Efficient & Effective Government

To manage fiscally sound county operations with a culture of transparency, accountability, citizen engagement and innovation.

CHARLOTTE COUNTY
FLORIDA

Agenda

- Financial Trends
- Goals & Initiatives
- Infrastructure General Government

Financial Trends

Efficient & Effective Government

Budget & Admin. Services

    Fiscal

    Risk Management

    Information Technology

    Real Estate
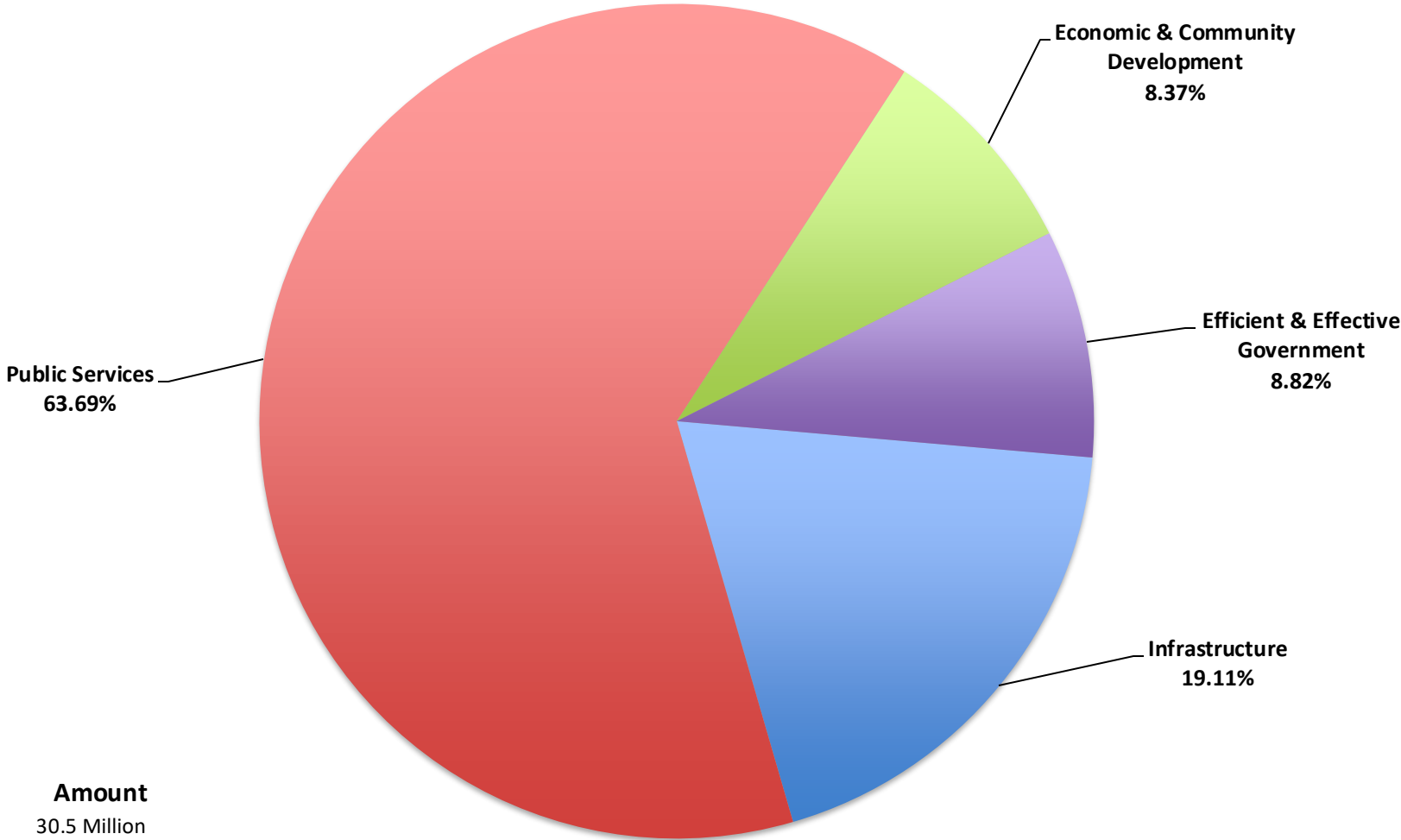
    Purchasing

    Fleet

Administration

County Attorney

County Commission

Human Resources

CHARLOTTE COUNTY
FLORIDA

FY24 Expenditures by Focus Area


Focus Area	Amount
Economic & Community Development	30.5 Million
Public Services	231.7 Million
Infrastructure	69.5 Million
Efficient and Effective Government	32.1 Million

Economic & Community Development
8.37%

Efficient & Effective Government
8.82%

Infrastructure
19.11%

Public Services
63.69%

FY24 Expenditures by Focus Area & Department
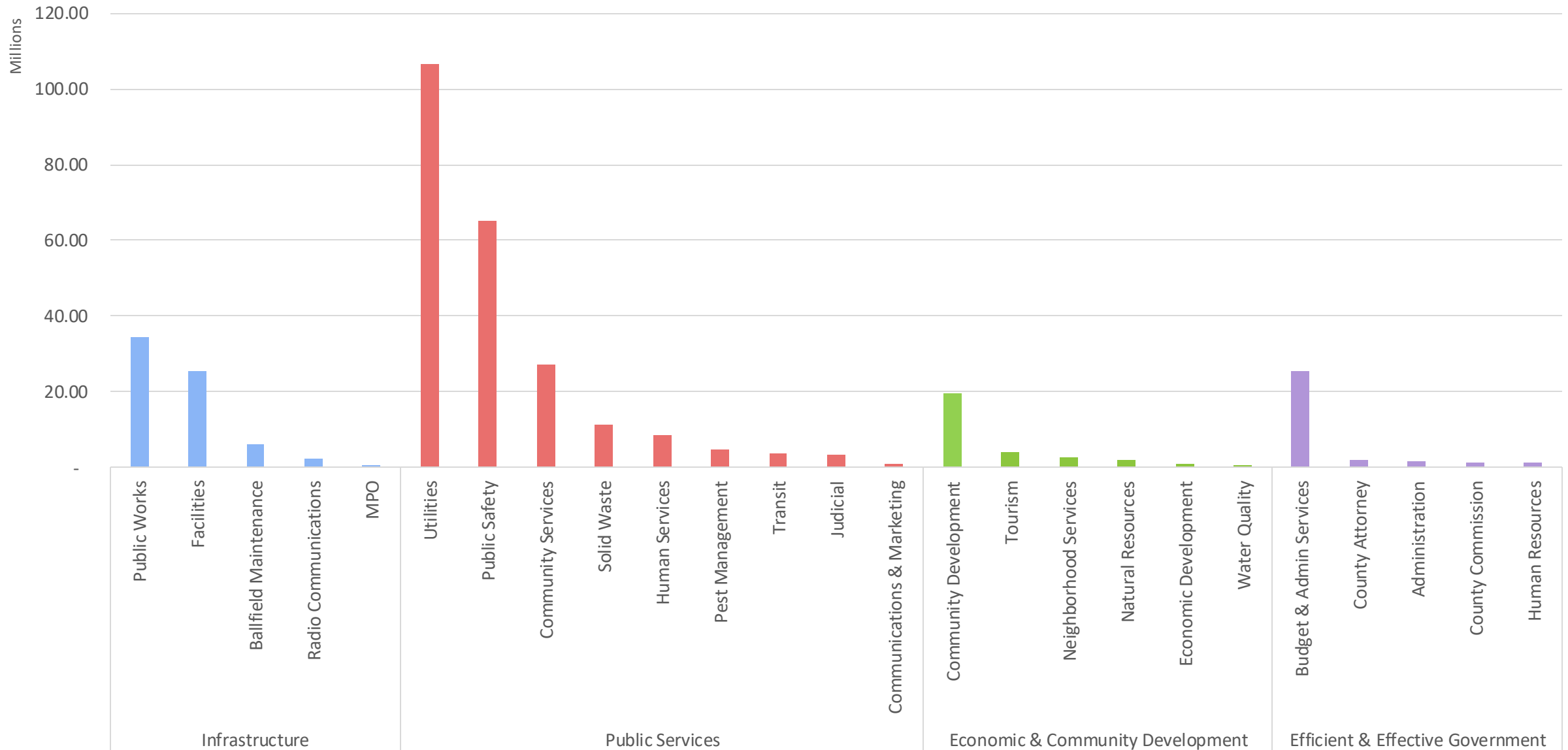
FY24 Revenue Sources:
Efficient & Effective Government

Charges for Services
24.38%

Misc. Revenues
1.33%

BCC General Revenues
74.28%

State and Federal
0.01%
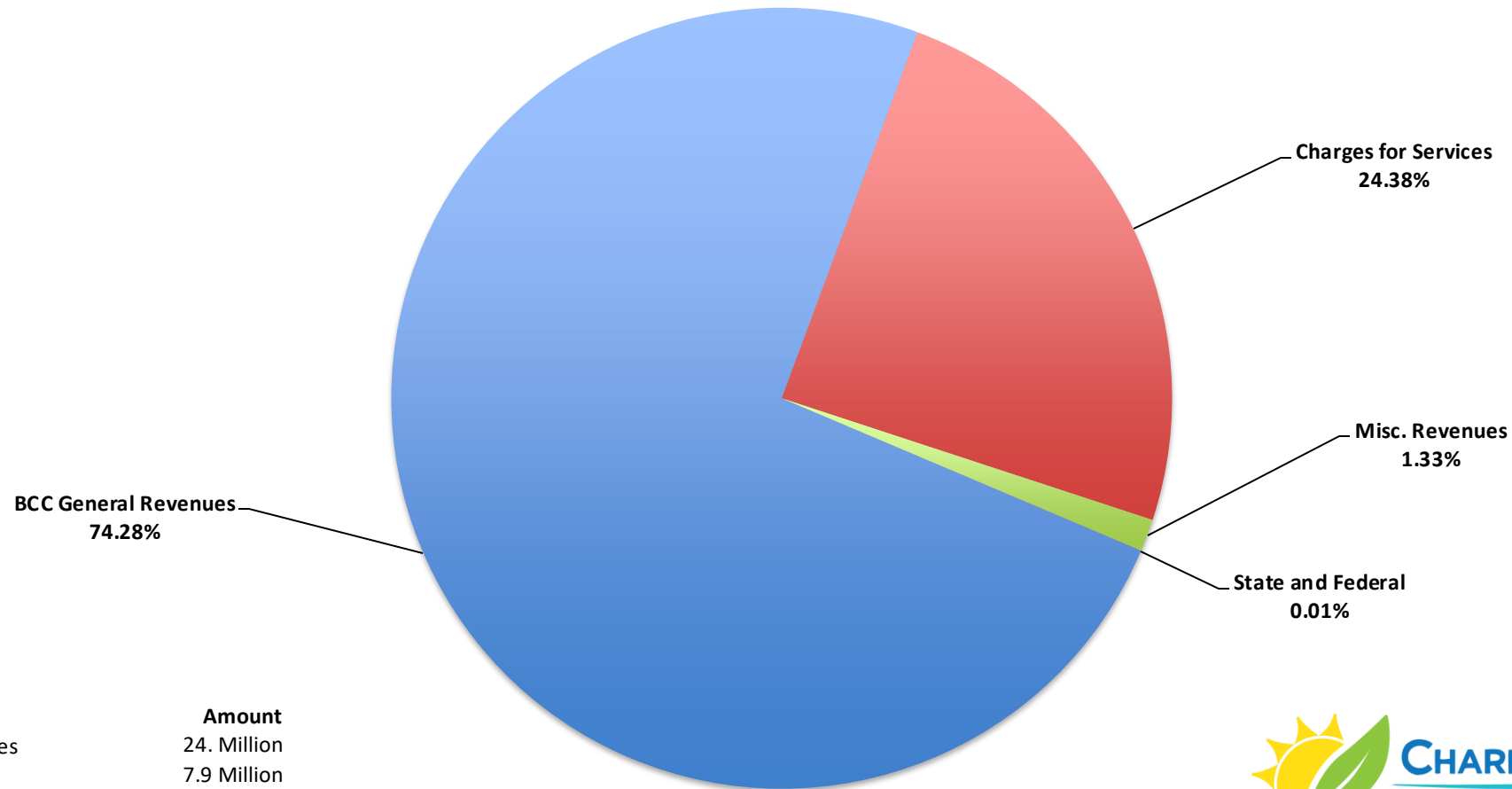
Funding Source	Amount
BCC General Revenues	24. Million
Charges for Services	7.9 Million
Misc. Revenues	430.8 Thousand
State and Federal	2.5 Thousand

