drainage, Utilities, Facilities, etc.).	Critical	67%	$471,125
Occupations and Releases of Easements Real Estate Services processes occupations and releases of easements that are required for permitting of homes, commercial and new development projects.	Critical	25%	$176,584
Surplus Property Real Estate Services processes surplus properties for sale by sealed bid from the County's inventory that are needed for any County use.	Critical	8%	$58,626
	Operating Budget	**100%**	**$706,334**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 335,440	$ 357,849	$ 365,265	$ 386,189
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 71,650	$ 45,000	$ 45,000	$ 45,000
Misc	$ 182,232	$ 300,000	$ 300,000	$ 300,000
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 589,322**	**$ 702,849**	**$ 710,265**	**$ 731,189**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 538,312	$ 643,658	$ 647,635	$ 668,014
Services & Charges	$ 37,310	$ 39,454	$ 40,852	$ 41,397
Operating Expenses	$ 9,769	$ 15,806	$ 17,847	$ 17,847
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 3,931	$ 3,931	$ 3,931	$ 3,931
Reserves	$ -	$ -	$ -	$ -
Total	**$ 589,322**	**$ 702,849**	**$ 710,265**	**$ 731,189**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	6	6	6	6
Part Time	0	0	0	0
Total	**6**	**6**	**6**	**6**
Proposed New Positions	0	0	0	0

Notes

Salaries & Benefits increased due to pay for performance increases.

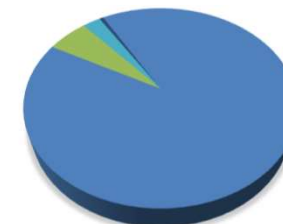**FY 26 Budgeted Revenue**
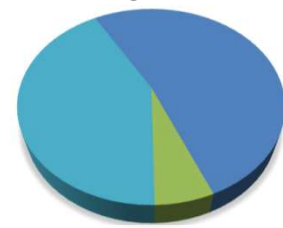
- BCC General Revenues 52%
- Charges for Services 6%
- Misc 42%

FY 26 Budgeted Expenditures

- Salaries & Benefits 91%
- Services & Charges 6%
- Operating Expenses 2%
- Transfers 1%

Budget and Administrative Services
Risk Management

Mission

Risk Management Division --- To provide active direction and leadership in the planning, development, and administration of programs and processes.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions	FY 26 - First Year Operating Budget		
Health Insurance and Benefits Administration of all benefit products including annual renewal, billing and eligibility, open and new-hire open enrollment, claims handling, customer service, HIPAA, Medicare Affordable Care Act, and IRS Section 125 compliance	Locally Mandated	40%	$21,504,740
Property and Casualty Insurance Administration of property and casualty insurance including management of all claims presented to County, safety and loss control activities designed to minimize loss to County, ADA compliance, Drug testing, training, DEP compliance, customer service	State Mandated	60%	$32,257,111
	Operating Budget	**100%**	**$53,761,851**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 44,410,656	$ 44,535,292	$ 50,244,162	$ 52,216,326
Misc	$ 1,831,502	$ 175,000	$ 200,000	$ 200,000
Transfers	$ 16,000	$ -	$ -	$ -
Beginning Balances	$ -	$ 21,582,543	$ 22,839,476	$ 19,518,738
Total	**$ 46,258,157**	**$ 66,292,835**	**$ 73,283,638**	**$ 71,935,064**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 304,183	$ 581,893	$ 565,355	$ 583,321
Services & Charges	$ 48,718,438	$ 50,005,347	$ 53,149,023	$ 55,294,912
Operating Expenses	$ 43,051	$ 74,387	$ 47,473	$ 46,106
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 3,049	$ 3,049	$ 3,049	$ 3,049
Reserves	$ -	$ 15,628,159	$ 19,518,738	$ 16,007,676
Total	**$ 49,068,720**	**$ 66,292,835**	**$ 73,283,638**	**$ 71,935,064**

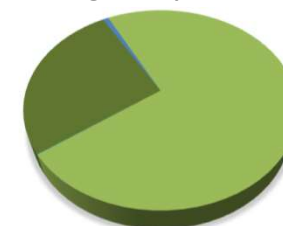| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	5	5	5	5
Part Time	0	0	0	0
Total	**5**	**5**	**5**	**5**
Proposed New Positions	0	0	1	1

Notes

Service and charges increased due to premium, insurance and claims-health increases.

FY 26 Budgeted Revenue

- Charges for Services 68%
- Misc 1%
- Beginning Balances 31%

FY 26 Budgeted Expenditures

- Salaries & Benefits 1%
- Services & Charges 73%
- Operating Expenses 1%
- Transfers 1%
- Reserves 24%
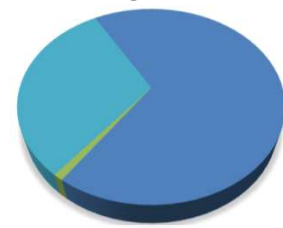
Budget and Administrative Services
Transit

Mission

Transit Division --- Charlotte County Transit provides public transportation that is a high quality, low cost curb-to-curb bus service that is safe, convenient and available to all. It also offers transportation to individuals who cannot do so for themselves due to economic, mental, or physical disability.

Linkage to Strategic Goals

Efficient and Effective Government	Public Services

Core Functions

FY 26 - First Year Operating Budget

Provide Transportation Service
Provide high quality, low cost curb-to-curb public bus service that is safe, convenient and accessible to all.

Critical	100%	$5,273,819

Operating Budget	100%	$5,273,819

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 3,201,319	$ 3,258,050	$ 4,578,941	$ 3,531,501
Charges for Services	$ 33,506	$ 20,000	$ 30,000	$ 30,000
Misc	$ (391)	$ -	$ -	$ -
Transfers	$ 1,382,366	$ 618,461	$ 1,940,586	$ 2,225,913
Beginning Balances	$ -	$ 732,495	$ -	$ -
Total	$ 4,616,801	$ 4,629,006	$ 6,549,527	$ 5,787,414

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 903,238	$ 979,063	$ 1,134,563	$ 1,172,390
Services & Charges	$ 2,539,324	$ 2,356,375	$ 3,435,846	$ 3,941,052
Operating Expenses	$ 244,009	$ 370,000	$ 703,410	$ 358,410
Capital	$ 145,380	$ 923,568	$ 1,275,708	$ 315,562
Other	$ -	$ -	$ -	$ -
Debt	$ 52,644	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	$ 3,884,596	$ 4,629,006	$ 6,549,527	$ 5,787,414

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	11	11	11	11
Part Time	0	1	1	1
Total	11	12	12	12
Proposed New Positions	0	0	2	4

Notes

Services and Charges - Increase due to new driver's contract.

FY 26 Budgeted Revenue
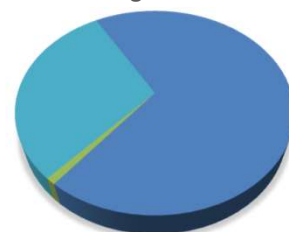
- State & Federal Revenue 69%
- Charges for Services 1%
- Transfers 30%

FY 26 Budgeted Expenditures

- Salaries & Benefits 18%
- Services & Charges 53%
- Operating Expenses 10%
- Capital 19%

FISCAL SERVICES
Levels of Service – 6 Year Metrics

Operation Support

Who is your primary Customer?	Operational Departments, Administration, BCC and Citizens
What is the primary service they receive from you?	Budget / Financial information and support
What is the main aspect of the service they care about?	Accuracy, transparency, timeliness

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy	% variance of 3rd Quarter Projections to Actual	Projections report	100.49%	107.73%	101.69%	102.01%	98.67%	104.69%
Transparency	SharePoint Fiscal Budget site visits	Site counter	33,453	32,845	33,854	78,571	8,478*	14,192
Timeliness	% of Procurement Card coding and approvals within set time frame	Bank of America Works	83%	87%	81%	87%	84%	85%
	# of VISA transactions		41,070	39,288	39,943	37,717	37,339	40,173

Capital Improvement Program Support

Who is your primary Customer?	Operational departments
What is the primary service they receive from you?	Planning, funding and monitoring of the capital program
What is the main aspect of the service they care about?	Accuracy, transparency, timeliness

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Transparency	# of Capital Improvement Projects	Adopted CIP Book	118	113	94	189	193	208
	Value of total annual CIP		$ 383,010,036	$ 400,485,452	$ 355,198,416	$ 420,779,985	$ 506,505,630	$ 725,608,244
Accuracy	Value of correcting journal entries as % of total CIP	Journal Entry log	0.560%	0.077%	0.141%	0.200%	0.228%	0.184%
	# of records on final assessment roll	MSBU database	663,741	659,603	663,991	658,613	657,296	662,517
	# of Certificate of Corrections (COC)	COC log and Certificates	453	249	238	901	504	0
	% of corrections to Non-Ad Valorem Assessment Roll	COC and Final Roll	0.068%	0.038%	0.036%	0.137%	0.077%	0.000%
Transparency	# of funds that have MSBU committee reporting	MSBU submission log	N/A	N/A	N/A	55	53	53
	# of reports supplied to MSBU committees		N/A	N/A	N/A	290	268	267
Timeliness	% of reports supplied to MSBU committees within set time frames		100%	100%	100%	80%	60%	98%
	% of CIP monthly reports issued within set time frame	Project status reports	90%	100%	100%	100%	92%	100%

FISCAL SERVICES
Levels of Service – 6 Year Metrics

Grant Support

Who is your primary Customer?	Operational departments, granting agencies, administration
What is the primary service they receive from you?	Financial reporting, analysis, and compliance of grant funds
What is the main aspect of the service they care about?	Compliance, accuracy, transparency and timeliness

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Compliance	Number of Fiscal Audit findings (single audit and Grantor monitoring)	Audit reports - manual tracking	0	0	0	0	0	2
Accuracy	% of reports returned for calculation errors (or unallowable costs)	Number of reports	N/A	178	221	213	327	280
Accuracy	% of reports returned for calculation errors (or unallowable costs)	Manual tracking of reports	N/A	1.69%	0.90%	1.41%	0.06%	1.430%
Transparency	# of grants with documentation available on shared site	Number of Grants	135	144	147	173	255	258
Timeliness	Average number of days to approve Grants Admin Approvals	New Grants SharePoint site	0.99	0.92	0.85	1.21	1.68	2.37

AP/AR Support

Who is your primary Customer?	Operational departments, Clerk/Comptroller
What is the primary service they receive from you?	Accounting and procurement transactions, tracking/reporting
What is the main aspect of the service they care about?	Accuracy, transparency, timeliness

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy	% of Procurement Card transactions without errors	Procurement Card exceptions reports	99.74%	99.62%	99.42%	99.49%	99.45%	99.32%
Accuracy	% of Rejected Invoices	Munis	N/A	N/A	N/A	N/A	N/A	N/A
Transparency	% of Internal Billing summaries posted on SharePoint within 30 days of end of month	SharePoint	39%	67%	81%	91%	94%	39%
Timeliness	% of Requisitions entered into EDEN within 2 business days	SharePoint	N/A	91%	97%	90%	96%	93%
Timeliness	# of Requisitions Processed	SharePoint	N/A	2066	1994	2138	2359	1865

FLEET MANAGEMENT

Levels of Service – 6 Year Metrics

Fleet Management

Who is your primary Customer?	Operational Departments
What is the primary service they receive from you?	Fleet Maintenance
What is the main aspect of the service they care about?	Safe, effective and efficient equipment in a timely manner

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Effective and Efficient	% of customer satisfaction	Survey	N/A	1	N/A	N/A	N/A	N/A
Effective and Efficient	Total number of repairs	Faster software	2,825	2,017	3,620	3,798	3,836	4,454
Effective and Efficient	Total number of sublets	Faster software	3,644	3,822	2,473	1,794	1,472	1,835
Timeliness	Average internal repair time (In Hours)	Faster software	N/A	1.4	2.2	3.1	3.3	3.9

Fuel Service

Who is your primary Customer?	Operational Departments
What is the primary service they receive from you?	Fuel
What is the main aspect of the service they care about?	Available and on demand

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Effective and Efficient	Total number of transactions	Ward fuel system	N/A	42,998	44,863	47,658	50,936	51,590
Effective and Efficient	Total fuel usage in gallons	Ward fuel system	N/A	657,407	757,743	918,495	939,000	955,168
Availability	% of system uptime	Ward fuel system	N/A	0.98	100	100	95	78

Information Technology

Levels of Service – 6 Year Metrics

Client Services

Who is your primary Customer?	Charlotte County Staff
What is the primary service they receive from you?	Computer Support
What is the main aspect of the service they care about?	Resolving computer issues in a timely manner and responsiveness to service requests

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Percentage of tickets compliant with SLA * Previous Metric: Percentage of unresolved tickets > 8 days	Freshservice	10.3%*	16.43%*	15.34%*	29.1%*	16.5%*	90.98%
Responsiveness to Service Requests	Survey Results (Closed tickets)	Freshservice	98.58%	97.70%	98.07%	97.00%	93.70%	98.30%
	# of Service Requests/Break Fix	Freshservice	8,127	10,308	10,026	11,272	11,455	13,290
	# of Open Tickets at end of FY	Freshservice	218	331	331	474	351	338

Network Services

Who is your primary Customer?	Charlotte County Staff, CCSO, Tax Collector, Property Appraiser, SoE, Justice Center, CHNEP, Guardian at Litem, Medical Examiner
What is the primary service they receive from you?	Network, server, storage, telephony support
What is the main aspect of the service they care about?	Availability, Data Integrity

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Availability/Services	Network Uptime (%)	Monthly Report	N/A	99.40%	99.10%	99.70%	99.85%	99.95%
Availability/Patch Management (Servers)	Patch Levels (%)	System Center Configuration Manager (SCCM) Reports	N/A	92.00%	94.00%	95.00%	98.00%	98.80%
Data Communications	Network Devices	Inventory Report	N/A	530	821	848	862	792
Voice Communications	Wired Telecommunications Devices	Inventory Report	N/A	3140	3822	4172	3741	3959
Mobile Communications	Wireless Communications Devices (smart phones, flip phones, other cellular)	Inventory Report	N/A	N/A	405/115/526	486/73/796	532/71/729	679/30/743
Availability/Patch Management (Servers)	Servers	Inventory Report	N/A	340	402	412	419	343

Information Technology

Levels of Service – 6 Year Metrics

GIS

Who is your primary Customer?	County staff, citizens, Property Appraiser, 911, City of Punta Gorda
What is the primary service they receive from you?	Accurate GIS Data, mapping services, website, field mobile application
What is the main aspect of the service they care about?	Accuracy, Availability and Integration with other systems

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy	Accuracy of GIS Data layers	Integrity checks	N/A	92%	95%	98%	98%	98%
		GIS User feedbacks (error reporting)	N/A	99%	98%	98%	98%	98%
		Footprints tickets	N/A	99%	99%	99%	97%	98%
Availability	Uptime of GIS Website, Web and Mobile Services and Applications	Monitored through automated web monitoring scripts, Analytics	99%	99%	99%	99%	99%	99%
	Acessibility to GIS data and licenses	Monitoring scripts, GIS User feedbacks, footprints tickets, GIS data requests	99%	99%	95%	98%	98%	98%

Information Services

Who is your primary Customer?	Charlotte County staff
What is the primary service they receive from you?	Software development/support, database maintenance, business Intelligence/data analytics
What is the main aspect of the service they care about?	Increasing efficiency, accessibility of data, user experience

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
User experience	Ratio of # of feasible feature requests submitted to number of features deployed over a period of time	Footprints/FreshService	N/A	0.3	0.9	90%	92%	72%
Accessibility of data	Number of subject areas modeled for the Enterprise Data Model (data dictionary)	Reports	N/A	14	202	447	1081	1470
Volume	# of applications supported/ # of non-mgmt staff	Master Software List	N/A	2.6:1	5.6:1	5:01	10:01	6.7:1
Increasing efficiency	% of time spent on tasks in the Grow or Transform categories over a period of time	Daily reporting	43%	49%	47%	26%	61%	49%

Information Technology

Levels of Service – 6 Year Metrics

Security

Who is your primary Customer?	Charlotte County Staff, CCSO, Tax Collector, Property Appraiser, SoE, CHNEP, Guardian at Litem, Medical Examiner							
What is the primary service they receive from you?	Boundary Firewall, Remote Access, Endpoint Protection, Cybersecurity training, Anti-Phishing campaigns, Penetration Testing, Vulnerability Assessments, Security Information and Event Management (SIEM), Incident Response							
What is the main aspect of the service they care about?	Data Confidentiality, Integrity and Availability							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Availability and Data Integrity/Incident Response	Malware/Spyware/Malicious Sites Blocked	Firewall / MSP Reports	N/A	308,835,250	15,115,781,460	2,594,044,612	2,308,375,498	4,760,356
	Volume Spam/Phishing Blocked	Office 365 / ProofPoint	N/A	6,267,472	8,796,216	7,921,752	6,528,624	7,134,131
Boundary Protection	Firewalls	Inventory Report	N/A	24	30	33	35	39
Devices protected	Servers and End-user Devices Protected	Inventory Report	N/A	2,711	3,084	3,216	3,581	5,151

Business Analysis

Who is your primary Customer?	Charlotte County Staff							
What is the primary service they receive from you?	Assist the organization in executing its strategic intent by providing process improvement, process management, and project management services.							
What is the main aspect of the service they care about?	Communication, accuracy, efficiency							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Process efficiency	How many processes mapped by BA team are having their metrics actively tracked (Ratio # of processes mapped/# of mapped processes with metrics) Goal 90%	Process repository	N/A	N/A	N/A	N/A	N/A	0
Project quality and utility	Customer satisfaction	Customer satisfaction survey	N/A	N/A	N/A	N/A	N/A	N/A
Organizational agility	How many of the county's processes are mapped (Goal will change as service matures FY25=160)	Process repository	N/A	N/A	N/A	N/A	N/A	?

PURCHASING

Levels of Service – 6 Year Metrics

Procurement Activities

Who is your primary Customer?	Internal County Departments								
What is the primary service they receive from you?	Coordination and oversight of the procurement process in the obtainment of goods and services								
What is the main aspect of the service they care about?	To purchase goods and services at the lowest total cost consistent with the needs of the department, using specifications to attract wide competition								
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Quality of Service	% of Customer Satisfaction	Internal /External Survey	86%	N/A	91%	N/A	N/A	N/A
Timeliness	Average Conversion times (days) for RFB within set timeframe	Eden/Contract Management	80	80	67	66	64	49
Timeliness	Average Conversion times (days) for RFP within set timeframe	Eden/Contract Management	102	114	99	88	121	41
Timeliness	Average Conversion times (days) for RFQ within set timeframe	Eden/Contract Management	40	29	25	28	25	22
Volume	# of Files for RFB, RFQ, RFP, Piggybacks, Sole Source and Miscellaneous	Eden/Contract Management	630	650	646	670	720	642

Fixed Asset Oversite

Who is your primary Customer?	Internal County Departments								
What is the primary service they receive from you?	Coordination in the management of fixed assets								
What is the main aspect of the service they care about?	To be in complaince with the Florida State Statutes								
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Compliance	% of audits completed within compliance	Eden/Excel/Audit	100%	100%	100%	100%	100%	100%
Volume	# of active assets	Eden/Excel	14,571	14,796	9,452	9,721	9976	10,315

REAL ESTATE SERVICES

Levels of Service – 6 Year Metrics

Land Acquisition

Who is your primary Customer?	Public Works, Utilities and Facilities							
What is the primary service they receive from you?	Acquire real property interests for county projects							
What is the main aspect of the service they care about?	Acquire the property in a timely manner and within budget restraints							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Customer Satisfaction	% of customer satisfaction	Internal/external surveys	97%	98%	98%	98%	99%	98%
Volume	# of transactions (Right of Entry, Easements, Sales and Purchases, PTO and ROE)	Spreadsheets/internal tracking logs	570	588	789	965	762	901

Occupations and Releases of Easements

Who is your primary Customer?	Public							
What is the primary service they receive from you?	Process the releases and the occupations							
What is the main aspect of the service they care about?	Process in a timely manner so they can move forward with their own projects							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Timeliness	% of transactions completed within set timeframe	Tracking Log/Spreadsheet	79%	98%	100%	100%	100%	100%
Volume	# of transactions	Tracking Log/Spreadsheet	362	384	494	528	397	457

RISK MANAGEMENT

Levels of Service – 6 Year Metrics

Health Insurance and Benefits

Who is your primary Customer?	Employees, Spouses, Dependents, and Retirees. Insurance Carriers and Medical Providers
What is the primary service they receive from you?	Administration of Health Benefits
What is the main aspect of the service they care about?	Effective, efficient and affordable care

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Effective	% of customer satisfaction	Employee survey	TBD	TBD	92.42%	TBD	TBD	TBD
Efficient	Annual Cost per covered life	Budget and Expense Report along with Cigna	$8,372	$8,385	$8,942	$9,548	$10,275	$10,597
Efficient	Annual Cost for Employee Only Coverage	Budget and Expense Report along with Cigna	$312	$312	$312	$312	$312	$312
Affordable	% of cost increase compared to national average (per employee cost)	Gehring Group	2.8%	-5.6%	2.3%	0.3%	1.4%	-3.9%

Property and Casualty Insurance

Who is your primary Customer?	Employees and the General Public
What is the primary service they receive from you?	Employees Workers' Compensation Administration, General Public management of all incidents resulting of County Operations
What is the main aspect of the service they care about?	Efficient and effective management of all incidents and claims

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Efficient	Safety / Workers' Compensation: Total Incurred Valuation Date 03/10/2025	Origami software	$851,083	$3,086,993	$1,382,948	$786,623	$975,429	$1,220,354
Efficient	Liability: Total Incurred Valuation Date 03/10/2025	Origami software	$356,781	$170,165	$538,601	$415,022	$332,230	$295,947
Effective	Safety WC Incidents: # of accidents reported	Origami software	268	268	200	186	209	252
Effective	Workers' Compensation: experience modification factor	Department of Financial Services	0.81%	0.88%	0.88%	0.80%	0.61%	0.63%
Effective	Liability: # of Liability Claims	Claims Data	117	83	168	172	185	243

FY26 and FY27 GOALS:

1 Compile Budget Book for Fiscal Years 2026 and 2027 and submit application to the Government Finance Officers Association for the Distinguished Budget Presentation Award.

2 CityWorks - Assist departments with implementation and testing of financial and budgetary components within the new Asset Management System. Continue to provide support around those functions and integration after full implementation.

3 Assist departments in project implementation and administration of the Hazard Mitigation Grant Program (HMGP) funds. These funds are being authorized through the recent Presiditional Disaster Declaration for Hurricane Ian to increase resiliency and reduce and mitigate future losses through hardening of county failcitites.

4 Assisting county departments and Administration with the 1% Local Option Sales Tax extension for the November 2026 ballot, including compiling documentation and data for public stakeholder meetings.

5 Develop a Disaster Recovery process to guide our organization through the FEMA PA program. In collaboration with Emergency Management's Resiliency and Recovery team, we will establish this process, strengthening coordination and enhancing organizational resiliency.

FY24/25 GOALS AND PROGRESS:

1 Compile Budget Book for Fiscal Years 2024 and 2025 and submit application to the Government Finance Officers Association for the Distinguished Budget Presentation Award.

Completed and received the award of first application.

2 Enterprise Resource Planning Transition - Assist in the implementation of Tyler Munis, providing process mapping and testing for financial and budgetary functions, in order to leverage industry best practices, and improve the efficiency and effectiveness of County's business processes.

The financials module of Munis has been fully implemented as of 10/1/2024. The Human Capital module is still in the implementatoin process with a targeted Go Live of July 2025. Fiscal will continue to assist with the implemenation as needed.

3 CityWorks - Assist departments with implementation and testing of financial and budgetary components within the new Asset Management System. Continue to provide support around those functions and integration after full implementation.

Facilites and Utilities went live in CityWorks during Fiscal Year 2024. The Utility Enigneering labor reporting for project capitalization has been successfully transitioned from SharePoint to CityWorks. Inventory management for the Utility, including truck and meter inventory, has also been successfully implemented in CityWorks and reconciled for Fiscal Year End.

4 Assist departments in project implementation and administration of the Hazard Mitigation Grant Program (HMGP) funds. These funds are being authorized through the recent Presiditional Disaster Declaration for Hurricane Ian to increase resiliency and reduce and mitigate future losses through hardening of county failcitites.

We have received verbal approval for two HMGP Ian projects—1) Fire Station #8 Safe Room and Generator and 2) CCBHC Generator—though the approval process has been slowed by FDEM and federal agencies. Additionally, we have received the HMGP NOFA for Debbie, Helene, and Milton, with a total of $60 million in funding available.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1 Mentoring Program - Develop and Implement Mentoring Program to assist employees in achieving their highest potential as members of the

Fiscal Services plans to finalize the mentoring program in the Summer of 2023. Have currently completed an employee survey to identify possible candidates for the program and determine their needs. Still need to complete a timeline for the program. Targeting launch of progam for Fiscal Year 2024.

2 Enterprise Resource Planning Transition - Assist in the implementation of Tyler Munis, providing process mapping and testing for financial and

Currently deep into the Munis implementation. Financial modules are progressing and starting to move forward with Purchasing and Human Capital. Current timeline of going live 4/1/2024 is on target.

3 CityWorks - Assist departments with implementation and testing of financial and budgetary components within the new Asset Management

Public Works went live in CityWorks at the start of Fiscal Year 2023. Fiscal is currently working with the County Assets Manager to finalize CityWorks reporting on work order materials, equipment and labor totals for MSBU and other billings. Current target of FY2024 for go live on CityWorks with Facilities and Utilities.

FY26 and FY27 GOALS:

1	Continue with planning for fuel tank replacement shedule.
2	Decrease sublet repairs, increase in house repairs. Increasing savings on parts & labor.
3	Increase mobile PM services for lube & inspections for all off road heavy equipment. This will be a savings on transport costs, lessen or avoid down times and provide higher level of service.
4	Acquire needed staffing and equipment for ongoing growth and support.
5	Web based calender and schedule to help with workflow.

FY24/25 GOALS AND PROGRESS:

1	Increase focus on employee cross training in all areas.
	On going including tech training
2	Increase mobile PM services for lube & inspections for all off road heavy equipment. This will be a savings on transport costs, lessen or avoid down times and provide higher level of service.
	Have on going schedules
3	Increase JB yard fuel tanks to increase holdings and save cost of fuel from tank wagon contract.
	Completion date summer 2025
4	Replace antiquated shop equipment, increase shop floor space to accommodate changes in technology and growth.
	Ongoing floor space increases as well as equipment upgrades
5	Decrease sublet repairs, increase in house repairs. Increasing savings on parts & labor.
	Ongoing- goal acomplished limited to space.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Work with NAPA to increase levels of service due to vehicle & parts shortages.
	Continuously working with NAPA to maximize levels of service.
2	Refining remote fuel monitoring systems
	Working to refine the process.
3	Developed a replacement for all county fuel storage tanks. This will include any tank 500 gallons and above
	Completed
4	Implement an automated PM scheduling and notification reminder system with all of our existing software.
	Completed
5	Streamline the entire departments current processes. Scheduling, Work Orders, Parts Processing and Billing
	Completed
6	Monitor and improve Vendor relationships and sublet process
	Completed
7	Bring more sublet in house for repairs
	Completed

Information Technology Division
Goals FY26 and FY27

CHARLOTTE COUNTY · FLORIDA

FY26 and FY27 GOALS:
1   a. Manage, populate, and maintain a business process repository populated by BAs but accessible to everyone in the county.   b. Provide departments insights into their operational metrics by determining a collection method for that data with each process review. A data
2   Develop an Enterprise wide set of GIS Policies and SOPs for an effective standardization and optimization of the County GIS environment, with monitoring and coordination through the addition of a GIS Coordinator position.
3   Banner - Working with the Utilities department, develop a plan for the upgrade/migration or replacement of the current Utilities billing program and beginning the process of implementing the plan by the end of the FY.
4   Continue migration to a zero network access solution to provide more secure, flexible and supportable access to users by building upon access for remote users/devices and expanding the implementation of Network Access Control (NAC) in County facilities.   Zero trust is a security concept where every user and device that tries to access a network is checked and verified, regardless of whether they are inside or outside the network. In simple terms, it means that no one is automatically trusted and everything is treated as a potential threat until proven otherwise.
5   a. Begin the Data Governance process by establishing a data dictionary and a data catalog for our BI Warehouse.   b. Build out the BI training to the different departments, including different methods of training so everyone has the ability to learn how to leverage our BI capabilities   c. Create a best standards and practices document for our developers
6   Refresh network infrastructure (switches, wireless access points) in FY26. Approximately 500+ devices.
7   Re-establish the computer refresh program with 50% completed in FY26 and 50% in FY27 with over 610+ laptops, desktops, and rugged devices each year.
8   Establish a business services team responsible for software/hardware asset management, IT project management, budget development and fiscal oversight, partnership agreements, and centralized customer communications.

FY24/25 GOALS AND PROGRESS:

1 **a.** Switch focus of Business analysts to become internal consultants for IT related matters in the county by creating a separate Business Analyst group within IT led by a Business Relationship Manager.

b. Work to develop a better relationship between IT and the departments and ensure our strategic goals align as part of a separate Business Relationship group.

c. Initiate a SharePoint education/training program aimed at guiding departments/divisions in developing their intranet sites to increase communication effectiveness. We've requested an additional programmer position to assist in the completion of this goal.

d. Develop a strategy to assist/guide departments in mapping and measuring the processes for their core services as part of a new Business Relationship group.

Completed

2 Develop an Enterprise wide set of GIS Policies and SOPs for an effective standardization and optimization of the County GIS environment, with monitoring and coordination through the addition of a GIS Coordinator position.

In progress

3 Establish redundant fiber optic loop in South County to improve service delivery and continuity of operations in the event of fiber cuts, disaster related outages, and during scheduled maintenance operations. We will be working with Emergency Management to obtain mitigation grant funding to accomplish this goal.

Completed as part of the SCADA Master Plan

4 Continue migration to a zero network access solution to provide more secure, flexible and supportable access to users by building upon access for remote users/devices and expanding the implementation of Network Access Control (NAC) in County facilities.
Zero trust is a security concept where every user and device that tries to access a network is checked and verified, regardless of whether they are inside or outside the network. In simple terms, it means that no one is automatically trusted and everything is treated as a potential threat until proven otherwise.

This is a continuous process

5 Banner - Working with the Utilities department, develop a plan for the upgrade/migration or replacement of the current Utilities billing program and beginning the process of implementing the plan by the end of the FY.

Under way

FY22/23 GOALS AND ACCOMPLISHMENTS:

1 Develop a strategy to assist/guide departments in mapping and measuring the processes for their core services.

Unable to accomplish due to staffing levels. Planning to implement a separate group in IT for an expanded Business Analysts capability headed by a Business Relationship Manager.

2 Initiate a SharePoint education/training program aimed at guiding departments/divisions in developing their intranet sites to increase communication effectiveness.

IT staff participated in multiple workshops conducted by Microsoft to assist us in creating a center of excellence that will guide us in creating roadmap to support citizen developers. We've requested an additional programmer position to assist in the completion of this goal.

3 Follow-up on revised pilot project on chat bots for the county, including internal chat bot for IT support.

Determined that a chatbot would be labor intensive not only for IT, but also for the department to maintain. Will be implementing a new ticketing system in FY23 that will include a ChatBot that will integrate with Teams.

4 Establish redundant fiber optic loop in South County to improve service delivery and continuity of operations in the event of fiber cuts and during scheduled maintenance operations.

Worked with Utilities to develop a coordinated plan for fiber connectivity to the Burnt Store facility and a redundant loop in South County that will eventually support the BCC network as a whole. The project can move forward once funding is identified. Working with Emergency Management on feasibility of using mitigation grant monies to accelerate project.

5 Develop a zero trust network access solution to provide more secure, flexible and supportable access to users.

Steps towards the implementation of a fully zero trust solution were accomplished with the implementation of mandatory Global Protect VPN connections from untrusted networks for County issued Windows devices and the implementation of Multifactor authentication via DUO for access to County resources from untrusted devices, networks, and VPN connections.

	Purchasing
CHARLOTTE COUNTY FLORIDA	**Purchasing** Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Review Purchasing Manual on an annual basis to accommodate any required revisions or updates, if necessary.

2	Average Conversion Times and Cost Avoidance is tracked for all Request for Quotes, Request for Bids, Request for Proposals and "Piggyback" Bids/Quotes.

3	Support upgrade and implementation of Munis for the Fixed Asset portion of the software that affects Purchasing.

FY24/25 GOALS AND PROGRESS:

1	Review Purchasing Manual on an annual basis to accommodate any required revisions or updates, if necessary.

Purchasing Manual was reviewed and no updates were required this year.

2	Average Conversion Times and Cost Avoidance is tracked for all Request for Quotes, Request for Bids, Request for Proposals and "Piggyback" Bids/Quotes.

Conversion times are tracked and reviewed on a regular basis.

3	Support upgrade and implementation of Munis for the Purchasing portion of the software.

Purchasing went live on Munis October, 2024.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Review Purchasing Manual on an annual basis to accommodate any required revisions or updates, if necessary.

Purchasing Manual was reviewed, updated and approved by the County Administrator.

2	Average Conversion Times and Cost Avoidance is tracked for all Request for Quotes, Request for Bids, Request for Proposals and "Piggyback" Bids/Quotes.

Conversion times are tracked and reviewed on a regular basis.

3	Support upgrade of Eden to Munis for the Purchasing portion of the software.

Participated in discussions and review meetings for the introduction of the Munis product upgrade from Eden.

Real Estate Services Division
Goals FY26 and FY27

FY26 and FY27 GOALS:

1 Effective management of the land acquisition program for County Capital Projects.

To acquire lands and/or easements necessary for County projects.

2 Effective Management of the Occupation and Release of Easement Program.

To continue meeting the established timelines for each application.

3 Effective Management of the disposal of surplus land program.

Manage to final surplus properties being disposed.

4 Effective management of the HCP program

Acquire properties within the HCP guidelines as approved by natural Resources.

5 Maintain running list of of Real Property and Lease Inventory

Maintain a list of properties acquired or sold on a continual basis.

FY24/25 GOALS AND PROGRESS:

1 Effective management of the land acquisition program for County Capital Projects.

Real Estate Services works to acquire lands and easements for County needs. 145 acquired in Fiscal 2024

2 Effective Management of the Occupation and Release of Easement Program.

457 total for FY 2024, increased from Ian levels, but still below pre-Ian numbers.

3 Effective Management of the disposal of surplus land program.

19 Properties sold, generating $538k in revenu in FY 2024.

4 Effective management of the HCP program

Conitnue to acquire lands or easements on behalf of the HCP program

5 Maintain running list of of Real Property and Lease Inventory

Maintain a list of inventory and leases on an ongoing basis

FY22/23 GOALS AND ACCOMPLISHMENTS:

1 Effective management of the land acquisition program for County Capital Projects.

Real Estate Services continues to acquire parcels and/or easements for County needs. (32 through Mar 30 - many projects delayed due to Hurrican Ian)

2 Effective Management of the Occupation and Release of Easement Program.

169 applications to date (through March 30). Numbers significantly down due to Hurricane Ian.

3 Effective Management of the disposal of surplus land program.

Presenting first sale of fiscal year to the BCC April 2023 - delay due to Hurricane Ian

4 Effective Management of the Peace River Preserve and Habitat Conservation Program.

Acquired 1 acre+/- in FY 23 thus far (Oct-Mar). Projects slowed due to Hurricane Ian.

5 Effectively maintain County's Real Property and Lease Inventory Reports.

Maintain an active list of parcels acquired and leases managed on an ongoing basis.

Risk Management Division
Goals FY26 and FY27

CHARLOTTE COUNTY FLORIDA

FY26 and FY27 GOALS:

1	Controlling Total Cost of Risk across the Health Benefits, and Property & Casualty Risk Management Programs.

2	Continued integration of the Wellness Program into the organization's culture.

3	Continue to comply with regulatory requirements governing our Health and Workers' Compensation Programs.

4	Continue effective communication and enhance our Safety Culture across the Organization.

FY24/25 GOALS AND PROGRESS:

1	Controlling Total Cost of Risk across the Health Benefits, and Property & Casualty Risk Management Programs.

Health Benefits cost increase trended below the National Average for FY 24, additionally our Health Clinic Pharmacy is expected to positively impact our Prescription costs. Workers' Compensation Program continues to perform well our 2024 Experience Modification factor of 0.63 tipped up only marginally from 0.61.

2	Continued integration of the Wellness Program into the organization's culture.

The Wellness program received the Mental Health America (MHA) Bell Seal for Workplace Mental Health. Also Charlotte County received the Cigna Healthy Workforce Designation for 2024.

3	Continue to comply with regulatory requirements governing our Health and Workers' Compensation Programs.

The Workers' Compensation program was audited by the Division of Financial Services with no significant findings attritable to Charlotte County.