CHARLOTTE COUNTY
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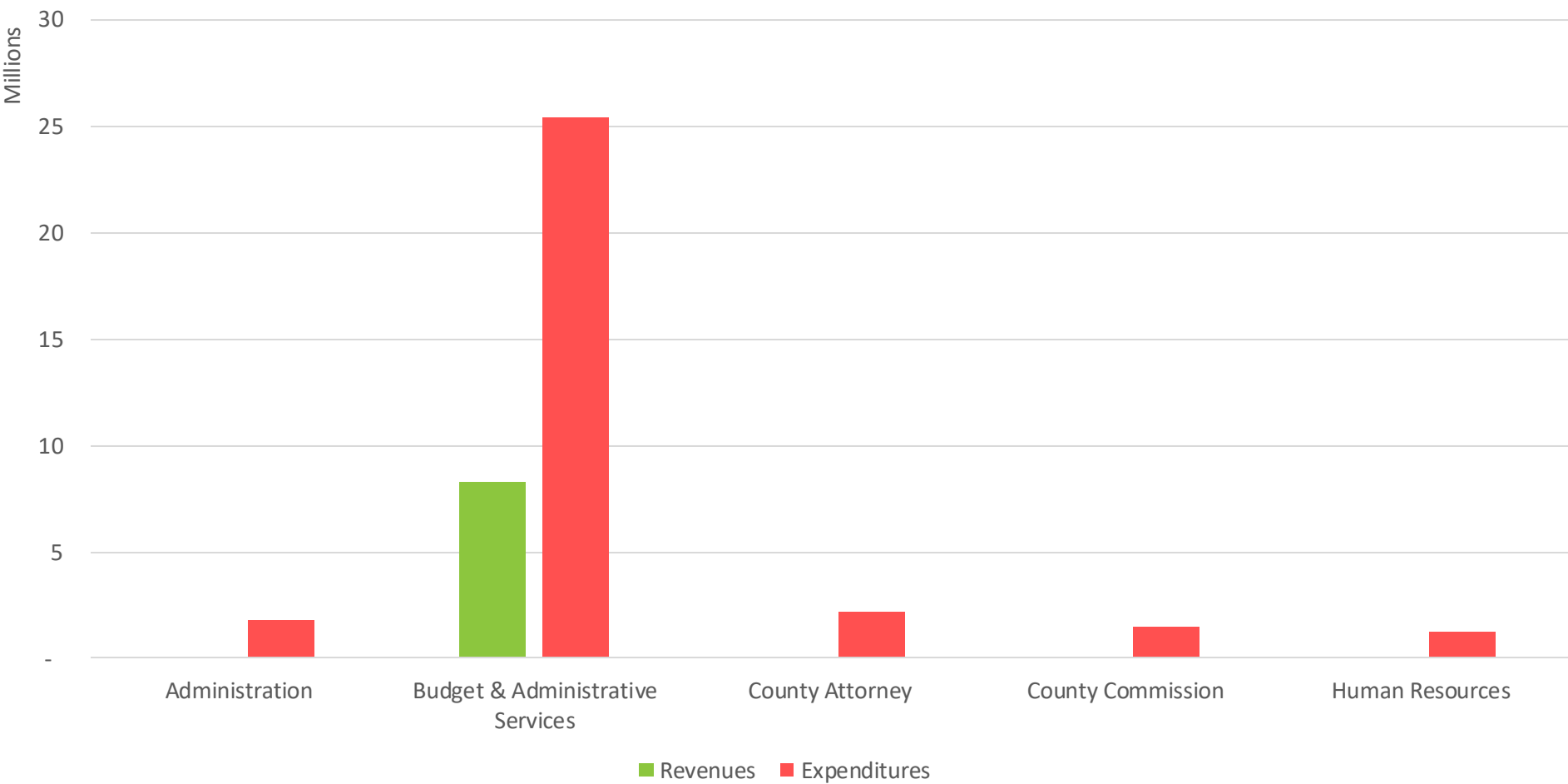
Historical Trend
Total Expenditures by Department

Millions

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |

Legend:
- Budget & Admin Services
- County Attorney
- Administration
- County Commission
- Human Resources
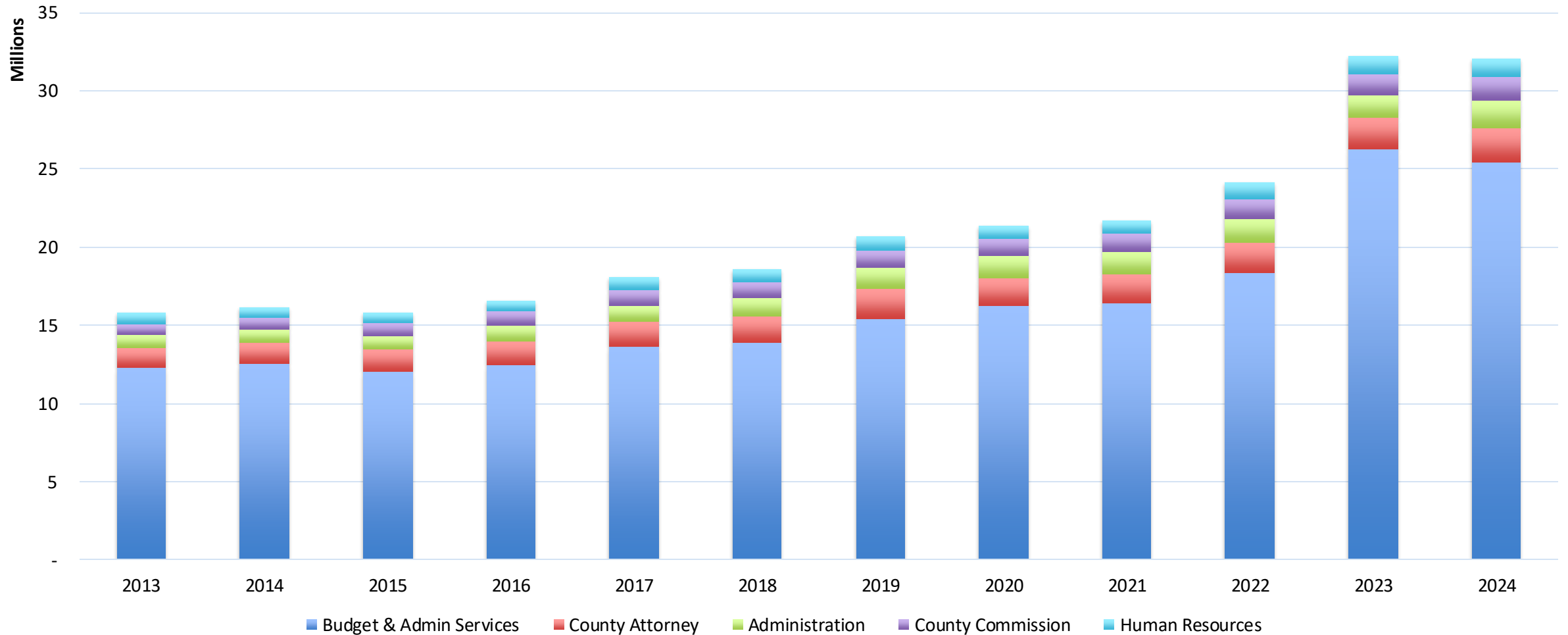
Historical Trend
Total FTE by Department
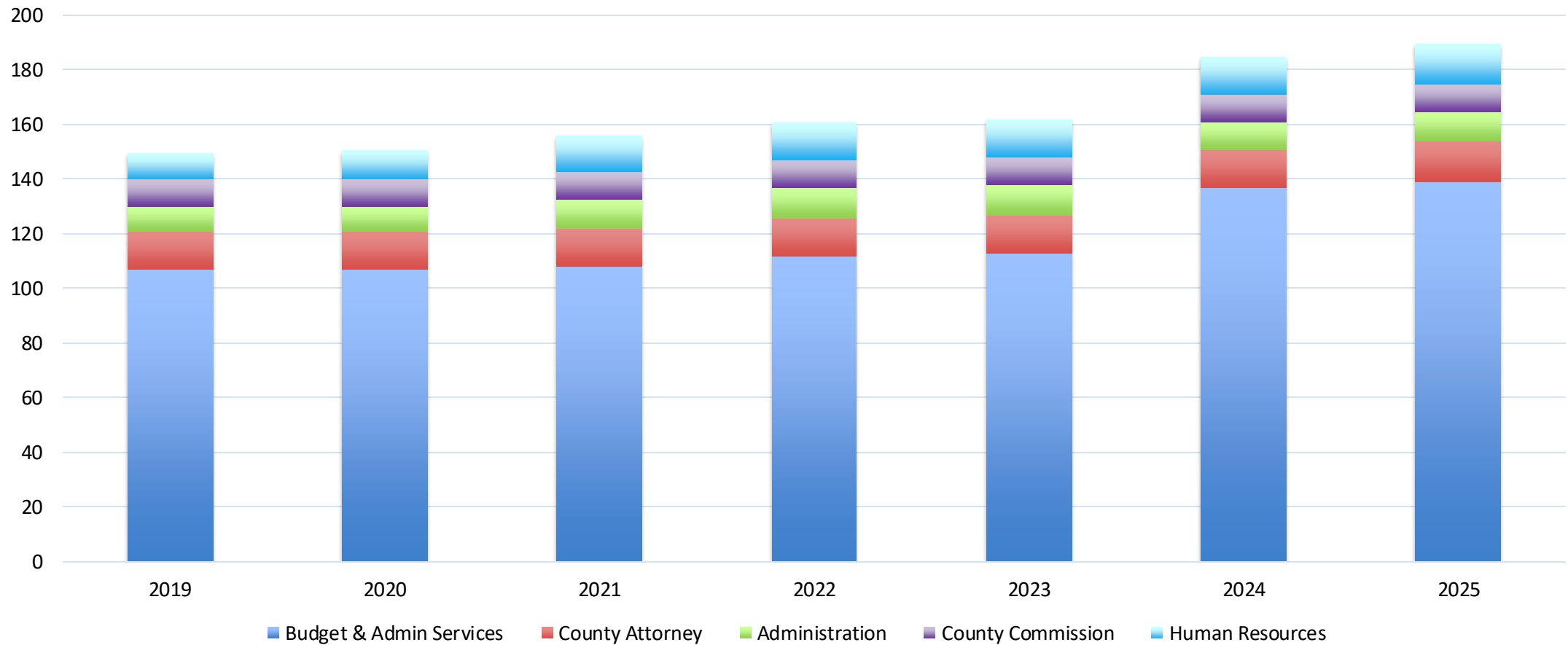
New Position Requests

FY26

Budget & Administrative Services (12)

- Information Technology (4)
- Fleet (4)
- Purchasing (1)
- Risk (1)
- Transit (2)