4	Continue effective communication and enhance our Safety Culture across the Organization.

Messaging with our weekly Safety Tips, Safety Committee meetings across County Departments, and Departmental awareness and engagement with Risk continues to control costs as evidenced by our Experience Modification factor maintaining well below 1.0 as 'baseline' across Government Operations as measured by the Division of Financial Services.

FY22/23 GOALS AND ACCOMPLISHMENTS

1	Fewer WC Claims

In FY 22 the County had 96 WC claims, the lowest incident rate in the last Seven years.

2	Lowered WC Experience Modification Factor

In FY 22 the WC Experience Modification Factor reduced to 0.80 from 0.88

3	Wellness

The Wellness Program continues to assimilatie into the organization's culture by fostering a unified approach to the work enviroment. This is accomplished by supporting the specific needs of the individuals, their families, and co-workers, while expanding to a 'growth mindset'.

4	Health Benefits

Risk Management continues to comply with the Affordable Care Act, HIPPA by working closley with our vendor partners, as well as internally, to stay current and in compliance with Regulations while providing affordable benefit programs

Charlotte County FLORIDA	**Transit Division** Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Implementation of on-demand service within three (3) desingated areas.
2	Expand marketing efforts and public outreach initiatives.
3	Increase overall ridership by 25%.

FY24/25 GOALS AND PROGRESS:

1	Implement new scheduling software which will assist in increasing ridership by at least 10%, reduce scheduling time by 3% and begin providing on-demand service within designated zones.

New scheduling software was implemented in October 2023 and launched the Charlotte Rides Mobile App in November 2024. With the software enhancements, ridership increased 45% in FY24 compared to FY23. Average queue time decreased by 66% and average handling time was reduced by 54%. The scheduling software has allowed for the previously required advance reservation time of 72-96 hours to be reduced to a minimum same-day request of 2 hours, based upon

2	Prepare 10-Yr Transportation Development Plan (TDP) which will include a fare study and post-Covid marketing strategy.

This goal was complete as the TDP was adopted by the BCC in July 2024. The fare study was completed in November 2024 and the marketing strategy is ongoing at the time of this update.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	To increase ridership by 12% after Covid-19 ridership losses.

Transit struggled during this period to increase ridership as a result of a driver shortage that affected all agencies across the nation.

2	To increase Rural Ridership by 5-7%

Rural ridership increased by 6.46% during this period.

3	To reduce Urban cost per trip by 3%.

Urban cost per trip decreased by 6% during this period.

4	To increase on-time performance by 2%.

On-time performance increased by 2%.

Communications

Communications

CHARLOTTE COUNTY
FLORIDA

Mission

Delivering exceptional service

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions

Core Functions	FY 26 - First Year Operating Budget		
Communications	Discretionary	57%	$724,018
Media and public relations; design and distribute materials promoting County programs and services; Design and mange content of two websites; write and distribute mass emails. Create marketing campaigns; supervise County Branding, support promotion and communication for other County departments; monitor and guide county social media; provide support and coordination of events; provide PIO support services for EOC.			
CCTV Government Television	Discretionary	43%	$541,747
Produce and broadcast all board, budget workshops, code enforcement, and other meetings as required; produce original videos on County issues and events; Broadcast public service messages on community events, activities, and announcements. Produce live streaming videos, Facebook Live videos, and maintain archives; provide broadcast engineering service to support full service government access TV channel in compliance with FCC regulations. Provide live production and broadcast from EOC during emergency activation.			
Operating Budget		100%	$1,265,765

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 899,348	$ 1,034,938	$ 1,228,765	$ 1,270,127
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 1,438	$ 5,000	$ 5,000	$ 5,000
Misc	$ 485	$ -	$ -	$ -
Transfers	$ 93,362	$ 132,000	$ 132,000	$ 132,000
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 994,632**	**$ 1,171,938**	**$ 1,365,765**	**$ 1,407,127**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 752,497	$ 953,463	$ 1,118,185	$ 1,154,358
Services & Charges	$ 146,090	$ 71,208	$ 123,880	$ 124,569
Operating Expenses	$ 22,909	$ 15,267	$ 23,700	$ 28,200
Capital	$ 73,136	$ 132,000	$ 100,000	$ 100,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	**$ 994,632**	**$ 1,171,938**	**$ 1,365,765**	**$ 1,407,127**

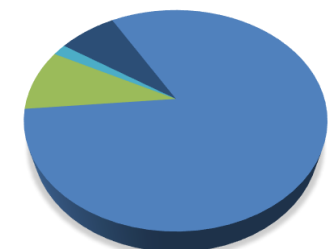| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	6	7	7	7
Part Time	0	0	0	0
Total	**6**	**7**	**7**	**7**
Proposed New Positions	0	0	2	1

Notes

FY 26 Budgeted Revenue
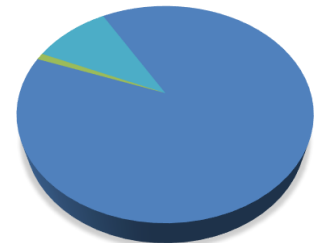
- BCC General Revenues 89%
- Charges for Services 1%
- Transfers 10%

FY 26 Budgeted Expenditures

- Salaries & Benefits 81%
- Services & Charges 10%
- Operating Expenses 1%
- Capital 8%

COMMUNICATIONS

Levels of Service - 6 Year Metrics

Who is your primary Customer?	General public, internal staff							
What is the primary service they receive from you?	Information about county policies and programs							
What is the main aspect of the service they care about?	Accuracy and timeliness, available and accessible							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Engagement	# of Press Releases	P-drive press release folder; Internal data tracking; Outreach events; National Citizen Survey (every two years)	190	219	248	390***	274***	452***
	NCS Watched Meeting		N/A	24%	N/A	N/A	N/A	30%
	NCS Comm Engagement		N/A	20%	N/A	N/A	N/A	27
	# of CCTV Videos		60	48	36	60	63	70
	# of County Facebook page Follows		9,558	12,818	16,078	22,000	24,536	28,858
	Social media engagement-Impressions [1]	Platform analytics/Digital Communications Report				48,482,754	50,217,585	59,578,880
	CC-TV Streaming Views							8,482
	CC-TV Streaming minutes							867
	Website views	Google Analytics				2,418,403	5,040,193	5,658,052

* Suspended during COVID ** As of October 2021; metric no longer used *** PIO and JIC combined [1]–Jan.–June 2022

CHARLOTTE COUNTY FLORIDA	**COMMUNICATIONS** Goals FY26 and FY27

FY26 and FY27 GOALS:

Continue Mission, Vision, Values outreach, with emphasis on line of sight. Create videos with staff and administration discussing line of sight.
Continue to expand social media reach and engagement.
Implement Strategic Communications Plan.
Continue to increase applications for countywide awards and promote award-winning stature of county government.

FY24/25 GOALS AND PROGRESS:

1 Continue Mission, Vision, Values outreach, with emphasis on line of sight. Create videos with staff and administration discussing line of sight.
Worked on appraisal overhaul committee to emphasize mission, vision and values. Created messaging for new appraisal launch, produced three videos to promote massaging, training availability and bell curve explanation.
2 Continue to expand social media reach and engagement.
Grew social media posts 11% to 8,084 posts with a 12% increase in impressions to 56,137,650. Grew total followers 30% to 234,596.
3 Implement Strategic Communications Plan.
Created and onboarded a new communications specialist and internal communications manager.
4 Continue to increase applications for countywide awards and promote award-winning stature of county government.
Submitted 31 NACo Achievement Award nomonations and one ICMA nomination. Helped develop nomination for Digital Counties Survey award.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1 Continue Mission, Vision, Values outreach, with emphasis on line of sight.
Create dry eras posters and distributed to department locations. Featured filled-in posters in Connections newsletter.
2 Continue to expand social media reach and engagement.
Created 7,290 social media posts that generated 50,217,585 impressions.Add 20,435 followers to reach 180,388 total followers.
3 Continue to improve functionality of Connect@Work.
Added new featured video on home page. Created documents hub button.
4 Implement Strategic Communications Plan.
Initiated a strategic communications plan review, to include an employee survey and a focus on centralized versus decentralized communications structure. Added a public relations manager to Community Development Department.
5 Continue to increase applications for countywide awards and promote award-winning stature of county government.

Community Development

Community Development

Mission

Advance the County's mission by anticipating challenges and forging solutions associated with community growth and infrastructure while protecting the life safety, health and welfare of the citizens and promoting the long term livability of the community.

Division Summary	FY 26 - First Year Operating Budget	
- Planning and Zoning --- Maintain the County's Comprehensive Plan; process DRI; process County initiatives, assist the public with the submission, review of large & small-scale plan amendments. Compliance with local, state & federal regulations relating to land use, zoning, natural resources for all permitted development. Land Development Regulations accurately reflect the requirements of the comprehensive plan & maintained as needed.	18%	$3,878,373
- Land Information Services --- Maintain all planning, zoning, concurrency, environmental & related data spatially for use in implementing ordinances, resolutions, community plans, overlays, and policy changes that promote the County's vision for the future of Charlotte County. Maintain the core address layer used by E-911, county agencies. Create & provide specialized maps, data, & detailed analyses to local consultants, developers, & the general public.	4%	$865,264
- Enforcement --- Commercial & residential properties are in compliance with the local zoning regulations through effective complaint resolution and inspections of new & remodeled structures. All unsafe residential structures made safe through the local unsafe building abatement code. All contracting work completed in compliance with local & state contractor licensing requirements.	17%	$3,766,088
- Building Construction Services --- All newly constructed or remodeled structures are built in full compliance with the provisions of the Florida Building Code & NFPA fire codes. Unsafe structures or areas of the County are identified & appropriately handled following an emergency event to protect the life safety, health, & welfare of the citizens of Charlotte County.	61%	$13,133,945
Operating Budget	100%	$21,643,670

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 4,036,592	$ 6,220,228	$ 6,729,589	$ 7,074,745
Taxes	$ 38,626	$ 150,000	$ 33,026	$ 33,026
Fees & Assessments	$ 14,739,805	$ 13,090,000	$ 10,781,424	$ 10,781,424
State & Federal Revenue	$ 76,583	$ 70,000	$ 70,000	$ 70,000
Charges for Services	$ 2,305,269	$ 1,238,780	$ 1,421,091	$ 1,421,091
Misc	$ 1,826,143	$ 455,000	$ 939,389	$ 939,389
Transfers	$ 477,612	$ 19,800	$ 19,800	$ 19,800
Beginning Balances	$ -	$ 21,325,195	$ 22,330,552	$ 19,679,281
Total	$ 23,500,631	$ 42,569,003	$ 42,324,871	$ 40,018,756

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 13,202,354	$ 14,947,674	$ 15,296,641	$ 16,594,648
Services & Charges	$ 5,836,868	$ 7,453,011	$ 6,006,606	$ 6,146,873
Operating Expenses	$ 355,386	$ 306,387	$ 340,423	$ 326,353
Capital	$ 110,679	$ 18,000	$ 18,000	$ 85,000
Other	$ -	$ -	$ -	$ -
Debt	$ 185,858	$ -	$ -	$ -
Transfers	$ 233,488	$ 223,608	$ 414,472	$ 362,848
Reserves	$ -	$ 19,620,323	$ 20,248,729	$ 16,503,034
Total	$ 19,924,633	$ 42,569,003	$ 42,324,871	$ 40,018,756

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	153	153	153	153
Part Time	0	0	0	0
Total	153	153	153	153
Proposed New Positions	0	0	0	0

Notes

The following pages provides a variance analysis for each division within Community Development.

FY 26 Budgeted Revenue

- BCC General Revenues 15%
- Taxes 1%
- Fees & Assessments 25%
- State & Federal Revenue 1%
- Fees/Charges for Services 3%
- Miscellaneous 3%
- Beginning Balances 51%

FY 26 Budgeted Expenditures

- Salaries & Benefits 36%
- Services & Charges 14%
- Operating Expenses 1%
- Transfers 1%
- Reserves 47%
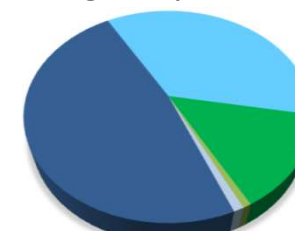
Community Development
Building Construction Services

Mission

Building Construction Services --- All newly constructed or remodeled structures are built in full compliance with the provisions of the Florida Building Code & NFPA fire codes. Unsafe structures or areas of the County are identified & appropriately handled following an emergency event to protect the life safety, health, & welfare of the citizens of Charlotte County.

Linkage to Strategic Goals

Efficient and Effective Government	Economic & Community Development

Core Functions

Compliance of Florida Building Code
Newly constructed or remodeled structures are built in compliance with the Florida Building & NFPA fire codes.

Damage Assessment
Identify unsafe structures or areas of the County following an emergency event to protect citizens of Charlotte County.

FY 26 - First Year Operating Budget

State Mandated	95%	$12,477,248
Critical	5%	$656,697
Operating Budget	**100%**	**$13,133,945**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ 120	$ -	$ -	$ -
Fees & Assessments	$ 14,734,967	$ 13,066,500	$ 10,777,030	$ 10,777,030
State & Federal Revenue	$ 76,583	$ 70,000	$ 70,000	$ 70,000
Charges for Services	$ 87,962	$ 118,580	$ 39,924	$ 39,924
Misc	$ 1,212,061	$ 2,000	$ 502,000	$ 502,000
Transfers	$ 457,799	$ -	$ -	$ -
Beginning Balances	$ -	$ 21,325,195	$ 22,330,552	$ 19,679,281
Total	**$ 16,569,492**	**$ 34,582,275**	**$ 33,719,506**	**$ 31,068,235**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 8,432,900	$ 8,979,772	$ 9,479,038	$ 10,601,648
Services & Charges	$ 3,825,821	$ 5,572,521	$ 3,394,481	$ 3,431,989
Operating Expenses	$ 271,218	$ 239,947	$ 260,426	$ 246,356
Capital	$ 90,866	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 185,858	$ -	$ -	$ -
Transfers	$ 186,830	$ 169,712	$ 336,832	$ 285,208
Reserves	$ -	$ 19,620,323	$ 20,248,729	$ 16,503,034
Total	**$ 12,993,493**	**$ 34,582,275**	**$ 33,719,506**	**$ 31,068,235**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	90	90	90	90
Part Time	0	0	0	0
Total	**90**	**90**	**90**	**90**
Proposed New Positions	0	0	0	0

Notes

Salaries and Benefits increased due to pay for performance increases. Services & Charges decreased due to reduced need for contractual services because of reduced permit activity.

FY 26 Budgeted Revenue

- Fees & Assessments 31%
- State & Federal Revenue 1%
- Fees/Charges for Services 1%
- Miscellaneous 2%
- Beginning Balances 65%

FY 26 Budgeted Expenditures

- Salaries & Benefits 28%
- Services & Charges 10%
- Operating Expenses 1%
- Transfers 1%
- Reserves 60%
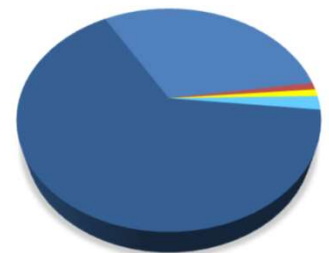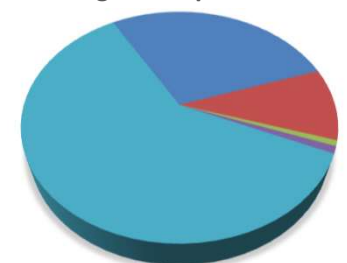
Community Development
Growth Management

Mission

Advance the County's mission by anticipating challenges and forging solutions associated with community growth and infrastructure while protecting the life safety, health and welfare of the citizens and promoting the long term livability of the community.

Linkage to Strategic Goals

Efficient and Effective Government   Economic & Community Development

Core Functions | FY 26 - First Year Operating Budget

Planning and Zoning
Long Range Planning (Comprehensive Plan); Review & interpret the Zoning Code while meeting local regulations;

State Mandated 50% $4,254,863

Land Information Services
Maintain the core address data; Internal and Interdepartmental maps, analysis, presentation materials and reports; External maps, analysis, presentation materials and reports; Create and maintain web maps and applications

State Mandated 11% $953,089

Enforcement of local zoning and licensing codes
Zoning Regulations; Building Abatement; Local & State Contractor Licensing Requirements

Locally Mandated 39% $3,301,773

Operating Budget	**100%**	**$8,509,725**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 4,036,592	$ 6,220,228	$ 6,729,589	$ 7,074,745
Taxes	$ 38,506	$ 150,000	$ 33,026	$ 33,026
Fees & Assessments	$ 4,839	$ 23,500	$ 4,394	$ 4,394
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 2,217,307	$ 1,120,200	$ 1,381,167	$ 1,381,167
Misc	$ 614,082	$ 453,000	$ 437,389	$ 437,389
Transfers	$ 19,813	$ 19,800	$ 19,800	$ 19,800
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 6,931,139**	**$ 7,986,728**	**$ 8,605,365**	**$ 8,950,521**

Expenses by Category
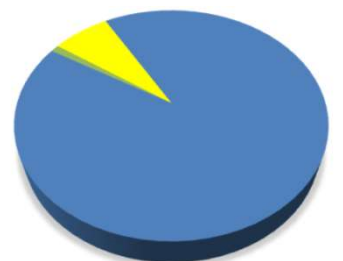
Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 4,769,453	$ 5,967,902	$ 5,817,603	$ 5,993,000
Services & Charges	$ 2,011,046	$ 1,880,490	$ 2,612,125	$ 2,714,884
Operating Expenses	$ 84,169	$ 66,440	$ 79,997	$ 79,997
Capital	$ 19,813	$ 18,000	$ 18,000	$ 85,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 46,658	$ 53,896	$ 77,640	$ 77,640
Reserves	$ -	$ -	$ -	$ -
Total	**$ 6,931,139**	**$ 7,986,728**	**$ 8,605,365**	**$ 8,950,521**
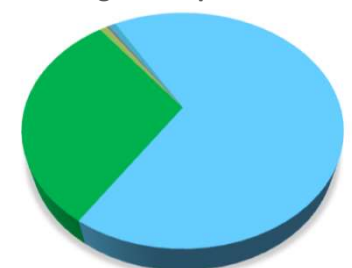
Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	63	63	63	63
Part Time	0	0	0	0
Total	**63**	**63**	**63**	**63**
Proposed New Positions	0	0	0	0

Notes

Salaries and Benefits decreased due to attrition. Services & Charges increased due to cost allocation increases and unsafe abatement increases.

FY 26 Budgeted Revenue

- BCC General Revenues 76%
- Taxes 1%
- Fees & Assessments 1%
- Fees/Charges for Services 16%
- Miscellaneous 5%
- Transfers 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 67%
- Services & Charges 30%
- Operating Expenses 1%
- Capital 1%
- Transfers 1%

40

CD - BUILDING CONSTRUCTION SERVICES

Levels of Service – 6 Year Metrics

Building Code

Who is your primary Customer?	Contractors and homeowners
What is the primary service they receive from you?	Permitting, plan review and inspections
What is the main aspect of the service they care about?	Accuracy of plan review, timely inspections, consistency

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy & Consistency	Number of inquiries from customers	Reported via Public Service and OneView	127	135	165	134	50	18**
	Quality Checks — Number of refunds issued		82	149	191	180	210	122
	Quality Checks — Over/Short log - Over		15	21	36	51	24	22
	Quality Checks — Over/Short log - Short		11	28	20	37	20	8
Timeliness	Number of plans reviewed	Accela	17,260	17,793	24,747	32,869	70,322*	59,091
	% of customers seen within 30 minutes at the front counter	Q Flow (2018-2022) / Q Less (since 2022)	88%	91%	92%	100%	76%*	99%
	Average holding time of customer calls (minutes)	Cisco Agent	5	3	1	2	16*	8
	% of inspections completed within 3 business days	Daily inspection reports (Accela)	96%	96%	98%	96%	95%	99%
	% of building plan reviews completed within 10 business days	Accela	68%	83%	98%	72%	64%*	99%
	% of damage assessment completed within 24 hours of event	Accela	85%	100%	100%	99%	88%*	99%
	% of damage assessment completed within 5 business days of event	Accela	92%	100%	100%	100%	90%*	100%

* Due to hurricane

**Changed to OneView July 2024. Data from Pubic Service is no longer accessible.

COMMUNITY DEVELOPMENT
Levels of Service – 6 Year Metrics
Planning and Zoning

Who is your primary Customer?	Contractors, design professionals and property owners							
What is the primary service they receive from you?	Plans review, permit review, inspections, rezone and plan amendments, variances, special exceptions							
What is the main aspect of the service they care about?	Accuracy, timeliness, consistency							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy	Number of Quality checks that meet standard	Rejections of reviews from Accela	2%	1%	3%	3%	2%	1%
		Number of refunds issued per refund log	45	109	60	36	61	89
		Over/Short log - Over	1	1	0	2	1	0
		Over/Short log - Short	1	0	0	0	0	0
Timeliness	% of inspections completed within 3 business days	Daily inspection reports from Accela	99%	100%	100%	99%	99%	99%
	Number of zoning plans reviewed	Accela reports to track permits per staff	2,737	3,009	3,971	4,630	6391*	7,994
Consistency	Number of inquiries from customers	Reported via Public Service and OneView	32	14	17	5	12	5**

*Due to Hurricane
**Changed to OneView July 2024. Data from Pubic Service is no longer accessible.

Land Information Services

Who is your primary Customer?	E911, sheriff's dept, EMS, tax collector, prop appraiser, GIS, utility co, school system, Google and GPS enabled services							
What is the primary service they receive from you?	Accurate address info, correct ownership info, safety and assessment and location, mapping							
What is the main aspect of the service they care about?	Quick response time in emergencies, proper notification, tax bills							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	% of Customer requests completed within standard timeframe of 5 business days	Footprints, Accela, GIS	99%	100%	100%	100%	100%	100%
Transparency / Communication	Number of hits to Footprints/Freshservice and Accela		853	545	304	310	213	176

*Due to Hurricane
**Changed to OneView July 2024. Data from Pubic Service is no longer accessible.

COMMUNITY DEVELOPMENT
Levels of Service – 6 Year Metrics
Code Compliance: Enforcement of local zoning and licensing codes

Who is your primary Customer?	Homeowners, contractors, citizens
What is the primary service they receive from you?	Regulation of the zoning code and contractor licensing
What is the main aspect of the service they care about?	Safety, timeliness, consistency, appearance of the County

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Safety	Number of code cases opened **	Accela	4585	3619	3853	3090	3,239	3,496
	Number of cases resolved (closed)		4,832	3,488	3,942	3,197	2,909	3,062
	Number of complaints (licensing)		365	495	302	128	166	161
Timeliness	% of inspections completed within 3 business days	Accela	86%	84%	78%	87%	22%*	84%
	Number of complaints addressed within 3 business days		1,227	932	1,112	600	711	N/A
	% of complaints about unsafe structures responded to within 1 working day		33%	67%	50%	74%	N/A	N/A
	Number of complaints about unlicensed activity responded to within 1 working day		167	211	197	36	40	74
Consistency	Number of code and licensing related inquiries from customers	Reported via Public Service. Changed to OneView July 2024	322	210	232	206	364*	13**
	% of Citizens approval of the County's appearance	Citizen Survey	68%	66%	N/A	N/A	N/A	N/A
Appearance of the County	% of high grass cases abated within 30 days	Accela	85%	97%	82%	83%	75%	75%

*Due to Hurricane

**Changed to OneView July 2024. Data from Pubic Service is no longer accessible.

CHARLOTTE COUNTY
FLORIDA

FY26 and FY27 GOALS:

1	Utilization of Forerunner software, which was specifically designed for floodplain management and is used to help communities and organizations plan, analyze, and manage flood risks. The software integrates data, tools, and models to facilitate floodplain mapping, mitigation planning, and regulatory compliance. This goal directly aligns with the Strategic Goal promoting Efficient & Effective Government.

2	Leverage and utililize the information from the Metro IGM study for future growth planning and strategic decision making. This initiative supports the strategic goal of Economic & Community Development by fostering a business-friendly environment that promotes a diversified and expanding economy.

FY24/25 GOALS AND PROGRESS:

1	Implementation phase to include the CRS (Community Rating System) data as well as the approved FEMA Risk maps into our community outreach efforts, permitting software, and mapping applications.

We continue to integrate the Community Rating System (CRS) data and the approved FEMA Risk maps into the community outreach efforts, permitting software, and mapping applications. This integration enables more informed decision-making, better risk communication with residents, and streamlined permitting processes, aligning with our objectives to enhance flood risk management and improve community engagement.

2	This goal is also aligned with the Strategic Plan of Effective and Effective Government. We will continue to research and develop new map applications using GIS technology to address recognized needs and fulfill requests from our citizens, business owners, and those looking to relocate to our area. Additionally, other software that has become available to create informative dashboards of reports and display of real time data will be utilized. This goal will continue to evolve as technology allows for the promotion of data transparency develops.

We successfully utilized Esri's data collection app, Surve123, allowing quick, efficient, and geospatially accurate data collection, which is critical in evaluating damage after the county was hit with two hurricanes. The data collected was used to create informative PowerBI dashboards and displayed real time data.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	We are moving into the next phase of documenting the county's participation in the National Flood Insurance Program. Specific emphasis will be placed on the current Risk MAP project being performed by FEMA. Working with the County's consultant, we will advocate for our citizens' interests and ensure the data produced by FEMA is accurate and relevant to the local area. This will be a four to five year project using recently provided information to review and evaluate the benefits for Charlotte County citizens. This goal directly supports the Strategic Plan set forth for Efficient & Effective Government.

We have completed the next phase with notifying citizens of their proposed Flood Zone based on the risk map provided by FEMA. The CRS (Credit Rating System) has been completed as of April of 2023.

2	We will continue to research and develop new map applications using GIS technology to address recognized needs and fulfill requests from our citizens, business owners, and those looking to relocate to our area. Additionally, other software that has become available to create informative dashboards of reports and display of real time data will be utilized. This goal will continue to evolve as technology allows for promotion of data transparency develops. This goal is also aligned with the Strategic Plan of Effective and Effective Government.

We continue to successfully meet the needs and requests of citizens, business owners, and potential relocators. As technology evolves, we progress in this goal annually, ensuring the ongoing improvement of services.

3	Using continual input from citizens, land developers, and business owners, we will organize our strategic look of the comprehensive plan as it relates to local regulations, ordinances. Through this process we will identify areas that need to be changed to better serve the community. This goal is directly aligned with the Strategic Plan of Economic & Community Development.

We accomplished this goal with the creation of Babcock Ranch Pattern Books. In collaboration with the Babcock Overlay Zoning District, staff enacted tailored codes and ordinances to simplify the process for new development in Babcock Ranch, providing diverse housing options and transportation solutions to cater to the multifaceted needs of our constituents. This achievement was awarded the 2024 NACo award for "Pattern Books - Babcock Ranch".

Community Services

Community Services

Mission

Delivering Exceptional Service

Division Summary	FY 26 - First Year Operating Budget	
- Parks Maintenance --- For all Parks and Ballfields: provide safety inspections, infrastructure repair and maintenance, and playable athletic fields; conduct equipment and fleet maintenance; setup and support park and facility rentals and events; schedule long-term maintenance programs; coordinate park planning with Facilities.	27%	$10,187,903
- Recreation --- Program operate Recreation Centers and Aquatic Facilities, provide summer and break camp for children, develop and implement youth and adult sport activities for active lifestyles, provide swim lessons for the public, provide special events, schedule and rent facilities for use.	32%	$12,091,460
- Cultural Resources Library & History --- Provide public access to print, audio, video and electronic materials for reference or checkout, meeting spaces for community groups and businesses, historic preservation and exhibits, programs and events to support literacy, lifelong learning and to educate the community about its history.	21%	$7,852,006
- Charlotte Sports Park --- Operate and program the Charlotte Sports Park; provide facility management, security, traffic management, paramedical, and maintenance operations during the Spring Training Season along with support for other league operations, and provide the required operations and support special events. necessary support for the other league operations, and provide the required operations and support for other special events.	8%	$3,166,792
- Natural Resources --- Maintain environmental permit compliance. Provide environmental review to include listed species, wetlands, and habitat impacts. Manage restoration and land management plans of environmentally sensitive lands. Continue the partnerships to implement the Manatee Protection Plan.	10%	$3,521,780
- Cooperative Extension --- Provides Master Gardener program, Plant Clinics, Consultations, Florida Yards and Neighborhoods Program. Develop and implement marine science program to increase sustainability of coastal resources. Offers research-based individualized training for youth. Offers adults the opportunity to develop skills.	2%	$872,467
Operating Budget	**100%**	**$37,692,408**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 22,409,657	$ 27,332,356	$ 30,691,286	$ 31,795,612
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ 8,910	$ 2,000	$ 2,000	$ 2,000
State & Federal Revenue	$ 490,824	$ 98,000	$ 98,000	$ 98,000
Charges for Services	$ 4,320,976	$ 3,928,970	$ 3,736,518	$ 3,875,068
Misc	$ 471,181	$ 128,974	$ 173,509	$ 179,594
Transfers	$ 3,707,559	$ 3,680,484	$ 4,751,369	$ 4,792,802
Beginning Balances	$ -	$ 814,515	$ 2,856,518	$ 3,156,518
Total	**$ 31,409,106**	**$ 35,985,299**	**$ 42,309,200**	**$ 43,899,594**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 12,744,769	$ 16,895,117	$ 17,307,810	$ 17,976,820
Services & Charges	$ 14,855,987	$ 14,939,011	$ 17,857,699	$ 18,755,446
Operating Expenses	$ 2,075,072	$ 1,920,619	$ 2,526,899	$ 2,583,594
Capital	$ 1,157,320	$ 1,237,166	$ 1,688,098	$ 1,457,566
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 575,959	$ 244,974	$ 384,113	$ 281,587
Reserves	$ -	$ 748,412	$ 2,544,581	$ 2,844,581
Total	**$ 31,409,106**	**$ 35,985,299**	**$ 42,309,200**	**$ 43,899,594**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	148	160	160	160
Part Time	87	90	90	90
Total	235	250	250	250
Proposed New Positions	0	0	95	19

FY 26 Budgeted Revenue

- BCC General Revenues 72%
- Fees & Assessments 1%
- State & Federal Revenue 1%
- Charges for Services 8%
- Miscellaneous 1%
- Transfers 11%
- Beginning Balances 6%

FY 26 Budgeted Expenditures

- Salaries & Benefits 40%
- Services & Charges 42%
- Operating Expenses 6%
- Capital 4%
- Transfers 1%
- Reserves 7%

Notes

The following pages provide a variance analysis for each divisiton within Community Services.
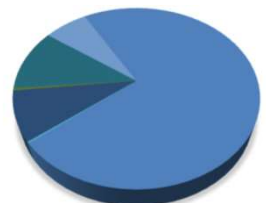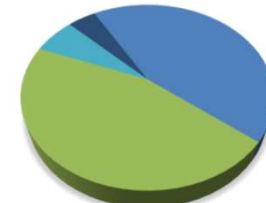
Community Services
Cooperative Extension

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Efficient and Effective Government

Public Services

Core Functions

		FY 26 - First Year Operating Budget	
Horticulture Program Development and Implementation Provides Master Gardener program, Plant Clinics, Consultations, Florida Yards and Neighborhoods Program	Locally Mandated	34%	$296,639
Sea Grant Program Develop and implement comprehensive marine science extension program to increase sustainability of coastal resources	Discretionary	33%	$287,914
4-H Youth Development Offers research-based individualized training for youth. Offers adults the opportunity to develop skills	Discretionary	33%	$287,914
	Operating Budget	**100%**	**$872,467**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 606,590	$ 626,774	$ 786,289	$ 802,604
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 8,980	$ -	$ -	$ -
Charges for Services	$ 38,427	$ 41,526	$ 42,732	$ 43,354
Misc	$ 224	$ -	$ -	$ -
Transfers	$ 32,646	$ 51,558	$ 59,948	$ 63,141
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 686,866**	**$ 719,858**	**$ 888,969**	**$ 909,099**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 20,615	$ 48,161	$ 20,690	$ 21,076
Services & Charges	$ 631,779	$ 634,966	$ 810,079	$ 845,005
Operating Expenses	$ 19,697	$ 29,228	$ 41,698	$ 35,421
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 14,775	$ 7,502	$ 16,502	$ 7,597
Reserves	$ -	$ -	$ -	$ -
Total	**$ 686,866**	**$ 719,858**	**$ 888,969**	**$ 909,099**

Positions

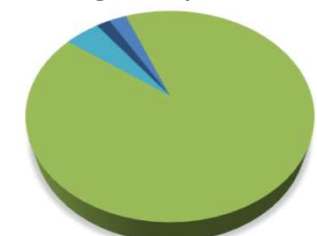| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	0	0	0	0
Part Time	0	0	0	0
Total	**0**	**0**	**0**	**0**
Proposed New Positions	0	0	0	0

Notes

Salaries decreased due to changes in Extensions cost allocation of Administration cost. Services and Charges increased due to the conversion of one part-time position to full-time, the addition of a part-time Program Assistant, and the inclusion of a compensation study as part of the UF contract. Operating Expenses rose due to the Administration's allocation of promotional activities and investments in artificial intelligence (AI).

FY 26 Budgeted Revenue

- BCC General Revenues 89%
- Charges for Services 4%
- Transfers 7%

FY 26 Budgeted Expenditures

- Salaries & Benefits 3%
- Services & Charges 91%
- Operating Expenses 4%
- Transfers 2%
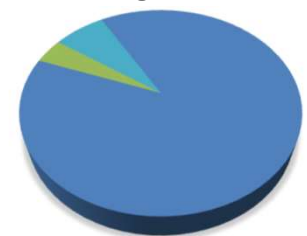
Community Services
Natural Resources Management

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Efficient and Effective Government
Economic & Community Development

Public Services

Core Functions	FY 26 - First Year Operating Budget		
Natural Resources Management Oversight of permit compliance, Habitat Conservation Plan, Gopher Tortoise Recipient Site, and Manatee Protection Plan	State Mandated	45%	$1,584,801
Environmental land management and restoration Implement approved land management plans and restoration activities on environmentally sensitive properties	State Mandated	45%	$1,584,801
Implementation of Abandon Vessel Program and Artificial Reef Program Enforcement of the ordinance to process and remove derelict vessels and implement the artificial reef program	State Mandated	10%	$352,178
	Operating Budget	**100%**	**$3,521,780**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 708,027	$ 1,754,877	$ 2,129,465	$ 2,209,590
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ 8,910	$ 2,000	$ 2,000	$ 2,000
State & Federal Revenue	$ 41,206	$ -	$ -	$ -
Charges for Services	$ 1,526,290	$ 1,065,366	$ 1,147,093	$ 1,164,753
Misc	$ 240,592	$ 111,500	$ 134,060	$ 140,145
Transfers	$ 626,938	$ 287,486	$ 351,106	$ 383,427
Beginning Balances	$ -	$ 814,515	$ 2,856,518	$ 3,156,518
Total	**$ 3,151,964**	**$ 4,035,745**	**$ 6,620,243**	**$ 7,056,433**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,020,924	$ 1,250,168	$ 1,322,198	$ 1,367,689
Services & Charges	$ 1,238,435	$ 1,528,859	$ 2,028,568	$ 2,135,808
Operating Expenses	$ 130,340	$ 150,279	$ 171,014	$ 174,951
Capital	$ 697,409	$ 326,166	$ 500,000	$ 500,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 64,857	$ 31,861	$ 53,881	$ 33,404
Reserves	$ -	$ 748,412	$ 2,544,581	$ 2,844,581
Total	**$ 3,151,964**	**$ 4,035,745**	**$ 6,620,243**	**$ 7,056,433**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	14	12	12	12
Part Time	0	0	0	0
Total	**14**	**12**	**12**	**12**
Proposed New Positions	0	0	0	2

FY 26 Budgeted Revenue

- BCC General Revenues 32%
- Fees & Assessments 1%
- Charges for Services 17%
- Miscellaneous 2%
- Transfers 5%
- Beginning Balances 43%

FY 26 Budgeted Expenditures

- Salaries & Benefits 20%
- Services & Charges 30%
- Operating Expenses 3%
- Capital 8%
- Transfers 1%
- Reserves 38%

Notes

The decrease in positions for FY25 reflects a reallocation of roles to a newly established cost center within Parks Maintenance. Two new full-time equivalent (FTE) positions are proposed for FY27 to support service delivery as outlined in the Parks Master Plan. Salaries & Benefits increased due to pay for performance increases. Services and charges increased due to increased exotic removal and inflationary increases to contracts. Capital expenditures have increased in anticipation of land acquisitions associated with the Habitat Conservation Plan.
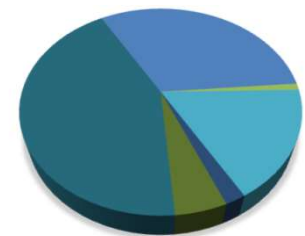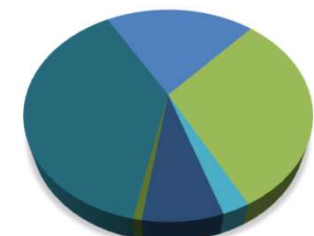
Community Services
Charlotte Sports Park

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Efficient and Effective Government

Public Services

Economic & Community Development

Core Functions

		FY 26 - First Year Operating Budget	
Management and Operation of Facility Twenty-year agreement with the Tampa Bay Rays to provide Spring Training and major league operations at the Sports Park		Locally Mandated	65%	$2,058,415
Special events, programs and activities In coordination with the availability of facilities other special events and various baseball tournaments are hosted		Discretionary	35%	$1,108,377
		Operating Budget	**100%**	**$3,166,792**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 233,442	$ 179,467	$ 283,910	$ 264,304
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 38,119	$ -	$ -	$ -
Charges for Services	$ 207,372	$ 183,160	$ 201,964	$ 183,407
Misc	$ 201,789	$ 3,046	$ 3,046	$ 3,046
Transfers	$ 2,235,119	$ 2,396,276	$ 3,144,175	$ 2,800,720
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 2,915,842**	**$ 2,761,950**	**$ 3,633,095**	**$ 3,251,477**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 814,285	$ 881,596	$ 950,207	$ 959,436
Services & Charges	$ 1,943,169	$ 1,753,366	$ 2,119,005	$ 2,150,970
Operating Expenses	$ 82,272	$ 81,898	$ 97,581	$ 91,036
Capital	$ -	$ -	$ 415,000	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 76,116	$ 45,090	$ 51,303	$ 50,034
Reserves	$ -	$ -	$ -	$ -
Total	**$ 2,915,842**	**$ 2,761,950**	**$ 3,633,095**	**$ 3,251,477**

Positions

| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	5	5	5	5
Part Time	2	2	2	2
Total	**7**	**7**	**7**	**7**
Proposed New Positions	0	0	0	0

Notes

Salaries & Benefits increased due to pay for performance increases. Services and Charges increased due to Equipment Lease Agreement anticipated with the Rays, and inflationary increases in Economic Impact Study and Security. Operating expenses increased due to increased repairs and maintenance moved to operating fund from shared capital fund. Capital increased due to replacement of washers and dryers, aquatherapy pool liner and Golf Cart.

FY 26 Budgeted Revenue

- BCC General Revenues 8%
- Charges for Services 5%
- Miscellaneous 1%
- Transfers 86%

FY 26 Budgeted Expenditures
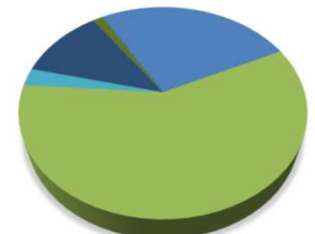
- Salaries & Benefits 26%
- Services & Charges 58%
- Operating Expenses 3%
- Capital 11%
- Transfers 2%

Community Services
Cultural Resources Library & History

Charlotte County FLORIDA

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Public Services

Core Functions	FY 26 - First Year Operating Budget		
Library Facilities Provide lending materials, general and history reference service, access to computers, wifi, technology and meeting space	Discretionary	32%	$2,512,642
Community Programming Provide lifelong learning through programming, services, and exhibits with a focus on literacy and local history	Discretionary	30%	$2,355,602
Charlotte County Heritage Preserve and promote the historical resources and heritage of Charlotte County	Discretionary	6%	$471,120
Digital Access Provide the community access to online materials and resources, programming, and learning opportunities	Discretionary	32%	$2,512,642
	Operating Budget	**100%**	**$7,852,006**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 6,147,151	$ 6,785,669	$ 7,462,006	$ 7,747,115
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 171,479	$ 98,000	$ 98,000	$ 98,000
Charges for Services	$ 421,847	$ 421,275	$ 435,805	$ 448,162
Misc	$ 11,102	$ 5,725	$ 27,700	$ 27,700
Transfers	$ 230,188	$ 161,467	$ 222,112	$ 256,043
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 6,981,767**	**$ 7,472,135**	**$ 8,245,624**	**$ 8,577,021**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 3,191,006	$ 4,013,999	$ 3,940,924	$ 4,070,698
Services & Charges	$ 2,933,452	$ 2,657,429	$ 3,270,095	$ 3,518,311
Operating Expenses	$ 449,494	$ 167,880	$ 640,987	$ 596,659
Capital	$ 312,144	$ 611,000	$ 365,000	$ 365,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 95,672	$ 21,827	$ 28,618	$ 26,353
Reserves	$ -	$ -	$ -	$ -
Total	**$ 6,981,767**	**$ 7,472,135**	**$ 8,245,624**	**$ 8,577,021**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	44	45	45	45
Part Time	22	22	22	22
Total	**66**	**67**	**67**	**67**
Proposed New Positions	0	0	6	12.75

FY 26 Budgeted Revenue

- BCC General Revenues 90%
- State & Federal Revenue 1%
- Charges for Services 5%
- Miscellaneous 1%
- Transfers 3%

FY 26 Budgeted Expenditures

- Salaries & Benefits 48%
- Services & Charges 40%
- Operating Expenses 7%
- Capital 4%
- Transfers 1%

Notes

Proposed positions for FY26 includes 6 FTEs tied to Service Delivery. Proposed FY27 positions includes 12.75 positions for the Library at Babcock Ranch. Increased Central and Indirect charges as well as self insurance are driving the variance in Services and Charges. Operating Expenses increased due to the reopening of Mid County Library, the reclassification of electronic subscription services, and various furniture and fixture additions and replacements. Capital decreases are attributable to the reclassification of electronic subscription services.
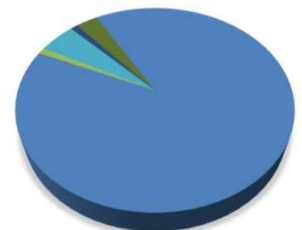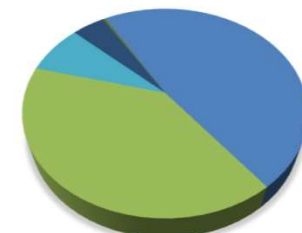
Community Services
Recreation

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Efficient and Effective Government	Public Services

Core Functions	FY 26 - First Year Operating Budget		
Recreation Centers	Discretionary	60%	$7,254,876
Provide programming to include youth camps, drop-in sports, sports leagues, facility rentals, and special events			
Aquatic Facilities	Discretionary	40%	$4,836,584
Provide aquatic programs and special events inclusive of swim lessons and in addition to hosting local swim teams			
	Operating Budget	**100%**	**$12,091,460**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 7,003,569	$ 9,268,190	$ 10,415,894	$ 10,904,130
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 118,735	$ -	$ -	$ -
Charges for Services	$ 1,649,455	$ 1,679,680	$ 1,416,250	$ 1,521,899
Misc	$ 11,062	$ 8,703	$ 8,703	$ 8,703
Transfers	$ 299,442	$ 241,992	$ 327,786	$ 382,627
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 9,082,262**	**$ 11,198,565**	**$ 12,168,633**	**$ 12,817,358**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 4,823,032	$ 6,986,276	$ 6,979,265	$ 7,339,774
Services & Charges	$ 3,326,053	$ 3,455,787	$ 4,310,679	$ 4,530,873
Operating Expenses	$ 793,433	$ 734,893	$ 801,516	$ 901,598
Capital	$ 22,836	$ -	$ 51,500	$ 22,700
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 116,907	$ 21,609	$ 25,674	$ 22,413
Reserves	$ -	$ -	$ -	$ -
Total	**$ 9,082,262**	**$ 11,198,565**	**$ 12,168,633**	**$ 12,817,358**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	52	53	53	53
Part Time	58	61	61	61
Total	**110**	**114**	**114**	**114**
Proposed New Positions	0	0	35.125	1.625

FY 26 Budgeted Revenue

- BCC General Revenues 85%
- Charges for Services 12%
- Miscellaneous 1%
- Transfers 2%

FY 26 Budgeted Expenditures

- Salaries & Benefits 57%
- Services & Charges 35%
- Operating Expenses 6%
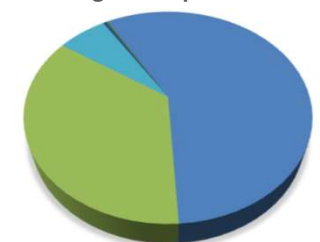- Capital 1%
- Transfers 1%

Notes

Positions added in FY25 for the Port Charlotte Beach expanded facility. 35.125 positions are proposed in FY26 to support service delivery as outlined in the Parks Master Plan. An additional 1.625 positions are proposed in FY27 to support the South County Recreation Center Renovation. Increased Central and Indirect charges as well as self insurance are driving the variance in Services and Charges. This account also includes increased maintenance costs for Recreation Centers and Swimming Pools. Operating Expenses include inflationary changes to Chemicals and program expenses. Increased Capital Expenses include fixture replacements according to the Division's Equipment Replacement Plan.

Community Services
Parks Maintenance

CHARLOTTE COUNTY FLORIDA

Mission

Delivering Exceptional Service

Linkage to Strategic Goals

Public Services	Economic & Community Development

Core Functions | FY 26 - First Year Operating Budget

Parks Maintenance
Daily maintenance as identified level of service, repairs, inspections, special event support and responses to concerns

State Mandated	40%	$4,075,161

Athletic Park Maintenance
Comprised of park maintenance, turf and irrigation management, field lining, striping, amenities, and tournament support

State Mandated	40%	$4,075,161

Park Planning, Design, Public Input, Construction and Administration
Master planning and outreach, evaluation of parks, park improvements, oversight and implementation of maintenance plan 20%

Locally Mandated	20%	$2,037,581

Operating Budget	100%	$10,187,903

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 7,710,879	$ 8,717,379	$ 9,613,721	$ 9,867,870
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 112,304	$ -	$ -	$ -
Charges for Services	$ 477,586	$ 537,962	$ 492,674	$ 513,492
Misc	$ 6,412	$ -	$ -	$ -
Transfers	$ 283,225	$ 541,706	$ 646,242	$ 906,844
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 8,590,405**	**$ 9,797,047**	**$ 10,752,637**	**$ 11,288,206**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 2,874,907	$ 3,714,917	$ 4,094,527	$ 4,218,147
Services & Charges	$ 4,783,099	$ 4,908,605	$ 5,319,273	$ 5,574,479
Operating Expenses	$ 599,835	$ 756,440	$ 774,103	$ 783,928
Capital	$ 124,931	$ 300,000	$ 356,598	$ 569,866
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 207,633	$ 117,085	$ 208,135	$ 141,787
Reserves	$ -	$ -	$ -	$ -
Total	**$ 8,590,405**	**$ 9,797,047**	**$ 10,752,637**	**$ 11,288,206**

Positions

| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	33	45	45	45
Part Time	5	5	5	5
Total	**38**	**50**	**50**	**50**
Proposed New Positions	0	0	54.25	2.875

Notes

Positions increased in FY25 due to the addition of multiple projects tied to the Parks Master Plan as well as reorganized staff to support the division in a new cost center tied to Parks Maintenance. Salaries and Benefits increased due to pay for performance. Services and Charges variance includes an increased allocation of Central and Indirect as well as self insurance charges. This line also includes increased playground maintenance, mulching and portable sanitary stations. Operating Expenses variances include additional equipment rentals. Capital increased due to inclusion of Heavy Equipment Plan replacement.

FY 26 Budgeted Revenue
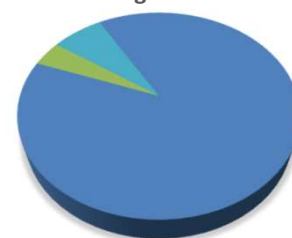
- BCC General Revenues 89%
- Charges for Services 4%
- Transfers 7%

FY 26 Budgeted Expenditures
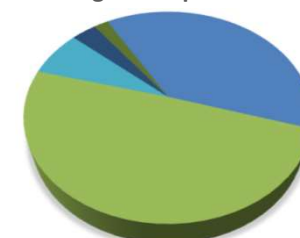
- Salaries & Benefits 38%
- Services & Charges 49%
- Operating Expenses 7%
- Capital 4%
- Transfers 2%

COMMUNITY SERVICES
Levels of Service – 6 Year Metrics

Parks Maintenance

Who is your primary Customer?	General Public who use parks							
What is the primary service they receive from you?	Clean and safe park facilities and amenities							
What is the main aspect of the service they care about?	Having those facilities open and available when they want to use them							
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Availability	% of adhearance to maintenance levels	Manhour reports-Currently two times a year for month at a time	N/A	N/A	N/A	N/A	N/A	N/A
Adaquecy	Adherance to Master Plan	Points per Park- In development	N/A	N/A	N/A	N/A	N/A	N/A

Recreation

Who is your primary Customer?	Charlotte County residents and visitors (youth and adults).							
What is the primary service they receive from you?	Quality of life improvements through programs, events and services.							
What is the main aspect of the service they care about?	Safe and clean facilities with a variety of programs, events and services.							
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Safety	Number of Safety related accidents, concerns and reports (Patrons)	iAuditor (online checklists - daily, weekly, monthly), incident and accident reports, comment cards, and surveys	42	14	40	16	1	20
Cleanliness	Number of Cleanliness related incidents, concerns and reports (Patrons)	iAuditor (online checklists - daily, weekly, monthly), incident and accident reports, comment cards, and surveys	80	37	19	14	1	3
Maintenance	% of adhearance to expected maintenance standards	Comment cards, quarterly inspections, surveys, iAuditor (online checklists - daily, weekly, monthly), and citizen concerns	99%	99%	99%	99%	99%	99%
Program Variety and Availability	Number of leisure program areas per accreditation	Program Inventories (annual)	91	87	84	90	189	191
Usage	Participation	Facilites Annual Report/ Active	348,072	211,280	260,228	263,935	295,419	238,820

Cultural Resources (Library and History)

Who is your primary Customer?	All Charlotte County residents and visitors							
What is the primary service they receive from you?	Provision of information entertainment and technology resources. Life long learning. Preservation of and access to charlotte county historical resources. Community meeting space.							
What is the main aspect of the service they care about?	Timely access to a diverse range of physical and virtual resources. Programming quality and relevance to Community. Clean welcoming environment with a variety of spaces for socialization and meetings. Access to fast Wifi and up to date technology hardware/software.							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of days request turnover time from order	Staff Monthly Report	N/A	N/A	N/A	N/A	N/A	N/A
Resource Availability	Number of programs provided in house and through outreach per year	Staff Monthly Report	2,107	1,082	928	1,944	1,636	2,096
Quality and Relevance	Collection turnover ratio	Intergrated Library System Analysis Customer satifaction serveys administered after program	N/A	N/A	2.95	3.1	3.3	3.6
	Collection age analysis ratio		N/A	N/A	2012	2012	2013	2014
	Number of items circulated		1,006,954	950,078	910,302	1,027,044	928,786	979,501
	Scores received pertaining to customer satisfaction per program		N/A	N/A	N/A	N/A	N/A	N/A
	Number of program attendees		43,165	58,897	41,155	57,593	38,613	42,425
Welcoming Environment	Square footage space per capita per set standard	BEBR	0.53	0.53	0.46	0.46	0.43	0.41
	Visits per capita	Foot traffic counters	4	1.5	1.2	1.6	1.36	1.4
	Number of customers	Foot traffic counters	667,172	284,177	223,586	296,823	272,050	298,663
Access to WiFi and other Technology resources		Edge	N/A	N/A	N/A	N/A	N/A	N/A

Charlotte Sports Park

Who is your primary Customer?	Charlotte County residents and visitors (youth and adults)							
What is the primary service they receive from you?	Provision of major and minor legue baseball games along with various programs events and activities							
What is the main aspect of the service they care about?	Safe and clean facilities in a fan friendly environment							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Safety	Number of Safety related accidents, concerns and reports	iAuditor (online checklists - daily, weekly, monthly), incident and accident reports, comment cards, and surveys	28	10	8	9	NA	10
Cleanliness	Number of Cleanliness related incidents, concerns and reports	iAuditor (online checklists - daily, weekly, monthly), incident and accident reports, comment cards, and surveys	32	14	0	3	NA	1
Maintenance	% of adhearance to expected maintenance standards	Comment cards, quarterly inspections, surveys, iAuditor (online checklists - daily, weekly, monthly), and citizen concerns	99%	100%	100%	100%	NA	100%
Friendly Environment	Quantity of events, returning rental customers, and partnership feedback	Comment cards, Economic Impact Study, surveys, Mystery Shopper Program, and citizen concerns	183	237	127	11	NA	15
Usage	Participants	Game attendance/major and minor league baseball	133,951	74,778	63,293	39,689	NA	46,340

Natural Resources Management

Who is your primary Customer?	Residents visitors and County Operations							
What is the primary service they receive from you?	Ecotourism recreation opportunities, regulatory compliance and ecosystem services							
What is the main aspect of the service they care about?	Availabilty of the lands for recreation and impact of regulations and ecosystem service benefits							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Availability of Land for Recreation	% of trail types maintained (primary, secondary and tertiary)	Land management Level of Service Document	N/A	N/A	N/A	N/A	N/A	N/A
Regulations	% of Permit and Program Compliance	Permit reports for: Stump Pass (sea turtle ordinance), HCP, MPP, Artifical Reef permits (multiple), AV/DV process compliance	100%	100%	100%	100%	100%	100%
Ecosystem Service	% of adherence to land management levels	Manhour/project reports and contract management	N/A	N/A	N/A	N/A	N/A	N/A

Extension Services - Horticulture Prog. Dev. and Implementation - Green Industries - Best Management Practices Training								
Who is your primary Customer?	Adult Audiences - Residential and Commercial							
What is the primary service they receive from you?	Research-based, Unbiased Information, Education, Commercial CEU's/Certiifcations							
What is the main aspect of the service they care about?	Research-based and Unbiased Solutions - Trustworthy and Applicable Content Which Can be Used Right Away							
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Trustworthy & Timely	% of post test results	Post program test - Best Management Practices Training	90%	94%	89%	95%	94%	91%
	% increase of post test compared to pre test of program	Post program test -Master Gardener Volunteer Program	86%	N/A	91%	91%	92%	90%
	% increase of post test compared to pre test of program	Post program test -Florida-Friendly Landscaping™	90%	100%	100%	96%	98%	95%
	% of Customer Satisfaction	UF/IFAS County Customer Survey - Best Management Practices Training	98%	100%	93%	93%	100%	96%
	% of Customer Satisfaction	UF/IFAS County Customer Survey - Master Gardener Volunteer Program	98%	83%	93%	93%	100%	100%
	% of Customer Satisfaction	UF/IFAS County Customer Survey -Florida-Friendly Landscaping™	98%	100%	93%	100%	100%	95%
Participation	Participation	Customer Contacts- Best Management Practices Training	64	8	48	58	52	59
	Participation	Customer Contacts - Master Gardener Volunteer Program	5862	1514	3741	3,019	2167	7890
	Participation	Customer Contacts-Florida-Friendly Landscaping™	1044	414	863	1,318	1254	595

Extension Services - Sea Grant Program - Florida Master Naturalist Program								
Who is your primary Customer?	Adult Audience - Residential, Commercial and Research Audiences - Decision-Makers							
What is the primary service they receive from you?	Research-Based, Unbiased Information, Some Commercial CEU's/Certifications							
What is the main aspect of the service they care about?	Research-based and Unbiased Solutions - Trustworthy and Applicable Content Which Can be Used Right Away							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Research-based and Unbiased Solutions	Mean of average knowledge gain	Pre/post program test	100%	100%	N/A	100%	N/A	91%
Trustworthy & Timely	% of Customer Satisfaction	UF/IFAS County Customer Survey	95%	97%	N/A	93%	95%	N/A
Participation	Participation	Customer Contacts	149	305	N/A	526	457	2833

Extension Services - 4-H Youth Development								
Who is your primary Customer?	Youth and Adult Volunteers							
What is the primary service they receive from you?	Research-based, Unbiased Information and Life Skills							
What is the main aspect of the service they care about?	Research-based and Unbiased Solutions - Trustworthy and Applicable Content Which Can be Used Right Away							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Research-based and Unbiased Solutions	% increase of post test compared to pre test of program	Pre/post program test	N/A	76%	100%	97%	92%	91%
Trustworthy & Timely	% of Customer Satisfaction	UF/IFAS County Customer Survey	98%	89%	93%	93%	100%	N/A
Participation	Participation	Customer Contacts	4581	4478	2848	1,261	1946	2076

Libraries Division
Goals FY26 and FY27

<table>
<tr><td colspan="2">FY26 and FY27 GOALS:</td></tr>
<tr><td>1</td><td>Programming: Focus on building literacy programming. Increase technology training for the public on both devices and makerspace equipment. Continue to build new programming that aids in community resilence and sustainability. Institute new Master Plan.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>2</td><td>Built Environment: Reconfigure indoor spaces to provide a healthier / safer environment for the public. Enhance our facilities outdoor spaces to allow for outdoor programming and activities.Continue design process for Babcock Ranch and the Cultural Center. Increase private work/study spaces in library branches. Complete historical trail signage.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>3</td><td>Access: Continue to expand Mobile service. Begin installation of holds lockers. Begin digitization of historical news archive. Increase range of non-book materials such as hotspots and other devices for public circulation.</td></tr>
<tr><td></td><td></td></tr>
</table>

<table>
<tr><td colspan="2">FY24/25 Goals and Progress</td></tr>
<tr><td>1</td><td>Programming: Develop strategic focus programming efforts with an emphasis on community involvement and sponsorship. Look for novel ways to bring both library and historical programming to the community.</td></tr>
<tr><td colspan="2">Literacy programming with community partners in development. Increased local sponsership of Division initiatives. Hosted Florida Historical Conference.</td></tr>
<tr><td>2</td><td>Built Environment: Reconfigure indoor spaces to provide a healthier / safer environment for the public. Enhance our facilities outdoor spaces to allow for outdoor programming and activities. Begin design process for Babcock Ranch. Continue to enhance and expand facilities technology. Continuation and expansion of curbside service and new 24/7 initiatives such as holds lockers. Plan new historical interpretive "trails" with signage.</td></tr>
<tr><td colspan="2">Hydroponics gardens begun at Port Charlotte. Seed libraries successfully started at all libraries. Work continues on Punta Gorda gardens with a new pathways and the completion of the reading / butterfly garden.Design process begun for Babcock Ranch and the Cultural Center. Design and renovation of Mid-County begun. New printer/scanning system installed for public.PC management system installed. Historical signage design begun with first trail sign anticipated to be completed in 2025.</td></tr>
<tr><td>3</td><td>Access: Further expand services out into the community. Enhance communications with the public. Investigate and explore other initiatives to enhance internet connectivity to reduce digital divide in our community. Enhance access to historic resources.</td></tr>
<tr><td colspan="2">Continued to refine and expand mobile service. Housebound service growing. History services have enhanced and updated Florida collections.</td></tr>
</table>

FY22/23 Goals and Accomplishments

1	Programming: develop strategic focus programming efforts with an emphasis on community involvement.

Focus on outreach and literacy initiated. Somewhat delayed due to Hurricane Ian. Expanded community led programming.

2	Built Environment; Reconfigure indoor spaces to provide a healthier / safer environment for the public. Enhance our facilities outdoor spaces to allow for outdoor programming and activities. Continue to enhance and expand facilities technology. Continuation and expansion of curbside service and new 24/7 initiatives such as holds lockers. Enhance access to historic properties. Plan new historical interpretive "trails" with signage.

Work begun on Punta Gorda and Englewood gardens and outdoor recreational facilities. Makerspace equipment expanded. Increased workshops and 1X1 training to the public on technology and equipment. Holds lockers "on hold" due to closure of Mid-County Regional. ADA sidewalk installed at the Cookie House. Interpretive trails signage on hold due to storms.

3	Access: Move services out into the community neighborhoods. Enhance communications with the public. Explore initiatives to enhance internet connectivity to reduce digital divide in our community. Enhance access to historic resources.

Regular mobile service to underserved neighborhoods started. Hotspot program expanded and successful. Oral histories and additional archival records digitized and available online.

	Recreation Division Goals FY26 and FY27
CHARLOTTE COUNTY FLORIDA	

1	Create a minimum of 12 internally facilitated training sessions that will be made available to all staff members within the Community Services Department.
2	Submit a minimum of three (3) proposals for speaking engagements at the Florida Recreation and Park Association (FRPA) Annual Conference.
3	Create a Camp Accreditation Committee to provide a proposal on what will be required for us to achieve accredition through the Amercian Camp Association (ACA). Specifics include costs, benefits, required modifications, capacities, staff ratios, community impacts, and submittal timeframe.
4	Create a Pump Room Operating Manual specific to each aquatic facility with a standardized Table of Contents which outlines how each piece of equipment functions along with information on vendors, purchasing, required signage, warranties, contracts, safety requirements, etc.
5	Submit a total of 25 award proposals to various local, state and/or national organizations.

FY24/25 Goals and Progress

1	Create a minimum of 10 internally facilitated training sessions that will be made available to all staff members within the Community Services Department.
There were a total of 13 internally facilitated trainings made available to the Rec Division staff members in FY 24/25.	
2	Submit a minimum of three (3) proposals for speaking engagements at the Florida Recreation and Park Association (FRPA) Annual Conference.
There were a total of three (3) presentations at the FRPA Annual Conference from the Rec Division ("Aquatics, To the Rescue", "Annual Training Program for Recreation", and "One Size Does Not Fit All").	
3	Create a Special Event Committee to achieve a minimum of five (5) initiatives in an effort to ensure consistency and operational standards at our recreation facilities.
A Special Event Committee was created with five (5) initiatives to ensure consistency and operational standards (QR codes for flyers, Parks and Rec Month, Revamp REC2U, Division newsletter, resource list of vendors).	
4	Offer an annual Mentorship Program within the Recreation Division to provide coaching, development, and insight to a staff member seeking continued and future growth in their profession.
This program occurred from June through November for a FT staff member with opportunities to meet monthly with their mentor (a Rec Superintendent), to attend all monthly supervisory meetings, to attend a Department Manager Meeting along with a Parks and Recreation Advisory Board Meeting, and to create a project/program that would benefit the Rec Division.	
5	Deliver a minimum of eight (8) programs utilizing social media platforms (ex. YouTube, podcasts, etc.) to better reach the Charlotte County community with our offered activities, events, and services.
The following platforms were used to better advertise our offered programs and activities: Facebook, YouTube, podcasts, Tik Tok, Instragram, Next Door app, Peachjar, Rec Waves.	

FY22/23 Goals and Accomplishments

1	Create a minimum of eight (8) internally facilitated trainings each year that will be made available to the staff members in the Recreation Division.

There were a total of 16 internally faciliated trainings made available to the Rec Division staff members in FY 23.

2	Create a virtual library of all internally facilitated staff training opportunities and provide this as a resource to confirm/document completion of trainings that can be accessed and utilized by staff members at any time.

There were a total of 18 internally faciliated training sessions included as part of the virtual library and available as a resource on the O Drive for all members.

3	Create a Summer Camp Committee that will streamline and standardize registration procedures and documents, staff trainings (inclusive of manuals), programmatic opportunities, field trips, etc. across all Community Services summer camp host facilities.

A Summer Camp Committee was created and chaired by the Rec Superintendent. They met regularly and have implemented several new procedures and processes with regards to registration, programmatic opportunities, and discipline measures in an effort to provide consistency in all camp locations.

4	Create a minimum of three (3) virtual program opportunities within our community.

There were several virtual program opportunities created for our community (ex. basketball skills and drills, spooky Halloween, dinner ideas for the holiday rush, etc.).

5	Focus on reaching underserved populations in Charlotte County by creating and implementing at least one (1) new recreational program opportunity for the following segments of our community at each recreation center: persons with diisabilities, senior citizens and teens.

This programming initiative was accomplished at many of our opened facilities. Unfortunately, we were not able to accomplish this goal at the Rec Centers that have been closed due to Hurricane Ian (ex. ACDRP, PCB, and TP).

FY26 and FY27 GOALS:	
1	Manage the operations of the Charlotte Sports Park for Spring Training per the contractual agreement with the Tampa Bay Rays for event security, traffic management (CCSO), Public Safety, Fan Host and Parking Attendant oversight, maintenance preparations, and staff training.
2	Support and maintain the minor league facility operations for the Tampa Bay Rays per the contractual agreement with the necessary requirements for security operations, event management and facility oversight.
3	Supervise all facility maintenance projects to include work orders, warranty repairs/replacements and approved capital improvement projects.
4	Update the Facility Inventory Project (FIP) and Equipment Inventory Project (EIP) on an annual basis for all areas of the Charlotte Sports Park inclusive of useful life (UL), remaining useful life (RUL), estimated costs and item description.
5	Provide an annual update for all equipment as part of the Food Service Concessions in the stadium.

FY24/25 Goals and Progress	
1	Manage the operations of the Charlotte Sports Park for Spring Training per the contractual agreement with the Tampa Bay Rays for event security, traffic management (CCSO), Public Safety, Fan Host and Parking Attendant oversight, maintenance preparations, and staff training.
Spring Training occurred at the Charlotte Sports Park in FY 24 with official attendance of 46,340. The official numbers for the 2025 Spring Training Season have not yet been announced by the Rays.	
2	Support and maintain the minor league facility operations for the Tampa Bay Rays per the contractual agreement with the necessary requirements for security operations, event management and facility oversight.
This occurred from April through mid-November in FY 24 with the minor league operations being scheduled for the same timeframe in FY 25.	
3	Supervise all facility maintenance projects to include work orders, warranty repairs/replacements and approved capital improvement projects.
This is continual and occurs on a daily basis. There was no Amendment with the Tampa Bay Rays for a Stadium CIP in FY 24/25.	
4	Update the Facility Inventory Project (FIP) and Equipment Inventory Project (EIP) on an annual basis for all areas of the Charlotte Sports Park inclusive of useful life (UL), remaining useful life (RUL), estimated costs and item description.
This was completed in October 2023 and October 2024.	
5	Provide an annual update for all equipment as part of the Food Service Concessions in the stadium.
This was completed in November 2023 and November 2024.	

FY22/23 Goals and Accomplishments	
1	Manage the operations of the Charlotte Sports Park for Spring Training per the contractual agreement with the Tampa Bay Rays for event security, traffic management (CCSO), Public Safety, Fan Host and Parking Attendant oversight, maintenance preparations, and staff training.
Spring Training occurred at the Charlotte Sports Park in FY 22 with official attendance of 24,150. In addition, the estimated total attendance at all combined minor league season games for Extended Spring Training, Florida Complex League (formerly Gulf Coast League), and Instructional League was 10,000. Spring Training in FY 23 did not occur due to the damages incurred from Hurricane Ian in September 2022.	
2	Support and maintain the minor league facility operations for the Tampa Bay Rays per the contractual agreement with the necessary requirements for security operations, event management and facility oversight.
This occurred from April through September in FY 22.	
3	Supervise all facility maintenance projects to include work orders, warranty repairs/replacements and approved capital improvement projects.
This is continual and occurs on a daily basis. There were a total of $108,200 approved by the BCC for Stadium CIP items in FY 22. There were no Stadium CIP items approved in FY 23 due to Hurricane Ian.	
4	Update the Facility Inventory Project (FIP) and Equipment Inventory Project (EIP) on an annual basis for all areas of the Charlotte Sports Park inclusive of useful life (UL), remaining useful life (RUL), estimated costs and item description.
This was completed in October 2021 and October 2022.	
5	Provide an annual update for all equipment as part of the Food Service Concessions in the stadium.
This was completed in November 2021 and November 2022.	

Parks and Natural Resources Division
Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Continue implementation of the Scrub-jay Habitat Conservation Plan.
2	Manage Tippecanoe Environmental Park in accordance with the FWC Gopher Tortoise Recipient Site Permit.
3	Continue implementation of the Parks and Recreation Master Plan.
4	Continue ongoing recovery efforts for storm damages in Parks.
5	Create a virtual outreach program for Coastal programs.

FY24/25 Goals and Progress

1	Continue implementation of the Scrub-jay Habitat Conservation Plan:
	Permit is in compliant and implementation is on going.
2	Manage Tippecanoe Environmental Park in accordance with the FWC Tortoise Recipient Site Permit:
	Managmement is on going.
3	Parks and Recreation Master Plan update
	Completed and was approved by BCC.
4	Continue implementation of the Manatee Protection Plan and QA/QC slip data
	Implementation is ongoing; data QA/QC is complete.
5	Create a Community Services interactive GIS map, along with virtual nature walks on County parklands
	Complete

FY22/23 Goals and Accomplishments

1	Continue implementation of the Scrub-jay Habitat Conservation Plan
	Permit is compliant and implementation is on going.
2	Manage Tippecanoe Environmental Park in accordance with the FWC Tortoise Recipient Site Permit
	Managmement is on going.
3	Create a trail map brochure for all county conservation lands and update the Blueways brochure to enhance outreach
	Completed
4	Continue implementation of the Manatee Protection Plan and initiate the plan review/update with regulatory agencies
	Completed
5	Inventory, assess, design and implement a wayfinding signage program through out the park system to provide clear and consistent information
	Design is completed; implementation is ongoing

FY26 and FY27 GOALS:

4-H	Strengthen Evaluation and Measuring Behavior Change in Youth Development programs (both in school and clubs). Create and implement evaluation methods (e.g., student self-assessments, teacher observations, and pre/post surveys) to assess both knowledge gain and behavior change within programs. Use the data collected to adjust program delivery and enhance the long-term impact of the programs.
4-H	Enhancing Volunteer Engagement and Positive Youth Development Practices. Increase the number of active 4-H volunteers by 10-15% over the next two years through targeted recruitment and engagement efforts. Increase the reach of volunteer programs to currently underserved parts of the county. Provide at least two annual PYD training sessions to help volunteers better understand youth development principles, ensuring high-quality learning experience for youth. Measure success through volunteer retention rates, participant feedback, and improved program outcomes
Sea Grant	The agent will conduct outreach and training related to natural habitat and wildlife monitoring. At least 60% of those who join these efforts will demonstrate proficiency in monitoring procedures and indicate increased knowledge of Florida's aquatic ecosystem and current threats. Additionally, data collected will fill an important data gap for natural resource managers.
Sea Grant	The Agent will conduct additional outreach that addresses Charlotte County's needs pertaining to water quality management. At least 60% of participants in these programs will indicate knowledge gain as related to species biology, water quality and nutrient management. Additionally, 25% of participants will indicate that they applied the skills they learned or changed their behavior to contribute to ecological preservation, conservation, and improvement.
Horticulture	As a result of information gathered by a formal horticultural needs assessment, UF/IFAS Charlotte County Extension will plan and implement a continuing series of "Edible Landscape Seminars" twice per year resulting in 80% increase in knowledge from at least 100 participants annually related to selection, planting, maintaining and harvesting various edible plants that can be grown in a typical landscape setting, as recorded in a post-program knowledge-gain evaluation and follow-up surveys gauging adoption of skills and behavior change.
Horticulture	As a result of information gathered by a formal horticultural needs assessment, UF/IFAS Charlotte County Extension will plan and develop a continuing series – 4 to 5 per year - focusing on advanced in-depth Florida-Friendly Landscaping™ Principles Seminars focused to provide knowledge gain, skill adoption and behavior change to at least 200 participants annually as recorded in a post-program knowledge-gain evaluation and follow-up surveys/interviews gauging adoption of skills and behavior change.
Horticulture	As a result of increased provision of Continued Education Units (CEU's) for the Professional Landscaping Green Industry community, at least 75 participants annually will increase their knowledge by 75% in improved landscape plant selection, pest management, and pruning practices, as recorded in a post-program knowledge-gain evaluation and follow-up surveys gauging adoption of skills and behavior change.

FY23 GOALS FY24/25 Goals and Progress

1 Hurricane Ian provided a blank slate ripe for introducing the Florida-Friendly Landscaping's 9 Principles to a successful landscape. Using existing educational platforms, all aspects of common-sense gardening will be taught to local residential participants. At least 50% of participants in the FFL Fridays seminars will pledge to implement at least one of the following FFL principles: right plant, right place (choosing plants based on appropriate site conditions); water efficiently (verify that their rain shut-off device is functional/that their irrigation system is functioning efficiently); fertilize appropriately (use slow-release fertilizers); support wildlife (select native plants to support pollinator and other wildlife populations); manage yard pests responsibly (verify that any pest management techniques implemented will not be detrimental to beneficial insects); protect the waterfront (install and/or maintain a low-maintenance vegetative buffer in landscapes adjacent to water bodies).
Follow-up surveys will be sent out to participants 6-12 months after each seminar, to determine what percentage of those who pledged to implement an FFL principle, followed through on the pledge, and to identify any barriers to implementation and offer potential solutions.

The contact information from 406 participants collected at 11 FFL Programs was supplied to the State Florida-Friendly Landscaping™ Office which conducted a survey of a sample of 69 individuals. As a result of the educational information they received, participants survey results indicated that 95.2% Adopted One or More FFL Practices. Additionally, ninety percent (90%) indicated that they reduced the amount of water used to irrigate your landscape, 82% said that "Yes", they do follow all state and local fertilizing ordinances, 91% now scout landscape regularly for pests and beneficial insects, and 84% now choose plants that are suited to their site conditions. These results, in addition to 88 Field Consultations, 1,347 Office Consultations 2,835 Phone Consultations, and 12,603 E-Mail Consultations provided evidense of impact, skill adoption and behavior change.