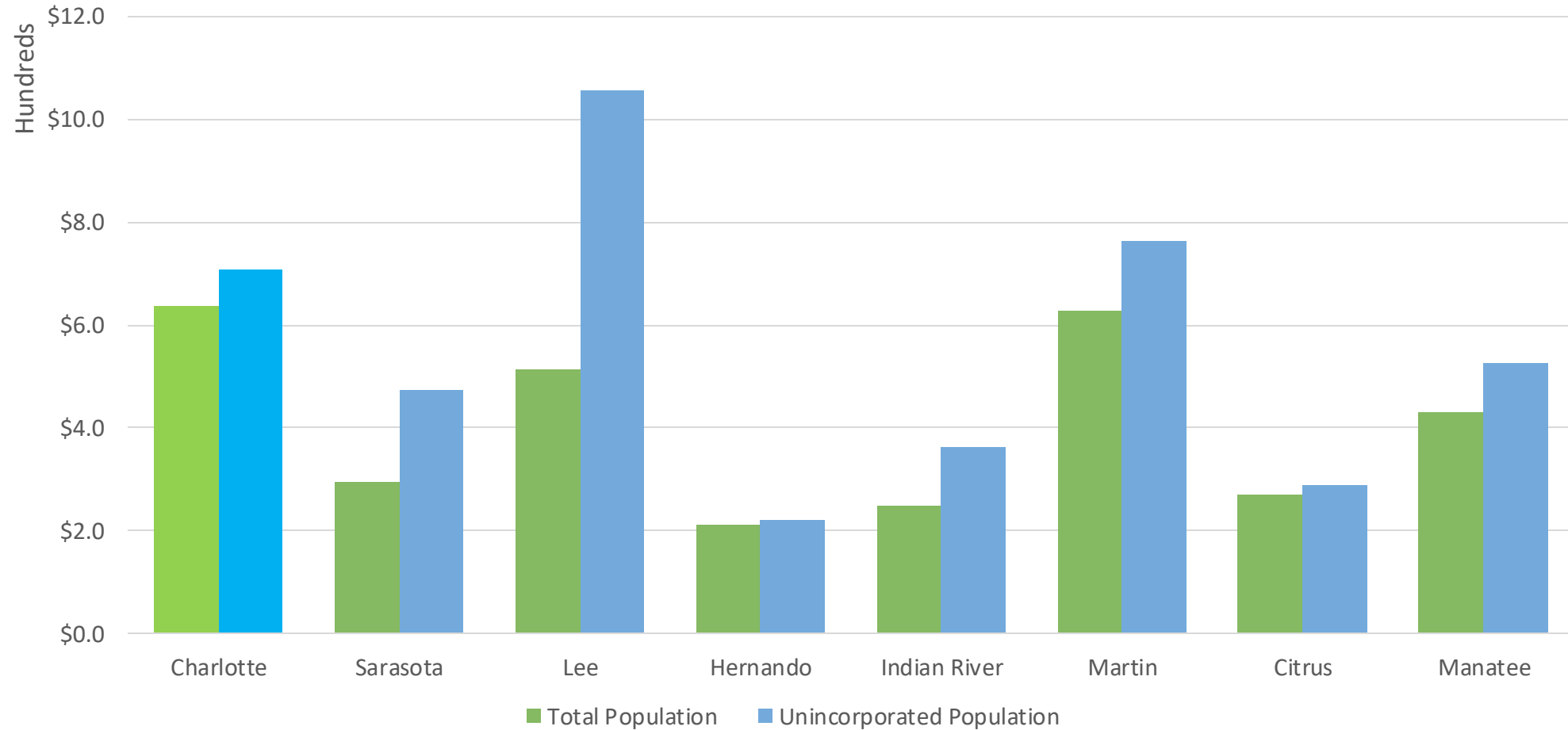**Human Resources (9)**

FY27

Budget & Administrative Services (9)

- Information Technology (2)
- Fleet (1)
- Purchasing (1)
- Risk (1)
- Transit (4)

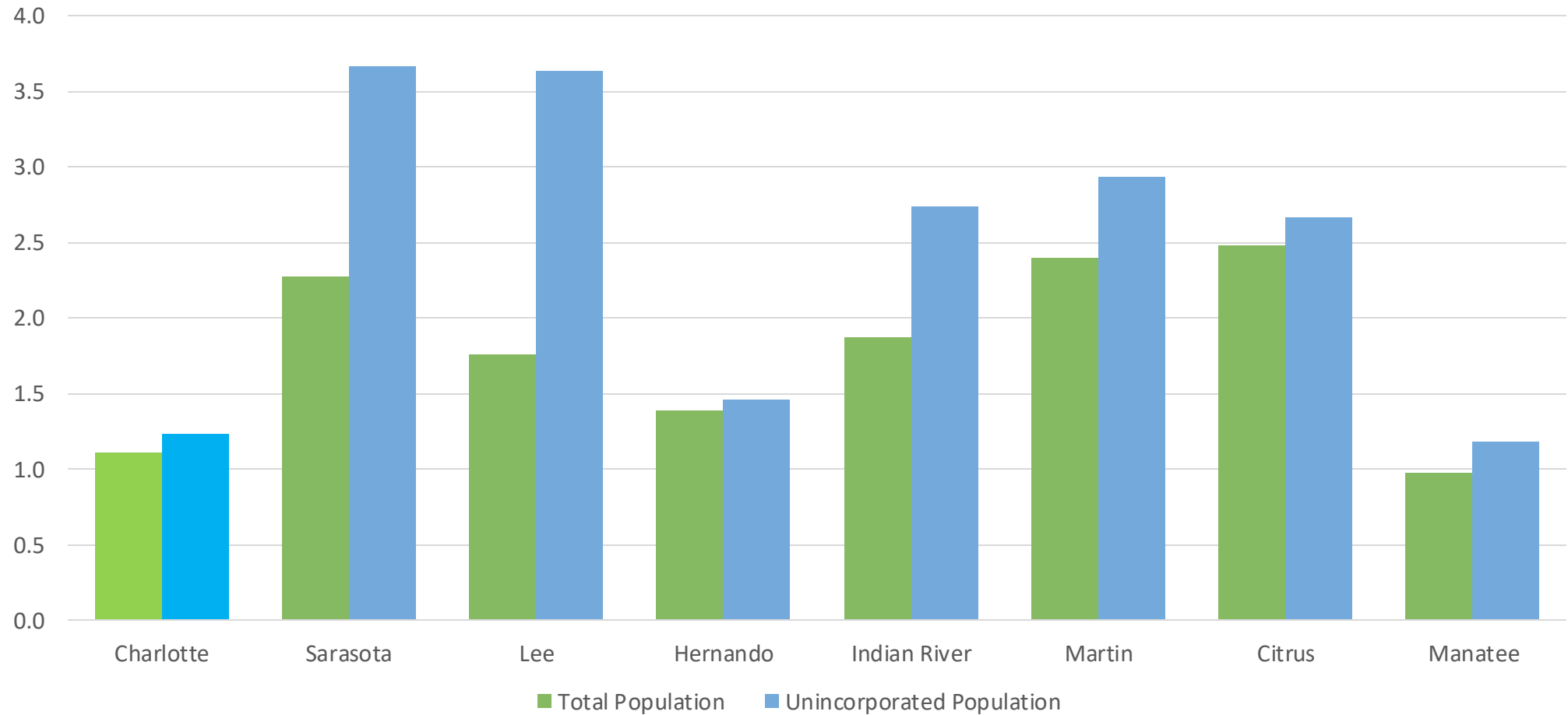**Human Resources (1)**

Attorney (2)

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FLORIDA

Population Data

Charlotte	Population	Percentage
Punta Gorda	20,410	10.00%
Unincorporated	183,716	90.00%
Total Population	204,126	100.00%

Citrus	Population	Percentage
Crystal River	3,491	2.15%
Inverness	7,860	4.84%
Unincorporated	150,889	93.00%
Total Population	162,240	100.00%

Hernando	Population	Percentage
Brooksville	9,566	4.68%
Unincorporated	194,699	95.32%
Total Population	204,265	100.00%

Indian River	Population	Percentage
Fellsmere	4,933	2.94%
Indian River Shores	4,512	2.69%
Orchid	531	0.32%
Sebastian	26,405	15.74%
Vero Beach	16,693	9.95%
Unincorporated	114,707	68.37%
Total Population	167,781	100.00%

Lee	Population	Percentage
Bonita Springs	54,868	6.85%
Cape Coral	213,301	26.63%
Estero	37,507	4.68%
Fort Myers	97,711	12.20%
Fort Myers Beach	3,255	0.41%
Sanibel	5,946	0.74%
Unincorporated	388,401	48.49%
Total Population	800,989	100.00%

Manatee	Population	Percentage
Anna Maria	987	0.22%
Bradenton	57,253	13.02%
Bradenton Beach	902	0.21%
Holmes Beach	3,026	0.69%
Longboat Key	2,761	0.63%
Palmetto	13,927	3.17%
Unincorporated	360,710	82.06%
Total Population	439,566	100.00%

Martin	Population	Percentage
Indiantown	6,664	4.09%
Jupiter Island	786	0.48%
Ocean Breeze	608	0.37%
Sewall's Point	2,038	1.25%
Stuart	19,264	11.83%
Unincorporated	133,487	81.97%
Total Population	162,847	100.00%

Sarasota	Population	Percentage
Longboat Key (part)	4,776	1.03%
North Port	86,552	18.64%
Sarasota	57,005	12.28%
Venice	27,793	5.99%
Unincorporated	288,097	62.06%
Total Population	464,223	100.00%

*From published 2023 (BEBR) Bureau of Economic & Business Research Report

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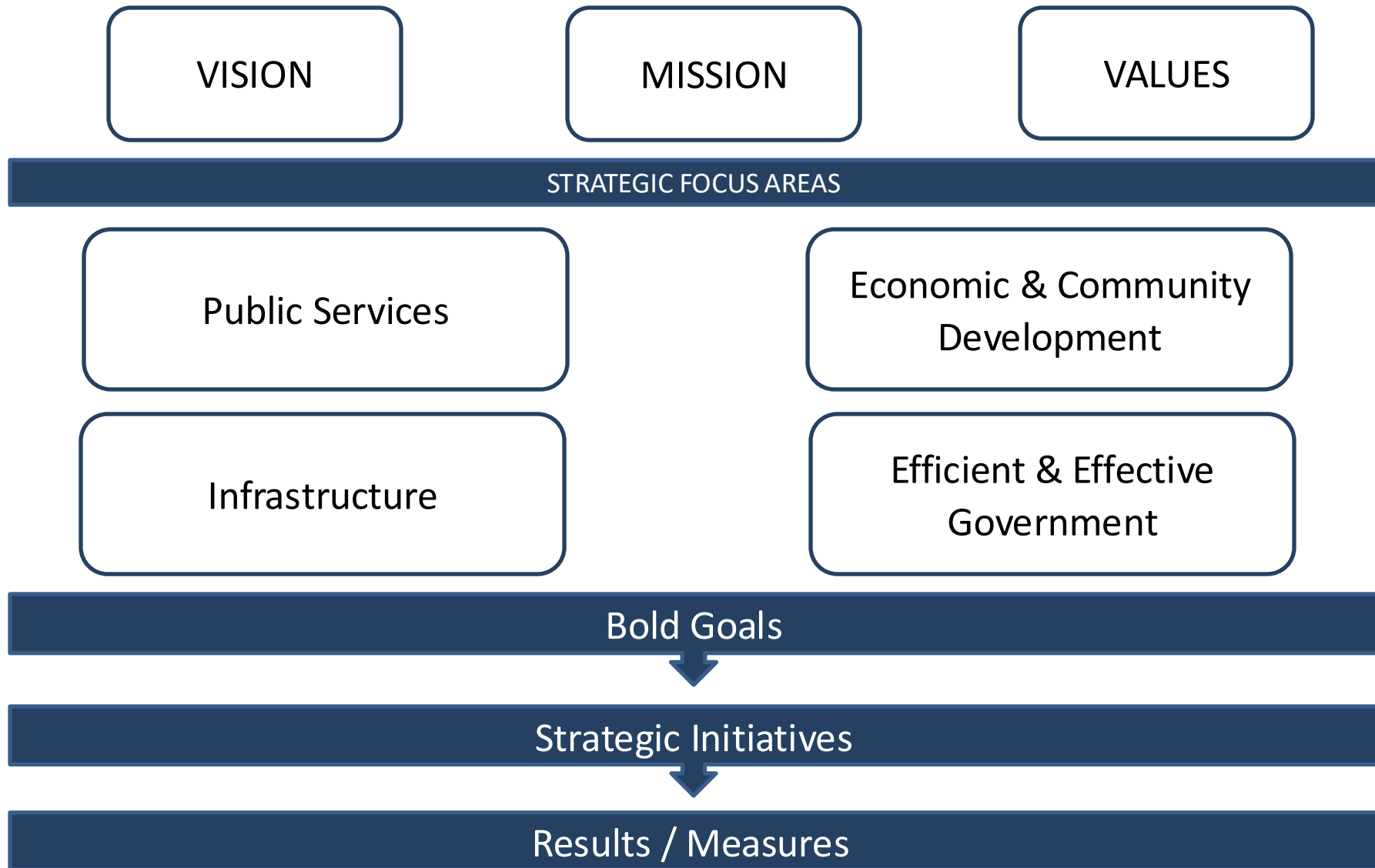
Efficient & Effective Government
Revised Goals

- Manage and communicate the complexities of a changing organization

- Ensure culture as "Great Place to Work"

- Increase "Line of Sight"

- Ensure culture of continuous improvement

- Strengthen the resiliency and recovery capacity of the organization

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Manage and communicate the complexities of a changing organization