2 Hurricane Ian has provided an opportunity to educate the public - many brand new residents - about urban forestry and the importance of proper tree selection, planting, aftercare, pruning, culture and pest management. Just like Charley in 2004, the goal is to increase the understanding of homeowners tree basic knowledge important for realizing sustainable urban tree canopy using research-based, unbiased information. As a result, at least 80% of 1,500 participants will express an increase in their tree culture knowledge and adopt noted skills in six-month follow-up surveys.

With a focus on Urban Foresty over the past couple of years, efforts were put inot large program events to educate customers on the proper selection, installation and aftercare of trees. The aftermath of Hurricane Ian left area landscapes blank and needing a restart using Florida-Friendly Landscaping™ Principles. One tool for outreach education are tree giveaways. Arbor Day programs are always a great way to reach the public and in 2023, with the help of a local benefactor, funding was secured to purchase and giveaway 250 Florida Elm Trees. As a part of the giveaway, participants had to attend a short in-house produced video on the simple act of planting a tree. Two-hundred and seventeen (213) people signed up for this event. A survey was developed and documents the following data from 54 respondents indicated that, 98% Strongly Agree/Agree that as a result of attending the short video class on how to properly plant a tree, they now feel better equipped to plant and provide aftercare for my tree and other trees in the future. Additionally, as a result of this Arbor Day Event, 89% indicated that thye had successfully planted and established their tree. Ninety-four percent (94%) said that theyn plan on planting additional trees using the knowledge they gained at this event, and 89% plan on sharing what I learned with others.

3 The 4-H Agent, Program Assistant and trained volunteers will facilitate various STEAM related camps and activities. Through these activities, 70% of the youth participants will increase their knowledge and skills related to science, technology, engineering, art and math (STEAM) as measured by pre/posttests, project reports, observation and relevant test scores.

In 2024, the impact of STEAM programming continued to grow, with youth demonstrating significant increases in their knowledge and skills related to STEM topics, meeting the annual objective. This growth was assessed using pre/posttests, project reports, and skill-a-thon scores. Participants reported at least a 70% increase in their understanding of key subjects such as plant identification, plant parts, art concepts, MyPlate nutrition, and embryology. In 2024, the 4-H Embryology program was implemented in two schools across nine classes, providing students with hands-on learning opportunities about the life cycle of a chicken, the anatomy of a chick, and the responsibilities involved in caring for living animals. This program included a self-contained special needs class, where caring for the eggs and chicks had a remarkable impact on student engagement. The project encouraged improved school attendance and fostered a sense of responsibility and ownership, which in turn motivated greater participation in class activities.
Additionally, the Exploring the ABCs of 4-H program was introduced in seven kindergarten classes in 2024. This program provided students with interactive, hands-on activities that aligned with 4-H projects related to STEAM (Science, Technology, Engineering, Arts, and Math). Through this initiative, young learners were able to explore a variety of 4-H topics, laying the foundation for their interest in and engagement with 4-H programs.
The self-directed summer craft project directly supports the development of STEM-related skills through artistic exploration. Participants engaged in hands-on activities that required problem-solving, creativity, and fine motor skills, all of which are integral to STEM learning. Techniques like Pointillism and creating wind chimes encouraged precision, experimentation with materials, and understanding cause-and-effect relationships, which align with engineering and scientific practices. The reported increase in confidence (93%) and willingness to apply newly learned skills (93%) reflects measurable growth in knowledge and abilities, demonstrating the project's success in enhancing participants' STEM-related competencies. This reinforces the objective of increasing youth knowledge and skills annually through innovative 4-H programming

4	Through 4-H projects and educational programs, at least 60% of youth participants will demonstrate adoption of the workforce preparedness skills: communication and higher order thinking (critical thinking, goal setting, financial literacy, etc.).

From 2019 to 2024, Charlotte County 4-H programming has demonstrated consistent growth in youth participation and success in fostering workforce development skills. Participation increased from 241 youth in 2022 to 317 in 2023 and further to 384 youth in 2024. These programs have been instrumental in equipping youth with essential competencies, including communication (verbal and non-verbal), critical thinking, goal setting, financial literacy, and job preparedness/professionalism.

In 2024, over 60% of 4-H members demonstrated workforce preparedness skills, surpassing the program's objective of at least 60% adoption of these skills. Participants reported gains in areas such as goal setting, record keeping, verbal and non-verbal communication, confidence in public speaking, and professionalism. Reflective narratives, record books, and achievement portfolios provided comprehensive evidence of skill acquisition and application, showcasing the impact of 4-H on youth development.

This sustained progress highlights the effectiveness of 4-H programming in preparing youth for future opportunities by fostering critical workforce skills, with consistent positive trends over the years. The data below illustrates these outcomes, emphasizing the transformative power of 4-H in shaping capable, confident, and career-ready individuals.

The following data provides a detailed breakdown of the specific knowledge gained, skills acquired, and behavioral changes observed among participants.

5	The agent will conduct outreach and training related to natural resource restoration and biological monitoring. At least 60% of volunteers participating in citizen science activities will indicate knowledge gain as related to Florida's aquatic ecosystems. Additionally, data collected will fill an important data gap for natural resource managers.

In 2024, 65 people were trained to participate in participatory science habitat surveys and species monitoring. Of those trained, 25 continued to complete seagrass surveys in Charlotte Harbor and Lemon Bay with the help of 39 additional participants who had either already received training or who were taught by those who had attended. Of all the 64 volunteers who completed seagrass surveys, 60% were returning volunteers. Fourteen participants who had already received Florida Horseshoe Crab Watch training completed beach nesting surveys in Spring 2024, but surveys were canceled in Fall 2024. As an example of knowledge gain, 97% of participants indicated that they had increased theri knoweldge of Horseshoe crab biology, 86% now knew about the Ecological importance of horseshoe crabs25

Horseshoe crab management, 86% could now identify Aging horseshoe crabs, 83% now knew about, Weighing horseshoe crabs, 79% were proficient in Measuring the width of a horseshoe crab prosoma, 86% were now successful in Sexing a horseshoe crab, 90% can successfully Tag a Horseshoe Crab, and 93% now knew how to Complete a beach nesting survey.   Eyes on Seagrass Participants also documented Knowledge Gain. One-hundred percent (100%) know how to Deploy & reel in a transect line, 88% can now identify seagrass96% can Measure seagrass blade height, 56% can Measure water clarity with a Secchi disc, and 79% can now Estimate percent cover.

FY22/23 Goals and Accomplishments

1	The Agent will conduct outreach and training as related to data collection for seagrass/macroalgae monitoring. At least 60% of volunteers participating in monitoring activities will indicate knowledge gain as related to species biology, water quality and nutrient management. Additionally, data collected will fill an important data gap regarding trends in macroalgae blooms and seagrass health.

In 2023, the agent trained 72 stakeholders either in person and 137 volunteers completed Eyes on Seagrass and Florida Horseshoe Crab Watch Surveys. Those that demonstrated their skill represent those who were trained this year. The higher number of total participants compared with those who were trained and demonstrated their skills reflects either a) repeat volunteers that are not required to train every year or b) evidence that trained volunteers are recruiting and teaching others. In 2023, Eyes on Seagrass retained 37% of volunteers from 2022. Eyes on Seagrass volunteers monitor 43 sites in Charlotte Harbor and Lemon Bay twice a year outside of FDEP monitoring, expanding the dataset and enhancing the conclusions by ecosystem managers. Before volunteering with Eyes on Seagrass, only 26% of those that answered the 3-month follow up survey considered themselves seagrass stewards. After participating with Eyes on Seagrass 82% of volunteers consider themselves seagrass stewards.

2	Develop FFL Program to Provide Continuity to Community HOA Landscape Committees. At least 50% of the HOA's Extension works with will adopt this FFL program

Homeowner Associations (HOAs) offer a great opportunity to work with the Landscape Committee to make changes and adapt FFL Principles into the footprint od these properties. Essential to this effort is equipping the Committee Members with the resources and tools needed to work within the greater administrative body of HOAs so they see the benefits and adopt the efforts needed to have a beautiful landscape and do so economically and to the betterment of the environment. Additionally, these committees will become educated consumers in the purchase of landscape services. Eleven HOA's

3	The 4-H Agent, Program Assistant and trained volunteers will facilitate various STEAM related camps and activities. Through these activities, 70% of the youth participants will increase their knowledge and skills related to science, technology, engineering, art and math (STEAM) as measured by pre/posttests, project reports, observation and relevant test scores.

Charlotte County 4-H programming has demonstrated consistent growth in youth participation and success in fostering workforce development skills. Participation increased to 317 in 2023. These programs have been instrumental in equipping youth with essential competencies, including communication (verbal and non-verbal), critical thinking, goal setting, financial literacy, and job preparedness/professionalism. An Overall Workforce Preparedness Skills Gained survey inbstrument documented that 71% of those surveyed had the Ability to set goals. Additionally, 100% demonstrated the Ability to keep records, 62% mastered Verbal Communication Skills, and 57% were proficient in Non-Verbal Communication Skills.

	Charlotte County 4-H currently has 18 certified and trained 4-H leaders with an 88% retention rate. 904 youth participated in 4-H STEAM classes either in-school or outside of school. 155 youth participated in the 4-H STEAM to Go! Crafty Clovers program. 285 youth participated in the 4-H Florida Wildlife Program, and 43 youth participated in virtual and in-person cooking classes.

4	Through school enrichment programs, youth will gain a better understanding of where their food comes from as well as how to put together a healthy plate based on the MyPlate model. In addition, club leaders have encouraged the implementation of educational games which create a more active club meeting promoting active lifestyles among the youth.

In Charlotte County, 507 youth participated in transformative healthy living programs. These programs encompassed dynamic initiatives such as the 4-H Health in the Wilderness and the 4-H What's In My Cart programs. These programs encompassed dynamic initiatives aiming to cultivate an understanding of essential health practices among youth. Through hands-on activities, interactive sessions, and engaging discussions, these youth were empowered to make informed choices about their health and well-being. Upon conclusion of the Healthy Habits grant funded through the Walmart Foundation (n=4,449 in 2020-221; n=TBD in 2022-2023) where the Agent serves as the co PI, this two-year grant survey reflects 2022-2023 programming. Behavior change percentages illustrate adoption of healthy living practices after attending programming. The program post-test indicated that 93% Plan to eat the recommended amount of fruits and vegetables, 86% Plan to drink less sugary drinks, 96% Plan to stay physically active, 49% Pay attention to how many vegetables you eat each day, 71% Pay attention to how active they are each day, 78% Know how to follow a recipe to make something to eat, 95% At 4-H, learned about healthy food choices, and 78% have Given family ideas for healthy meals or snacks.

	As a result of the new office location, outreach efforts to our horticultural customers will be redoubled with 85% acknowledgment of Extension relocation site.

A formal Needs Assessment was conducted regarding residential horticultural educational needs with 165 respondents. One of the questions was the participant's familiarity with Extension as of 2024. As a result of this survey, 48% indicated that they had attended a couple of classes/events at UF/IFAS Extension. Addiiotnally, 18% had attended numerous events/classes at UF/IFAS Extension, and 28% had actually volunteered with Extension - past or present. As an additional indicater of awareness, UF/IFAS Extension hosted the 2024 Florida-Friendly Landscaping™ Fest held on April 27, 2024, at Centennial Park, 1120 Centennial Blvd in Port Charlotte from 9 am-2 pm. With over one-thousand attendees counted, this event was a massive success! The overarching concept of Florida-Friendly Landscaping™ was emphasized with a series of nine booths highlighting each Principle manned by Master Gardener Volunteers. Attendees would visit a booth and learn more about that concept. Basic to the 2024 Florida-Friendly Landscaping™ Fest was research-based, unbiased education which, when comingled with an array of entertainment and gardening goods, wrapped up a well-run event with an outstanding turnout!

Economic Development

Economic Development

Mission

Economic Development - Promote the growth, retention, and attraction of diverse, high-impact industries to strengthen the local economy. Foster the creation of high-skill, high-wage jobs while enhancing economic diversity and broadening the tax base.

Linkage to Strategic Goals

Efficient and Effective Government   Economic & Community Development

Core Functions

Economic Development
Promote, Identify, recruit, work, encourage and expand business and workforce
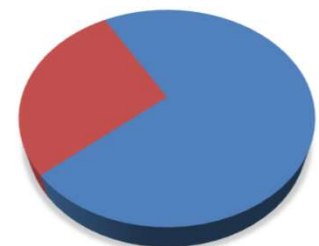
FY 26 - First Year Operating Budget

Critical	92%	$1,103,702
State Mandated	8%	$99,899
Operating Budget	**100%**	**$1,203,601**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 774,739	$ 940,966	$ 906,673	$ 955,129
Taxes	$ 301,274	$ 350,000	$ 350,000	$ 350,000
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 1,076,013	$ 1,290,966	$ 1,256,673	$ 1,305,129

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 641,863	$ 832,493	$ 780,932	$ 805,688
Services & Charges	$ 376,222	$ 408,969	$ 383,655	$ 399,855
Operating Expenses	$ 17,674	$ 45,164	$ 39,014	$ 44,514
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 35,915	$ -	$ 42,000	$ 44,000
Transfers	$ 4,340	$ 4,340	$ 11,072	$ 11,072
Reserves	$ -	$ -	$ -	$ -
Total	$ 1,076,013	$ 1,290,966	$ 1,256,673	$ 1,305,129

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	6	6	6	6
Part Time	0	0	0	0
Total	6	6	6	6
Proposed New Positions	0	0	0	1

Notes

FY 26 Budgeted Revenue

■ BCC General Revenues 72% ■ Taxes 28%

FY 26 Budgeted Expenditures
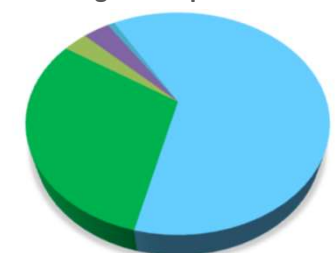
■ Salaries & Benefits 63%

■ Services & Charges 30%

■ Operating Expenses 3%

■ Debt 3%

■ Transfers 1%

ECONOMIC DEVELOPMENT

Levels of Service – 6 Year Metrics

Economic Development

Who is your primary Customer?	New businesses interested in relocating to or opening in Charlotte County plus existing businesses considering expansion
What is the primary service they receive from you?	Site selection, possible financial incentive packages and/or assistance working with Charlotte County
What is the main aspect of the service they care about?	Help them from the start to the finish line

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Assistance / Guidance	# of Touches - meetings, phone calls, emails, etc.	Tracking Sheet	3,500	5,000	8,000	10,073	45,000	50,000
	# of application packages completed & submitted		53	75	83	100	83	102
	# of Executed PSA's or leases		3	3	2	5	2	2
	# of BCC agenda items presented (Economic Development, CRAs, Regular Agenda, Public Hearings)		23	25	32	20	15	4
	# of completed projects		6	5	3	3	5	6
Follow-Through	# of new jobs created by client	Customer records	600	150	300	650	800	100
	Increase in ad valorem tax base	Property Tax records	9.8 M	8.5 M	18 M	50 M	75 M	50 M
	Total incentive packages	EFI/Charlotte County records	$692,000	$75,000	$0	$0	$0	$0
	Grants	Internal Tracking Grants	$1,996,194	$0	$0	$0	$0	$0

FY26 and FY27 GOALS:

1 Development & Capital Investment: Increase opportunities for industrial development in Charlotte County while balancing open space. Target development initiatives with a goal of securing $50 million in new business capital investment.

2 Business Retention: Strengthen local business relationships by completing a minimum of 50 annual Business Retention & Expansion (BRE) visits.

3 Workforce Development: Position Charlotte County as a hub for skilled professionals by expanding high-wage jobs in target industries, increase workforce housing, and leveraging economic incentives for growth. Job Creation: Facilitate the creation of 100 high-wage jobs within high-impact, for targeted industries.ce visibility and engagement by increasing digital marketing programs and increase performance by 20% year over year.

FY24/25 GOALS AND IN PROGRESS:

1 Create new workforce housing model and attract developer(s) to build new product.

Met with several developers and businesses. Continuing the conversation to bring in a project that makes sense for Workforce Housing.

2 Launch workforce attraction campaign and help area businesses with their employee shortage.

Veteran PCS Campaign - Strengthened program with more social media and website activity - this year started tracking the below data.
1. The number of sessions that began on your site or app. - 18,833
2. The total number of active users - 16,396
3. The number of users who interacted with your site or launched your app for the first time (event triggered: first open) - 16,551

3 Bring new aviation cluster to PGD including MRO, engine repair, and other related services.

NAS MRO signed a contract with the airport Authority. Project is in Engineering. Cultivating other aviation projects in the ECAP.

4 Focus on industrial development in ECAP including the development of new 378,000sf spec building, megafactory for factory-built homes and continue to attract new businesses to the ECAP.

Continue to market spec building opportunities to prospective businesses with bids on the table. Possible movement in 2025.

5 Push the Mixed-Use zoning opportunities at Promenades Mall and the Port Charlotte Town Center to attract repurposing of both these dated facilities.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1 Expand existing aviation-industry cluster to include major MRO & Other aviation related business.

Vesta AirCoils has signed lease. Still working with numerous buisnesses so roll goal forward to 2023.

2 New Marketing Efforts - MV 100 Acres, Distribution companies, Cheney Led, CH.

Aviation campaign ran 5/21 - 8/21. 81,562 Google ad impressions; 444 Google ad clicks; 53,547 Reddit video impressions; 283,150 LinkedIn impressions; and 2,106 LinkedIn ad clicks. Distribution campaign ran 9/21 - 10/21. 147,898 Google ad impressions; 1,751 Google ad clicks; 16,520 Reddit video impressions; 963 Reddit video views; 148,000 Linkedin impressions; and 1,751 LinkedIn ad clicks.

3 Assist Aviation Training Prgrams - A&P opening Jan 2021 + Flight School temp now open+ future relocation.

A&P opened with Grand Reveal on Sept 17, 2021. In 11/22, 18 students will have completed Airframe portion of program and will immediately begin Powerplant. 100 students registered for this session.

4 Secure Affordable housing incentives, developers, projects.

Push Mixed Use Zoning overlay which BCC approved in November 2020, updated RFP for Bachmann Tract.

5 Define workforce needs + work with local educational Partners to meet needs.

Continued as active member of SWFL Workforce Development Board and worked with CareerSource Florida on hiring needs of local companies.

Facilities Management

Facilities Management

Mission

To create and support facilities which contribute to a productive, safe and enriching environment for employees, residents and visitors to Charlotte County

Division Summary	FY 26 - First Year Operating Budget	
- Maintenance and Operations --- To provide quality service through logistical and customer support in an efficient and professional manner to ensure safe, clean, well maintained facilities for the public and staff use.	67%	$13,867,657
- Business Services --- To support the goals and objectives of the Facilities Construction and Maintenance Department, as the department supports the County.	12%	$2,411,766
- Project Management --- To provide exceptional professional planning, design, and management of construction projects for new and existing County facilities and infrastructure.	15%	$3,316,179
- Security --- To provide professional security services through physical visibility, building infrastructure, and education to foster a safe and secure workplace environment.	6%	$1,205,883
Operating Budget	**100%**	**$20,801,486**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 13,533,007	$ 15,633,429	$ 21,132,534	$ 20,863,160
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 502,221	$ 305,000	$ 305,000	$ 305,000
Misc	$ 388,054	$ 323,456	$ 323,456	$ 323,456
Transfers	$ 143,017	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 14,566,299**	**$ 16,261,885**	**$ 21,760,990**	**$ 21,491,616**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 5,315,468	$ 6,729,418	$ 7,004,686	$ 7,222,071
Services & Charges	$ 8,328,445	$ 9,023,792	$ 13,328,073	$ 13,396,832
Operating Expenses	$ 259,326	$ 323,291	$ 468,727	$ 457,727
Capital	$ 143,017	$ 5,500	$ 369,925	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 334,626	$ -	$ 190,230	$ 195,937
Transfers	$ 185,417	$ 179,884	$ 399,349	$ 219,049
Reserves	$ -	$ -	$ -	$ -
Total	**$ 14,566,299**	**$ 16,261,885**	**$ 21,760,990**	**$ 21,491,616**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	62	69	69	69
Part Time	0	0	0	0
Total	**62**	**69**	**69**	**69**
Proposed New Positions	0	0	10	0

Notes

A total of ten FTEs are being requested throughout FY26—five to support infrastructure and five focused on service & delivery. Key changes across all areas of Facilities Management include increased self-insurance costs driven by inflation, higher education and travel expenses due to greater request for participation in professional conferences, & planned replacements of heavy vehicles and miscellaneous equipment.

FY 26 Budgeted Revenue

- BCC General Revenues 98%
- Charges for Services 1%
- Miscellaneous 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 32%
- Services & Charges 61%
- Operating Expenses 3%
- Capital 2%
- Debt 1%
- Transfers 1%

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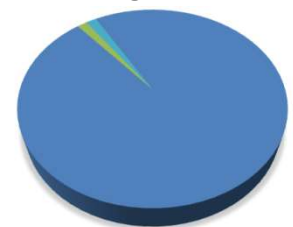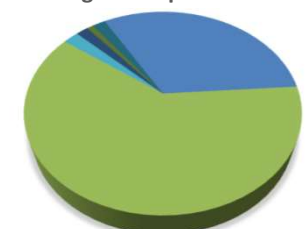
Facilities Management
Maintenance and Operations

CHARLOTTE COUNTY
FLORIDA

Mission

Maintenance and Operations --- To provide quality service through logistical and customer support in an efficient and professional manner to ensure safe, clean, well maintained facilities for the public and staff use.

Linkage to Strategic Goals

Efficient and Effective Government   Infrastructure

Core Functions	FY 26 - First Year Operating Budget		
Operation of Public Building and Grounds	Discretionary	30%	$4,160,297
Manage the appearance, cleanliness, and condition of grounds and facilities to support government functions			
Repairs	State Mandated	50%	$6,933,829
Complete repairs in a highly skilled manner by responding to all repair requests through the work order system			
Contracted Services	Locally Mandated	10%	$1,386,766
Implement and manage operational repair needs for County facilities through contracted services			
Preventative Maintenance	Locally Mandated	10%	$1,386,766
Perform preventative maintenance to County buildings and infrastructure systems to industry standards and useful life span			
	Operating Budget	**100%**	**$13,867,657**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 9,385,795	$ 10,422,286	$ 14,088,356	$ 13,908,773
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 348,315	$ 203,333	$ 203,333	$ 203,333
Misc	$ 269,134	$ 215,637	$ 215,637	$ 215,637
Transfers	$ 99,189	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 10,102,433**	**$ 10,841,257**	**$ 14,507,327**	**$ 14,327,744**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 3,686,535	$ 4,486,279	$ 4,669,791	$ 4,814,714
Services & Charges	$ 5,776,180	$ 6,015,861	$ 8,885,382	$ 8,931,221
Operating Expenses	$ 179,855	$ 215,527	$ 312,485	$ 305,151
Capital	$ 99,189	$ 3,667	$ 246,617	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 232,079	$ -	$ 126,820	$ 130,625
Transfers	$ 128,596	$ 119,923	$ 266,233	$ 146,033
Reserves	$ -	$ -	$ -	$ -
Total	**$ 10,102,433**	**$ 10,841,257**	**$ 14,507,327**	**$ 14,327,744**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	43	46	46	46
Part Time	0	0	0	0
Total	**43**	**46**	**46**	**46**
Proposed Part Time	0	0	7	0

Notes

Key changes for Maintenance & Operations is requesting increased funding for an elevator maintenance contract due to bid challenges, as well as for small projects not covered by departments or CIP. Additional funding is also proposed for HVAC repairs to reflect aging units & prior year costs, along with expanded services like tree trimming, window cleaning, & sidewalk repairs not included in current contracts.
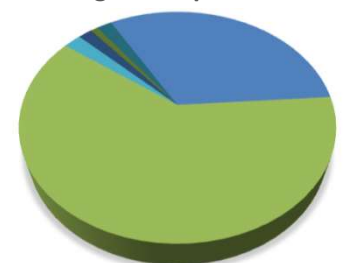
FY 26 Budgeted Revenue

- BCC General Revenues 98%
- Charges for Services 1%
- Miscellaneous 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 32%
- Services & Charges 61%
- Operating Expenses 3%
- Capital 2%
- Debt 1%
- Transfers 1%

Facilities Management
Business Services

CHARLOTTE COUNTY
FLORIDA

Mission

Business Services --- To support the goals and objectives of the Facilities Construction and Maintenance Department, as the department supports the County.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions		FY 26 - First Year Operating Budget		
Administrative Support Services		Discretionary	70%	$1,688,237
Support the goals and objectives of Facilities Construction and Maintenance, as the department supports the County				
County Switchboard Phone Service		Discretionary	10%	$241,177
Receive, record, and direct calls received at the county switchboard phone line				
Personnel		State Mandated	10%	$241,177
Act as liaison to Human Resources in all aspects of employee relations in accordance with county policies				
Records		State Mandated	10%	$241,177
Maintain department records compliance in accordance with state and federal requirements.				
		Operating Budget	**100%**	**$2,411,766**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 1,746,195	$ 1,812,571	$ 2,450,149	$ 2,418,917
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 64,803	$ 35,362	$ 35,362	$ 35,362
Misc	$ 50,071	$ 37,502	$ 37,502	$ 37,502
Transfers	$ 18,454	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 1,879,522**	**$ 1,885,436**	**$ 2,523,013**	**$ 2,491,782**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 685,867	$ 780,222	$ 812,138	$ 837,342
Services & Charges	$ 1,074,638	$ 1,046,237	$ 1,545,284	$ 1,553,256
Operating Expenses	$ 33,461	$ 37,483	$ 54,345	$ 53,070
Capital	$ 18,454	$ 638	$ 42,890	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 43,178	$ -	$ 22,056	$ 22,717
Transfers	$ 23,925	$ 20,856	$ 46,301	$ 25,397
Reserves	$ -	$ -	$ -	$ -
Total	**$ 1,879,522**	**$ 1,885,436**	**$ 2,523,013**	**$ 2,491,782**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	8	8	8	8
Part Time	0	0	0	0
Total	**8**	**8**	**8**	**8**
Proposed New Positions	0	0	0	0

Notes

There are no significant changes for Business Services; most adjustments are related to inflationary impacts and annual merit-based personnel increases.

FY 26 Budgeted Revenue
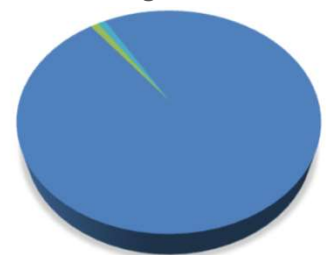
- BCC General Revenues 98%
- Charges for Services 1%
- Miscellaneous 1%

FY 26 Budgeted Expenditures
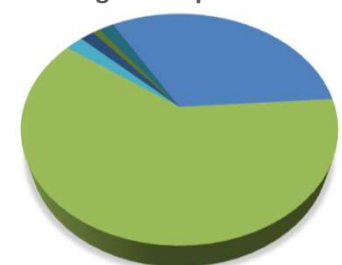
- Salaries & Benefits 32%
- Services & Charges 61%
- Operating Expenses 3%
- Capital 2%
- Debt 1%
- Transfers 1%

Facilities Management
Project Management

Mission

Project Management --- To provide exceptional professional planning, design, and management of construction projects for new and existing County facilities and infrastructure.

Linkage to Strategic Goals

Efficient and Effective Government   Infrastructure

Core Functions | FY 26 - First Year Operating Budget

| Core Functions			FY 26 - First Year Operating Budget
Perform the programming, planning and budgeting of facility concepts and projects Identify needs, develop scope, budget, work with stakeholders, and ensure the projects are built according to county standards	Locally Mandated	30%	$994,854
Perform and manage planning, analysis and design services Execute design and construction contracts in accordance with federal, state and local permit requirements	Locally Mandated	30%	$994,854
Manage construction of County projects Manage new construction of approved facilities and major renovations and repairs to existing facilities	Locally Mandated	30%	$994,854
Execute budgeted small projects identified within CMP and work order systems Identify and execute alterations to County facilities when complexity exceeds normal repairs and maintenance	Locally Mandated	10%	$331,618
Operating Budget	**100%**		**$3,316,179**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 1,746,195	$ 2,492,286	$ 3,368,955	$ 3,326,011
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 64,803	$ 48,623	$ 48,623	$ 48,623
Misc	$ 50,071	$ 51,565	$ 51,565	$ 51,565
Transfers	$ 18,454	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 1,879,522**	**$ 2,592,474**	**$ 3,469,143**	**$ 3,426,200**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 685,867	$ 1,072,806	$ 1,116,689	$ 1,151,345
Services & Charges	$ 1,074,638	$ 1,438,576	$ 2,124,765	$ 2,135,727
Operating Expenses	$ 33,461	$ 51,539	$ 74,725	$ 72,971
Capital	$ 18,454	$ 877	$ 58,974	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 43,178	$ -	$ 30,327	$ 31,236
Transfers	$ 23,925	$ 28,677	$ 63,664	$ 34,921
Reserves	$ -	$ -	$ -	$ -
Total	**$ 1,879,522**	**$ 2,592,474**	**$ 3,469,143**	**$ 3,426,200**
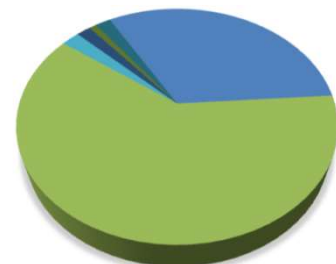
Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	8	11	11	11
Part Time	0	0	0	0
Total	**8**	**11**	**11**	**11**
Proposed New Positions	0	0	3	0

FY 26 Budgeted Revenue

- BCC General Revenues 98%
- Charges for Services 1%
- Miscellaneous 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 32%
- Services & Charges 61%
- Operating Expenses 3%
- Capital 2%
- Debt 1%
- Transfers 1%

Notes

Key changes for Project Management include a request for three FTEs in FY26 to support Capital Improvement Program (CIP) projects. Additionally, funding is being requested under services & charges for third-party architectural & engineering reviews. Budget is also being requested for a third-party CEI firm to ensure construction and design compliance, along with program management audit & consulting services.

Facilities Management
Security

Mission

Security --- To provide professional security services through physical visibility, building infrastructure, and education to foster a safe and secure workplace environment.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions

FY 26 - First Year Operating Budget

Promote Security and Safety
Identify and implement solutions to security issues, manage security personnel, manage and maintain security equipment

Critical	60%	$723,530

Implement and manage security needs for County facilities through contracted services
Manage security operations at County locations by ensuring performance of contracted annual operational services

Locally Mandated	40%	$482,353

Operating Budget	100%	$1,205,883

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 654,823	$ 906,286	$ 1,225,074	$ 1,209,459
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 24,301	$ 17,681	$ 17,681	$ 17,681
Misc	$ 18,777	$ 18,751	$ 18,751	$ 18,751
Transfers	$ 6,920	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 704,821	$ 942,718	$ 1,261,507	$ 1,245,891

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 257,200	$ 390,111	$ 406,069	$ 418,671
Services & Charges	$ 402,989	$ 523,118	$ 772,642	$ 776,628
Operating Expenses	$ 12,548	$ 18,742	$ 27,173	$ 26,535
Capital	$ 6,920	$ 319	$ 21,445	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 16,192	$ -	$ 11,028	$ 11,359
Transfers	$ 8,972	$ 10,428	$ 23,151	$ 12,698
Reserves	$ -	$ -	$ -	$ -
Total	$ 704,821	$ 942,718	$ 1,261,507	$ 1,245,891

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	3	4	4	4
Part Time	0	0	0	0
Total	3	4	4	4
Proposed New Positions	0	0	0	0

Notes

Key changes for Security include increased expenditures associated with the new contract for security services, primarily driven by inflation. Additionally, repair & maintenance costs are rising due to the aging security camera infrastructure across the county, with many units reaching the end of their operational life.

FY 26 Budgeted Revenue

- BCC General Revenues 98%
- Charges for Services 1%
- Miscellaneous 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 32%
- Services & Charges 61%
- Operating Expenses 3%
- Capital 2%
- Debt 1%
- Transfers 1%

FACILITIES MANAGEMENT
Levels of Service - 6 Year Metrics

Maintenance and Operations

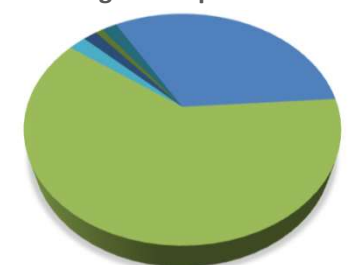| Who is your primary Customer?	Governmental employees/Elected Officials/General Public								
What is the primary service they receive from you?	Repair, maintenance, and operations of County buildings and infrastructure								
What is the main aspect of the service they care about?	Uninterrupted operations of County facilities providing a safe, clean, and comfortable work environment								

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Restoration to operational efficiency	Number of open and closed (created) work orders (SharePoint)	Work Order System	N/A	N/A	N/A	4822	3853	3874/3813
	Number of open and closed work orders (SpiceWorks)		N/A	N/A	N/A	4926	4029	3912/4307
	Number of work orders rolled forward		N/A	N/A	N/A	N/A	182	61
	Percentage of work orders rolled forward		N/A	N/A	N/A	1.59%	2.30%	<1%
Contract Management	Successful contractor performance	Annual contract reviews	N/A	N/A	N/A	91%	93%	100%
	Number of service disruptions		N/A	N/A	N/A	0	4	0
Workload	Building square footage managed	Buildings defined as having four walls and a roof	N/A	N/A	N/A	2,072,691	2,072,691	2,015,672
	Assets square footage maintained	Measurable asset square footage maintained at some level	N/A	N/A	N/A	2,239,263	2,239,263	2,236,529
	Acreage maintained (@ 32times/year)	Measurable acreage maintained at some level	N/A	N/A	N/A	500	919	919

Business Services

Who is your primary Customer?	Governmental employees/Elected Officials/General Public								
What is the primary service they receive from you?	Support services, customer service								
What is the main aspect of the service they care about?	All business services related to Facilities Management								

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Calls received at the county switchboard phone line	Number and category of calls received at the county switchboard phone line.	Call log tracking spreadsheet	3,118	3,302	11,426	11,889	31,738	14,794
Energy Efficiency Savings and	Cost avoidance and rebates	Utility accounts, Energy CAP	N/A	N/A	N/A	N/A	$67,658	$642,591

Project Management								
Who is your primary Customer?	Governmental employees/Elected Officials/General Public							
What is the primary service they receive from you?	Creating new facilities and improvements to maintain compliance with the capital improvement plan and master space plans							
What is the main aspect of the service they care about?	Responsibly meeting the programmatic needs in an effective and efficient manner							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Programmed needs met within the capital improvement documents	Projects completed in	Project workflow	N/A	N/A	N/A	12	6	3
	Cost of projects completed		N/A	N/A	N/A	$24,457,758	$22,870,304	$23,754,534
Small Projects	Projects completed		N/A	N/A	N/A	N/A	213	179
	Cost of projects completed		N/A	N/A	N/A	N/A	$2,000,767	$2,201,614
Workload	Number of projects rolled forward	Sales tax projects, capital improvement projects	N/A	N/A	N/A	20	10	17
	Rollover projects costs		N/A	N/A	N/A	$91,325,431	$84,115,231	$125,323,974
	Number of new projects		N/A	N/A	N/A	10	6	16
	New projects costs		N/A	N/A	N/A	$14,603,287	$31,000,000	$64,487,917
	Number of sales tax projects		N/A	N/A	N/A	11	7	10
	Number of project managers		N/A	N/A	N/A	5	6	5
	Hurricane projects cost		N/A	N/A	N/A	N/A	$32,547,512	$ 55,608,393
	Number of projects rolled forward	Small Project annual contracts, Capital Maintenance Projects	N/A	N/A	N/A	N/A	31	
	Number of small projects completed		N/A	N/A	N/A	N/A	213	179
	Cost of small projects completed		N/A	N/A	N/A	N/A	$2,000,767	$2,201,614
	Number of CMP projects closed		N/A	N/A	N/A	N/A	22	10
	Cost of CMP projects closed		N/A	N/A	N/A	N/A	$787,187	$4,309,151
	Number of project coordinators		N/A	N/A	N/A	N/A	3	3

Security								
Who is your primary Customer?	Governmental employees/Elected Officials/General Public							
What is the primary service they receive from you?	Provide a safe and secure workplace in a customer centric environment							
What is the main aspect of the service they care about?	Security and safety							
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Security compliance	Incidents county wide	Incident report dashboard	N/A	N/A	N/A	171	96	95
Customer support	Citizen contact at Murdock Administration Campus	Public interaction logs	N/A	N/A	N/A	26,665	35,091	40,256

CHARLOTTE COUNTY
FLORIDA

FY26 and FY27 GOALS:

1	Initiate Master Space Plan and complete the first phase of design and programming
2	Utilizing the strategic asset management plan to replace the current Facilities Optimization Software (FOS)
3	Develop a strategy for a Building Automation System (BAS) to improve resiliency
4	Develop Security Gate Repair and Replacement Schedule

FY24/25 GOALS AND PROGRESS:

1	Asset management program development
Supported the County's Implementation and training of Asset Management Governance and SAMP.	
2	Develop internal training program
Created an outline of training and onboarding with our Cultural Enhancement Program along with committee involvement for future training needs and development.	
3	Support countywide initiative to support resiliency and sustainability
Supporting the County's CIP/CNA programs and Budget along with Grant oppertunities for future buildings and saferooms as part of resilience and sustainability. Future Generator and Generator Tie in Projects will be normalized within design of new buildings and structures for this purpose. Future HVAC and Security Controls for redundancy and backups will be built in our specifications and programming into new projects.	
4	Develop countywide master key program
Development complete and Implementation in progress	

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Develop basis of design standards for county buildings
Developed standards across major disciplines (architectural, civil, mechanical, electrical, plumbing, low voltage, security, automation, color palette)	
2	Integrate Cityworks and condition assessment database
Cityworks integration/implementation late summer 2023.	
3	Provide the best customer service to the public while maintaining the safety of all that enter our facilities
Annual contracts and service cycles are successfully performed.	
4	Develop a comprehensive security program for county buildings
Hired building control specialists to support countywide lock study and security assessment. Phase 1 access control change over complete.	

Human Resources

Human Resources

Mission

Human Resources (HR) is dedicated to delivering exemplary customer service. HR contributes through the development and administration of effective HR systems. They consult in the area(s) of performance management, disciplinary actions, difficult workplace situations, conflict resolution/guidance, and the interpretation of employment regulations. HR is also responsible for building organizational capability through planned efforts, organization wide, to increase effectiveness in the organization's 'processes'.

Linkage to Strategic Goals

Efficient and Effective Government

Core Functions

Core Functions	FY 26 - First Year Operating Budget		

Employee and Labor Relations
Risk avoidance; EEO-4 reporting; performance mgmnt; discipline coaching; CBA, Policies, Procedures interpretation/administration/negotiation; terminations w/o discrimination; contested unemployment claims; response to all EEOC charges; grievances; mediations.

State Mandated — 22% — $401,638

Recruiting/Employee Transaction
Wage classification analysis; FRS/Deferred Compensation assistance; job advertising; applicant screening; selection/testing; interviewing assistance; equitable compensation coaching; background investigations; drug screens; employment offers; employee programs.

State Mandated — 46% — $870,841

Learning/Organizational Development
Performance Management, competency development, integration, data collection, succession, and planned interventions. Multiple development opportunities, liability claim prevention, workforce planning & design, team/individual skill/personality assessments, coaching.

Critical — 32% — $604,333

Operating Budget	100%	$1,876,812

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 1,242,576	$ 1,219,588	$ 1,876,812	$ 1,924,380
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 1,242,576	$ 1,219,588	$ 1,876,812	$ 1,924,380

FY 26 Budgeted Revenue

■ BCC General Revenues 100%

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,088,135	$ 1,019,869	$ 1,446,245	$ 1,492,868
Services & Charges	$ 105,153	$ 107,719	$ 338,498	$ 339,443
Operating Expenses	$ 49,288	$ 92,000	$ 92,069	$ 92,069
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	$ 1,242,576	$ 1,219,588	$ 1,876,812	$ 1,924,380

Positions

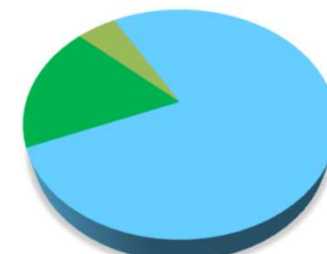| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	13	14	14	14
Part Time	0	0	0	0
Total	13	14	14	14
Proposed New Positions	0	0	10	1

Notes

Five (5) HR Coordinators are charged to other departments (Public Works, Community Services, Public Safety, Community Development and Utilities).

FY 26 Budgeted Expenditures
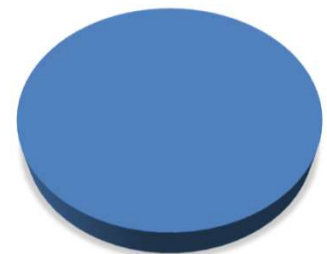
■ Salaries & Benefits 78%

■ Services & Charges 18%

■ Operating Expenses 4%

HUMAN RESOURCES

Levels of Service – 6 Year Metrics

Employee & Labor Relations

Who is your primary Customer?	Employees, Unions and Departments							
What is the primary service they receive from you?	Employment information, contract language/interpretation, partnering for solutions							
What is the main aspect of the service they care about?	Accurate paychecks, valuable benefits, fair and equitable treatment, consistent practices, need to make a difference							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy	*# of paycheck grievances*	Internal review, grievance log	2	5	0	0	2	2
Valuable Benefits	% of Employee satisfaction, usage, and benchmarking	Stay interviews every 2 yrs, surveys	N/A	72%	N/A	N/A	N/A	N/A
Fair and Equitable Treatment	# of grievances, complaints, lawsuits	Grievance log, tracking	18	27	7	6	14	8
	Organizational turnover data	Metrics report	10.10%	11.41%	11.61%	14.47%	14.10%	13.20%
	1 HR staff per 100 employees (1:100 industry standard)	Data report	12:1264.50	14:1292.50	14:1329.63	14:1360	14:1351	14:1591

Recruiting/Employee Transaction

Who is your primary Customer?	Applicants, Departments, Employees							
What is the primary service they receive from you?	Employment, internal movement							
What is the main aspect of the service they care about?	Fair and equitable treatment, timely, retention, experience							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Fair and Equitable Treatment	# of grievances, complaints, lawsuits (other than payroll)	Grievance log, tracking by category	18	27	7	6	12	8
Timeliness	# of Days to hire	NeoGov monthly reports	67	77	73	77	65	77
	24 hour response time	HR satisfaction survey	N/A	N/A	N/A	N/A	N/A	N/A
Retention & Experience	# of initial probation completion	Surveys	88.5%	91.7%	86.8%	82.0%	84.9%	81.3%

Learning/Organizational Development

Who is your primary Customer?	Employees, Departments, Administration, Citizens							
What is the primary service they receive from you?	Training, development plans, succession planning, assessments, career coaching							
What is the main aspect of the service they care about?	Growth and career progression							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Growth and Career Progression	# of internal movement	Survey and monthly reports	114	171	186	126	203	170
	# of contact hours		N/A	18,623	44,374	29,774	78,844	62,794
	Amount of tuition reimbursement dollars		$17,270	$32,410	$34,204	$30,397	$9,456	$31,008
	# of development plans/PIPs		20	5	6	12	16	2

CHARLOTTE COUNTY FLORIDA

FY26 and FY27 GOALS:

1	Successful transition from Eden software to Munis software
2	Support cell phone roll-out through training and engagement initiatives
3	Complete deployment of Learn LMS system to all departments - to include employee training
4	Evaluate maturity of overall departmental service delivery -- work with Gartner to develop action plan to improve service delivery

FY24/25 GOALS AND PROGRESS:

1	Continue workforce development initiatives that support organizational focus areas & goals.
Continue building college partnerships for intern programs, recruitment materials, job fairs, mock interviews, student mentoring, temporary staffing.	
2	Increase metrics on all supplemental employees and track placement in permanent positions.
This initiative is ongoing	
3	Successful transition from Eden software to Munis software for the HR technology functions.
This initiative is ongoing	
4	Continue Belonging and Inclusion training initiatives.
This iinitiative has been postponed	

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Continue workforce development initiatives that support organizational focus areas & goals.
Continue building college partnerships for intern programs, recruitment materials, job fairs, mock interviews, student mentoring, temporary staffing.	
2	Develop a Diversity & Inclusion training initiative and Mental Health support materials.
Research is continuing for development of a training plan to build upon last year's introduction and add a mental health component.	
3	Continue use of onboarding software, interview software, and recruitment metrics to increase speed of hiring.
Onboarding is decreasing days to fill by having paperwork completed electronically. Sparkhire is speeding up interviewing and metrics are in place.	
4	Successful contract negotiations for both unions.
IAFF negotiations will be staring June 2023 and IUPAT will be starting in 2024.	

Human Services

Human Services

Mission

The mission of Charlotte County Human Services is to collaborate and provide programs & connections that increase financial stability and support individuals and families as they work to reach their fullest potential.

| Division Summary	FY 26 - First Year Operating Budget	
- Veteran Services --- Veterans Services provides information and assistance with obtaining benefits to veterans, their dependents, and their survivors through outreach and one-on-one counseling.	3%	$517,627
- Neighborhood Services --- Facilitation of the development and preservation of affordable housing, improving conditions in low-income neighborhoods, and ensuring compliance with state and federal housing funding, through integration and collaboration with housing partners.	51%	$7,032,529
- Aging & Adult Services --- Provides case management and various services to elligible seniors through state & federal grants. Services help Charlotte County residents move toward becoming self-sufficient and are guided by the annual Community Action Plan.	18%	$2,565,357
- Intake Services --- Intake Coordinators provide County residents and visitors with information and referrals, utility and water bill assistance, and coordinates the Charlotte County Food Pantry Program in collaboration with the Harry Chapin Food Bank.	26%	$3,531,254
- Family Stability - Provides family supportive services including educational, employment, housing supports supports, juvenile diversion, disaster recovery and community outreach. Assistance is provided for homeless prevention case management to help residents move toward becoming self-sufficient.	2%	$243,020
Operating Budget	**100%**	**$13,889,787**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 5,656,739	$ 6,064,310	$ 6,572,458	$ 6,739,883
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 5,197,593	$ 2,988,355	$ 3,549,043	$ 3,551,095
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 1,000,392	$ 486,671	$ 486,671	$ 486,671
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ 2,375,709	$ 3,281,615	$ 3,281,615
Total	$ 11,854,724	$ 11,915,045	$ 13,889,787	$ 14,059,264
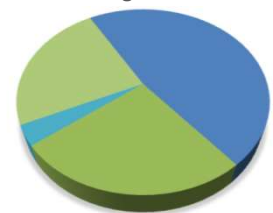
Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 2,918,603	$ 3,447,893	$ 3,474,473	$ 3,583,244
Services & Charges	$ 6,107,497	$ 5,106,221	$ 6,181,493	$ 6,245,516
Operating Expenses	$ 52,521	$ 72,366	$ 80,368	$ 80,368
Capital	$ 6,673	$ -	$ -	$ -
Grants	$ -	$ -	$ -	$ -
Debt	$ 4,385	$ -	$ -	$ -
Transfers	$ 2,765,044	$ 911,756	$ 2,059,424	$ 2,056,107
Reserves	$ -	$ 2,376,809	$ 2,094,029	$ 2,094,029
Total	$ 11,854,724	$ 11,915,045	$ 13,889,787	$ 14,059,264
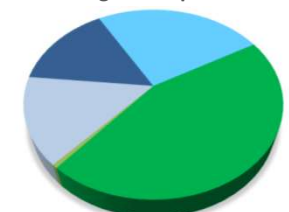
Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	29	37	37	37
Part Time	0	0	0	0
Total	29	37	37	37
Proposed New Positions	0	0	2	1

Notes

FY 26 Budgeted Revenue

- BCC General Revenues 47%
- State & Federal Revenue 25%
- Miscellaneous 4%
- Beginning Balances 24%

FY 26 Budgeted Expenditures

- Salaries & Benefits 25%
- Services & Charges 44%
- Operating Expenses 1%
- Transfers 15%
- Reserves 16%

Human Services
Intake Services

Mission

Intake Services --- Intake Coordinators provide County residents and visitors with information and referrals, utility and water bill assistance, and coordinates the Charlotte County Food Pantry Program in collaboration with the Harry Chapin Food Bank.

Linkage to Strategic Goals

Efficient and Effective Government   Public Services

Core Functions	FY 26 - First Year Operating Budget		
Provide Information & Referral and conduct Intake for all of Human Services	Critical	20%	$706,251
Conduct client interview & assessment with referral for the FSC as an integrated partnership.			
Medicaid, Hospital, Child Medical Exams and Unclaimed Bodies	State Mandated	3%	$2,175,938
Medicaid/HCRA/Child Medical Exams/Burial-cremation of unclaimed bodies			
Provide direct supervision and evaluation of the LIHEAP and EHEAP Programs	Critical	70%	$401,878
Provide financial assistance to eligible applicants for the LIHEAPand EHEAP Programs			
Provide coordination and supervision for the Human Services Food Bank Program	Critical	4%	$141,250
Provide staple goods, fresh and frozen foods, and toiletries to Charlotte County residents			
Provide evaluation for Heartship and Ambulance Waiver Program	Critical	3%	$105,938
Provide financial assistance to low-income families			
	Operating Budget	**100%**	**$3,531,254**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 2,198,968	$ 2,605,030	$ 2,843,004	$ 2,917,942
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 735,119	$ 686,511	$ 685,500	$ 685,500
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 250	$ 2,750	$ 2,750	$ 2,750
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 2,934,337	$ 3,294,291	$ 3,531,254	$ 3,606,192

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 852,379	$ 1,154,535	$ 1,080,545	$ 1,113,982
Services & Charges	$ 2,048,402	$ 2,099,585	$ 2,407,300	$ 2,448,801
Operating Expenses	$ 17,124	$ 29,268	$ 30,518	$ 30,518
Capital	$ 3,336	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 2,193	$ -	$ -	$ -
Transfers	$ 10,904	$ 10,904	$ 12,892	$ 12,892
Reserves	$ -	$ -	$ -	$ -
Total	$ 2,934,337	$ 3,294,291	$ 3,531,254	$ 3,606,192

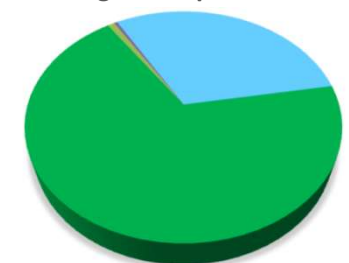| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	8	10	10	10
Part Time	0	0	0	0
Total	8	10	10	10
Proposed New Positions	0	0	0	0

Notes

FY 26 Budgeted Revenue
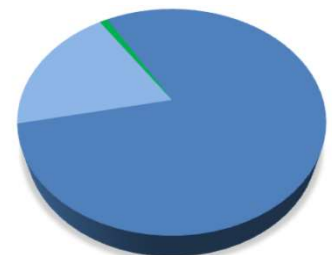
- BCC General Revenues 80%
- State & Federal Revenue 19%
- Miscellaneous 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 30%
- Services & Charges 68%
- Operating Expenses 1%
- Transfers 1%

Human Services
Aging & Adult Services

Mission

Aging & Adult Services --- Provides case management and various services to elligible seniors through state & federal grants. Services help Charlotte County residents move toward becoming self-sufficient and are guided by the annual Community Action Plan.

Linkage to Strategic Goals

Efficient and Effective Government	Public Services

Core Functions

Core Functions	FY 26 - First Year Operating Budget		
Lead Agency Case Management Services Provide ongoing case management services while meeting all State and Federal grant requirements	State Mandated	85%	$2,180,553
Administer the Family Self-Sufficiency and Homeless Prevention program for Seniors Provide financial assistance to low-income families through the federally funded CSBG Program	Critical	8%	$205,229
Coordinate an integrated client services model to streamline access to community services, Conduct facility inspections, oversee maintenance, ensure compliance, and provide outreach on Human Services programs and partner information.	Critical	7%	$179,575
	Operating Budget	**100%**	**$2,565,357**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 246,167	$ 361,270	$ 404,271	$ 403,760
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 2,511,125	$ 1,582,000	$ 2,136,086	$ 2,136,061
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 50,945	$ 23,000	$ 23,000	$ 23,000
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ 2,000	$ 2,000	$ 2,000
Total	**$ 2,808,237**	**$ 1,968,270**	**$ 2,565,357**	**$ 2,564,821**

FY 26 Budgeted Revenue

- ■ BCC General Revenues 15%
- ■ State & Federal Revenue 83%
- ■ Miscellaneous 1%
- ■ Beginning Balances 1%

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 820,169	$ 727,886	$ 909,015	$ 937,858
Services & Charges	$ 1,984,245	$ 1,235,904	$ 1,650,945	$ 1,621,566
Operating Expenses	$ 3,824	$ 4,480	$ 5,397	$ 5,397
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	**$ 2,808,237**	**$ 1,968,270**	**$ 2,565,357**	**$ 2,564,821**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	8	8	8	8
Part Time	0	0	0	0
Total	**8**	**8**	**8**	**8**
Proposed New Positions	0	0	0	0

FY 26 Budgeted Expenditures

- ■ Salaries & Benefits 35%
- ■ Services & Charges 64%
- ■ Operating Expenses 1%

Notes
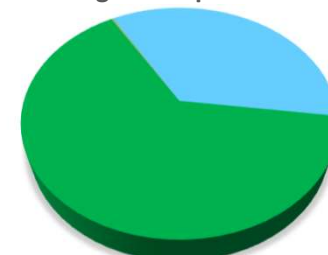
Human Services
Neighborhood Services

CHARLOTTE COUNTY
FLORIDA

Mission

Neighborhood Services --- Facilitation of the development and preservation of affordable housing, improving conditions in low-income neighborhoods, and ensuring compliance with state and federal housing funding, through integration and collaboration with housing partners.

Linkage to Strategic Goals

Efficient and Effective Government	Public Services
Economic & Community Development	

Core Functions

	FY 26 - First Year Operating Budget		
Coordinate integrated client services model to streamline access to community services. Convene and coordinate efforts among partner agencies to integrate services.	Discretionary	10%	$703,253
Develop, implement, monitor and evaluate all County housing programs. Manage and support affordable housing programs in Charlotte County, including the SHIP and HOME programs, coordinate with departments and partners, provide technical assistance, ensure compliance, conduct customer satisfaction surveys, lead the Affordable Housing Advisory Committee, conduct outreach,	Critical	65%	$4,571,144
Develop, implement, monitor and evaluate HUD Community Planning and Development (CPD) Oversee coordination for Entitlement status, including CDBG and HUD funding, ensuring staffing, multi-department engagement, and deliverables.	Critical	20%	$1,406,506
Participate, coordinate and evaluate other housing and community initiatives Administer the AHAC and serve as the County's Fair Housing Office for federal compliance	Critical	3%	$210,976
Initiate new program planning and development Explore grant opportunities to expand and create model programs	Critical	2%	$140,651
	Operating Budget	**100%**	**$7,032,529**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 2,757,773	$ 2,553,188	$ 2,791,993	$ 2,866,931
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 1,692,899	$ 500,000	$ 500,000	$ 500,000
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 949,197	$ 460,921	$ 460,921	$ 460,921
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ 2,373,709	$ 3,279,615	$ 3,279,615
Total	**$ 5,399,869**	**$ 5,887,818**	**$ 7,032,529**	**$ 7,107,467**

FY 26 Budgeted Revenue

- BCC General Revenues 40%
- State & Federal Revenue 8%
- Miscellaneous 6%
- Beginning Balances 46%

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 759,931	$ 1,015,721	$ 991,149	$ 1,022,253
Services & Charges	$ 1,859,051	$ 1,562,187	$ 1,866,686	$ 1,913,837
Operating Expenses	$ 21,217	$ 32,249	$ 34,134	$ 34,134
Capital	$ 3,336	$ -	$ -	$ -
Grants	$ -	$ -	$ -	$ -
Debt	$ 2,193	$ -	$ -	$ -
Transfers	$ 2,754,141	$ 900,853	$ 2,046,532	$ 2,043,215
Reserves	$ -	$ 2,376,809	$ 2,094,029	$ 2,094,029
Total	**$ 5,399,869**	**$ 5,887,818**	**$ 7,032,529**	**$ 7,107,467**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	8	6	6	6
Part Time	0	0	0	0
Total	**8**	**6**	**6**	**6**
Proposed New Positions	0	0	1	0

FY 26 Budgeted Expenditures

- Salaries & Benefits 14%
- Services & Charges 26%
- Operating Expenses 1%
- Transfers 29%
- Reserves 29%

Notes

Recovery and Resiliency Coordinator Position reflected here for FY 26.
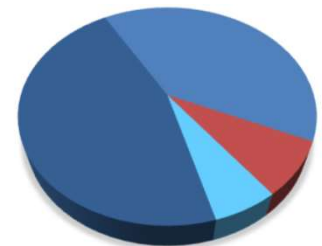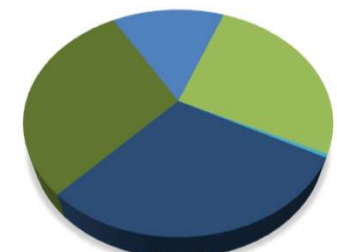
Human Services
Veteran Services

Mission

Veteran Services --- Veterans Services provides information and assistance with obtaining benefits to veterans, their dependents, and their survivors through outreach and one-on-one counseling.

Linkage to Strategic Goals

Efficient and Effective Government   Public Services

Core Functions

	FY 26 - First Year Operating Budget		

Provide information & assistance to veterans, their dependents, and their survivors.
Provide counseling, maintain database of resources and provide referrals

Participate and organize veterans' activities in partnership with veteran organizations
Lead multiple initiatives to expand resources to veterans, family members, caregivers, and survivors

Maintain all required accreditations
FL Department of Veteran Affairs, Disabled American Veterans, American Legion

Critical	91%	$473,111
Discretionary	5%	$25,881
State Mandated	4%	$18,635
Operating Budget	100%	$517,627

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 451,324	$ 512,369	$ 517,627	$ 535,147
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 451,324	$ 512,369	$ 517,627	$ 535,147

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 373,424	$ 445,803	$ 412,195	$ 424,964
Services & Charges	$ 68,154	$ 61,496	$ 97,012	$ 101,763
Operating Expenses	$ 9,746	$ 5,070	$ 8,420	$ 8,420
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	$ 451,324	$ 512,369	$ 517,627	$ 535,147

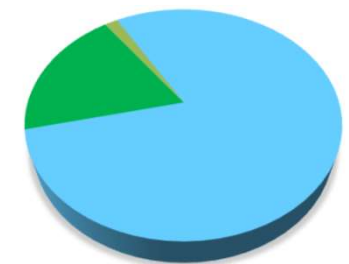| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	5	5	5	5
Part Time	0	0	0	0
Total	5	5	5	5
Proposed New Positions	0	0	0	0

Notes

FY 26 Budgeted Revenue
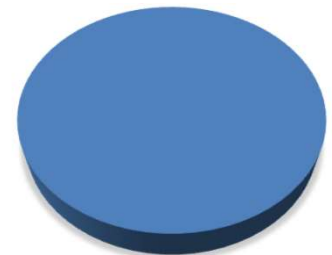
■ BCC General Revenues 100%

FY 26 Budgeted Expenditures

■ Salaries & Benefits 80%

■ Services & Charges 19%

■ Operating Expenses 1%

Human Services
Family Stability

Mission

Family Stability - Provides family supportive services including educational, employment, housing supports supports, juvenile diversion, disaster recovery and community outreach. Assistance is provided for homeless prevention case management to help residents move toward becoming self-sufficient.

Linkage to Strategic Goals

Efficient and Effective Government   Public Services

Core Functions

Core Functions	FY 26 - First Year Operating Budget		
Coordinate an integrated client services model to streamline access to community services, Support 21 tenant agencies at FSC, coordinate integrated services for families, provide program administration, engage in community coalitions, and lead the CAAAB.	Discretionary	10%	$24,302
Administer the Family Self-Sufficiency, Homeless Prevention, and Juvenile Diversion Programs Provide financial assistance to low-income families through CSBG and TANF grants, support youth diversion through the Prearrest Delinquency Citation Program, and conduct outreach on homeless prevention services.	Critical	45%	$109,359
Administer and Engage in Disaster and Long Term Recovery Programs Provide disaster-related home repairs and homeless prevention through SHIP and CSBG-DRSF, lead long-term recovery efforts, and coordinate with disaster response groups for comprehensive support.	Critical	45%	$109,359
	Operating Budget	**100%**	**$243,020**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 2,507	$ 32,454	$ 15,563	$ 16,103
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 258,450	$ 219,844	$ 227,457	$ 229,534
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 260,957**	**$ 252,298**	**$ 243,020**	**$ 245,637**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 112,700	$ 103,948	$ 81,570	$ 84,187
Services & Charges	$ 147,646	$ 147,050	$ 159,550	$ 159,550
Operating Expenses	$ 611	$ 1,300	$ 1,900	$ 1,900
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ -	$ -	$ -	$ -
Reserves	$ -	$ -	$ -	$ -
Total	**$ 260,957**	**$ 252,298**	**$ 243,020**	**$ 245,637**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	0	8	8	8
Part Time	0	0	0	0
Total	**0**	**8**	**8**	**8**
Proposed New Positions	0	0	1	1

Notes

2 Prearrest Delinquency Citation Case Managers, 1 in FY 26, 1 in FY 27.

FY 26 Budgeted Revenue

■ BCC General Revenues 6%

■ State & Federal Revenue 94%

FY 26 Budgeted Expenditures

■ Salaries & Benefits 33%

■ Services & Charges 66%

■ Operating Expenses 1%

92

HUMAN SERVICES

Levels of Service – 6 Year Metrics

Veteran Services

Who is your primary Customer?	All Veterans and their families
What is the primary service they receive from you?	Claims assistance, referrals and advocacy for a wide variety of VA services. •Support for veterans and their spouses in determining eligibility and providing better access to VA benefits. •Assistance with the preparation and submission of Fully Developed Claims. •Outreach, support and connection for Veteran's in Charlotte County.
What is the main aspect of the service they care about?	Personal interaction to provide recommendations and guidance through a difficult system

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Personal Interaction and Guidance	% of Customer satisfaction	Survey	100%	97%	100%	100%	100%	100%
	# of Veterans/Dependents Served	Database	N/A	1608	1663	1671	2028	3092
	# of Claims - * We did not see clients face-to-face or file claims during APR-JUN due to COVID-19 mission essential duties. It is probable our Division would have submitted approximately 780 new claims between 10/1/2019-9/30/2020.	Database	775	613*	836	829	1023	1185
	Economic Impact *NEW: FY2022 Economic Impact Analysis includes two reports: DoD Retired and DoD Survivor Payments. DoD reports include retired pay after deductions for survivor benefits and any amount offset by a Veterans Administration benefits.	Defense Human Resource, Office of Actuary Report - Economic Impact Analysis (Monthly Payments)	$5,638,800	$6,265,439	$5,581,000	$6,870,570	$7,459,172	2022 Data
		DoD (Annual Payments)	$67,665,600	$75,185,268	$66,972,000	$82,446,840	$89,510,063	2022 Data
		Geographic Distribution of VA Expenditures (GDX), the National Center for Veterans Analysis and Statistics, Department of Veterans Affairs	$79,248,000	$164,497,000	$195,235,000	$237,271,000	NA	$257,294,000
		TOTAL Financial Benefits for Veterans Residing in Charlotte County	$146,913,600	$239,682,268	$262,207,000	$319,717,840	NA	$405,655,000

HUMAN SERVICES
Levels of Service – 6 Year Metrics
Neighborhood Services

Who is your primary Customer?	Charlotte county residents in need of intermediate and long-term supports to enhance well-being							
What is the primary service they receive from you?	Case management and temporary financial assistance to attain self-sufficiency and/or housing stability							
What is the main aspect of the service they care about?	Preventing future crisis and ensuring household stability							
How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Crisis avoided or eliminated with rental, utility and other financial assistance and/or educational/employment supports	# of individuals/households served by programs providing financial assistance *COAD	Monthly data report	108	1252*	289	164	269/93	200
Improved quality of life	% of customer satisfaction	Customer satisfaction surveys; CCHS monthly report; TANF monthly report; JJIS	N/A	94%	N/A	N/A	96%	100%
	% of assisted households remaining stably housed		N/A	100%	100%	100%	98%	100%
	Recidivism rate for juveniles *Current Data is not available.		2.9%	10.0%	N/A*	4.0%	N/A*	N/A*
	Successful completion of Prearrest Delinquency Citation Program		75%	85%	81%	87%	89%	83%
Access to affordable housing	# of households assisted with downpayment, owner-occupied rehab or rental assistance	SHIP annual report; monthly Housing Division report;	417	27	27	53	49	27
	# of affordable housing units added to inventory		96	112	34*	22	88	97

HUMAN SERVICES

Levels of Service – 6 Year Metrics

Aging & Adult Services

Who is your primary Customer?	Charlotte County residents predominantly aged 55 and older, disabled adults and individuals 18 and over impacted by Alzheimer's Disease.							
What is the primary service they receive from you?	Case management, connection and oversight community support							
What is the main aspect of the service they care about?	On time, quality staff, Information, Referral and Support							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	% of time standards met	Internal data	100%	100%	100%	100%	100%	100%
Quality Staff	% of Customer Satisfaction	Surveys	100%	100%	86%	98%	96%	98%
	# of unduplicated elders assisted.	Annual Monitoring Reports	696	624	559	321	350	375
	Vendors have monitoring findings		0	0	0	0	0	0

Intake Services

Who is your primary Customer?	Charlotte County residents in need of human services programming.							
What is the primary service they receive from you?	Provide free, confidential, intake assessment and prioritization for persons seeking Human Services programs.							
What is the main aspect of the service they care about?	Crisis resolution and connection to resources.							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Crisis Resolution and Information and Referral	Call/Contact Volume Note - ** Covid19 Pandemic ***COVID 19 Vaccination Info* Hurricane Ian ****Hurricane Debby & Helene	Cisco Agent/Calabrio	19,098	29,198**	96,097***	54,647	68,629*	53,518 ****
	# of households/individuals served by programs providing financial assistance	NewGen Report; Monthly Data Report	978	1,188	1,156 Housholds/2,385 Individuals	1,680 Households/3,899 Individuals	2,187 Households/3,932 Individuals	1,571 Households/3,127 Individuals
	% of Customer Satisfaction	Forms Surveys	N/A	94%	N/A	N/A	97%	90%

HUMAN SERVICES
Goals FY26 and FY27

FY26 and FY27 GOALS:

1	To continue to work with FSC partners and County IT to create a unified online application and screening database that will support the integrated client services model
2	To develop an integrated disaster response and recovery framework both for the department and FSC partners
3	To develop a department wide strategic staffing plan that addresses onboarding, cross training, best practices, and technology gaps
4	To create a department wide communications and outreach strategy
5	To become an entitlement community and coordinate federal community initiatives that serve the residents of Charlotte County
6	To continue trauma-informed training and development

FY24/25 GOALS AND PROGRESS:

1   To continue and embrace a coordinated entry system for homeless prevention services as a department and in collaboration with Community partners

Charlotte County Human Services serves as the lead agency for homeless prevention services. While there are always ways to improve, the co-location of the COC in the Family Services Center, monthly integrated case management meetings with over 40 providers/participants and the ongoing development of a shared referral system has resulted in huge improvements in the coordination of services for those facing homelessness. Additionally, working together with other agencies that provide financial assistance in the COAD application and unmet needs funding table for disasters has further solidified the system. Creating the Family Stability Services division highlights our committment to our role as the lead provider. Our next steps will be to finalize the referral system in our online software system project.

2   To continue to refine and implement the Integrated Client Services Model within the department and community wide

The monthly integregrated case management meetings have expanded beyond Family Services Center partners to include outside social services agencies and faith-based organizations. These meetings are the cornerstone of the success of the model and have proven to be invaluable for all involved. The meetings are run by by our Family Stability Services manager and the Coordinated Entry Manager for Homeless Services. They staff cases, discuss resources and provide referrals for all participants. This group has been tasked with creating a shared referral process that will be enhanced once our software project is completed. This will allow county staff to provide referrals to partners, partners can then accept or decline, and provide notes. "Morning Enlightment" meetings also occur monthly where community providers highlight programs and resources. Local organizations sponsor the event and provide refreshments, materials and information. This further enhances knowledge and relationships within the community.

3   To strengthen outreach and case management services to better serve Veterans

The move to the FSC has been a force multiplier for our veteran community. Our Veteran Service Officers have greater depth of knowledge of local resources and can easily provide a warm hand-off or referral to other staff or FSC partners immediately. The integration model has benefited dozens of veterans and that will only grow as our Veteran Services team gets fully staffed. Unhoused veterans have sought out our VS team for a benefits review and been connected to housing because of the integrated client services model. This small team has transformed the lives of many of our veteran residents.

4   To attain new funding sources for our community grants, particularly disabled adults

Becoming an entitlement community has been our grant focus for some time. While we are on the cusp, we are still working to maximize available funding. Hurricane recovery funding through HHR and CSBG-DRSF and LiHEAP disaster funding have kept our staff busy for a few years. Developing strategies to serve our most vulnerable populations is more critical then ever due to uncertain economic conditions and disaster recovery. Federal funding would build capacity both internally and with external agencies.

5   To continue trauma-informed care training and development

Though scheduled trauma informed trainings were canceled due to the hurricanes in 2024, we have rescheduled those programs and look forward to the opportunity to resume our trauma informed training. Some members of the team have completed certification courses from Florida State University and if costs allow, more will pursue the course. Additional trainings on resilience following trauma would benefit our staff and partners. Support form Green Cross and Charlotte Behavioral Health Care have been offered in the weeks and months following Helene and Milton.

6   To continue planning and participation in the Long Term Disaster Recovery efforts

Unfortunately, disaster recovery has become part of the ongoing work within our department. The development of an integrated disaster recovery and response framework is the next step in our long term strategy. Detailed planning with partners on long-term recovery, disaster case management and connection with unmet needs will create a smoother process in the event of another disaster.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1   To continue and embrace a coordinated entry system for homeless prevention services

Internally, case managers are conducting monthly coordinated case conferencing sessions with our Community partners to discuss issues surrounding homeless prevention and share their case management approaches to better serving clients. During these meeting the exchange of information and ideas has helped staff find alternative and potential solutions to a wide range of problems suffered by ctheir clients. Leadership is collaborating with partner organizations such as Gulf Coast Partners to fight at risk youth homelessness, they have assisted in the development and implementation of new programming that serves this exceptionally vulnerable population.

2   To continue to implement the Integrated Client Services Model department and community wide

The Integrated Service Model was completed and has been implemented and is now in use by County HS staff as an integral part of the Family Service Center - Phase I program. Community partners are required to sign leases and a memoranddum of agreement agreeing to follow the vision and goals of the Family Services Center and to actively integrate their employees in joint activities, share programming/resources and share organizational data.Twelve community partners have been approved by the County Commisisoners at this time and it is anticipated that additional partner opportunities will arise upon completion of Phase II. As new partners are added each year and become organizations become more accustom to the concept of integrated services, it is hoped that this model will become a future best practice of the Human Services Field.

3   To strengthen outreach and case management services to better serve Veterans

With pandemic restrictions now being lifted, the Veterans Services Division had increased its visibility in the community by conducting extensive outreach to Veterans organizations, public events, military ceremonies and private presentations. Staff provides Veterans and their families with information and assistance in navigationg the VA bebefits system and providing much needed advocacy while their clients are applying for benefits or appealing cases. Staff has attended and completed required training at state conferences, broadening their ability to network at regional, state and national levels. Leadership participates in State level Veterans organizations, learning about the most recent changes and opportunities being presented by the federal government and also sharing in local successes.

4   To attain new funding sources for our community grants, particularly disabled adults

As a result of Hurricane Ian, the County received various forms of grant funding from State and Federal agencies that were put to use for disaster relief. A grants committee for the Family Services Center has been established and wil be exploring additional funding and will also partner with non-profit community partners to seek grants that will benefit their organizations and the FSC as a whole.

5   To continue trauma-informed care training and development

Staff has had hands on experience this year applying their traunma informed knowledge and skills while working on hurricane preparation, response and recovery. The need for this training is understood and all exsiting and new staff will continue to take part in training. The invitaiton for this training will also be extended to community partners.

Public Safety

Public Safety

Mission

To maintain a safe and healthy community by delivering essential services from skilled, professional and dedicated public servants.