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Ensure Culture as "Great Place to Work"

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Comp and Class Study

- Benchmark Survey data returned

- First draft revised pay plan under review

- Final draft targeted for beginning of July

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Learning Management

NeoGov Learn
Learning Management System

- Create own content
  - Interactive courses
  - Upload existing
- 916 online courses
  - Compliance
  - Interpersonal Skills
  - Software
  - Safety
  - Many more
  - Bilingual Courses
- Include links to 3rd party sites

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NeoGov Learn
Learning Management System
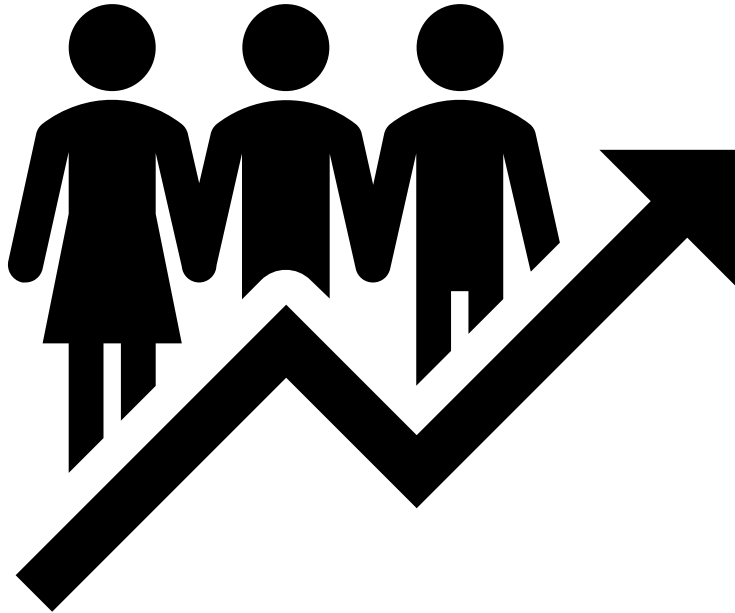
- Track employee's progress
  - Started
  - Completions
  - Withdrawals
- Enter Certificates and Licenses
  - CDL – Passenger
  - First Aid/CPR/AED
  - Special Skills e.g., bilingual
- Manage expiration dates and notify employees of need to recertify.
- Create Certificates of Completion

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NeoGov Learn
Learning Management System

- Employees can manage enrollment
  - Enroll
  - Withdraw
- Track their own progress
- Access to their training transcript
  - Include online courses
  - In-Person classes
  - Conferences
- Supervisors/Managers will be able to see their own record, as well as their employees' records.

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Ensure Culture of Continuous Improvement

Employee Health Center

Unique Patient Participation

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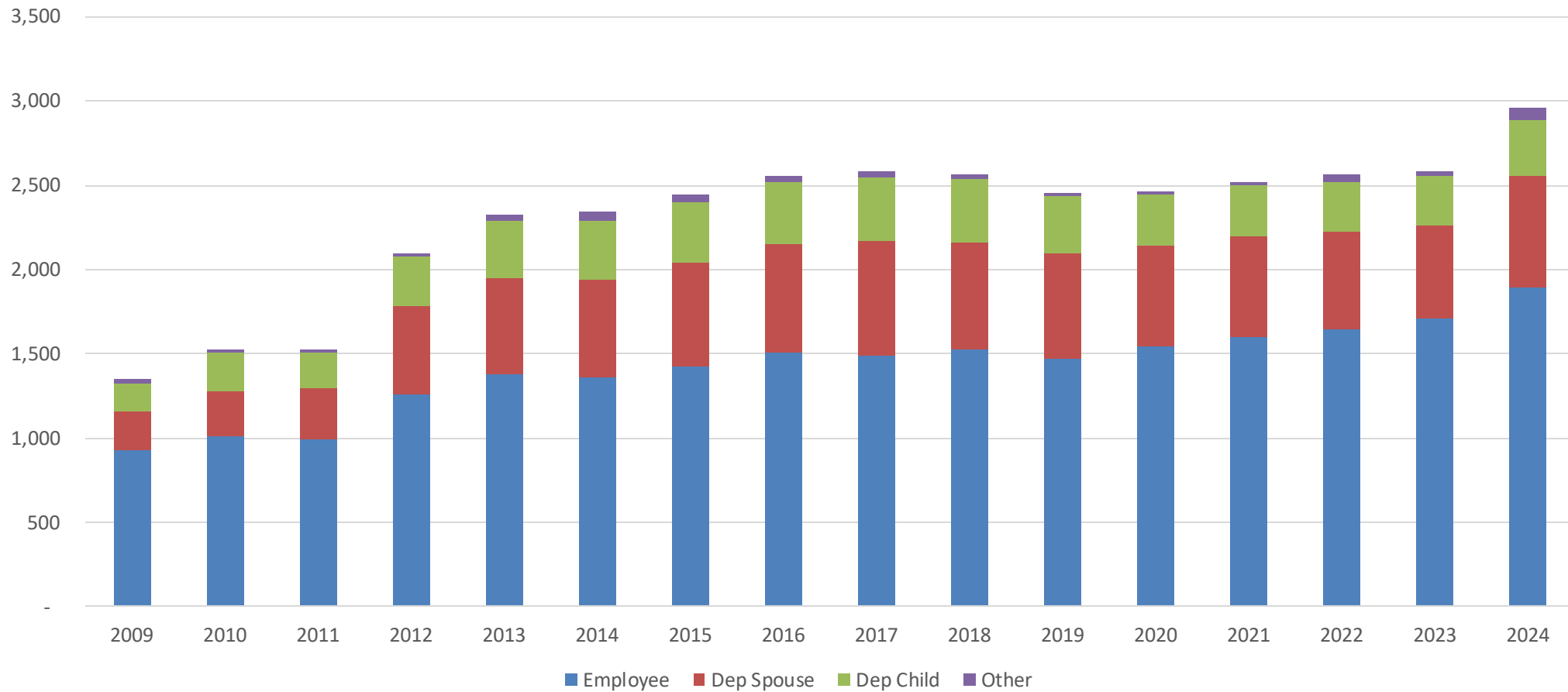
Health Plan Gross Medical Costs
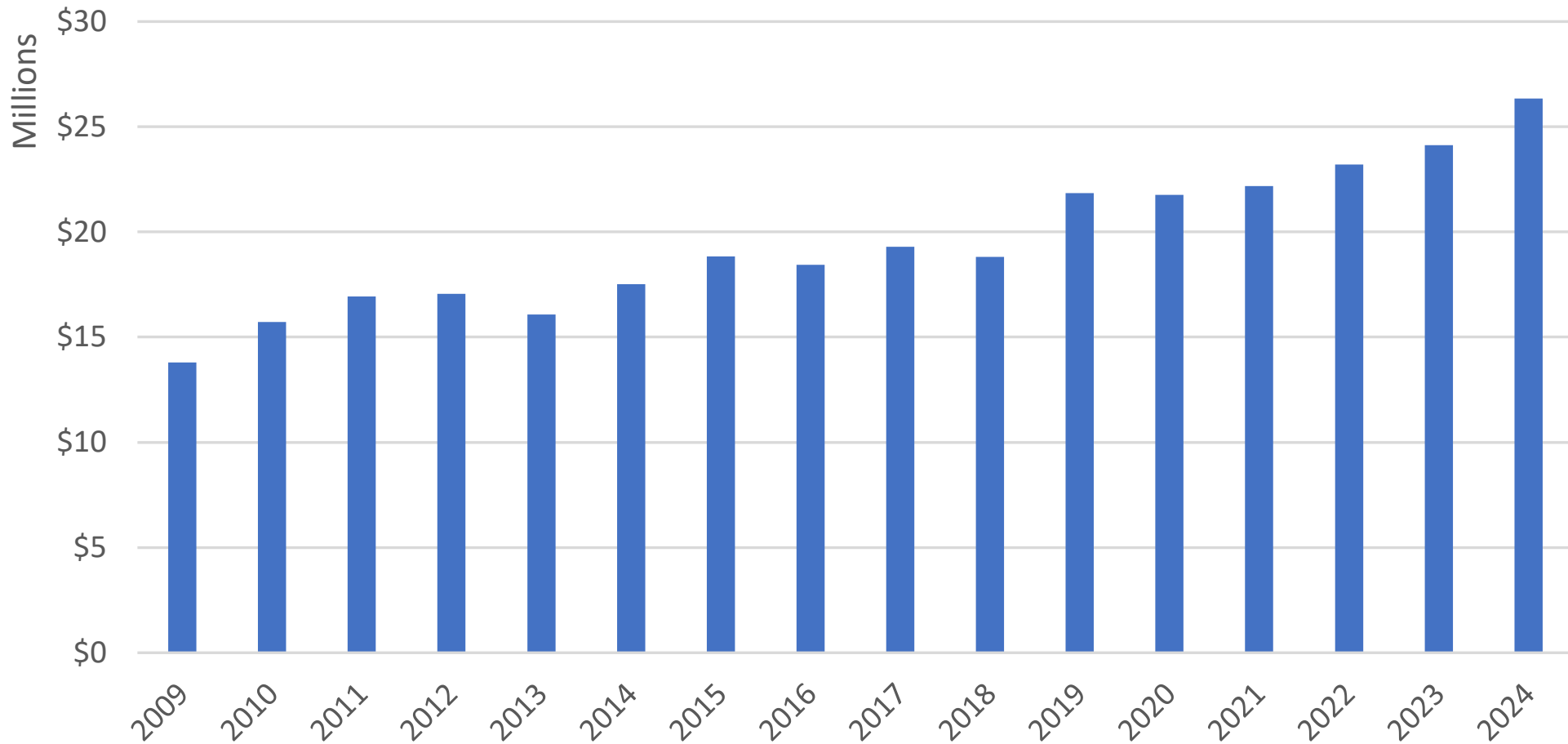
Projected Savings
Cost per employee per month
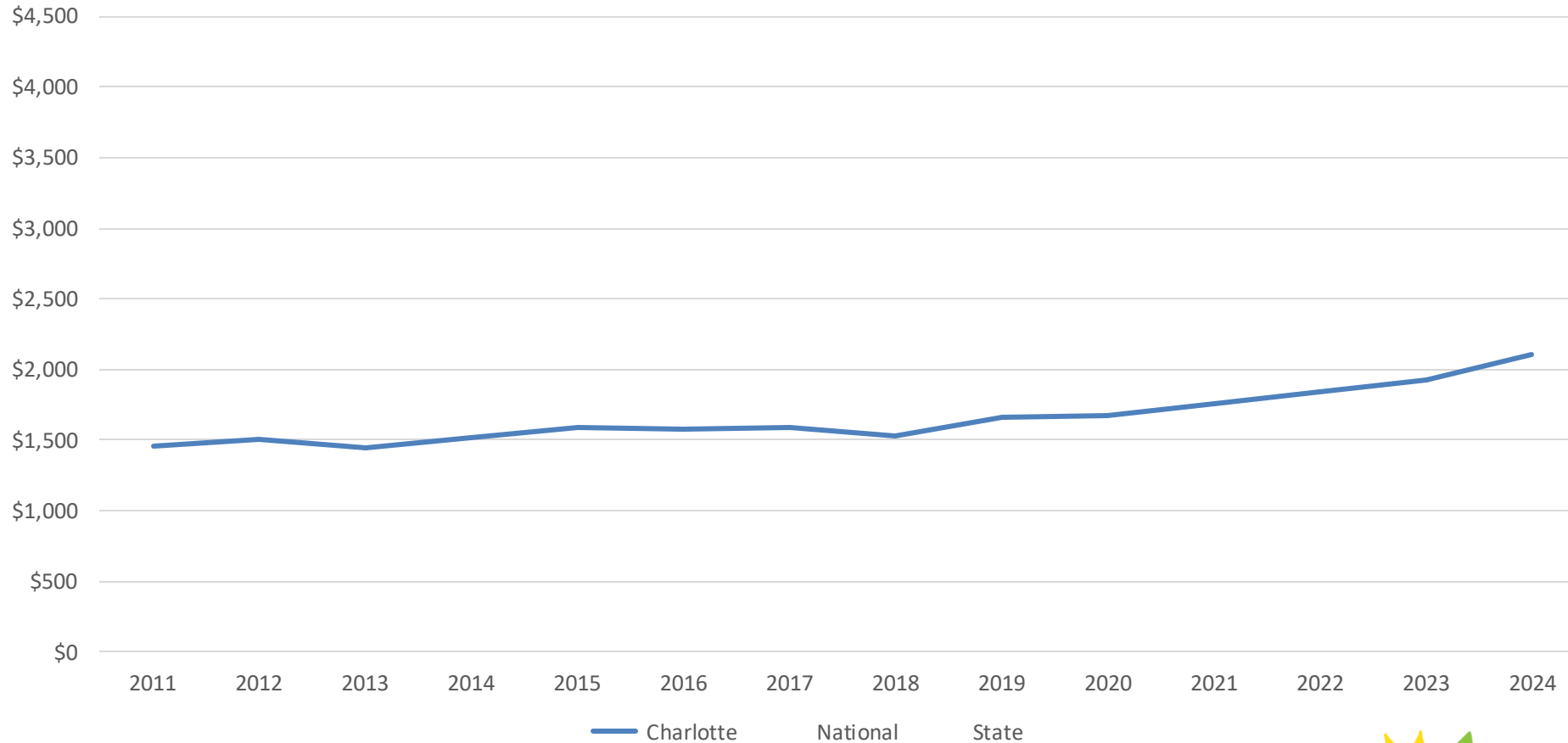
Projected Savings
Cost per employee per month
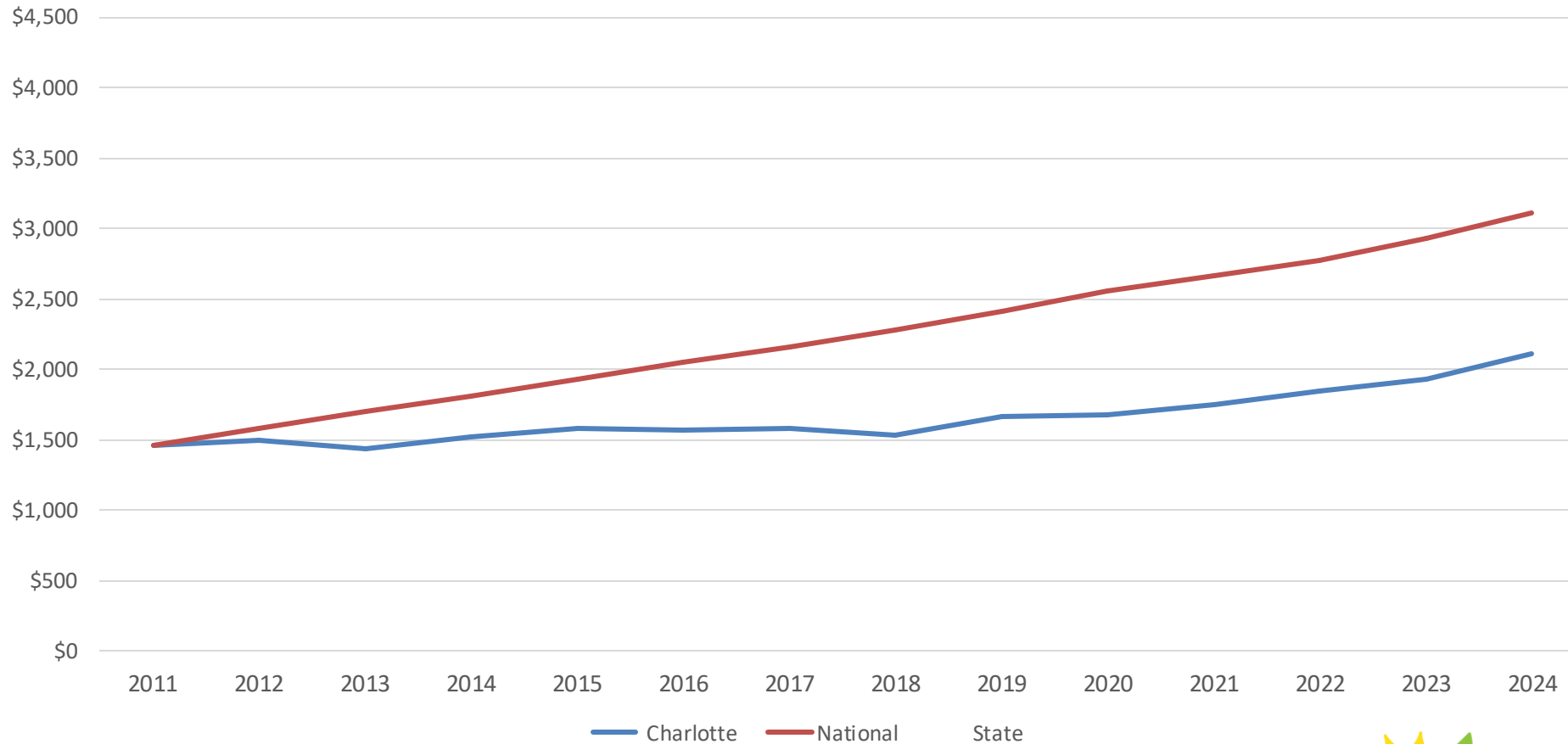
$237 million in savings when compared to Florida average.