Division Summary	FY 26 - First Year Operating Budget	
- Animal Control --- Educate the public in public safety and humane issues regarding animals, enforce the county ordinances and statutes pertaining to animals, assist the public in resolving animal issues, protect the safety and welfare of the citizens and animals of this community.	3%	$1,669,404
- Emergency Management --- To prepare for, respond to, recover from, and mitigate against the loss of life, injuries, and damage caused by both natural and technological hazards that would adversely affect the residents and visitors of Charlotte County.	1%	$1,289,559
- EMS --- Emergency Medical Services Department provides ALS (emergency) and BLS (nonemergency) medical care to the citizens and visitors of Charlotte County. Through this service we protect the lives and welfare of our community while ensuring the highest commitment to safety, professionalism, integrity and care.	39%	$27,084,739
- Fire --- The Fire Recue Department provides emergency and nonemergency services to the citizens and visitors of Charlotte County. Through this service we protect the lives, property and environment of our community while ensuring the highest commitment to safety, professionalism, integrity and care.	55%	$38,507,145
- Radio Communications --- To provide the highest quality communications to all system users by managing the overall system and maintaining the day-to-day operations of the P25 700 MHz simulcast radio system.	2%	$1,863,959
Operating Budget	**100%**	**$70,414,806**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 11,065,089	$ 16,939,084	$ 18,266,586	$ 19,100,059
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ 34,144,073	$ 41,072,086	$ 45,972,827	$ 49,703,132
State & Federal Revenue	$ 415,985	$ 271,807	$ 281,360	$ 281,360
Charges for Services	$ 12,041,222	$ 10,694,454	$ 12,102,100	$ 12,127,930
Misc	$ 5,483,054	$ 1,933,088	$ 3,338,254	$ 3,030,961
Transfers	$ 1,152,610	$ 1,899,615	$ 1,846,528	$ 1,846,528
Beginning Balances	$ -	$ 6,446,634	$ 7,747,762	$ 6,340,858
Total	**$ 64,302,034**	**$ 79,256,768**	**$ 89,555,417**	**$ 92,430,828**

FY 26 Budgeted Revenue

- BCC General Revenues 21%
- State & Federal Revenue 1%
- Charges for Services 13%
- Miscellaneous 3%
- Transfers 3%
- Beginning Balances 8%

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 45,542,539	$ 50,813,968	$ 52,834,643	$ 54,728,839
Services & Charges	$ 11,849,670	$ 11,327,803	$ 13,834,656	$ 14,193,431
Operating Expenses	$ 2,451,082	$ 3,186,138	$ 3,745,507	$ 3,377,005
Capital	$ 2,780,449	$ 3,884,340	$ 8,966,505	$ 4,110,000
Other	$ -	$ -	$ -	$ -
Debt	$ 92,555	$ -	$ -	$ -
Transfers	$ 197,804	$ 189,901	$ 365,859	$ 342,066
Reserves	$ -	$ 9,854,618	$ 9,808,247	$ 15,679,487
Total	**$ 62,914,099**	**$ 79,256,768**	**$ 89,555,417**	**$ 92,430,828**

FY 26 Budgeted Expenditures

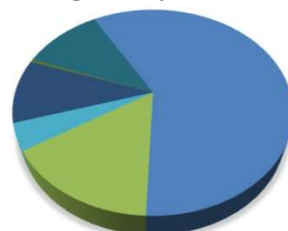| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	350	358	367	367
Part Time	1	0	0	0
Total	**351**	**358**	**367**	**367**
Proposed New Positions	0	0	55	34

Notes

A total of fifty five FTEs are being requested throughout FY26—A total of thirty four FTEs are being requested throughout FY27. The following pages provide a variance analysis for each division within Public Safety.

- Salaries & Benefits 59%
- Services & Charges 15%
- Operating Expenses 4%
- Capital 10%
- Transfers 1%
- Reserves 11%
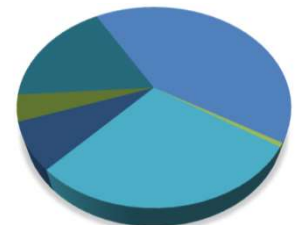
Public Safety
Animal Control

Mission

Animal Control --- Educate the public in public safety and humane issues regarding animals, enforce the county ordinances and statutes pertaining to animals, assist the public in resolving animal issues, protect the safety and welfare of the citizens and animals of this community.

Linkage to Strategic Goals

Public Services

Core Functions

Animal Services
Maximize public safety by providing acceptable levels of animal control services to all Charlotte County citizens. To maintain and/or restore safe environments through dangerous animal regulation, humane trapping, rabies control, and the removal of strayed animals. To educate and assist the citizens in regard to animal control issues, such as, wildlife trapping, invasive species, public nuisance animals, and all other related issues To enforce the Ordinances and State Statutes through assessing and issuing penalties as appropriate.

FY 26 - First Year Operating Budget

State Mandated	100%	$1,669,404
Operating Budget	**100%**	**$1,669,404**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 1,122,083	$ 1,149,881	$ 1,162,353	$ 1,175,257
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 449,915	$ 526,000	$ 551,100	$ 576,930
Misc	$ 24,147	$ 6,000	$ 8,000	$ 8,000
Transfers	$ -	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 1,596,145**	**$ 1,681,881**	**$ 1,721,453**	**$ 1,760,187**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 780,786	$ 836,039	$ 875,049	$ 900,473
Services & Charges	$ 703,039	$ 744,377	$ 718,608	$ 741,478
Operating Expenses	$ 60,271	$ 49,416	$ 75,747	$ 66,187
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 52,049	$ 52,049	$ 52,049	$ 52,049
Reserves	$ -	$ -	$ -	$ -
Total	**$ 1,596,145**	**$ 1,681,881**	**$ 1,721,453**	**$ 1,760,187**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	9	9	9	9
Part Time	0	0	0	0
Total	**9**	**9**	**9**	**9**
Proposed New Positions	0	0	1	0

Notes

Key changes for Animal Control include a decrease in expenditures under Services & Charges due to the cancellation of the contract with Pet Data. The pet licensing process is now being managed internally. To support this transition, they are requesting one additional FTE in FY26 under Sevice Delivery handle responsibilities related to pet tag administration.

FY 26 Budgeted Revenue

- BCC General Revenues 67%
- Charges for Services 32%
- Miscellaneous 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 50%
- Services & Charges 42%
- Operating Expenses 4%
- Transfers 4%

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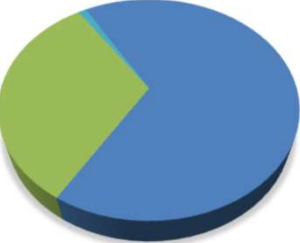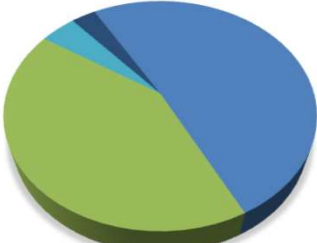
Public Safety
Emergency Management

Mission

Emergency Management --- To prepare for, respond to, recover from, and mitigate against the loss of life, injuries, and damage caused by both natural and technological hazards that would adversely affect the residents and visitors of Charlotte County.

Linkage to Strategic Goals

Public Services

Core Functions

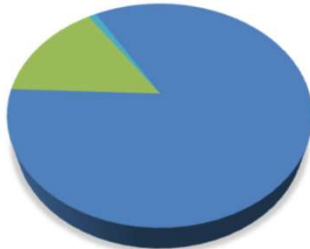|	FY 26 - First Year Operating Budget		
Preparedness and Planning	Critical	46%	$597,066
Prepare County residents, businesses, visitors, and government entities to properly respond to emergencies through an educational program that encompasses all avenues of communication.			
Operations and Response	State Mandated	32%	$415,238
Management of the Emergency Operations Center during emergencies, issue emergency advisories, training first responders in Incident Management and Command, maintain National Incident Management System (NIMS) compliance, conduct exercises, and institute corrective actions.			
Mitigation and Recovery	State Mandated	22%	$277,255
Maintain Local Mitigation Strategy to guide programs and projects that prevent, protect, and minimize the loss from future incidents. Initiates recovery process with State and Federal agencies to ensure County fully recovers reimbursement entitled from emergencies.			
	Operating Budget	**100%**	**$1,289,559**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 891,075	$ 1,037,239	$ 1,104,528	$ 1,150,128
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 198,896	$ 204,655	$ 204,655	$ 204,655
Charges for Services	$ 1,217	$ 5,000	$ 5,000	$ 5,000
Misc	$ 8,842	$ -	$ -	$ -
Transfers	$ 7,488	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 1,107,517	$ 1,246,894	$ 1,314,183	$ 1,359,783

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 608,499	$ 828,806	$ 806,045	$ 832,443
Services & Charges	$ 406,816	$ 352,944	$ 405,160	$ 422,315
Operating Expenses	$ 62,088	$ 53,020	$ 78,354	$ 80,401
Capital	$ 25,490	$ 7,500	$ 20,000	$ 20,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 4,624	$ 4,624	$ 4,624	$ 4,624
Reserves	$ -	$ -	$ -	$ -
Total	$ 1,107,517	$ 1,246,894	$ 1,314,183	$ 1,359,783

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	6	7	7	7
Part Time	0	0	0	0
Total	6	7	7	7
Proposed New Positions	0	0	1	1

Notes

Key changes for Emergency Management include a request for one additional FTE in FY 26 & one in FY 27 for Service Delivery both are Readiness/Resiliency Positions. Increase to Operating Expenses due to purchase of items for Disaster Resource Kits.

FY 26 Budgeted Revenue

- BCC General Revenues 84%
- State & Federal Revenue 15%
- Charges for Services 1%

FY 26 Budgeted Expenditures

- Salaries & Benefits 62%
- Services & Charges 30%
- Operating Expenses 5%
- Capital 2%
- Transfers 1%

Public Safety
EMS

Charlotte County FLORIDA

Mission

EMS --- Emergency Medical Services Department provides ALS (emergency) and BLS (nonemergency) medical care to the citizens and visitors of Charlotte County. Through this service we protect the lives and welfare of our community while ensuring the highest commitment to safety, professionalism, integrity and care.

Linkage to Strategic Goals

Public Services

Core Functions
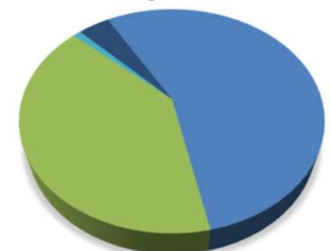
Emergency Medical Services

Emergency Medical Services provides emergency medical services over an area of 693 square miles. The Department is divided into three Battalions that operate 17 Advanced Life Support (ALS) Rescue Units including the 10-hour peak load units. These rescues respond out of 19 stations (two of which are Punta Gorda Fire Department). All operational personnel, with a few exceptions, have been crossed trained as both Firefighter/ EMTs or Firefighter/Paramedics. Emergency crews are divided into three 24 hour shifts, which work from 08:00 am to 08:00 am followed by 48 hours off duty and 10-hour day time shifts for the peak load units.

FY 26 - First Year Operating Budget

State Mandated	100%	$27,084,739
Operating Budget	**100%**	**$27,084,739**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 9,051,931	$ 14,751,964	$ 15,999,705	$ 16,774,674
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 140,400	$ -	$ -	$ -
Charges for Services	$ 11,498,887	$ 10,117,454	$ 11,500,000	$ 11,500,000
Misc	$ 2,703,586	$ 392,096	$ 392,096	$ 392,096
Transfers	$ 182,561	$ 880,000	$ 880,000	$ 880,000
Beginning Balances	$ -	$ -	$ -	$ -
Total	**$ 23,577,365**	**$ 26,141,514**	**$ 28,771,801**	**$ 29,546,770**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 18,176,044	$ 20,420,319	$ 21,225,462	$ 22,058,576
Services & Charges	$ 4,133,254	$ 3,657,145	$ 4,643,196	$ 4,700,332
Operating Expenses	$ 952,666	$ 1,202,885	$ 1,216,081	$ 1,102,425
Capital	$ 262,202	$ 850,728	$ 1,676,625	$ 1,675,000
Other	$ -	$ -	$ -	$ -
Debt	$ 42,762	$ -	$ -	$ -
Transfers	$ 10,437	$ 10,437	$ 10,437	$ 10,437
Reserves	$ -	$ -	$ -	$ -
Total	**$ 23,577,365**	**$ 26,141,514**	**$ 28,771,801**	**$ 29,546,770**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	143.5	143	147	147
Part Time	1	0	0	0
Total	**144.5**	**143**	**147**	**147**
Proposed New Positions	0	0	20.5	14

Notes

Key changes for EMS include a request for twenty & a half additional FTEs in FY 26, eight & a half for Service Delivery & twelve for Infrastructure. For FY 27 there is a request for fourteen additional FTEs, two for Service Delivery & twelve for Infrastructure. Services & Charges reflect a significant increase, primarily due to PEMT actuals, which are offset by corresponding revenues. There is also an inflationary increase in professional services & an additional request for a Mental Health Counselor. Capital shows a large increase due to the replacement of vehicles related to inflation.
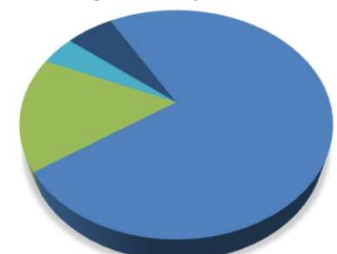
FY 26 Budgeted Revenue

- BCC General Revenues 55%
- Charges for Services 40%
- Miscellaneous 1%
- Transfers 4%

FY 26 Budgeted Expenditures

- Salaries & Benefits 73%
- Services & Charges 17%
- Operating Expenses 4%
- Capital 5%
- Transfers 1%

Public Safety
Fire

CHARLOTTE COUNTY
FLORIDA

Mission

Fire --- The Fire Recue Department provides emergency and nonemergency services to the citizens and visitors of Charlotte County. Through this service we protect the lives, property and environment of our community while ensuring the highest commitment to safety, professionalism, integrity and care.

Linkage to Strategic Goals

Public Services

Core Functions

	FY 26 - First Year Operating Budget		

Fire Rescue

Charlotte County Fire provides fire protection over an area of 693 square miles. The Department is divided into three Battalions that operate eleven ALS Engines, one BLS Engines, three ladder trucks, one heavy resque squad, and four brush trucks. All operational personnel, with a few exceptions, have been crossed trained as both Firefighter/ EMTs or Firefighter/Paramedics. Emergency crews are divided into three 24 hour shifts, which work from 08:00 am to 08:00 am followed by 48 hours off duty.
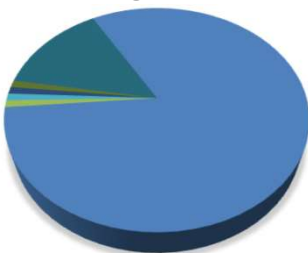
Locally Mandated	100%	$38,507,145
Operating Budget	**100%**	**$38,507,145**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ 34,144,073	$ 41,072,086	$ 45,972,827	$ 49,703,132
State & Federal Revenue	$ 76,690	$ 67,152	$ 76,705	$ 76,705
Charges for Services	$ 91,204	$ 46,000	$ 46,000	$ 46,000
Misc	$ 1,809,222	$ 761,064	$ 761,064	$ 761,064
Transfers	$ 918,793	$ 1,019,615	$ 966,528	$ 966,528
Beginning Balances	$ -	$ 5,214,289	$ 7,786,458	$ 6,379,554
Total	**$ 37,039,982**	**$ 48,180,206**	**$ 55,609,582**	**$ 57,932,983**

FY 26 Budgeted Revenue

- Fees & Assessments 82%
- State & Federal Revenue 1%
- Charges for Services 1%
- Miscellaneous 1%
- Transfers 1%
- Beginning Balances 14%

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 25,694,303	$ 28,385,672	$ 29,641,408	$ 30,641,651
Services & Charges	$ 6,081,800	$ 6,012,037	$ 7,349,632	$ 7,679,186
Operating Expenses	$ 1,332,631	$ 1,404,938	$ 1,516,105	$ 1,287,142
Capital	$ 957,900	$ 2,891,112	$ 6,999,880	$ 2,375,000
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 126,255	$ 118,352	$ 294,310	$ 270,517
Reserves	$ -	$ 9,368,095	$ 9,808,247	$ 15,679,487
Total	**$ 34,192,890**	**$ 48,180,206**	**$ 55,609,582**	**$ 57,932,983**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	188.5	196	201	201
Part Time	0	0	0	0
Total	**188.5**	**196**	**201**	**201**
Proposed New Positions	0	0	32.5	19

FY 26 Budgeted Expenditures

- Salaries & Benefits 54%
- Services & Charges 13%
- Operating Expenses 3%
- Capital 12%
- Transfers 1%
- Reserves 17%

Notes

Key changes for Fire include a request for thirty-two a half additional FTEs in FY 26, eleven & a half for Service Delivery & twenty-one for Infrastructure. For FY 27 there is a request for nineteen additional FTEs, one for Service Delivery & eighteen for Infrastructure. Services & Charges reflect a significant increase, primarily due to annual inspections & equipment testing. This category also includes an inflationary increase in professional services & an additional request for a Mental Health Counselor. Capital shows a substantial increase driven by the replacement of vehicles related to inflation.

Public Safety
Radio Communications

Mission

Radio Communications --- To provide the highest quality communications to all system users by managing the overall system and maintaining the day-to-day operations of the P25 700 MHz simulcast radio system.

Linkage to Strategic Goals

Public Services

Core Functions	FY 26 - First Year Operating Budget		
Radio System Management	Critical	100%	$1,863,959
Manage and maintain the County-wide P25 700 MHz public safety network radio system.			
	Operating Budget	100%	$1,863,959

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 937,256	$ 773,928	$ 2,177,094	$ 1,869,801
Transfers	$ 43,768	$ -	$ -	$ -
Beginning Balances	$ -	$ 1,232,345	$ (38,696)	$ (38,696)
Total	$ 981,024	$ 2,006,273	$ 2,138,398	$ 1,831,105

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 282,906	$ 343,132	$ 286,679	$ 295,696
Services & Charges	$ 524,761	$ 561,300	$ 718,060	$ 650,120
Operating Expenses	$ 43,426	$ 475,879	$ 859,220	$ 840,850
Capital	$ 1,534,857	$ 135,000	$ 270,000	$ 40,000
Other	$ -	$ -	$ -	$ -
Debt	$ 49,793	$ -	$ -	$ -
Transfers	$ 4,439	$ 4,439	$ 4,439	$ 4,439
Reserves	$ -	$ 486,523	$ -	$ -
Total	$ 2,440,182	$ 2,006,273	$ 2,138,398	$ 1,831,105

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	3	3	3	3
Part Time	0	0	0	0
Total	3	3	3	3
Proposed New Positions	0	0	0	0

Notes

Key changes for Radio Communications include an increase in operating expenses related to software upgrades & rising maintenance costs. There is also a new request for tower site equipment upgrades & a countywide Phase 2 replacement of refurbished radios. Capital shows an increase due to the RFI Site Vantage P25 Advanced Power Monitoring System & the addition of microwave links, including one to the new CCSO dispatch center.

FY 26 Budgeted Revenue
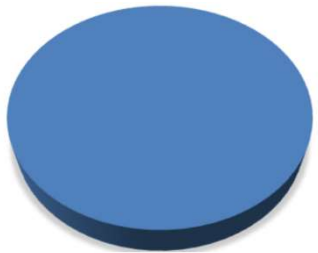
■ Miscellaneous 100%

FY 26 Budgeted Expenditures
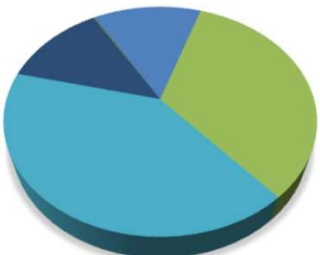
■ Salaries & Benefits 13%
■ Services & Charges 33%
■ Operating Expenses 40%
■ Capital 13%
■ Transfers 1%

ANIMAL CONTROL

Levels of Service – 6 Year Metrics

Animal Services

Who is your primary Customer?	Citizens & Animals
What is the primary service they receive from you?	Enforcing County Ordinances & State Statutes, Education, Complaint Resolution
What is the main aspect of the service they care about?	Complaint Resolution/Ordinance Compliance/Animal Welfare

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Complaint Resolution/Ordinance Compliance/Animal Welfare	% of Incoming Phone Calls Requiring Call Response/Supplemental Reports	SharePoint Database & IT Phone Extension Report	29.4%	20.0%	26.0%	22.8%	28.60%	31.50%
	# of Incoming Phone Calls	IT Phone Extension Report	43,166	52,889	42,967	45,053	44,332	43,590
	Incident/Supplemental Reports Generated from Incoming Calls and Service Requests	SharePoint Database	12,707	10,591	11,163	10,254	12,669	13,747
	# of License Tags Sold	PetData Inc.	N/A	23,849	27,542	27,349	32,664	21,776
	# of Citations Issued for Ordinance Violations	Animal Control Records	N/A	154	199	193	330	407
	# of Animals Transported to AWL Shelter by Animal Control (held pursuant to contract)	Animal Welfare League	N/A	730	918	1,123	1,169	1,256
	# of animals transported to AWL shelter by citizens (held pursuant to contract)	Animal Welfare League	N/A	506	928	1,112	1,114	896
	Total animal intake to Animal Welfare League (held pursuant to contract)	Animal Welfare League	N/A	1,236	1,846	2,281	2,283	2,152

EMERGENCY MANAGEMENT

Levels of Service – 6 Year Metrics

Preparedness and Planning

Who is your primary Customer?	Citizens, visitors, and businesses
What is the primary service they receive from you?	Preparedness education, hazard identification, and disaster planning
What is the main aspect of the service they care about?	Thorough and timely education

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Planning	% of plans reviewed annually	Internal Report	100%	100%	100%	100%	100%	100%
	# of community requested presentations		46	9	20	27	35	51
	Population impacted		3,595	6,220	1,781	1,895	1,700	5,107

Operations and Response

Who is your primary Customer?	Citizens, visitors, and businesses.
What is the primary service they receive from you?	Emergency notification, protective action guidance, and emergency protective measures.
What is the main aspect of the service they care about?	Timely and accurate guidance and measures.

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Volume Reached	% of population signed up for Everbridge	Everbridge Reports	14%	14%	12%	13%	18%	21%

Mitigation and Recovery

Who is your primary Customer?	Citizens, visitors, businesses, and government agencies.
What is the primary service they receive from you?	Coordination identification of mitigation opportunities and actions. Seek opportunities for state and federal assistance.
What is the main aspect of the service they care about?	Leveraging funding opportunities.

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Funding Opportunities	% of participants in Flood Insurance programs	Community Development	27%	27%	27%	N/A	N/A	N/A*

*Data no longer available

FIRE/EMS
Levels of Service – 6 Year Metrics
Fire & EMS

Who is your primary Customer?	Citizens and visitors of Charlotte County							
What is the primary service they receive from you?	All Hazards Response and Rescue, Fire Suppression, ALS Transport, and Community Risk Reduction							
What is the main aspect of the service they care about?	Quick response, hazard mitigation, highly trained responders							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2018	2019	2020	2021	2022	2023	2024
Effective	Calls for Service	ImageTrend/CAD Data	30,895	30,735	31,191	35,224	37,868	37,777	40,309
	Total Unit Responses		50,765	50,676	52,335	59,450	64,836	67,216	73,990
	EMS Transports		18,882	19,067	19,572	21,956	22,988	23,503	24,881
	NFIRS Incident Type Category 1 - Fire		532	472	622	631	741	674	648
	NFIRS Incident Type Category 3 - Rescue & EMS Incident		23,924	23,943	23,723	26,752	28,728	28,998	30,014
	NFIRS Incident Type Category 5 - Service Call		3,044	3,033	3,159	3,857	3,138	3,280	3,963
	Calls Per Day - Average		84.6	84.2	85.5	96.5	103.7	103.5	110.4
	Turnout Time - 90th Percentile		2:39	2:43	2:49	2:44	2:47	2:34	2:24
	Travel Time - 90th Percentile		9:30	8:20	8:46	9:06	9:51	9:39	9:39
	Total Call Time - 90th Percentile		0:51:26	0:51:18	0:55:41	0:58:54	1:01:27	0:58:49	0:58:25
	Fire Prevention - Existing Occupancy Inspections	Accela/Imagetrend	1058	1046	845	959	848	1285	2918
	Fire Prevention - Construction Documents / Plans Review		1371	1511	1344	2014	2357	2969	3072
	Fire Prevention - New Construction Inspections		1982	2033	2152	2419	8,698*	7,233*	6688
						*Sunseeker	6,276	4,773	62

RADIO COMMUNICATIONS

Levels of Service - 6 Year Metrics

Radio System Management

Who is your primary Customer?	Governmental radio users										
What is the primary service they receive from you?	Radio system monitoring and support										
What is the main aspect of the service they care about?	Reliable radio communications										
How do we measure "what customers care about"?	**What is (or can be) measured?**	**What is the source of this data?**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Radio Subscriber Reliability	% of Radio Subscriber Repairs	Radio Repair Log File	2.5%	3.2%	3.1%	1.4%	1.8%	4.3%	4.9%	9.7%	13.2%
	# of Radio Subscriber Repairs (Internal & External)		60	78	77	37	45	112	133	279	386
	# of Radio Subscribers		2,385	2,425	2,450	2,596	2,511	2,581	2,720	2,867	2,928

FY26 and FY27 GOALS:

1 To renegotiate the existing contract with the Animal Welfare League

The new agreement will align the goals and objectives of both organizations, creating a solid foundation for a strong community partnership. This collaboration will benefit our community for years to come, reinforcing our shared dedication to advocating for the well-being of domesticated pets in the county.

2 Launch the Animal Control Awareness Initiative to Strengthen Community Involvement

This initiative focuses on enhancing community engagement by:

- Increasing visibility through social media platforms
- Creating a robust outreach program
- Designating a specific budget for initiative-related costs
- Promoting departmental programs across diverse channels
- Collaborating with local media to advocate for responsible pet ownership as the core objective.

3 Dangerous Dog Protocol Updates

We will maintain our partnership with the County Attorney to refine and improve protocols for Dangerous Dog Classifications in Charlotte County. This effort will involve:

- Establishing internal procedures for conducting Dangerous Animal Appeal Hearings
- Collaborating with the County Attorney to design updated forms that replace outdated or obsolete ones
- Ensuring Dangerous Dog Ordinances comply with Florida Statutes
- Developing new policies and delivering training sessions for staff
- Assigning senior staff members with oversight responsibilities.

4 Restructure Pet Licensing Program

Our goal is to redesign the pet-licensing program to better serve the pet owners and residents of Charlotte County. Proposed improvements include:

- In-House Enhancements
- Partner with the IT department to create online pet-licensing capabilities and streamline data sharing with local veterinarians.
- Hire additional staff dedicated exclusively to managing and enhancing the pet-licensing program.

FY24/25 GOALS AND PROGRESS:

1 To improve Officers personal protection & safety by outfitting them with body armor vests to wear during field responses

This goal was successfully achieved in January 2024. We collaborated with Federal Eastern International LLC and allocated the necessary budget funds. Additionally, new policies and protocols were established to support this accomplishment.

2 To enhance our disaster response plan and capabilities through cross-training select staff in ESF-17 procedures and protocol, creating an Animal Control specific resource guide for the ESF-17 station, and establishing an MOU with at least one humane animal organization to streamline resources to our County for disaster response if needed

This goal has been largely accomplished. We now have three staff members fully trained in ESF-17 protocol. Additionally, we have developed a department-specific resource guide to streamline, enhance, and standardize local and state resource requests for Animal Control. At present, we are awaiting a response on a submitted Memorandum of Understanding (MOU) with the Humane Society of the United States.

3 To establish a 'rabies vaccine citation compliance initiative' to assist pet owners found to be non-compliant by giving them the chance to pay a 'compliance fee', lower than the standard fine amount as long as proof of vaccination is obtained within a specified time period. This approach aims to decrease the number of court appearances required for officers and alleviate the burden on traffic court schedules.

This project remains to be a work-in-progress. An LSR was filed (LSR25-0352) outlining the primary objectives and intended outcome.

4 To consolidate local resources and information by creating a comprehensive and accessible form for locating lost pets in Charlotte County. This streamlined and simplified process will serve as a central hub, featuring social media contacts for community-driven pet recovery efforts in the area; direct links to submit a 'lost pet report' to our department and local animal shelters; contact information for local animal shelters, making it easier to seek immediate help; and practical guidance on conducting a thorough search for a missing pet. By offering this consolidated resource, we aim to make the process more efficient and increase the likelihood of reuniting lost pets with their owners.

This goal was completed in April 2024. The interactive document titled 'What to Do if Your Pet is Lost' features social media contacts for quick and easy reference, direct links to local resources to file lost reports, and contact information for all local animal shelters.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	To partner with the Animal Welfare League for a low-cost spay/neuter program for Charlotte Co. pet owners

The low-cost spay/neuter program was officially launched in 2022.

2	To integrate new computer software to accommodate the evolving needs of our department

This continues to be a work-in-progress. We have had demos with two established software companies who specialize in Animal Services. We are expected to complete this in 2023.

3	To replace the livestock fence at our pasture and establish an inter-department agreement between Animal Control & Public Works

The livestock fence was replaced in 2022. A Memorandum of Understanding was also created and signed by all relevant parties outlining the usage of the land currently being used to house livestock.

4	To update our dangerous animal protocol

Animal Control entered into a contractual agreement with the Florida Division of Administrative Hearings to hear all cases related to classified dangerous animals in our County. We also trained our entire department as Notaries and are now using the resources of a civil process server to ensure proper postings.

5	To integrate new computer software to accommodate the evolving needs of our department

This goal was completed. We went live with Comcate software on 05/15/2023.

6	To create an 8-hour training course for all Animal Control Officers for the use of extendable batons, pepper-spray, and self-defense.

This goal was completed with the assistance of certified safety instructors fromTalonTactical LLC. The syllabus contains maneuvers related to the proper use of stance, balance, and positions and includes live exposure training with pepper-gel.

7	To create an additional position of Sr. Animal Control Officer to increase oversight over department operations

This goal was completed. The additional position of Sr. Animal Control Officer was approved by the BOCC on 09/19/2023.

FY26 and FY27 GOALS:

1	Provide tools to enhance preparedness to our most vulnerable populations through outreach and engagement that leverages the established partnerships with community partners.
2	Establish a framework for recovery from disasters to ensure all elements for the Charlotte County BCC are working in concert and engaging with the process in a uniform and coordinated manner.
3	Enhance overall readiness by creating Disaster Response Kits and training identified personnel on the eployment and operation of the various uses.

FY24/25 GOALS AND PROGRESS:

1	Increase response, preparedness and recovery capacity by pursuing grants (State and Federal) that will provide essential space for risk sheltering, funding for planning initiatives relating to adaptation, strengthening of infrastructure and mass care capabilities.
	Submitted for well over $100 million in Hazard Mitigation Grant Program grants that if awarded will enhance the response and readiness of our community through enhancements to infrastructure and lessening or eliminating the impacts of future disasters.
2	Address opportunities for improvement identified in the aftermath of Hurricane Ian; specifically logistical planning and tracking for disaster sites, disaster contracts and increasing depth of staff for specific disaster roles by leveraging County employees.
	Enhanced training has occurred as a result of Hurricane Ian to ensure a trained and ready workforce of County staff. Logistical processes have been streamlined and practiced to include the establishment of MOUs for disaster sites.
3	Expand the employee disaster role training program to ensure a cadre of trained individuals capable of meeting the response and recovery needs of Charlotte County before, during and after events.
	Shelter and Call Center training have continued to grow and mature while traning has been established for various other disaster functions such as Points fo Distribution and Reunification Centers.
4	Complete work on the Long-term Recovery Plan that provides a blueprint going forward that aims to address issues within the Recovery Support Function categories that existed prior to Ian or were made worse by the storm; with the outcome being a stronger more resilient community, better able to withstand future disaster.
	The Long-Term Recovery Plan was completed through a Whole Community approach that included resident and stakeholder input.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Create a better overall understanding of the EOC among stakeholders that do not normally staff the EOC by extending opprotunities to participate in exercises where participants are run through the paces of a simulated activation.
	Completed through partnering with stakeholders and expanding exercise opprotunities to additional staff.
2	Leverage the traction gained throughout the Pandemic response by maitaining and growing the work groups established to handle the myriad of issues associated with disaster response (Mass Care, Health/Medical/Responder, JIC, Logistics, Education, Critical Infrastructure, Trasportation, Animal/Agricultural, Private Sector, etc.).
	Completed: Fucntional work groups continue to meet to addess planning, training, and exercise goals while continuing to address real-workd events.
3	Foster greater communictation and collaboration within the Local Mitiation Strategy Work Group to identify creative projects and improve the overall resiliency of our community by reducing or emliminating the risks associted with our County hazard profile.
	Completed: The LMS working group meets more frequently to address the needs of the community and enhance reslience.
4	Enhance EOC responder effectiveness by revising positional job aids.
	Completed: Regular training and job aids have been developed for EOC staff to ensure appropriate resources are available to train new staff and enhance the capabilities of existing EOC staff.
5	To complete the continuity of operations plans updates to all critical agencies. These plans provide frameworks to ensure the ability of agencies to continue delivery of critical services and response capabilities. The development of the plans paid dividends in the immediate aftermath of Ian, where numerous critical agencies were unable to access their normal work sites due to damage or inaccessibility.
	Completed: COOPs are addressed annually for critical partners and updated as needed.
6	Enhanced outreach to the business community by partnering with the Charlotte County Economic Development Office and Chambers of Commerce and participating in webinars and speaking engagements driven at employee and business preparedness. The dialogue begun in the early part of Hurricane Season ensured that a line of communications was already established and utilized in the days leading up and after Ian.
	Completed: Emergency Management has participated in several webinar trainings targeted to Chamber of Commerce membership as well as in-person outreach. A business disaster plan template has been created and is being made available to the business community.

FY26 and FY27 GOALS:

1	New Station 17 operation implementation
2	Replacement Station 3 and Station 6 operation implementation
3	Build a coverage plan to accommodate a 6-week Kelly Day implementation
4	Expand the CISM (Critical Incident Stress Management) peer support initiative to strengthen our Mental Health program
5	Exploration of a community paramedicine program, potentially tied to the IRIS initiative

FY24/25 GOALS AND PROGRESS:

1	First year implementation of our Strategic Plan as approved by the BCC
Complete	
2	Define and implement specific plans to address the dispatch concerns identified in the Scope of Cover Study
Complete: ProQA, Rapid Dispatch, Establishment of Workgroup	
3	Define and implement specific plans to address the response time gaps identified in the Scope of Cover Study
Complete: Implementation of 12-hour rescues, station design, location assessment, Actively pursuing Station Alerting System	
4	Work with County Department partners to identify opportunities in recruitment/retention and develop plans/programs for implementation and delivery
Complete: Visioning workgroup, HR Partnership for recruiting, Increase marketing for recruiting	

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	New station 2 and 5 operation implementation
Complete	
2	Enhance Engine 7 service standard with implementation of ALS non-transport
Complete	
3	Complete a Scope of Cover and Staff Optimization Study for Fire/EMS
Complete	
4	Complete a Strategic Plan for Fire/EMS
Complete	
5	Complete a Business Plan to facilitate operations of the Regional ARFF Trainer
Complete	

Radio Communications Division
Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Deploy and configure new radios to county fire department and CCSO with additional region 6 channels and new features such as WiFi, AES encryption and radio management. FY2026
2	Procure and install new P25 antenna analyzer and alarm monitoring system.FY2026
3	Begin phase 1 of the procurement of radio replacements for all county departments FY2026. Phase 2 will begin FY2027
4	Begin phase 2 installation of SeeHawk automated BDA uplink testing system.

FY24/25 GOALS AND PROGRESS:

1	Replace aging tower site alarm monitoring system.
Tower site alarm replacement underway. All equipment has been procured and staged. Installation to begin in the next 60 days	
2	Complete Sun tower to Gunrange tower microwave link to complete our west county network ring.
FCC Licenses have been approved and all equipment has been ordered. Installation to begin in the next 90 days	
3	Complete negoitations and develop lease with Verizon to install new cell site at Babcock Ranch tower. Develope policies and procedures for tower contractors and cellular carriers leasing county owned properties and tower sites.
Verizion cell site negoations have been completed and a draft lease is ready for legal review. Policies and Procedures recommendations have been submitted to legal for review and guidance.	
4	Begin phase 1 installation of SeeHawk automated BDA uplink testing system. Evaluate radio system user fees.
Phase 1 uplink testing equipment installed and tested. Radio system user fees are status quo at this time.	

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Establish ISSI interoperability server connection with Lee county
This is currently in the early stages of discussion with Lee County Public Safety due that they rolled out their P25 system late and with restrictions which we are currently working through. Lee County mandate that only P25 phase 2 radios operate on their system.	
2	Fire Station Alerting System
Currently in discussion to determine the best options for the Fire Department.	
3	Complete VHF backup radio system.
Completed	
4	Hire new technican assistant to support radio manager.
Completed	

Public Works

Public Works

Mission

To deliver quality public works services and manage public road and stormwater infrastructure on behalf of the citizens of Charlotte County effectively and efficiently.

Division Summary	FY 26 - First Year Operating Budget	
Engineering --- Advance the County's mission by anticipating challenges and forging solutions associated with community growth and infrastructure while protecting the life safety, health and welfare of the citizens and promoting the long term livability of the community.	22%	$12,291,177
Pest Management --- To ensure the public's health, welfare, and quality of life through effective control of the County's mosquito population and aquatic /exotic vegetation populations, using an integrated approach that is fiscally sound and pursuant to Florida Statute and Administrative Codes.	10%	$5,915,155
Road Maintenance --- To deliver quality public works services and manage public road and stormwater infrastructure on behalf of the citizens of Charlotte County, effectively and efficiently.	48%	$26,401,661
Solid Waste --- Advance the County's mission by overseeing the disposal of solid waste from businesses and residents of Charlotte County.	20%	$10,731,483
Operating Budget	**100%**	**$55,339,476**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 4,589,694	$ 8,683,365	$ 8,922,777	$ 9,257,713
Taxes	$ 12,040,293	$ 13,656,231	$ 12,040,292	$ 12,040,292
Fees & Assessments	$ 1,430,955	$ 1,460,000	$ 1,430,957	$ 1,430,957
State & Federal Revenue	$ 3,673,868	$ 4,561,697	$ 3,673,851	$ 3,673,851
Charges for Services	$ 15,521,454	$ 10,179,722	$ 15,538,923	$ 15,528,923
Misc	$ 18,417,790	$ 17,637,858	$ 21,007,949	$ 20,432,684
Transfers	$ 1,639,710	$ 3,573,289	$ 3,679,530	$ 3,679,530
Beginning Balances	$ -	$ 45,837,794	$ 71,119,773	$ 71,817,135
Total	**$ 57,313,766**	**$ 105,589,956**	**$ 137,414,052**	**$ 137,861,085**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 17,251,652	$ 26,865,568	$ 27,188,710	$ 27,694,165
Services & Charges	$ 20,959,782	$ 21,646,489	$ 23,225,868	$ 23,509,836
Operating Expenses	$ 5,492,330	$ 3,676,726	$ 4,924,898	$ 4,868,023
Capital	$ 682,306	$ 3,766,434	$ 4,985,329	$ 4,089,666
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 1,356,825	$ 2,115,752	$ 2,696,084	$ 2,736,127
Reserves	$ -	$ 47,518,987	$ 74,393,163	$ 74,963,268
Total	**$ 45,742,895**	**$ 105,589,956**	**$ 137,414,052**	**$ 137,861,085**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	213	213	213	213
Part Time	1	1	1	1
Total	**214**	**214**	**214**	**214**
Proposed New Positions	0	0	0	0

Notes

The following pages provide a variance analysis for each division within Public Works.

FY 26 Budgeted Revenue

- BCC General Revenues 7%
- Taxes 8%
- Fees & Assessments 2%
- State & Federal Revenue 3%
- Charges for Services 11%
- Miscellaneous 15%
- Transfers 3%
- Beginning Balances 51%

FY 26 Budgeted Expenditures

- Salaries & Benefits 20%
- Services & Charges 16%
- Operating Expenses 4%
- Capital 4%
- Transfers 2%
- Reserves 54%
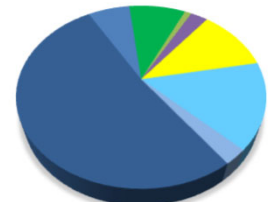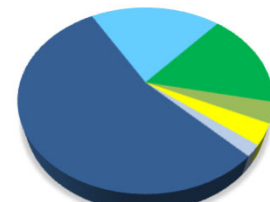
Public Works
Road Maintenance

Mission

Road Maintenance --- To deliver quality public works services and manage public road and stormwater infrastructure on behalf of the citizens of Charlotte County, effectively and efficiently.

Linkage to Strategic Goals

Infrastructure

Core Functions

FY 26 - First Year Operating Budget

Road and Drainage Maintenance
To build and maintain countywide infrastructure that meets our evolving needs and enhances our community appearance.

State Mandated	100%	$26,401,661
Operating Budget	100%	$26,401,661

Revenues by Category

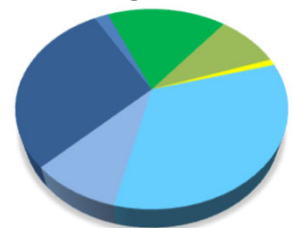| Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 378,284	$ 331,681	$ 541,079	$ 537,053
Taxes	$ 6,530,221	$ 7,705,388	$ 6,530,220	$ 6,530,220
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 3,673,868	$ 4,561,697	$ 3,673,851	$ 3,673,851
Charges for Services	$ 57,875	$ 25,722	$ 57,875	$ 57,875
Misc	$ 13,003,638	$ 13,919,508	$ 13,361,447	$ 13,361,447
Transfers	$ 1,243,138	$ 3,501,689	$ 3,476,630	$ 3,476,630
Beginning Balances	$ -	$ 5,082,212	$ 11,807,469	$ 9,183,302
Total	$ 24,887,024	$ 35,127,897	$ 39,448,571	$ 36,820,378

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 10,137,582	$ 14,386,324	$ 14,570,154	$ 14,697,437
Services & Charges	$ 8,961,070	$ 9,507,012	$ 10,242,969	$ 10,359,103
Operating Expenses	$ 1,469,243	$ 1,252,911	$ 1,588,538	$ 1,534,338
Capital	$ 228,197	$ 541,434	$ 267,300	$ 216,800
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 945,237	$ 1,579,926	$ 2,062,315	$ 2,079,907
Reserves	$ -	$ 7,860,290	$ 10,717,295	$ 7,932,793
Total	$ 21,741,329	$ 35,127,897	$ 39,448,571	$ 36,820,378
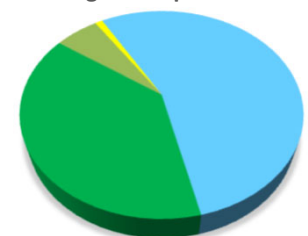
Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	106	106	106	106
Part Time	1	1	1	1
Total	107	107	107	107
Proposed New Positions	0	0	0	0

Notes

Salaries & Benefits increased due to pay for performance increase.
Operating expenses increased due to inflationary increases.
Capital decrease due to heavy equipment being moved to CIP.

FY 26 Budgeted Revenue

- BCC General Revenues 2%
- Taxes 17%
- State & Federal Revenue 9%
- Charges for Services 1%
- Miscellaneous 33%
- Transfers 9%
- Beginning Balances 29%

FY 26 Budgeted Expenditures

- Salaries & Benefits 36%
- Services & Charges 26%
- Operating Expenses 4%
- Capital 1%
- Transfers 6%
- Reserves 27%

Public Works
Pest Management

Mission

Pest Management --- To ensure the public's health, welfare, and quality of life through effective control of the County's mosquito population and aquatic /exotic vegetation populations, using an integrated approach that is fiscally sound and pursuant to Florida Statute and Administrative Codes.

Linkage to Strategic Goals

Efficient and Effective Government	Public Services

Core Functions | FY 26 - First Year Operating Budget

Mosquito Control
Provide an arthropod control program for the control of disease vectoring or pestiferous mosquitoes

State Mandated	50%	$2,957,578

Aquatic Weeds
Control aquatic vegetation (native & exotic) in County freshwater canals and drainage ditches for storm water conveyance.

State Mandated	50%	$2,957,578

Operating Budget	100%	$5,915,155

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 4,029,562	$ 4,654,077	$ 5,814,966	$ 6,082,151
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 839,510	$ 588,000	$ 842,509	$ 842,509
Transfers	$ 57,928	$ -	$ -	$ -
Beginning Balances	$ -	$ -	$ -	$ -
Total	$ 4,927,000	$ 5,242,077	$ 6,657,475	$ 6,924,660

FY 26 Budgeted Revenue

- BCC General Revenues 88%
- Miscellaneous 12%

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,557,115	$ 1,710,096	$ 1,850,598	$ 1,909,461
Services & Charges	$ 1,254,000	$ 1,356,779	$ 1,608,477	$ 1,618,766
Operating Expenses	$ 1,736,877	$ 1,829,273	$ 2,456,080	$ 2,531,680
Capital	$ 53,079	$ 20,000	$ 361,470	$ 452,900
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 325,929	$ 325,929	$ 380,850	$ 411,853
Reserves	$ -	$ -	$ -	$ -
Total	$ 4,927,000	$ 5,242,077	$ 6,657,475	$ 6,924,660

FY 26 Budgeted Expenditures

- Salaries & Benefits 28%
- Services & Charges 24%
- Operating Expenses 36%
- Capital 6%
- Transfers 6%

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	16	16	16	16
Part Time	0	0	0	0
Total	16	16	16	16
Proposed New Positions	0	0	0	0

Notes

Salaries & Benefits increased due to pay for performance increase.
Services and charges increased due to increased contract costs.
Operating expenses increased due to inflationary increases such as chemicals.
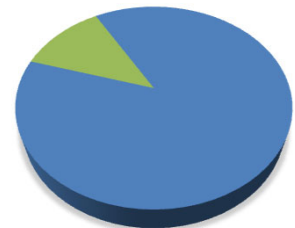
Public Works
Engineering

Mission

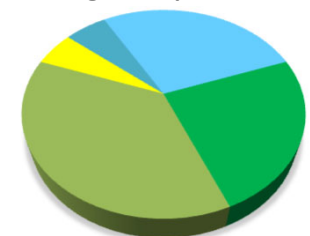Engineering --- Advance the County's mission by anticipating challenges and forging solutions associated with community growth and infrastructure while protecting the life safety, health and welfare of the citizens and promoting the long term livability of the community.

Linkage to Strategic Goals

Efficient and Effective Government   Public Services
Economic & Community Development

Core Functions

Core Functions	FY 26 - First Year Operating Budget		
Road & Bridge Project Construction and Traffic Maintenance Capital project development and assessment. Coordinate right-of-way land acquisition. Monitoring and inspection of utility right-of-way permits.	State Mandated	71%	$8,739,027
Survey Review and comment on Subdivision Plats. Provide vertical control benchmark program and elevation data for FEMA. Provide data collection for topo for drainage studies.	State Mandated	3%	$417,900
Lighting Services Repair and maintain traffic signals, traffic control devices and streetlights.	State Mandated	15%	$1,880,550
Land Development Enforcement of local Land Development Regulations including ROW mining and stormwater.	State Mandated	10%	$1,253,700
	Operating Budget	**100%**	**$12,291,177**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ 181,848	$ 3,697,607	$ 2,566,732	$ 2,638,509
Taxes	$ 5,510,072	$ 5,950,843	$ 5,510,072	$ 5,510,072
Fees & Assessments	$ 1,430,955	$ 1,460,000	$ 1,430,957	$ 1,430,957
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 135,962	$ 154,000	$ 150,428	$ 140,428
Misc	$ 1,565,319	$ 2,153,850	$ 3,801,033	$ 3,225,768
Transfers	$ 160,960	$ 56,600	$ 132,900	$ 132,900
Beginning Balances	$ -	$ 8,180,328	$ 12,310,560	$ 11,175,731
Total	$ 8,985,117	$ 21,653,228	$ 25,902,682	$ 24,254,365

Expenses by Category
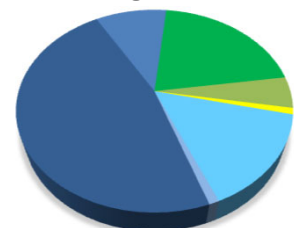
Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 2,319,346	$ 6,785,504	$ 6,798,424	$ 7,001,733
Services & Charges	$ 4,675,431	$ 6,036,038	$ 5,174,103	$ 5,177,423
Operating Expenses	$ 311,949	$ 214,598	$ 318,650	$ 233,000
Capital	$ 401,030	$ 1,631,000	$ 1,979,059	$ 1,809,466
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 40,879	$ 152,117	$ 181,212	$ 166,071
Reserves	$ -	$ 6,833,971	$ 11,451,234	$ 9,866,672
Total	$ 7,748,635	$ 21,653,228	$ 25,902,682	$ 24,254,365
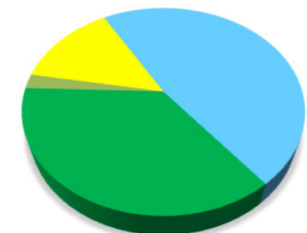
Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	59	59	59	59
Part Time	0	0	0	0
Total	**59**	**59**	**59**	**59**
Proposed New Positions	0	0	0	0

Notes

Salaries & Benefits increased due to pay for performance increase.
Services and charges decreased due to contract costs.
Operating expenses increased due to inflationary increases.
Capital increased due to new equipment request and replacement schedule.

FY 26 Budgeted Revenue

- BCC General Revenues 10%
- Taxes 21%
- Fees & Assessments 5%
- Charges for Services 1%
- Miscellaneous 15%
- Transfers 1%
- Beginning Balances 47%

FY 26 Budgeted Expenditures

- Salaries & Benefits 26%
- Services & Charges 19%
- Operating Expenses 1%
- Capital 8%
- Transfers 1%
- Reserves 45%

Public Works
Solid Waste

Mission

Solid Waste --- Advance the County's mission by overseeing the disposal of solid waste from businesses and residents of Charlotte County.

Linkage to Strategic Goals

Public Services

Core Functions	FY 26 - First Year Operating Budget		
Solid Waste Disposal Maintain and enforce the Florida statutory and administrative rules regarding the construction, operation and closure of solid waste storage facilities.	State Mandated	50%	$5,365,742
Solid Waste Resources Operates the Mid County Mini-Transfer & Recycling Facility (Murdock) and the West Charlotte Mini-Transfer and Recycling Facility (Englewood) to ensure the collection of household hazardous waste.	State Mandated	50%	$5,365,742
	Operating Budget	**100%**	**$10,731,483**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ -	$ -	$ -	$ -
Charges for Services	$ 15,327,617	$ 10,000,000	$ 15,330,620	$ 15,330,620
Misc	$ 3,009,324	$ 976,500	$ 3,002,960	$ 3,002,960
Transfers	$ 177,684	$ 15,000	$ 70,000	$ 70,000
Beginning Balances	$ -	$ 32,575,254	$ 47,001,743	$ 51,458,102
Total	**$ 18,514,625**	**$ 43,566,754**	**$ 65,405,323**	**$ 69,861,682**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 3,237,609	$ 3,983,644	$ 3,969,534	$ 4,085,534
Services & Charges	$ 6,069,281	$ 4,746,660	$ 6,200,319	$ 6,354,544
Operating Expenses	$ 1,974,261	$ 379,944	$ 561,630	$ 569,005
Capital	$ -	$ 1,574,000	$ 2,377,500	$ 1,610,500
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 44,780	$ 57,780	$ 71,707	$ 78,296
Reserves	$ -	$ 32,824,726	$ 52,224,633	$ 57,163,803
Total	**$ 11,325,932**	**$ 43,566,754**	**$ 65,405,323**	**$ 69,861,682**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	32	32	32	32
Part Time	0	0	0	0
Total	**32**	**32**	**32**	**32**
Proposed New Positions	0	0	0	0

FY 26 Budgeted Revenue

- Charges for Services 23%
- Miscellaneous 5%
- Transfers 1%
- Beginning Balances 71%

FY 26 Budgeted Expenditures

- Salaries & Benefits 6%
- Services & Charges 9%
- Operating Expenses 1%
- Capital 4%
- Transfers 1%
- Reserves 79%

Notes

Salaries & Benefits increased due to pay for performance increase.
Services and charges increased due to increased contracts such as tire disposal and cover dirt.
Operating expenses increased due to inflationary increases.
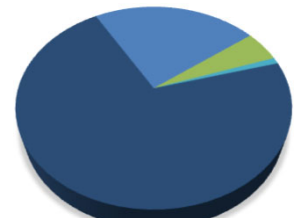
PUBLIC WORKS: ROAD MAINTENANCE

Levels of Service – 6 Year Metrics

Road and Drainage Maintenance

Who is your primary Customer?	The citizens of Charlotte County and internal departments.
What is the primary service they receive from you?	Maintenance of county infrastructure (roads, ditches, ROW)
What is the main aspect of the service they care about?	Timeliness, Accuracy, Amount, Cost

Line & Grade

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed line and grade requests	EAMS (CMMS System that replaces EAMS) FY25 Cityworks	379	210	139	170	62	185
Accuracy	Number of revisit for corrections **(Regraded)**	EAMS (CMMS System that replaces EAMS) FY25 Cityworks	9%	7%	8%	15%	Less than 1%	7%
Amount	Amount of Line & Grade work performed **(SQ FT)**	EAMS (CMMS System that replaces EAMS) FY25 Cityworks	2,398,764	1,919,873	1,579,303	1,004,835	382,763	678,044
Cost	Average cost of Line & Grade work **(SQ FT)**	EAMS (CMMS System that replaces EAMS) FY25 Cityworks	$1.13	$1.12	$1.40	$1.50	$1.77	$3.36

Pothole Repair

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2020
Timeliness	Number of completed pothole requests	EAMS (CMMS System that replaces EAMS)	232	140	140	107	230	504
Amount	Amount of Pothole work performed **(Tons)**	EAMS (CMMS System that replaces EAMS)	250	162	162	145	194	329
Cost	Average cost of Pothole work **(Per Ton Installed)**	EAMS (CMMS System that replaces EAMS)	$986.86	$812.81	$813.81	$1,337.67	$1,089.04	$1,291.43

Vac-Con

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed Vac-Con requests	EAMS (CMMS System that replaces EAMS)	379	617	486	269	737	873
Amount	Amount of Vac-Con work performed **(Per Culverts Cleaned)**	EAMS (CMMS System that replaces EAMS)	7,292	2,883	2,611	4,025	2,410	3,439
Cost	Average cost of Vac-Con work **(Per Culverts Cleaned)**	EAMS (CMMS System that replaces EAMS)	$101.06	$182.22	$192.50	$175.05	$227.04	$246.98

Small Pipe Install >30"

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed Small Pipe Install requests	EAMS (CMMS System that replaces EAMS)	188	104	70	65	108	178
Amount	Amount of Small Pipe Install work performed **(LF Installed)**	EAMS (CMMS System that replaces EAMS)	21,607	6,631	6,663	6,713	4,385	6,940
Cost	Average cost of Small Pipe Install **(LF Installed)**	EAMS (CMMS System that replaces EAMS)	$114.29	$188.32	$196.08	$164.33	$289.06	$326.53

Large Pipe Install <30"

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed Large Pipe Install requests	EAMS (CMMS System that replaces EAMS)	0	3	8	7	12	9
Amount	Amount of Large Pipe Install work performed **(LF Installed)**	EAMS (CMMS System that replaces EAMS)	816	632	350	901	768	600
Cost	Average cost of Large Pipe Install **(LF Installed)**	EAMS (CMMS System that replaces EAMS)	$506	$390	$492	$335	$860	$806

PUBLIC WORKS: ROAD MAINTENANCE

Levels of Service – 6 Year Metrics

Menzi Muck

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Amount of Menzi Muck work performed (SF Cleared)	EAMS (CMMS System that replaces EAMS)	21,493,765	16,585,465	15,076,969	18,842,227	359,021	1,412,559 SQ Yds
Cost	Average cost of Menzi Muck work (SF Cleared)	EAMS (CMMS System that replaces EAMS)	$0.03	$0.03	$0.03	$0.03	$0.39	$0.46 per SQ Yd

Brush Cut Response

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed Brush Cut Response requests	EAMS (CMMS System that replaces EAMS)	513	348	454	295	298	368
Amount	Amount of Brush Cut Response work performed (Incidents)	EAMS (CMMS System that replaces EAMS)	755	436	431	642	183,390 CY (Unit of	107,037 CY
Cost	Average cost of Brush Cut Response (Incidents)	EAMS (CMMS System that replaces EAMS)	$1,029.13	$931.82	$841.25	$941.50	$92.00	2.73 per CY

Flail Mower

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed Flail Mower requests	EAMS (CMMS System that replaces EAMS)	107	148	135	85	476	689
Amount	Amount of Flail Mower work performed (Per CY)	EAMS (CMMS System that replaces EAMS)	9,720,096	9,212,592	8,366,850	7,529,660	6,655,684	8,670,886
Cost	Average cost of Flail Mower work (Per CY)	EAMS (CMMS System that replaces EAMS)	$0.10	$0.11	$0.10	$0.11	$0.09	$0.10

ROW Clear/Haul

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Timeliness	Number of completed ROW Clear/Haul requests	EAMS (CMMS System that replaces EAMS)	576	599	525	268	366	640
Amount	Amount of ROW Clear/Haul performed (Loads Removed)	EAMS (CMMS System that replaces EAMS)	771	787	435	3,352	28649.82 Tons (Unit of	481 Tons
Cost	Average cost of ROW Clear/Haul (Per Load Removed)	EAMS (CMMS System that replaces EAMS)	$242.52	$203.30	$308.12	$195.77	$6.01 per Ton	$580.44 per Ton

PUBLIC WORKS: ROAD MAINTENANCE

Levels of Service – 6 Year Metrics

Signing & Marking Maintenance

Who is your primary Customer?	The citizens of Charlotte County and internal departments.
What is the primary service they receive from you?	Maintenance of county infrastructure (Traffic signs)
What is the main aspect of the service they care about?	Amount of work performed, Cost

Sign Maintenance

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Number of traffic signs repaired	EAMS (CMMS System that replaces EAMS)	17,924	20,303	26,945	21,837	62,831	3,847
Cost	Average cost to repair traffic signs	EAMS (CMMS System that replaces EAMS)	$11.13	$12.54	$12.01	$11.87	$10.78	$49.96

Road Striping

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Number of road striping performed (LF)	EAMS (CMMS System that replaces EAMS)	1,559,920	1,029,431	597,686	1,037,578	52,388	471,691
Cost	Average cost of road striping (Per LF)	EAMS (CMMS System that replaces EAMS)	$0.12	$0.13	$0.16	$0.20	$0.15	$4.39

Road Legends

Amount	Number of road legends installed	EAMS (CMMS System that replaces EAMS)	4,438	2,681	2,552	3,860	702	20,797
Cost	Average cost per road legend	EAMS (CMMS System that replaces EAMS)	$37.66	$49.41	$54.38	$61.54	$61.81	$14.16

Sign Inspection

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Number of signs inspected	EAMS (CMMS System that replaces EAMS)	85,622	97,110	79,309	138,029	168,437	454,898
Cost	Average cost per inspection	EAMS (CMMS System that replaces EAMS)	$1.17	$1.13	$1.46	$1.21	$0.59	$1.95

Sign Fabrication

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Number of road signs fabricated	EAMS (CMMS System that replaces EAMS)	1,635	1,289	2,332	2,072	4,309	4,866
Cost	Average cost per road sign fabricated	EAMS (CMMS System that replaces EAMS)	$29.83	$39.69	$39.82	$45.03	$46.11	$86.87

Raised Pavement Marker Installation (RPM)

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Number of RPM's installed	EAMS (CMMS System that replaces EAMS)	12,503	10,268	2,650	3,224	0	0
Cost	Average cost per RPM Installed	EAMS (CMMS System that replaces EAMS)	$3.63	$4.61	$8.11	$7.98	$0.00	$0.00

After-Hour Trouble Calls

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount	Number of after-hour requests	EAMS (CMMS System that replaces EAMS)	76	83	103	113	94	103
Cost	Average cost per after-hour response	EAMS (CMMS System that replaces EAMS)	$197.89	$166.96	$206.45	$202.42	$204.73	$211.63

PUBLIC WORKS: MOSQUITO & AQUATIC WEED CONTROL

Levels of Service – 6 Year Metrics

County-Wide Mosquito Control

Who is your primary Customer?	The citizens and visitors of Charlotte County
What is the primary service they receive from you?	Mosquito Control, Reduced Risk of Human Health Diseases transmitted by mosquito vectors..
What is the main aspect of the service they care about?	Reduction in the amount of mosquitos; less toxic & Safer Chemical use; Healthy Environment.

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Reduced Mosquito Population	# and types of mosquitos trapped per area (by Calendar Year)	Visual count and ID of trapped mosquitos; Frontier Precesion Database	18,480	40,454	37,080	29,890	24,234	18,835
	# of Mosquito Treatment Missions	Combined Air and Ground Adulticide Missions on Calendar Basis; Frontier Precession Database	460	645	484	562	477	368
	# of Acres Covered		1,135,863	1,752,826	1,378,240	1,639,475	1,312,105	885,535
Safe Chemicals	% of Compliance with EPA approved chemicals and doses	Examine chemical label for EPA numbering and approval; Annual WorkPlan	100%	100%	100%	100%	100%	100%
Healthy Environment	# of vector borne diseases reported in sentinel flock	Number of DOH reported seroconversions of chickens per week; Frontier Precession Database	3	8	2	27	3	2
	# of human cases of vector borne diseases	Number of DOH reported human cases of locally aquired vector borne diseases; DOH Arbovirus Report	0	1	1	1	0	0

Aquatic Weed Control

Who is your primary Customer?	The citizens and visitors of Charlotte County
What is the primary service they receive from you?	Open Waterways and reduced breeding grounds
What is the main aspect of the service they care about?	Asthetics

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Amount of open waterway	% of waterways covered with vegetation or notation of complete monoculture of vegetation	Waterway inspections 3 times a year Aquatic Access Database	90%	93%	92%	90%	92%	94%

PUBLIC WORKS: ENGINEERING

Levels of Service – 6 Year Metrics

Road and Bridge Project Construction and Traffic Maintenance

Who is your primary Customer?	The citizens of Charlotte County						
What is the primary service they receive from you?	Safe and uncongested travel routes						
What is the main aspect of the service they care about?	Safe and uncongested travel routes						

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2020	2021	2022	2023	2024
Safe Travel Routes	# of accident reports for repeat or trouble areas	Accident reports from Sherriff's Office	4,029	5,083	5,679	4,021	3,951
Uncongested Travel Routes	County maintained Road segments not meeting LOS	Periodic and requested travel counts	3	2	2	2	2

Survey

Who is your primary Customer?	Internal divisions as well as outside review/Private and public agencies						
What is the primary service they receive from you?	Survey, legal descriptions						
What is the main aspect of the service they care about?	Accuracy						

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2020	2021	2022	2023	2024
Accuracy	# of Survey's being reviewed	Accela	136	133	142	166	164

Lighting Services for Charlotte County

Who is your primary Customer?	The citizens of Charlotte County						
What is the primary service they receive from you?	Installation and maintenance of street lights and signalization						
What is the main aspect of the service they care about?	Speed of response to inquiries, they want traffic lights, street lights						

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2020	2021	2022	2023	2024
Timeliness	# of repairs responded to within set time frame	Cartegraph	160	179	218	114	538
Street Lights	# of residential street light requests	Spreadsheet/Log	38	33	25	15	18

Land Development

Who is your primary Customer?	The citizens of Charlotte County						
What is the primary service they receive from you?	ROW permits and inspection of work within the ROW						
What is the main aspect of the service they care about?	Speed of Permit Issuance, Speed of Inspections, ROW restored properly						

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2020	2021	2022	2023	2024
Permit Inspection Timeliness	# of ROW permits not inspected within one business day of request (does not include utility ROW permits)	Monthly reports/Accela	100%	100%	100%	100%	100%
ROW Restored	# of final sign-offs on ROW permits (not including utility ROW permits)		3,887	6,385	6,755	9548	164

PUBLIC WORKS: SOLID WASTE

Levels of Service – 6 Year Metrics

Solid Waste Disposal

Who is your primary Customer?	The citizens of Charlotte County
What is the primary service they receive from you?	Proper disposal
What is the main aspect of the service they care about?	Cost, Timely collection

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Quality of Life	Tons of Solid Waste Processed	Waste Works - Monthly Reports	259,053	278,631	306,549	332,262	640,825	463,286
	Recycling Percentage	State Reports Retract	76%	75%	78%	78%	77%	60%
Timeliness	Number of potential touches collection services	Lines of collection services times the number of residential units	18,199,584	18,448,768	18,782,816	19,402,032	19,490,432	19,799,312
	Number of complaints received	Waste Management's complaint report	6,084	5,314	8,252	6,502	6,518	4,107
	Percentage of complaints		0.033%	0.029%	0.044%	0.034%	0.033%	0.021%
Cost	Cost of Disposal (Tipping fee) Dollars Per Ton	Compare to neighboring Counties	$36.79	$37.60	$38.43	$39.28	$39.28	$39.28
		Lee County	$50.20	$50.20	$50.20	$59.96	$59.96	$63.56
		Sarasota County	$57.56	$57.56	$57.56	$57.96	$59.08	$59.08

Solid Waste Resources

Who is your primary Customer?	The citizens of Charlotte County
What is the primary service they receive from you?	Proper disposal
What is the main aspect of the service they care about?	Convenience

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Convenience	Number of customers that utilize the Transfer Facilities	Monthly Report	74,348	63,132	72,496	70,280	79,783	63,973
Quality of Life	HHW Customers	Monthly Report	8,662	10,013	10,850	9,521	7,418	9,984
Quality of Life	Number of SQG Inspections	Monthly Report	268	263	281	279	282	289
Quality of Life	Outreach Program Cost	EDEN & Monthly Reports	$8,030	*$72,032	$14,103	$38,869	$63,445	$48,964
Quality of Life	Outreach Program Touches	EDEN & Monthly Reports	705,375	*6,988,762	285,994	296,946	4,675,876	595,452
Quality of Life	Illegal Dumping	Number of Investigations and arrests	1,345 / 9	1125 / 26	1096 / 32	576 / 22	504 / 23	1,170 / 16
Quality of Life	Keep Charlotte Beautiful	Number of Volunteers	2,807	4,223	3,122	2,612	3,180	2,566

*Outreach Program Costs – Includes changes in contract recycling containment

*Outreach Program Touches – Commercial touches include Lee County

Road Maintenance Division
Goals FY26 and FY27

CHARLOTTE COUNTY FLORIDA

FY26 and FY27 GOALS:

1	Ensure the continuous transfer of knowledge within our organization.
2	Continue to increase the use of mobile technology and GIS to increase efficiency and provide proper training to staff
3	Update and maintain the Maintenance and Operations Strategic Plan Goals and Objectives.
4	Focus on onboarding vacant positions to rightsize the division for increased growth throughout the community.
5	

FY24/25 GOALS AND PROGRESS:

1	Align the collection and mapping of infrastructure assets to meet our design in Cityworks
The collection and mapping of assets has been ongoing. Public Works created an Asset Management Division to focus solely on these efforts.	
2	Increase the use of mobile technology and GIS to increase efficiency and provide proper training to staff
There have been monthly Cityworks trainings for all staff to participate in. The topics varied and were created via feedback from field staff questions and concerns. Beta testing of the new cityworks version began and will be rolled out in the next fiscal year.	
3	Instill continuity of knowledge transfer for our organization
There have been peer to peer trainings held in a variety of topics including but not limited to asphalt maintenance, vaccuum culvert cleaning truck operation, laser level and rod setup and operation, and pipe loading and unloading. Additionally, the division supervisors have begun creating continuity binders for their positions and	
4	Update and maintain the Maintenance and Operations Strategic Plan Goals
The Strategic Plan Goals and Objectives were updated with the accomplishments for the fiscal year.	
5	

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Implementation, training and roll out of the Cityworks asset management program
Cityworks implementation and roll out began in June 2022 for all Public Works staff and was placed on hold due to the occurrence of Hurricane Ian.	
2	Align the collection and mapping of infrastructure assets to meet our design in Cityworks
Ongoing.	
3	Finish the MSBU Study and implement ideas that staff feels would help align all MSBU's
The MSBU Methodology Study was placed on hold following a presentation regarding the proposed Waterway Methodology.	
4	Increase the use of mobile technology and GIS to increase efficiency and provide proper training to staff
Field staff were trained on the use of ipads with the roll out of Cityworks.	
5	Instill continuity of knowledge transfer for our organization
Ongoing.	

Mosquito Control Division
Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Examine/research new chemical possibilities to decrease cost and prevent population resistance. Experiment with newly released adulticides.

2	Continue experimental Deployment of Dry Granule larvicides and monitor efficacys in known areas, such as salt flats, state lands, and park areas for long term control.

3	Increase Source Reduction activities and Domestic Inspection programs with newly approved staff.

4	Examine/research by performing cage trials on a new chemical adulticide challanging salt marsh mosquitos.

5	Increase biological staff time with drone (UAV) applications, larva photos, drone operation, research product application by UAV

FY24/25 GOALS AND PROGRESS:

1	Perform Bottle Bio Assays on both technical grade and final formulaized insecticide products.

Several adulticides were tested and examined by bottle bioassay in technical grade as well as formulation grade material. Results on Kontrol, and Dibrome indicate a moderate to high level of effectivness. Bioassays perfromed on Diibrome to determine rresistance potenital wich resulted in low potenital, also on Kontrol wich indicated potential

2	Research new chemical products in both effectivness and lasting effectivness.

Waiting for ReMoa Tri to receive EPA approval so it may be used to challange local populations of mosquitos. Performed a large scale test of dry granular adulticide metalrve results were postive. Smaller scale perfomed with Duplex G also with positive potentail for long term control

3	Increase the number of pooled mosquito tests for arbovirus that can cause human disease. West Nile, Zika, Chickungunya, SLE and Dengue. Continue on the next iteration of the population map by species for county.

Popultaion mapping is on going and updates being added. Pool testing will be increased as the rainy season begins.

4	Ensure all Staff are First aide and CPR certified in field conditions. Find replacement for Adulticide Scourge which is no longer manufactured. Determine the value of drone mapping of marshes.

All staff are CPR/first aide trained. New Hires are sighned up to take the classes. Only one new adulticide coming to market besides fyfanon - malathion is REMOA TRI which will be examined.

5	Increase Source Reducation activities and Domestic Inspection programs.

Posted and advirtised for two addational staff for doemstic inspection program.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Continue to expand surveillance activities specifically for Aedes aegypti and Aedes albopictus with new traps.

Experimental trap security devices have been desighned for BG Automated sentinile traps a remote counting system.

2	Expand Disease Surveillance activities in general for all notable human diseases, i.e. West Nile, Zika, Chikungunya, and Dengue.

New vacutube system detects arbo viruses is being employed in addation to sentinel chicken program

3	Examine/research new chemical possibilities to decrease cost and prevent population resistance. Experiment with greener pesticides marketed as more natural.

Several "greener products" were examined and determined to be less effective than current products. Knockdown differed from mortality.

4	Employ Dry Granule larvicide and monitor efficacy in known areas, such as salt flats, state lands, and park areas for long term control.

Salt flats on the west wall of the harbor were treated early with granular metalarve. The result seems to indicate a less numerouds first hatch and effective control for 30-40 days.

5	Examine/research new chemical possibilities to decrease cost and prevent population resistance. Coordinate with State Land Managers on spinosid larvicide applications.

Spinosid applications were approved in certain areas of the salt marsh and incorporated into the arthropod control plan with FDEP approval.

Aquatic Weed Division
Goals FY26 and FY27

FY26 and FY27 GOALS:
1   Following the established treatment schedule maintain greater than 95% efficiency of on time treatments for the year.
2   Research other delivery methods for aquatic use herbicides, drone,/ UAV, smaller amphibious vehicles, mechanical harvestors.
3   Expand educational outreach regarding the dynamic of aquatic weed growth and mosquito reproduction in aquatic weeds, increase public awareness and function of program.
4   Continue and emphasise more work on Maintaining the mitigations sites with the removal of invasive and non native plants in area of spring lake islands and Manchester isalads in accordance with FDEP Permit.
5   Prepare for the potential of expanded NPDES general permit for mosquito pesticide use required by USEPA through FDEP

FY24 / FY25 GOALS AND PROGRESS:
1   Purchase land or establish more easements for launching locations on non tidally influnceed canals, before all property on waterways is non accessible.
Construct adequate launch sites for airboats or marsh master in areas where county has purchased or established an easement for canal entry. Sitess have been developed and a list provided to Engineering for any dredging work that might occur.
2   Following the established treatment schedule maintain greater than 95% efficiency of on time treatments for the year.
Missing the goal of 95% due to staff turnover and inability to fill all postions. Salary adjustments may assit in this area
3   Establish a working Field Coordinator to oversee field activitties performed by aquatic staff and serve as a technical resource.
The postion was drafted and the BCC approved the postion of Aquatic Coordinator. It was filled by an individual with 20 years of aquatic plant management.
4   Maintain the mitigations sites with required vegetated littoral zones with native plants and maintain compliance with SWFWMD Permits
Some mitigation and plant transfer was completed in areas of veterns highway. The ponds were used as addational plantings were added to extend the littoral zone and act as filters for tunoff water from the highway.
5   Examine potential for the use of smaller spray paltforms that would be amphibious and terrestrail.   Orginal supplemental vehicles were debated and determined to be

FY22 / FY23 GOALS AND ACCOMPLISHMENTS:
1   Purchase land or establish easements for launching locations before all property on waterways is non accessible.
Constructed several adequate launch sites for airboats or marsh master in areas where county has purchased or established an easement for canal entry Entry has been mainatained by mowing and identified as govt property local HOA/POA standards asf applicable This is ongoing but most launch sites have been improved in slope and angle
2   Following the established treatment schedule maintain greater than 95% efficiency of on time treatments for the year.
90 % of the designed treatment areas were addrresed. Due to staffing and the remianing areas will be added to next years schedule.
3   Expand educational outreach regarding the dynamic of aquatic weed growth and mosquito reproduction.
Education and public out reach has been conbined with mosquito outreach activities. Several Schools Stem nights and POA's have been adressed. After epiddemic has passed these activties will be reviewed and performed.
4   Maintain the mitigations sites with the removal of invasive and non native plants in area of spring lake islands and Manchester isalads in accordance with FDEP Permit.
SWFWMD Permits have been renewed and some vegetated littoral zones areas were replacing damaged or dead plants to new species. Increase and continue exotic and invasive removal on Manchester island has occurredon a brief level.
5   Examine herbicide use, types and quantities and reduce the amount of surfactant used
The aquatic plant treatment perrmit was renewed and recommended herbicides were noted. The amounts of glyphosate and other herbicides that are routinely used is being tracked and inventoried in a newly created database.