Legend: Charlotte — National — State

CHARLOTTE COUNTY
FLORIDA

Health Plan Employer Paid Rx Costs

33
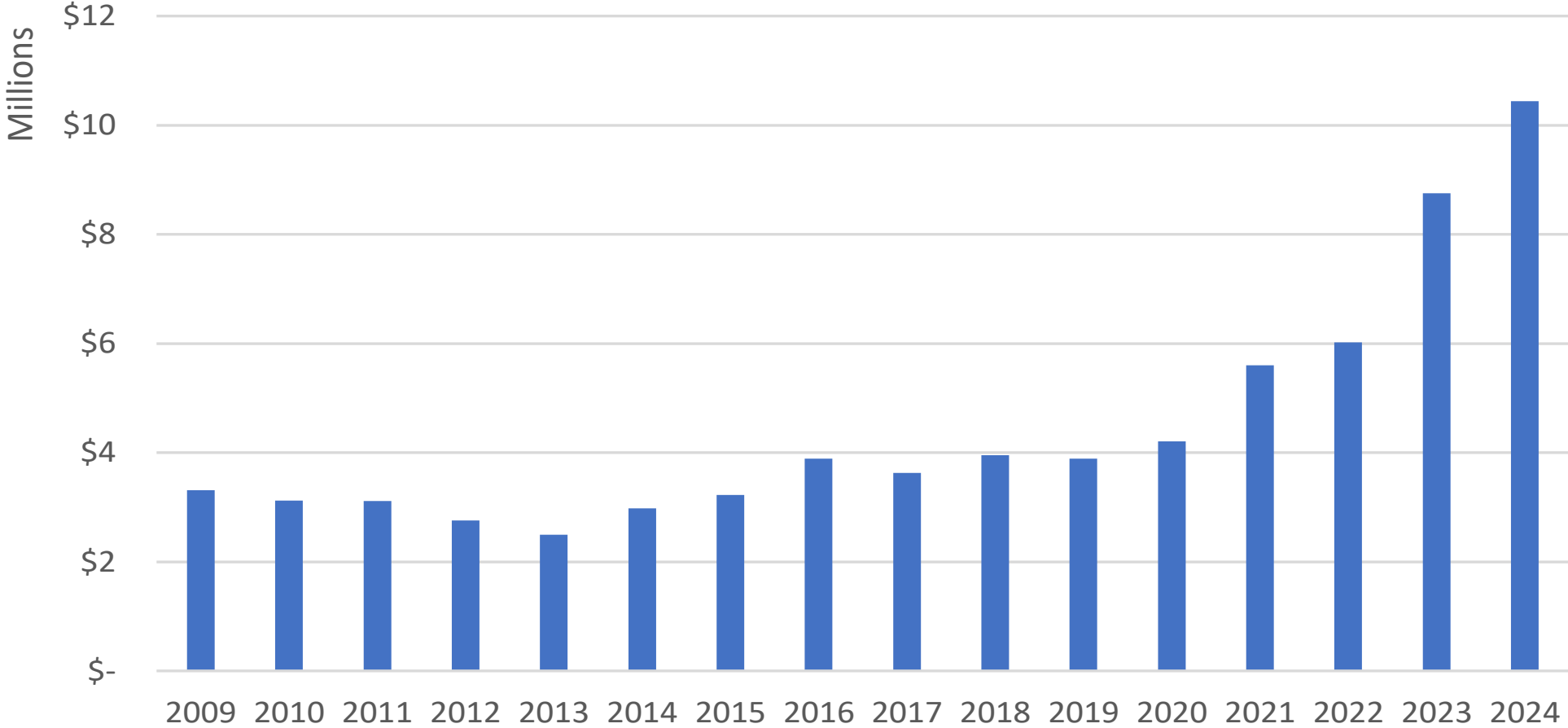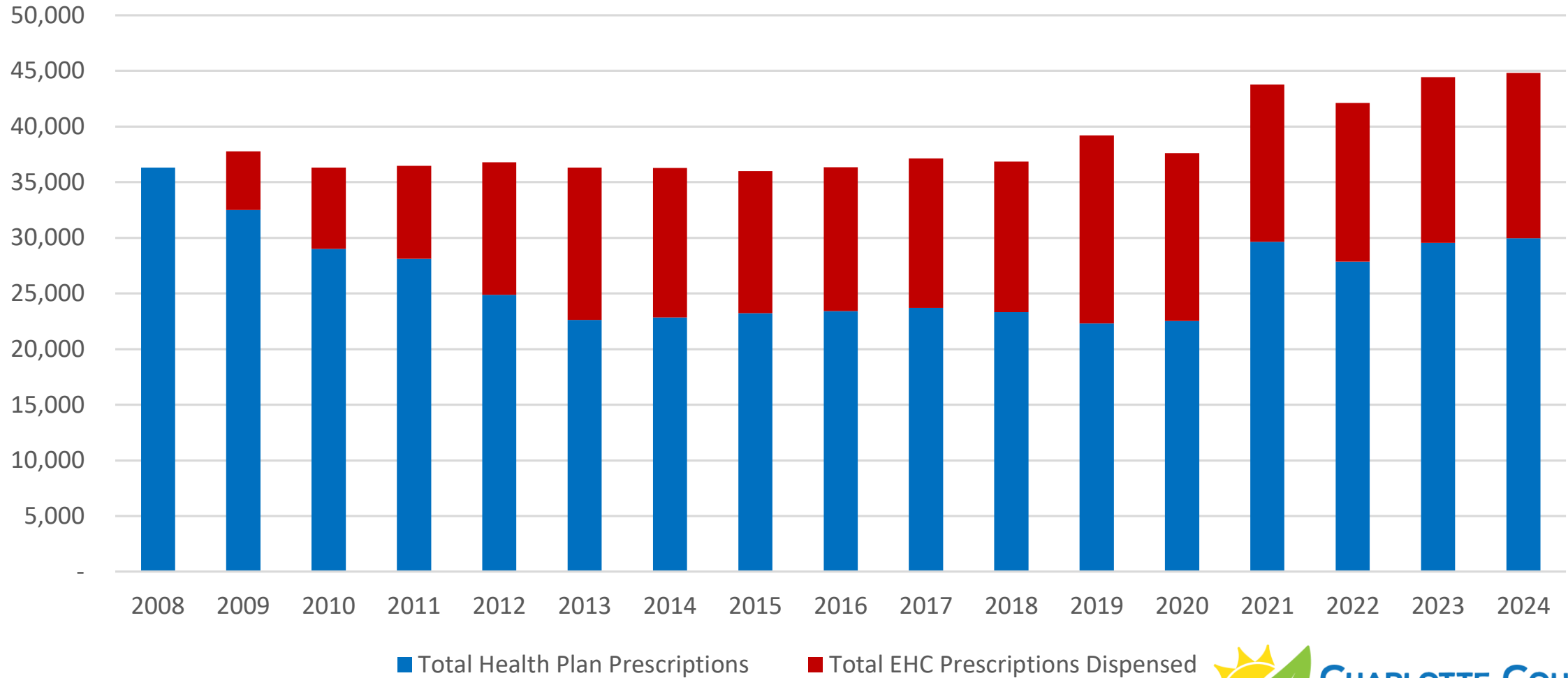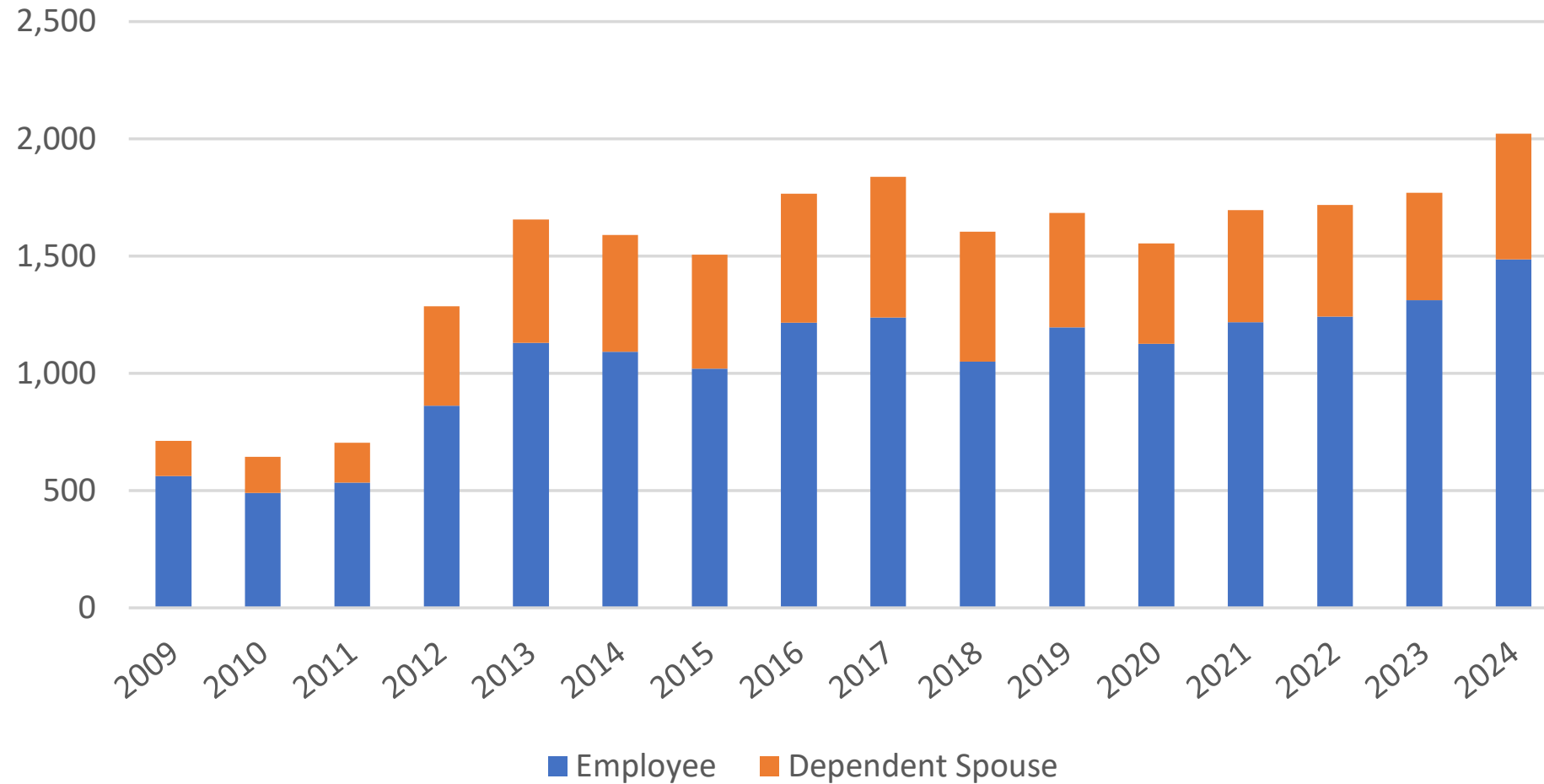
Health Plan Update