FY26 and FY27 GOALS:

1	Finalize a Project Management guide to help new hires as well as consistency within the division.
2	Continue to update the priority list of transportated related projects. The list should be made up of projects based on concurrency, safety, and projected growth.
3	Ensure all excavation operations are operating per Charlotte County Ordinance.
4	Ensure all ROW inspections are completed within one day of request. Ensure all areas within Utility ROW permits are restored properly.

FY24/25 GOALS AND PROGRESS:

1	Ensure all design and construction contracts start and are completed on time.
Some projects this year were delayed due to hurricane recovery efforts; however staff is getting all projects back on track.	
2	Create a comprehensive priority list for transportation related issues bbased on concurrency, safety, and projected growth. Continue to update the list based on data.
The priority list has been completed and incorporated into the CAN, CIP, and CMPs.	
3	Ensure all excavation operations are operating per Charlotte County Ordinance.
All commercial excavation permits are inspected at least three times a year and all complaints are investigated and handled accordingly.	
4	Enusre all ROW inspections are completed within one day of request.
All inspections were completed within 1 workday of being requested.	

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Ensure all design contracts start and are completed on time.
2	Ensure all construction contracts start and are completed on time.
3	Ensure all excavation operations are operating per Charlotte County Ordinance.
4	Enusre all ROW inspections are completed within one day of request.

Solid Waste Division
Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Obtain a Vertical Expansion Landfill Operations Permit form Florida Department of Environmetal Protection

2	Completed all repairs to the West County Transfer Facility

3	Install semi-truck entrance only at Mid County Transfer Facility

4	Add additional lanes on Zemel Road for stacking at the entrance of the new scale house

FY24/25 GOALS AND PROGRESS:

1	New scale house fully operational by the end of FY2024

Completed

2	Apply for Industry awards related to Solid Waste Division programs

Ongoing

3	Continue to meet the State's mandated 75% recycling rate

Ongoing

4	Complete a tipping fee and sanitation assessment rate study

Ongoing

5	Review and evaluate Solid Waste's facilities damaged during hurricane and its impact on operations

West County Transfer Facility was appoved to be repaired

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Review / evaluate the operational needs to increase staffing to meet Landfill's operational work demand

Received approval for four additional position

2	Upgrade West County Transfer Facility's employee breakroom and public bathroom

Completed

3	Continue to meet the State's mandated 75% recycling rate

County met and exceeded State's mandated 75% recycling rate

4	Implementation, training and roll out of the Cityworks asset management program

Completed

Tourism

Tourism

Mission

Tourism---To brand, market and sell the area globally as Florida's premiere eco-tourism, leisure, amateur sports and meeting/conference destination for the continual economic benefit of the community.

Linkage to Strategic Goals

Public Services	Economic & Community Development

Core Functions

	FY 26 - First Year Operating Budget		
Leisure Travel Marketing Building awareness and brand identity for the area through advertising and public relations.	Critical	47%	$2,867,787
Media and Public Relations To increase awareness through generating earned media for the destination.	Critical	22%	$1,329,275
Sporting/Meeting Event Development Promotes the area to meeting planners and sporting events rights holders.	Critical	26%	$1,624,669
Leisure Sales (Domestic and International) Promote the Charlotte Harbor Gulf Island Coast for accomodations, attractions, activities, and dining.	Critical	5%	$332,319
	Operating Budget	**100%**	**$6,154,049**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ 5,230,139	$ 5,503,572	$ 5,700,000	$ 5,700,000
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 47,500	$ 80,000	$ 80,000	$ 80,000
Charges for Services	$ -	$ -	$ -	$ -
Misc	$ 343,275	$ -	$ -	$ -
Transfers	$ 38,500	$ -	$ -	$ -
Beginning Balances	$ -	$ 3,720,200	$ 9,715,000	$ 8,301,132
Total	**$ 5,659,413**	**$ 9,303,772**	**$ 15,495,000**	**$ 14,081,132**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 1,055,902	$ 1,256,482	$ 1,299,270	$ 1,342,227
Services & Charges	$ 2,699,144	$ 3,895,462	$ 4,606,430	$ 4,970,786
Operating Expenses	$ 152,736	$ 187,241	$ 248,349	$ 248,349
Capital	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -
Debt	$ 46,732	$ -	$ -	$ -
Transfers	$ 754,819	$ 754,819	$ 754,819	$ 754,819
Reserves	$ -	$ 3,209,768	$ 8,586,132	$ 6,764,951
Total	**$ 4,709,333**	**$ 9,303,772**	**$ 15,495,000**	**$ 14,081,132**

Positions

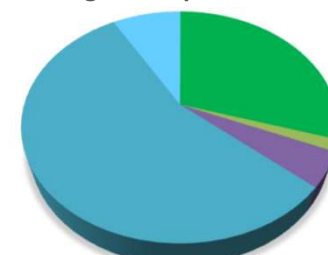| Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	8	10	10	10
Part Time	2	2	2	2
Total	**10**	**12**	**12**	**12**
Proposed New Positions	0	0	0	0

Notes

FY 26 Budgeted Revenue
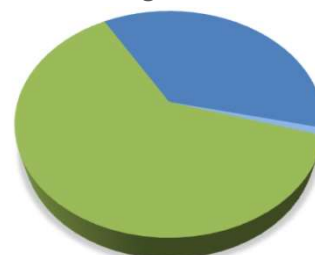
- Taxes 37%
- State & Federal Revenue 1%
- Beginning Balances 62%

FY 26 Budgeted Expenditures

- Salaries & Benefits 9%
- Services & Charges 30%
- Operating Expenses 1%
- Transfers 5%
- Reserves 55%

TOURIST DEVELOPMENT BUREAU

Levels of Service – 6 Year Metrics

Overall Tourism Impact

Who is your primary Customer?	Industry partners and residents							
What is the primary service they receive from you?	Economic benefits and jobs as a result of visitor spending							
What is the main aspect of the service they care about?	Economic impact, jobs, reduced tax liability, quality of life improvements							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Visitor intercept surveys and statistical analysis	Total # of annual visitors	Contracted 3rd party research annual report	656,200	699,400	863,000	972,100	986,100	1,146,000
	Total annual economic impact		$619,631,800	$622,140,500	$844,435,500	$1,043,865,100	$1,061,050,000	$1,260,293,200
	Total lodging room nights		1,089,549	1,070,597	1,193,015	1,177,806	1,138,600	1,268,800
	Jobs supported		7,620	7,728	10,752	13,226	12,900	12,800
	Average household tax savings due to tourism		$705	$703	$875	$1,083	$1,026	$1,078
	Net tax benefit to Charlotte County government					$36,372,700	$37,883,500	$35,139,700

Leisure Travel Marketing

Who is your primary Customer?	Potential and existing visitors.							
What is the primary service they receive from you?	Awareness of the area and Information about the area.							
What is the main aspect of the service they care about?	Accurate, timely and targeted information about our destination.							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Accuracy	% of visitors who were properly targeted/influenced by marketing (social, digital, email, etc)	Visitor surveys; monthly/quarterly *Intercept research, internal relational data engine analysis (Exposed*Influence)*	17.3%*	18.9%	15.6%	12.1%	8.6%	
Increase Business	Total # of visitors	Occupancy/ADR data, economic impact data *STR/ATR Data (Occupancy/ADR), Intercept research, internal relational data engine analysis*	519,032	699,400	863,000	972,100	986,100	
	Economic impact and tax revenue		$638,785,138	$622,140,500	$844,435,500	$1,043,865,100	$1,061,050,000	
Top Funnel (Inspiration)	# of impressions generated	Reports produced by the various digital marketing platforms we utilize						103,638,004
Mid Funnel (Information)	Website sessions/users/event count (onsite actions)	Google Analytics						1,299,490/ 940,087/ 10,822,280
Low Funnel (Conversion)	Lodging referrals via website	Book Direct Analytics						6,022

TOURIST DEVELOPMENT BUREAU

Levels of Service – 6 Year Metrics
Media & Public Relations

Who is your primary Customer?	Travel journalists, social media influencers and other media
What is the primary service they receive from you?	Information, digital assets and/or exposure to the destination
What is the main aspect of the service they care about?	Accurate and timely information. In-market FAM tour assistance.

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Increase Business	Total # of visitors	Occupancy/ADR data, economic impact data	519,032	699,400	863,000	972,100	986,100	
	Economic impact and tax revenue	*STR/ATR Data (Occupancy/ADR), Intercept research, internal relational data engine analysis*	$638,785,138	$622,140,500	$844,435,500	$1,043,865,100	$1,061,050,000	
Awareness	# of media familiarization (FAM) tour participants	Staff report						37 individuals/ 3 group FAMS
Exposure	# of favorable articles and "mentions" available via various media outlets, both print and digital (blogs, articles, social media, etc.)	Cision data	221	467	486	373	3,238*	
	Total Audience	Muck Rack media monitoring service						454.7 billion
	Ad Equivalency							$236,811,216
	Facebook followers	Meta analytics						50.8K
	Instagram followers	Meta analytics						5.7K

*Spike in mentions in 2023 due to extensive coverage related to opening of Sunseeker Resort

TOURIST DEVELOPMENT BUREAU
Levels of Service – 6 Year Metrics

Sporting/Meeting Event Development

Who is your primary Customer?	Sports/event organizers and meeting planners
What is the primary service they receive from you?	Information, negotiation with venues and hotels, logistic support, financial support/grants.
What is the main aspect of the service they care about?	The production of a successful event logistically and financially as well as from a participation standpoint.

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Volume of Business	# of sports events	Internal data	25	24	48	57	37*	58
	# of meetings/conventions							23
Revenue Generation	Economic impact (sports)	Destinations International event impact calculator and/or commissioned event impact studies	$11,890,719	$15,300,259	$25,400,110*	$39,861,049	$39,587,938	$51,879,761
	Economic impact (meetings)	Destinations International economic impact calculator						$22,123,737
Success of Event	# of attendees (sports)	Event organizer reports	18,533	33,249	62,213	82,854	55,503	
	Hotel room nights (sports)	Destinations International event impact calculator						34,173
	Hotel room nights (meetings)	Reports from lodging partners						22,604

*18 events cancelled in FY23 due to Hurricane Ian   **9 events cancelled in FY25 due to Hurricanes Helene/Milton

Film/Digital Media

Who is your primary Customer?	Film and TV producers. Internal and industry partners
What is the primary service they receive from you?	Location scouting, crew assistance. Media to use for promotion
What is the main aspect of the service they care about?	Successful production. High quality imagery

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Success of Production	# of inquiries	Reelscout data, direct inquiries, permit filed	36	25	31	24	24	
Quality	Economic impact and tax revenue	Internal data Economic impact data	$638,785,138	$622,140,500	$844,435,500	$1,043,865,100	$1,061,050,000	

Leisure Sales (Domestic & International)

Who is your primary Customer?	Tour operators, travel agents, consumers
What is the primary service they receive from you?	Destination information related to accommodations, attractions, activities, events and dining options
What is the main aspect of the service they care about?	Timely, accurate information

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Education	# of 1 on 1 travel professional appointments and/or travel professionals trained	Staff report						300
	# of travel professionals hosted in-market for familiarization (FAM) tours	Staff report						32
Distribution	# of visitor guides distributed at consumer shows	Staff report/International rep report						4,000
Visitation	# of international visitors	3rd party research company annual report						$57,300

CHARLOTTE COUNTY
FLORIDA

Tourism
Goals FY26 and FY27

FY26 and FY27 GOALS:

1	Visitation, Economic Impact, TDT

Increase visitation in FY26 by 100,000 people vs. FY25 and another 50,000 in FY27, increase total economic impact by $100 million in FY26 and another $50 million in FY27; increase TDT collections by 10% for FY26 and another 5% for FY27.

2	Website traffic

Increase website user sessions, page views and session duration each by 10%.

3	Sports Business Development

Recruit, host and/or support a minimum of 65 sporting events in FY 26 generating over $55 million in economic impact and 65 events in FY 27 generating a minimum of $60 million in economic impact.

4	Meetings/Convention Development

For FY 26 book or instrumentally assist in the booking of 25 meetings/conventions and increase the meeting planner database by 10% and for FY 27 book or insturmentally assist in the booking of 30 meetings/conventions while increasing the meeting planner database by 10%.

5	Earned Media/PR

For both FY 26 recruit and/or host a minimum of 35 individual travel media/influencers in-market (to include 2 group media FAMS) assisting with the creation of their itineraries and other logistics. Increase this to 40 individuals for FY 27.

FY24/25 GOALS AND PROGRESS:

1	With the anticipated opening of Sunseeker Resort, which will allow our destination to host large meetings and conventions along with other group and individual leisure business, it is our goal to increase visitation in FY24 by 100,000 people in FY24, increase total economic impact by $100 million and increase our TDT collections by 15% for FY24 and another 10% for FY25.

Progress: FY 24 saw approximately 1,146,000 visitors come to Charlotte County which was nearly 160,000 more than in FY 23. In addition, total economic impact increased by nearly $200 million and TDT collections increased by 16.1%. Also, YTD which only includes Q1 of FY 2025, the number of visitors is up by 18,200 compared to Q1 of FY 24, economic impact is up approximately $22 million and TDT collections are up 4.3%.

2	Increase website users, user sessions, and event count each by 10%.

Progress: In FY 24 users increased by 48.8% vs. FY 23 while user sessions increased by 45.7% and event count (or onsite actions) increased by75%. As of Apr. 1, 2025, YTD users are up 51.1%, user sessions are up 45.3% and event count is up 47% over the same time period in FY 24. It should be noted that website traffic experienced a significant spike in Oct. 2024 due to the hurricanes.

3	Recruit, host and/or support a minimum of 60 sporting events in FY 24 generating over $45 million in economic impact and 65 events in FY 25 generating a minimum of $48 million in economic impact.

Progress: In FY 2024, 58 sporting events were hosted and/or supported by the VCB generating approximately $51,879,761.

4	For FY 24 generate a minimum of 40 leads/RFP's for meetings/convention business and increase the meeting planner database by 25% and for FY 25 generate a minimum of 45 leads/RFP's while increasing the meeting planner database by 20%.

Progress: For FY 24 the VCB generated 38 meetings/convention leads and YTD for FY 25 that figure is already at 42 leads. In this time period, the meeting planner database has grown significantly and currently sits at 523 with the goal of exceeding 600 by the end of the fiscal year.

5	For both FY 24 & 25 recruit and/or host a minimum of 10 individual travel writers in-market assisting with the creation of their itineraries and other logistics. Also, recruit and/or host 2 group media FAM tours.

Progress: In FY 24 the VCB hosted a total of 37 media individuals in-market which included the coordination and hosting 3 group media FAMS, which brought media from Canada, Brazil and Germany. As of Apr. 1 in FY 25, the VCB has hosted a total of 13 media individuals. It should be noted that no media were able to be hosted Oct.-Dec. in FY 25 due to the aftermath of the hurricanes.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Although the County suffered a significant temporary loss of lodging inventory as a result of Hurricane Ian, it is our goal to match FY 2022's TDT collections and total economic impact while, for the first time, welcoming over 1 million visitors to the destination.

While we fell just 3.3% short of our goal of matching FY 2022's TDT collections, we rallied at the end of the fiscal year having our strongest September on record surpassing the previous Sept. by 28.6%. Also, we did meet our goal of matching FY 2022's economic impact, surpassing it by 1.7% and came close to our visitor goal by welcoming 986,100 visitors in FY 2023.

2	While our PR Manager position was vacant for the first four months of FY 2023, it is our goal to recruit and/or host a minimum of 8 individual travel writers in-market assisting with the creation of their itineraries and other logistics. In addition, our goal is to host at least 1 group media FAM tour in this FY.

Staff was able to recruit and host 9 travel writers in-market for FY 2023. While no group FAMS were conducted in FY 2023, multiple were scheduled for FY 2024.

| 3	Taking into account that approximately 15 sporting events scheduled for FY 2023 had to be cancelled due to the hurricane, and some County sports facilities still are not back online, it is our goal to reschedule as many as we can for FY 2024 while still hosting 48 events in FY 2023. Furthermore, it's our goal that these 48 events will generate approximately 34 million in total economic impact.
	Ultimately, 18 events had to be cancelled for FY 2023 due to the aftermath of Hurricane Ian. We were still able to host 37 total events which generated over $37 million in economic impact.
4	Generate a minimum of 30 meetings/convention/trade show leads and increase the meeting planner database by 25%.
	Staff exceeded the goal of generating a minimum of 30 meetings/convention leads while also assisting in the closing of business projected to generate 10,000-12,000 room nights. The meeting planner database was also increased by over 25% during FY 2023.
5	To expand and diversify our sales and marketing efforts, it is our goal to contract with an International Representation firm by July 1, 2023 and devise a comprehensive plan to directly promote our destination to the UK and/or German markets.
	The VCB put out two separate RFP's and were able to successfully contract with Cellet Marketing & Public Relations for the UK market and Sommer Touristik Marketing for the German market. Both agencies hit the ground running collaborating on a comprehensive plan to educate tour operators, travel agents, travel media and the consumer as to our tourism-related offerings.

Utilities

Mission

To provide products and services of uncompromising standards of value to the community, by operating a public utility system that is economically sound, environmentally responsible, operationally reliable and customer responsive.

Division Summary	FY 26 - First Year Operating Budget	
- Water --- Deliver safe, high quality and sustainable water to customers for drinking, fire suppression and irrigation purposes	52%	$48,380,425
- Wastewater Treatment/Water Reclamation --- Collect and treat wastewater in an environmentally sound manner. Produce reclaimed water for use in irrigation.	48%	$44,720,819
Operating Budget	**100%**	**$93,101,244**

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 510,203	$ 400,000	$ -	$ -
Charges for Services	$ 116,479,327	$ 112,966,977	$ 118,950,581	$ 124,638,324
Misc	$ 8,239,424	$ 4,071,884	$ 2,732,722	$ 2,737,051
Transfers	$ 9,251,204	$ 15,049	$ -	$ -
Beginning Balances	$ -	$ 85,818,978	$ 87,656,782	$ 79,879,332
Total	**$ 134,480,157**	**$ 203,272,888**	**$ 209,340,085**	**$ 207,254,707**

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 25,653,897	$ 28,497,099	$ 30,149,976	$ 31,080,000
Services & Charges	$ 20,035,263	$ 26,538,414	$ 33,024,495	$ 32,117,272
Operating Expenses	$ 41,320,762	$ 26,262,055	$ 29,926,773	$ 35,022,245
Capital	$ (0)	$ 18,726,835	$ 26,703,185	$ 5,712,234
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$
Transfers	$ 22,432,037	$ 29,547,601	$ 9,371,715	$ 15,088,894
Reserves	$ -	$ 73,700,884	$ 80,163,941	$ 88,234,062
Total	**$ 109,441,958**	**$ 203,272,888**	**$ 209,340,085**	**$ 207,254,707**

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	282	298	298	298
Part Time	0	0	0	0
Total	**282**	**298**	**298**	**298**
Proposed new Positions	0	0	20	7

FY 26 Budgeted Revenue

- Charges for Services 57%
- Miscellaneous 1%
- Beginning Balances 42%

FY 26 Budgeted Expenditures

- Salaries & Benefits 14%
- Services & Charges 15%
- Operating Expenses 14%
- Capital 13%
- Transfers 5%
- Reserves 39%

Notes

Proposed New Positions: FY26 - 13 FTE CIP - Akermann, Eastport, FY27 - 2 FTE CIP - Burnt Store

Proposed New Positions: FY26 - 6 FTE manpower study, 1 FTE - Readiness/Resiliency

FY27 - 5 FTE manpower study

Fees/Various Charges: FY26 increase due to connections growth

Services & Charges Expenses: FY26 increase of $2M Contractual Services, $1.7M Professional Services

Operating Expenses: FY26 increase due to inflationary pressures and Peace River increases

Capital Expenses: FY26 increase due to funding of CIPs and Equipment replacement

Transfer Expenses: FY26 decrease due to payoff of bond & reduction of CIP/CMP

Utilities
Water
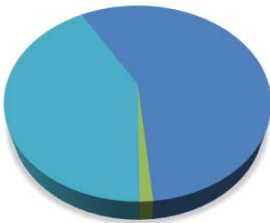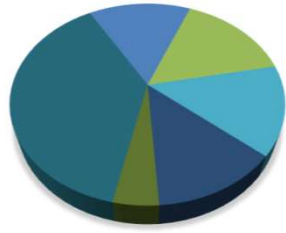
Mission

Water --- Deliver safe, high quality and sustainable water to customers for drinking, fire suppression and irrigation purposes

Linkage to Strategic Goals

Efficient and Effective Government
Infrastructure

Public Services

Core Functions	FY 26 - First Year Operating Budget		
Water Supply	State Mandated	32%	$15,433,356
Supply treated water from Peace River Water Authority and county owned - Burnt Store Water Plant.			
System Maintenance & Integrity	State Mandated	31%	$15,046,312
This division performs corrective, preventative and predictive maintenance to maintain system integrity			
Future Water Supply Demands	State Mandated	25%	$12,095,106
Ensure that Water supply needs are being met and planned for over the next 20 years			
Outreach, Consumer Education, Employee Training, Customer Contact	State Mandated	5%	$2,419,021
Informs and educates the public on water quality and conservation. Promotes Employee further education			
Fiscal Planning and revenue collection	Locally Mandated	7%	$3,386,630
Ensure fiscal sustainability through financial planning/budgets and timely billing and collections			
	Operating Budget	**100%**	**$48,380,425**

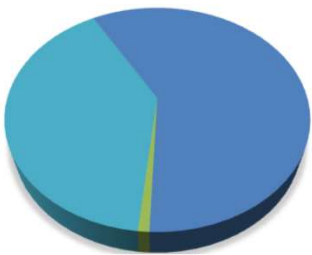| Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 279,816	$ 206,920	$ -	$ -
Charges for Services	$ 64,156,625	$ 64,025,619	$ 64,839,694	$ 67,833,905
Misc	$ 4,518,838	$ 2,106,391	$ 1,406,642	$ 1,488,125
Transfers	$ 5,073,739	$ 7,785	$ -	$ -
Beginning Balances	$ -	$ 44,394,262	$ 45,120,483	$ 43,430,125
Total	$ 74,029,019	$ 110,740,978	$ 111,366,819	$ 112,752,155

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 10,998,120	$ 11,390,602	$ 12,734,243	$ 13,585,859
Services & Charges	$ 8,844,009	$ 10,864,177	$ 12,784,492	$ 12,943,308
Operating Expenses	$ 27,877,678	$ 20,014,287	$ 22,861,691	$ 27,897,447
Capital	$ (0)	$ 9,473,681	$ 13,303,115	$ 2,107,154
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 12,302,648	$ 15,285,010	$ 4,808,633	$ 8,177,358
Reserves	$ -	$ 38,125,558	$ 41,263,615	$ 47,972,564
Total	$ 60,022,456	$ 105,153,314	$ 107,755,789	$ 112,683,689

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	115	118	118	118
Part Time	0	0	0	0
Total	115	118	118	118
Proposed	0	0	3	2

Notes

Added FTE Positions: FY26 - 3 FTE manpower study, FY27 - 2 FTE manpower study,

FY 26 Budgeted Revenue

- Charges for Services 59%
- Miscellaneous 1%
- Beginning Balances 40%

FY 26 Budgeted Expenditures

- Salaries & Benefits 12%
- Services & Charges 11%
- Operating Expenses 21%
- Capital 13%
- Transfers 5%
- Reserves 38%
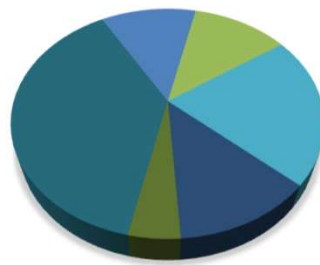
Utilities
Wastewater Treatment

CHARLOTTE COUNTY FLORIDA

Mission

Wastewater Treatment/Water Reclamation --- Collect and treat wastewater in an environmentally sound manner. Produce reclaimed water for use in irrigation.

Linkage to Strategic Goals

Efficient and Effective Government	Public Services
Infrastructure	

Core Functions / FY 26 - First Year Operating Budget

Wastewater Supply - Quantity/Quality/Treatment
Treating wastewater throughout the county and providing reclaimed water for irrigation

System Maintenance & Integrity
Preventative, predictive and corrective maintenance ensure system integrity at six treatment plants in county

Future Wastewater Treatment Demand
Capacity needs will be identified and built accordingly meeting compliance standards

Outreach, Consumer Education, Employee Training, Customer Contact
Informs and educates the public on water treatment and reclamation. Promotes Employee further education

Fiscal Planning and Revenue Collection
Ensure fiscal sustainability through financial planning/budgets and timely billing and collections

State Mandated	32%	$14,534,266
State Mandated	34%	$15,339,241
State Mandated	21%	$9,212,489
Locally Mandated	5%	$2,280,762
Locally Mandated	8%	$3,354,061
Operating Budget	**100%**	**$44,720,819**

Revenues by Category

Revenues by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
BCC General Revenues	$ -	$ -	$ -	$ -
Taxes	$ -	$ -	$ -	$ -
Fees & Assessments	$ -	$ -	$ -	$ -
State & Federal Revenue	$ 230,387	$ 193,080	$ -	$ -
Charges for Services	$ 52,322,701	$ 48,941,358	$ 54,110,887	$ 56,804,419
Misc	$ 3,720,586	$ 1,965,493	$ 1,326,080	$ 1,248,926
Transfers	$ 4,177,464	$ 7,264	$ -	$ -
Beginning Balances	$ -	$ 41,424,716	$ 42,536,299	$ 36,449,207
Total	**$ 60,451,139**	**$ 92,531,910**	**$ 97,973,266**	**$ 94,502,552**

Expenses by Category

Expenses by Category	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Salaries & Benefits	$ 14,655,776	$ 17,106,497	$ 17,415,733	$ 17,494,141
Services & Charges	$ 11,191,254	$ 15,674,237	$ 20,240,003	$ 19,173,964
Operating Expenses	$ 13,443,083	$ 6,247,768	$ 7,065,082	$ 7,124,798
Capital	$ (0)	$ 9,253,154	$ 13,400,070	$ 3,605,080
Other	$ -	$ -	$ -	$ -
Debt	$ -	$ -	$ -	$ -
Transfers	$ 10,129,388	$ 14,262,591	$ 4,563,082	$ 6,911,536
Reserves	$ -	$ 35,575,326	$ 38,900,326	$ 40,261,498
Total	**$ 49,419,502**	**$ 98,119,574**	**$ 101,584,296**	**$ 94,571,018**

Positions

Positions	FY 24 Actual	FY 25 Adopted	FY 26	FY 27
Full Time	167	180	180	180
Part Time	0	0	0	0
Total	**167**	**180**	**180**	**180**
Proposed	0	0	17	5

Notes

Proposed New Positions: FY26 - 13 FTE CIP - Akermann S2S & Eastport WRF,
  4 FTE - manpower study
FY27 - 2 FTE CIP - Burnt Store WRF, 3 FTE - manpower study

FY 26 Budgeted Revenue
- Charges for Services 56%
- Miscellaneous 1%
- Beginning Balances 43%

FY 26 Budgeted Expenditures
- Salaries & Benefits 17%
- Services & Charges 20%
- Operating Expenses 7%
- Capital 13%
- Transfers 5%
- Reserves 38%
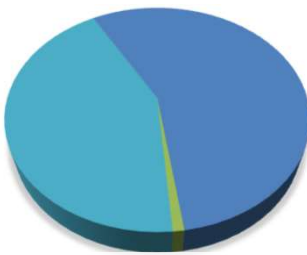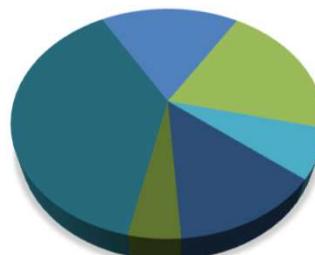
CHARLOTTE COUNTY UTILITIES
Levels of Service – 6 Year Metrics

Water

Who is your primary Customer?	Charlotte County residents and commercial businesses							
What is the primary service they receive from you?	Clean, safe drinking water							
What is the main aspect of the service they care about?	Safety, Availability							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Safety	Regulatory Compliance	Sampling & Monthly reports	100%	100%	100%	100%	100%	100%
Availability	# of water main breaks per 100 miles of pipe per cause	Monthly and annual reports	3.13	3.53	5.4	3.06	5.69	10.8
	Average time to repair in hours - Burnt Store Water System		2.0	6.3	5.0	5.0	3.9	3.5
	Average time to repair in hours - Peace River Water System		3.6	4.7	3.9	5.0	3.4	2

Wastewater Treatment/Water Reclamation

Who is your primary Customer?	Charlotte County residents and commercial businesses							
What is the primary service they receive from you?	Wastewater collection and treatment, and reclamation distribution							
What is the main aspect of the service they care about?	Reliability and sanitation							

How do we measure "what customers care about"?	What is (or can be) measured?	What is the source of this data?	2019	2020	2021	2022	2023	2024
Reliability	# of Florida Department of Environmental Protection (FDEP) monthly inspections	Monthly reports submitted to FDEP	72	72	72	72	72	72
	% of Florida Department of Environmental Protection (FDEP) Compliance	Inspection reports performed by FDEP	100%	100%	100%	100%	100%	100%
	# of gallons of wastewater & reuse water spilled as a % of daily flows	Radio Telemetry Data created from Utilities' telemetry system	0.012%	0.040%	4.700%	0.037%	0.040%	0.320%
	# of customer calls	Customer calls tracked in CMMS workorder system	3058	3059	3023	3266	4314	4301
	Average response time (in hours)		1.50	1.50	1.25	1.25	1.25	1.28
Sanitation	# of gallons spilled into environment	Spill report submittals to FDEP provide gallons spilled per incident	274,510	864,790	2,156,968	977,017	165,836	301,202
	# of FDEP violations	FDEP violation notices received after site inspections or spill report data (spills > 1,000 gal)	5	0	4	0	4	0
	# of work orders for collection system and treatment processes *Note: FY2020 includes laboratory	Preventative & Corrective Work orders completed monthly; Maintain Radio Telemetry logs	22,382	67,099	60,620	56,279	53,704	56,802

Charlotte County Utilities
Goals FY26 and FY27

FY26 and FY27 GOALS:

1   Utilities Plant Maintenance Plan

Create a Plant Maintenance Plan for a structured schedule outlining regular inspections, cleaning, and servicing all equipment within a wastewater treatment plant to ensure optimal performance, prevent breakdowns, and maintain compliance with FDEP.

2   Utilities Asset Management Plan

Complete an Asset Management Plan (AMP) for CCU. The plan will be a comprehensive strategy to effectively manage CCU's physical infrastructure. Fundamentally, a roadmap for maintaining and replacing assets to meet future demand and maximize the return on investments.

3   SCADA Master Plan Update

Update the CCU SCADA Master Plan by revising and modifying the current strategic plan for Supervisory Control and Data Acquisition (SCADA). This revision will allow us to incorporate new technologies, address operational changes, improve system efficiency, enhance security measures, and align with evolving business needs within our facilities and/or infrastructure network.

4   Utilities Metrics and Benchmarking

Enhance our process for measuring and analyzing key performance indicators (KPIs). This improvement will enable CCU to identify areas for enhancement and potential cost savings. Essentially, it provides a method to track and evaluate CCU's efficiency in comparison to its peers. Key metrics for benchmarking may include but are not limited to, planned customer outages, unplanned disruptions in water and wastewater services, leaks and breaks, hydrants out of service, and the number of work orders completed each month.

5   Water Utility Innovation Program

Develop a program designed to encourage and support the development and implementation of new technologies, practices, and approaches within a water and sewer Utility, aiming to improve operational efficiency, sustainability, and service delivery by embracing innovative solutions to address current challenges in water and sewer management. Key points - focus on improvement, technology adoption, sustainability goals, collaboration, and learning.

FY24/25 GOALS AND PROGRESS:

1   Water Meter Study and Meter Changeout program

The Water Meter Study is currently in progress. Data is being collected and analyzed for a final report and presentation to the Board, which is expected to take place in 2025. The Meter Changeout program is also ongoing. From January 2024 to December 2024, a total of 11,525 meters were replaced. This program benefits both the Utility and its customers by providing more accurate water usage readings, facilitating better leak detection, promoting water conservation, and enhancing system efficiency.

2   Obtain APWA Certification

Utilities obtained their APWA certification. January 9, 2024, APWA Director, Robert Garland, presented the APWA Accreditation award to Charlotte County Utilities Department. APWA certifications are credentials from the American Public Works Association that demonstrate experience and excellence in the public works and utility industry. The certification is valid for five years. CCU plans to recertify in the future.

3   Update 2011 Standards

The update to the 2011 Standards is still in progress. Contract #23-012 was awarded to Kimley-Horn & Associates on January 24, 2023, to prepare a Utilities Design Manual. This document is intended for use by developers in Charlotte County as a standard for applying, building, and certifying utility work that the County will accept, own, and maintain. In addition to the manual, Kimley-Horn is assisting Charlotte County Utilities (CCU) in reviewing their details and standard specifications, as well as assessing existing application and certification forms. A final presentation will be made to the Board in the near future.

4   CMOM Program

The CMOM (Capacity, Management, Operations, and Maintenance) Program is an ongoing initiative aimed at enhancing the wastewater collection system. This program emphasizes continuous improvement through several key strategies, including regular inspections and monitoring of the collection system, preventative maintenance, data analysis and reporting, stakeholder engagement, and emergency response planning. By implementing these strategies, the CMOM Program ensures the effective management of wastewater infrastructure.

5	Asset Management Plan Expansion

On September 26, 2023, the Board successfully awarded a contract to The Woodhouse Partnership, North America Ltd., to take the lead in developing the County's Strategic Asset Management Plan. Subsequently, FY25 CCU will issue a Request for Proposals (RFP) for the Utilities Asset Management Plan. This comprehensive plan will clearly define the Utilities' strategic approach to managing its physical assets. Essential components will include a thorough asset inventory, a risk assessment, effective maintenance strategies, capital investment planning, and performance monitoring. CCU will work in close partnership with the County's Asset Manager to ensure seamless integration and alignment between the County's strategic framework and CCU's initiatives.

FY22/23 GOALS AND ACCOMPLISHMENTS:

1	Water Master Plan

On April 25, 2023, the Potable Water Master Plan was finalized and submitted to the CCU. The plan has been published on CCU's website for public access. CCU will evaluate the recommendations outlined in the plan and incorporate them based on the prioritization of our Capital Improvement Projects (CIPs).

2	Sewer Master Plan

On March 22, 2022, the Board awarded contract 2022000201 to Jones Edmunds & Associates for a comprehensive sewer master plan update to the 2017 Sewer Master Plan. This project was under development throughout the 2022/2023 fiscal year and is projected to be finalized by the 2024/2025 fiscal year. The consulting engineers will present the updated plan to the Board at a CCU quarterly meeting.

3	Implement CMOM Program

The CMOM (Capacity, Management, Operation, and Maintenance) roadmap was completed in FY22. CCU staff has made progress on one of the primary components of this roadmap: the reduction of Sanitary Sewer Overflows (SSOs). On September 6, 2023, a professional services contract #2023000301 was awarded to Jones Edmunds & Associates for conducting an SSO Analysis. This work will continue into FY 23/24. Additionally, CCU staff is in the process of gathering data to create and/or update Standard Operating Procedures for Sewer Cleaning. A program targeting Fats, Oils, and Grease (FOG) is also being developed to implement measures aimed at preventing and reducing the occurrence of FOG-related SSOs. The implementation of the CMOM program is ongoing and will extend into the next fiscal year.

4	Water Meter Study

On November 14, 2023, Contract #2023000654 was awarded to E Source Companies LLC for a comprehensive analysis of the utility's Advanced Metering Infrastructure (AMI) system. This analysis includes an evaluation of physical assets, maintenance operations, practices, and policies. The project is currently underway and will continue into the next fiscal year, FY 24/25. CCU staff and consultants will persist in executing the project tasks as defined in the agreed-upon scope of work outlined in the contract. A final presentation will be made to the Board upon completion.

5	Staffing Evaluation

CCU staff successfully collaborated with the consulting firm Blue Cypress, which was awarded contract 2022000264 for a comprehensive business process and manpower audit at CCU on April 12, 2022. The final report was submitted to CCU, and a well-received presentation was made to the Board on February 13, 2023. The report included strong recommendations for various positions, leading CCU to promptly request and secure approval from the Board to hire these essential new roles. This proactive effort is actively underway to ensure that the Utility is fully staffed and equipped to meet its objectives.