- Sarasota Memorial Hospital status
- Health Plan carrier decision – July 22 meeting
- Potential employee benefit year change

CHARLOTTE COUNTY
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IT Business Analysis Team

IT Business Analysis Team

FY 23/24 Team Goals

- Increase Communications Between Departments & Information Technology

- Analyze and Document Current Processes

- Facilitate Access to New Technologies

- Ensure Successful IT Projects

- Deliver Business Value

- Facilitate Business Agility

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2023
Business Analysis Team

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IT Business Analysis Team Core Services

- ## Strategic Needs Analysis & Alignment
  - Working with departments to identify business needs and enabling the organization to address that need while ensuring the resulting strategy aligns with the organization's goals.

- ## Requirements Analysis and Design Definition
  - Identifying solution options that meet business needs and estimating the potential value that could be realized for each solution option.

- ## Solution Evaluation
  - Assessing the performance of and value delivered by existing solutions.

- ## Process Innovation, Project & Portfolio Management
  - Supports organizational efficiency, transparency, and alignment between the organizations business units and Information Technology.

Department Road Trip

January – February 2024

- 50+ meetings with managers & staff to discuss technology needs and process pain points

- Resulted in a list with 150+ items

- New items added and prioritized regularly

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Department/IT Roadmap

- Living list of the opportunities or challenges that departments have identified

- Prioritized by department directors

- Work performed based on prioritization and resource availability

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Department / IT Roadmap

- 70 items have been completed
- 43 items in progress
- 88 items pending

Roadmap Items

● Complete ● Active ● Pending

	Complete	Active	Pending
Process Review	30	25	56
Process Improvement	8	11	20
Project	18	18	

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Featured Success

- Proof of Concept for department Levels of Service metrics
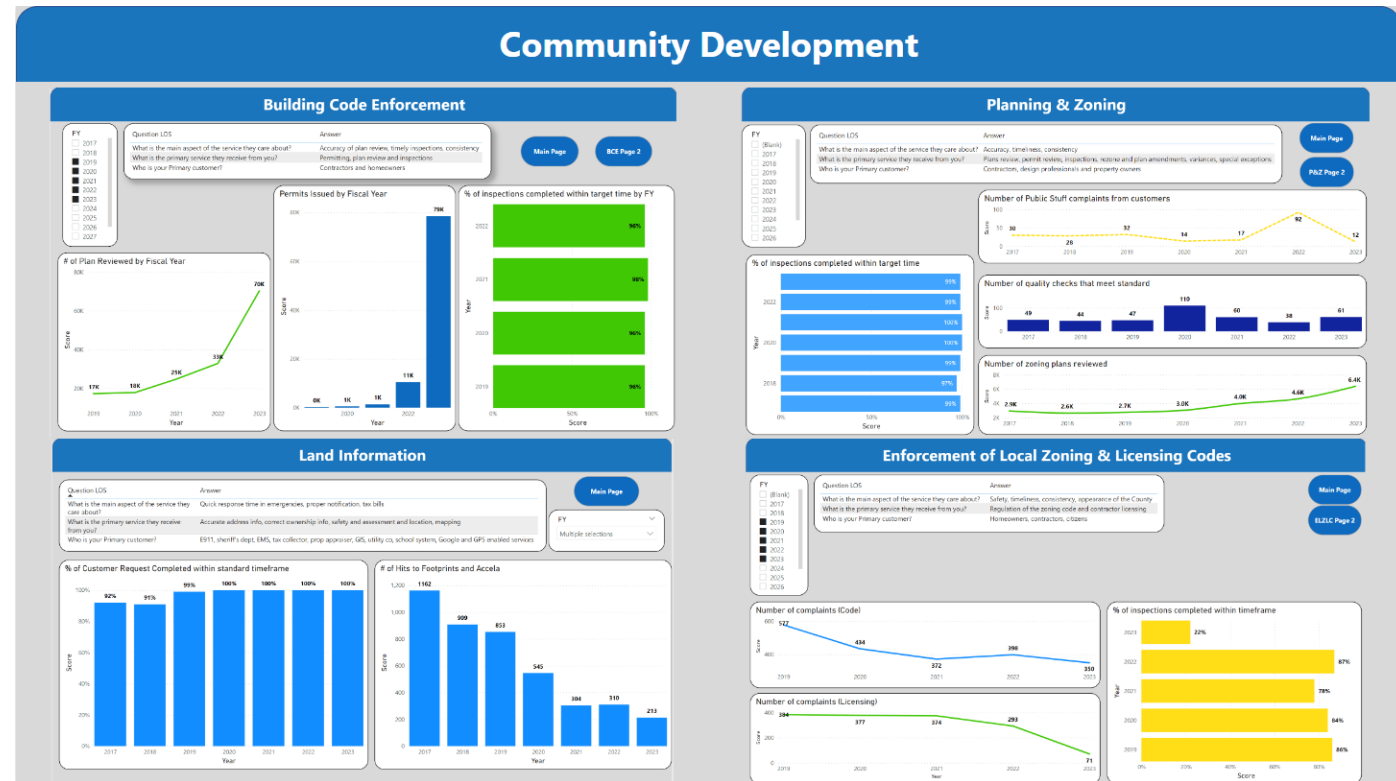
Featured Success

Utilities Boil Water Notice Map
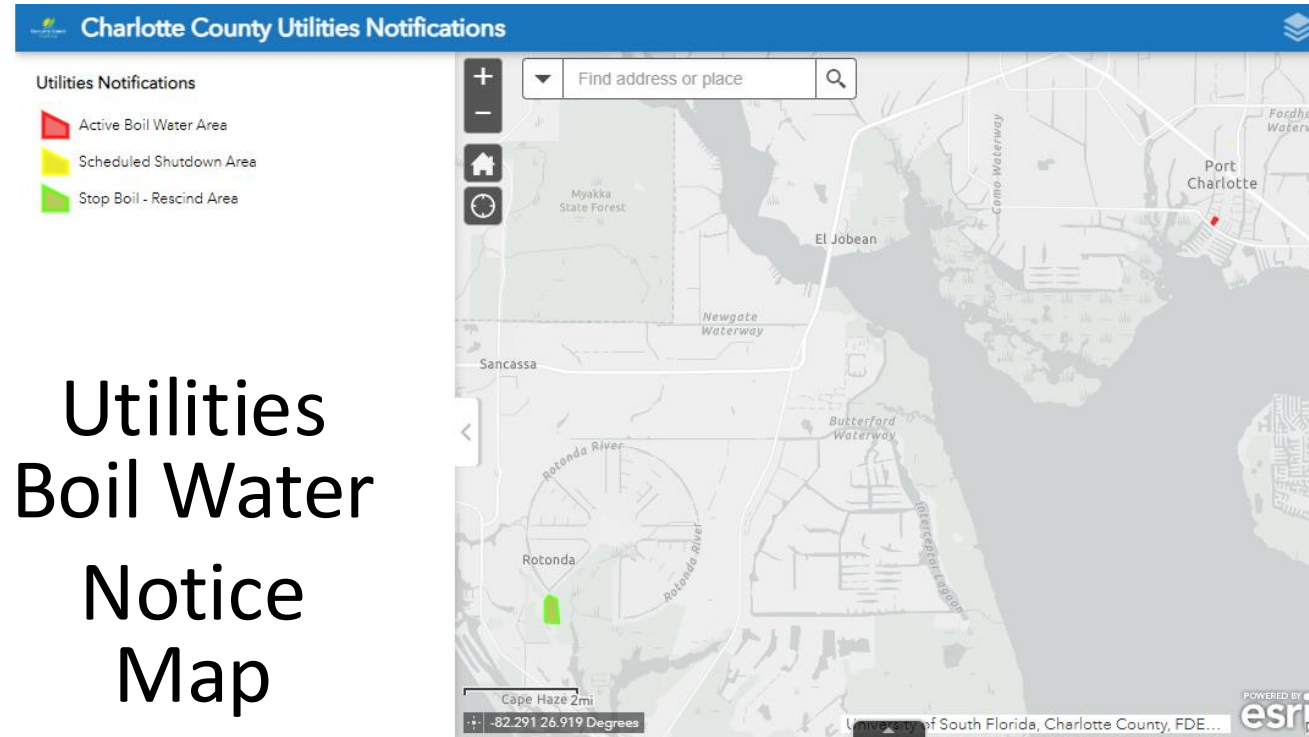
Utility Notices | Charlotte County, FL (charlottecountyfl.gov)

Charlotte County App

The Charlotte County FL App | Charlotte County, FL

Additional Successes

Citizen Facing	Internal Improvements

Citizen Facing

- Cemeteries Plot Online Inquiries
- Notice of Commencement Recording Automation in Accela
- Stormwater Permits digital processing via Accela Citizen Access

Internal Improvements

- Digital Signature Capabilities
- Digitized Procurement Card paperwork
- Animal Control Incident Management
- MobileEyes – Commercial Fire Inspections
- Accela Milestone Inspections

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Featured Improvements In Progress

County wide credit card payment system

- Utilities Billing – *7/1/25 Go Live*
- Aircraft Rescue & Fire Fighting Billing
- Animal Control Billing
- EMS Billing/Medical Records
- Fire Prevention / False Alarms Billing
- County Records Request
- Public Works Cemeteries
- Transit Rider Fees
- Transfer Facilities

Pay My Bill

Home > Departments & Agencies > Utilities Department > Pay My Bill

Pay Your Bill Your Way

Warning: If you have received an urgent notice and are in imminent danger of having your services disconnected, we recommend you speak to a customer service agent when making your utility payment. Please call 941.764.4300 if this applies.

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Featured Improvements In Progress

Community Development Forerunner

- AI powered review of elevation certificates for floodplain reviews
- Damage Assessment
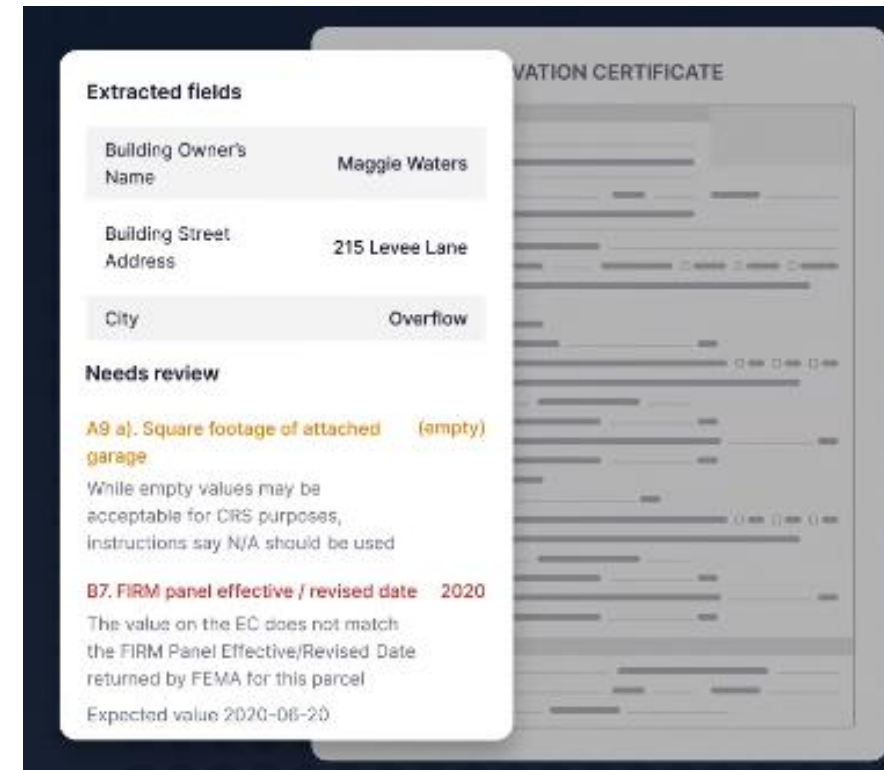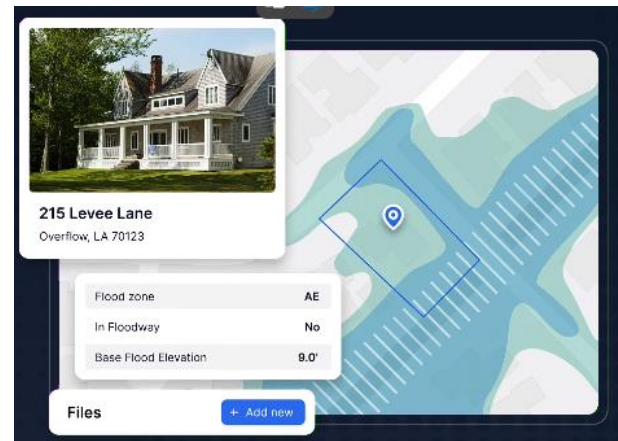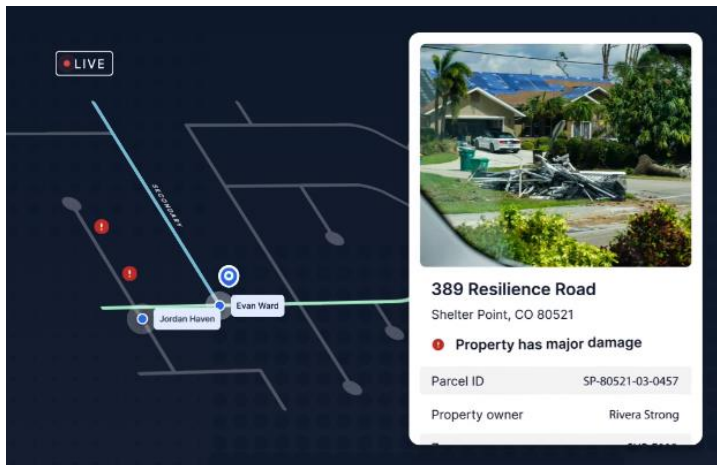
Featured Improvements In Progress

Connect @ Work Redesign

- Streamline access to essential employee services and resources
- Enhance mobile accessibility for field workers and remote employees
- Improve content findability and user engagement
- Reduce administrative overhead in content management
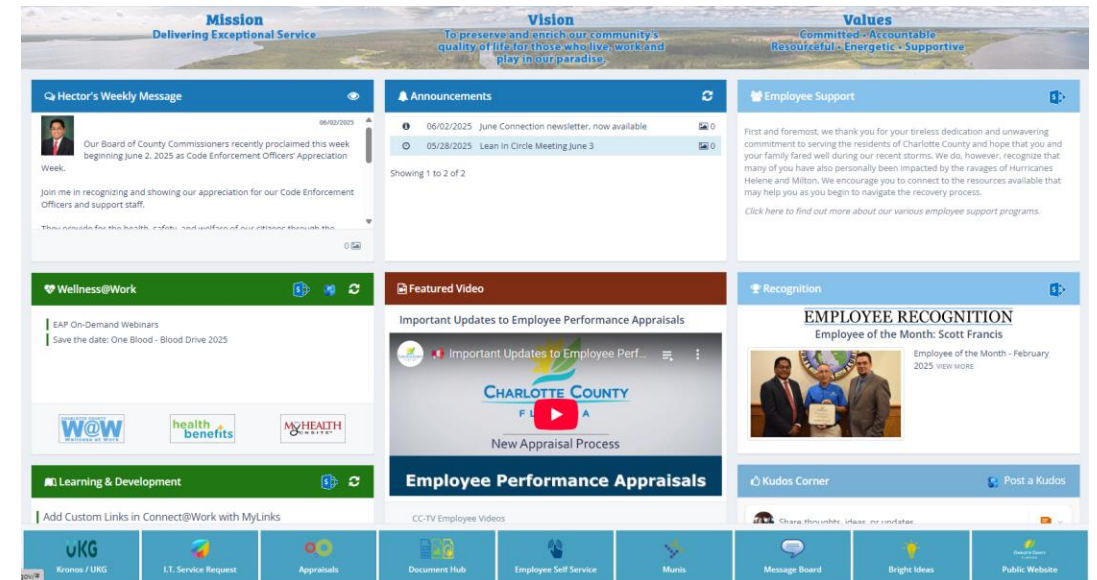
Additional Improvements In Progress

- Banner Utilities Billing upgrade

- Radio Asset Management - CommShop

- Human Services Case Management System

- Construction Project Management System

- Water Quality Data Project

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IT Business Analysis Team

FY 23/24 Team Goals

- Increase Communications Between Departments & Information Technology
- Analyze and Document Current Processes
- Facilitate Access to New Technologies
- Ensure Successful IT Projects
- Deliver Business Value
- Facilitate Business Agility

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2023

Business Analysis Team

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Future Goals

- Transition from Reactive to Proactive (Solution Evaluation)
  - Assess the performance of and value delivered by existing solutions
  - Reduce duplication of effort
- Identify and visualize performance metrics for core services
- Automate tasks where it makes sense
- Take advantage of AI where applicable
  - AI user group
- Focus on areas with direct citizen impact to enhance citizen experience

Thank you

Achievements

2025 NACo Achievement Awards

- Joint Team-Building Event
- Info Hubs
- Real Estate Services – Storm Site Planning and Usage
- Digital Transformation of the Notice of Commencement Process
- Charlotte County UF/IFAS Master Gardener Volunteer Program
- Eyes on Seagrass
- Technology and Collaboration: The Critical Role of GIS Data Accuracy in 911 Routing
- Optimizing Water Quality Monitoring through GIS-Driven Solutions
- Capital Maintenance Plan
- Collegiate Swim Team
- Evening Water Aerobics
- Expanding Community Engagement Through Technology
- Facility Phased Reopening After Natural Disasters
- Great Garage Sale
- Lifeguard Rotation Schedules
- Livestream Summer Camp Decorating Challenge

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2025 NACo Achievement Awards

- Mass Care Shelters
- Pickleball Leagues
- Quarterly Operational and Program Evaluations
- Quarterly Staff Survey
- Rec 2 U
- Summer Camp Training
- Coastal Educational Outreach
- Sensory Playground Components
- Streamlining Subdivision Regulations
- Manasota Key Code Changes
- Pop-Up Permitting Site in West Charlotte County
- Damage Assessment Tags
- Partners Annual Outcomes Reporting Process
- Family Services Center Multi-Sensory Room
- Charlotte Rides Mobile App

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Additional Achievements

- 2024 Government Social Media Golden Post Award for "Best Next-door Presence"

- National Association of Telecommunications Officers and Advisors NATOA Government Program Award of Honor for Hurricane Ian coverage

- Cigna Healthy Workforce Designation - Gold

- The Bell Seal for Workplace Mental Health - Platinum

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Increase "Line of Sight"

Increase "Line of Sight"

"Line of Sight" means that employees can see the connection between their goals and the organization's goals. The benefits are many – to ensure that employee's best efforts are helping achieve the organization's goals, as well as to help them know that the work they're doing matters.

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Increase "Line of Sight"

- Ambassador Program

- Leadership Development Program

- Quarterly Manager and Supervisor Meetings

- Connect@Work Redesign

- Internal Communications

Evaluation Overhaul

Purpose

Emphasis on culture

Focus on the employee

Meaningful and valuable

Reduce subjectivity

Easy to complete

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Core Competencies

Committed

Accountable

Job Skills

Delivering Exceptional Service

Resourceful

Supportive

Energetic

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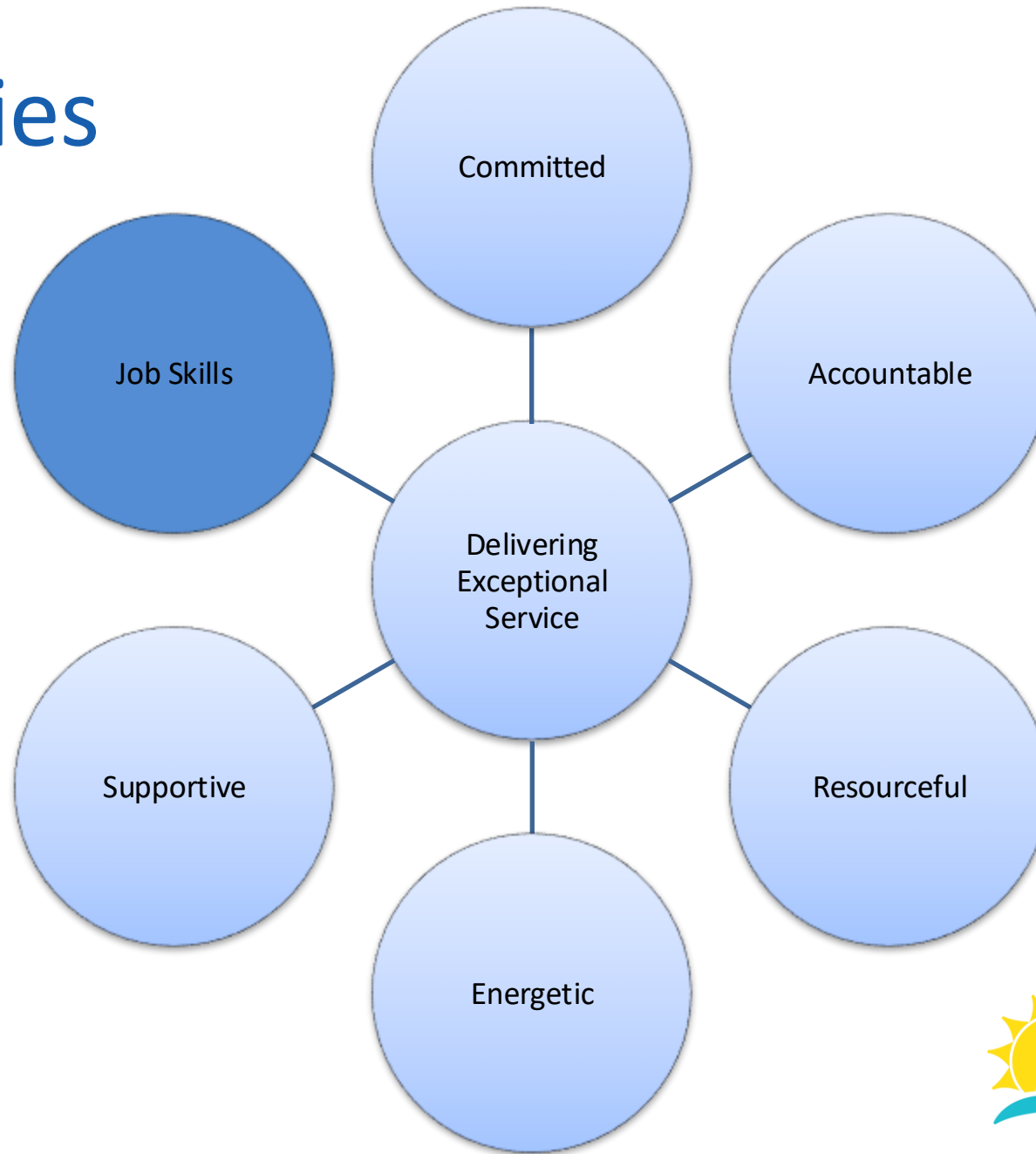
Employee Self Evaluation

Employee Self-evaluation

A. What achievements are you most proud of since your last evaluation?

Self: N/A

Comments:

B. How do you show our core values in your daily work?

Self: N/A

Comments:

C. What goals do you want to work toward before your next evaluation, and how do you plan to reach them?

Self: N/A

Comments:

- What achievements are you most proud of since your last evaluation?

- How do you show our core values in your daily work?

- What goals do you want to work toward before your next evaluation, and how do you plan to reach them?

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Strengthen the resiliency and recovery capacity of the organization

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Infrastructure
General Government

Charlotte County
FLORIDA

General Government
(Thousands)

Projected Expenditures	FY26 Projected	FY27 Projected	FY28 Projected	FY29 Projected	FY30 Projected	FY31 Projected	6 Year Total
Facilities	15,574	65,790	240,896	-	10,972	-	333,232
Community Services	47,014	36,188	83,672	39,579	29,253	25,373	261,079
Public Safety	12,008	21,586	29,577	6,152	-	13,282	82,605
Infrastructure Compliance	-	-	7,152	-	-	-	7,152
Total Projected Expenditures	**74,596**	**123,564**	**361,297**	**45,731**	**40,225**	**38,655**	**684,068**

CHARLOTTE COUNTY
FLORIDA

General Government

(Thousands)

	FY26 Projected	FY27 Projected	FY28 Projected	FY29 Projected	FY30 Projected	FY31 Projected	6 Year Total
Total Projected Expenditures	74,596	123,564	361,297	45,731	40,225	38,655	684,068
Projected Revenue							
Ad Valorem Available	17,497	12,929	22,546	21,329	24,521	28,276	127,098
Departmental Revenues	575	-	68,715	-	6,948	-	76,238
Impact Fees	3,783	3,783	3,783	3,783	3,783	3,783	22,696
HMGP	-	-	102,669	-	-	-	102,669
Sales Tax 2014	448	-	-	-	-	-	448
Sales Tax 2020	10,977	-	8,242	9,380	-	-	28,599
Sales Tax 2026 (50%)	-	14,125	18,833	18,833	18,833	18,833	113,000
Total Projected Revenues	**33,279**	**30,837**	**224,787**	**53,325**	**54,084**	**50,891**	**470,476**
Variance	(41,317)	(92,727)	(136,510)	7,594	13,859	12,236	(213,322)

*Sales Tax Extension 6-year total includes anticipated future year collections

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Recommendations

- Updated revenues – Murdock CRA repayment

- Separate HMGP projects

- Fund projects based on actual cashflow not budget

- Use Sales Tax process to prioritize projects

CHARLOTTE COUNTY

F L O R I D A

General Government

(Thousands)

	FY26 Projected	FY27 Projected	FY28 Projected	FY29 Projected	FY30 Projected	FY31 Projected	6 Year Total
Total Projected Expenditures	16,641	30,779	265,735	104,901	48,157	21,471	487,684
Projected Revenue							
Ad Valorem Available**	22,497	17,929	27,546	26,329	29,521	33,276	157,098
Departmental Revenues	-	-	28,180	-	-	-	28,180
Impact Fees	3,783	3,783	3,783	3,783	3,783	3,783	22,696
HMGP	-	-	102,669	-	-	-	102,669
Sales Tax 2026 (50%)*	-	14,125	18,833	18,833	18,833	18,833	113,000
Total Projected Revenues	26,279	35,837	181,011	48,945	52,136	55,891	423,642
Variance	9,638	5,058	(84,724)	(55,956)	3,979	34,420	(64,042)

*Sales Tax Extension 6-year total includes anticipated future year collections
**Increased by $5M each year

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General Government

(Thousands)

HMPG	Project	Year	FY26	FY27	FY28	FY29	FY30	FY31	Total
	HMGP								
H2	Special Needs Saferoom	28			38,729				38,729
H9	Public Safety Saferoom	28			23,776				23,776
H12	Emergency Management Generators - Kingsway	28			755				755
H14	Emergency Management Generators - Neil Arm.	28			521				521
H7	Charlotte County Health Dept 1100 Loveland Generator	28			441				441
H1	Bissett Community Park Ph 3	28-31			32,800				32,800
H11	Mid County Operations Facility - Utilities	28			39,543				39,543
H15	Mid County Operations Facility - Public Works	28							
H10	Open Outfalls/Canal Hardening	28			7,152				7,152
	Totals				143,717				143,717
	Potential Revenues								
	HMGP				102,669				102,669
	Department Revenues				28,180				28,180
	Totals				130,849				130,849
	Surplus / Shortfall				(12,868)				(12,868)

CHARLOTTE COUNTY
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General Government
(Thousands)

Sales Tax 2026									
Project	**Year**	**FY26**	**FY27**	**FY28**	**FY29**	**FY30**	**FY31**	**Total**	***Future***
Cultural Center/Library Replacement	27-28		2,121	65,790				67,911	
Mid County Annex	29				50,189			50,189	
Fleet Management Building	32							-	*27,045*
Babcock Library & Annex	27		18,806					18,806	
Placida Passive Park Phase 2	32							-	*16,477*
South Murdock Community Park	28-30			5,848	119	9,386		15,353	
Centennial Park Pool Ph 3	30					14,672		14,672	
Fire Station 4 Repl	32							-	*13,282*
Recreation Center Renovation, South County	28			12,034				12,034	
Clerk Records Warehouse Replacement	29				10,863			10,863	
Fire Station 18, Edgewater Drive	28			10,793				10,793	
Fire Station 19, Gasparilla Road	28			10,793				10,793	
Myakka River Park - Phase 2	31						10,704	10,704	
Maracaibo Community Park & Concession	28-29			1,086	9,380			10,466	
Centennial Park Ph 2	29				10,147			10,147	
Recreation Center Renovation, Centennial Park	32							-	*10,135*
Sports Field Conversions	27-29		5,303	3,374	298			8,975	
Park Renovation, Major Ph 1	29				8,707			8,707	
Charlotte Harbor Event Center Parking Garage	28			8,257				8,257	
Tringali Community Center Replacement	30-32					126	761	887	*6,904*
Multi Use Trails (allocation)	28-43			1,250	1,250	1,250	1,250	5,000	*1,250*
Fire Station 21, Babcock Site 3	30					6,152		6,152	
Fire Station 20, Babcock Site 2	29				5,801			5,801	

General Government
(Thousands)

Sales Tax 2026									
Project	**Year**	**FY26**	**FY27**	**FY28**	**FY29**	**FY30**	**FY31**	**Total**	***Future***
GC Herring Park PH 2	30					4,765		4,765	
Bissett Community Park Ph 2 - Construction	31						4,732	4,732	
Wm R. Gaines Jr. VMP Ph 3	29				4,374			4,374	
CARE Expansion / Grace Street Complex	31						4,024	4,024	
Charlotte Sports Park Asphalt Parking	29				3,773			3,773	
Fire/EMS Vehicle Maintenance Warehouse Expansion	27		2,916					2,916	
Port Charlotte Beach Park Stabilization	32							-	*2,706*
Loveland Blvd Building Renovation (Human Services)	32							-	*2,121*
	Totals	-	29,146	119,225	104,901	36,351	21,471	311,094	*79,920*
Potential Revenues									
Sales Tax 2026 (50%)*		-	14,125	18,833	18,833	18,833	18,833	113,000	
	Totals	-	14,125	18,833	18,833	18,833	18,833	113,000	
Surplus / Shortfall		-	(15,021)	(100,392)	(86,068)	(17,518)	(2,638)	(198,094)	

*Sales Tax Extension 6-year total includes anticipated future year collections

General Government

(Thousands)

All Other Projects								
Project	**Year**	**FY26**	**FY27**	**FY28**	**FY29**	**FY30**	**FY31**	**Total**
								-
Tuckers Grade Community Park	30					11,806		11,806
Emergency Ops Center (EOC) Expansion	24-26	7,424						7,424
Boating Improvements - Ainger Creek - *(addl)*	26	2,969						2,969
Park Restroom (New) - Design (Maracaibo, Hathaway, Centennial)	28			2,793				2,793
Bissett Community Park Ph 1	21-26	2,651						2,651
Park Restroom (New) - Design (Kiwanis, Franz Ross)	27		1,633					1,633
Park Restroom (New) - Design (Harold Ave, SCRP)	26	1,430						1,430
Park Restroom (New) - Constr (Randy Spence & Midway)	26	1,167						1,167
Countywide Elevator Assessment	26	1,000						1,000
Totals		16,641	1,633	2,793	-	11,806	-	32,873
Potential Revenues								
Ad Valorem Available		22,497	17,929	27,546	26,329	29,521	33,276	157,098
Impact Fees		3,783	3,783	3,783	3,783	3,783	3,783	22,696
Totals		26,279	21,712	31,329	30,112	33,303	37,058	179,793
Surplus / Shortfall		9,638	20,079	28,536	30,112	21,497	37,058	146,920

*Increased by $5M each year

CHARLOTTE COUNTY
FLORIDA

General Government

(Thousands)

	FY26	FY27	FY28	FY29	FY30	FY31	Total
Surplus from All Other	9,638	20,079	28,536	30,112	21,497	37,058	146,920
Shortfall from HMGP	-	-	(12,868)	-	-	-	(12,868)
Shortfall after Sales Tax	-	(15,021)	(100,392)	(86,068)	(17,518)	(2,638)	(198,094)
Total Surplus / Shortfall	9,638	5,058	(84,724)	(55,956)	3,979	34,420	(64,042)

CHARLOTTE COUNTY
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General Government

(Thousands)

	FY26	FY27	FY28	FY29	FY30	FY31	Total
Surplus from All Other	9,638	20,079	28,536	30,112	21,497	37,058	146,920
Shortfall from HMGP	-	-	(12,868)	-	-	-	(12,868)
Shortfall after Sales Tax	-	(15,021)	(100,392)	(86,068)	(17,518)	(2,638)	(198,094)
Total Surplus / Shortfall	9,638	5,058	(84,724)	(55,956)	3,979	34,420	(64,042)
Additional 1/10 Mill	3,502	3,852	4,102	4,369	4,653	4,955	25,432
Revised Surplus / Shortfall	13,140	8,910	(80,622)	(51,588)	8,632	39,376	(38,609)

CHARLOTTE COUNTY
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Questions?