



Budget Workshop 2023/24 – 2024/25

April 20, 2023



CHARLOTTE COUNTY
FLORIDA

Agenda

- Financial Trends
- Goals
 - Affordable Housing
 - Water Quality
 - Workforce Development



Economic & Community Development

To create a business climate that promotes a diversified, growing economy consistent with sustainable growth management plans, environmental stewardship and enhanced quality of life.



Financial Trends

Economic & Community Development

Community Development

Building Construction Services

Planning & Zoning

Code Enforcement

Land Information Services

Community Services

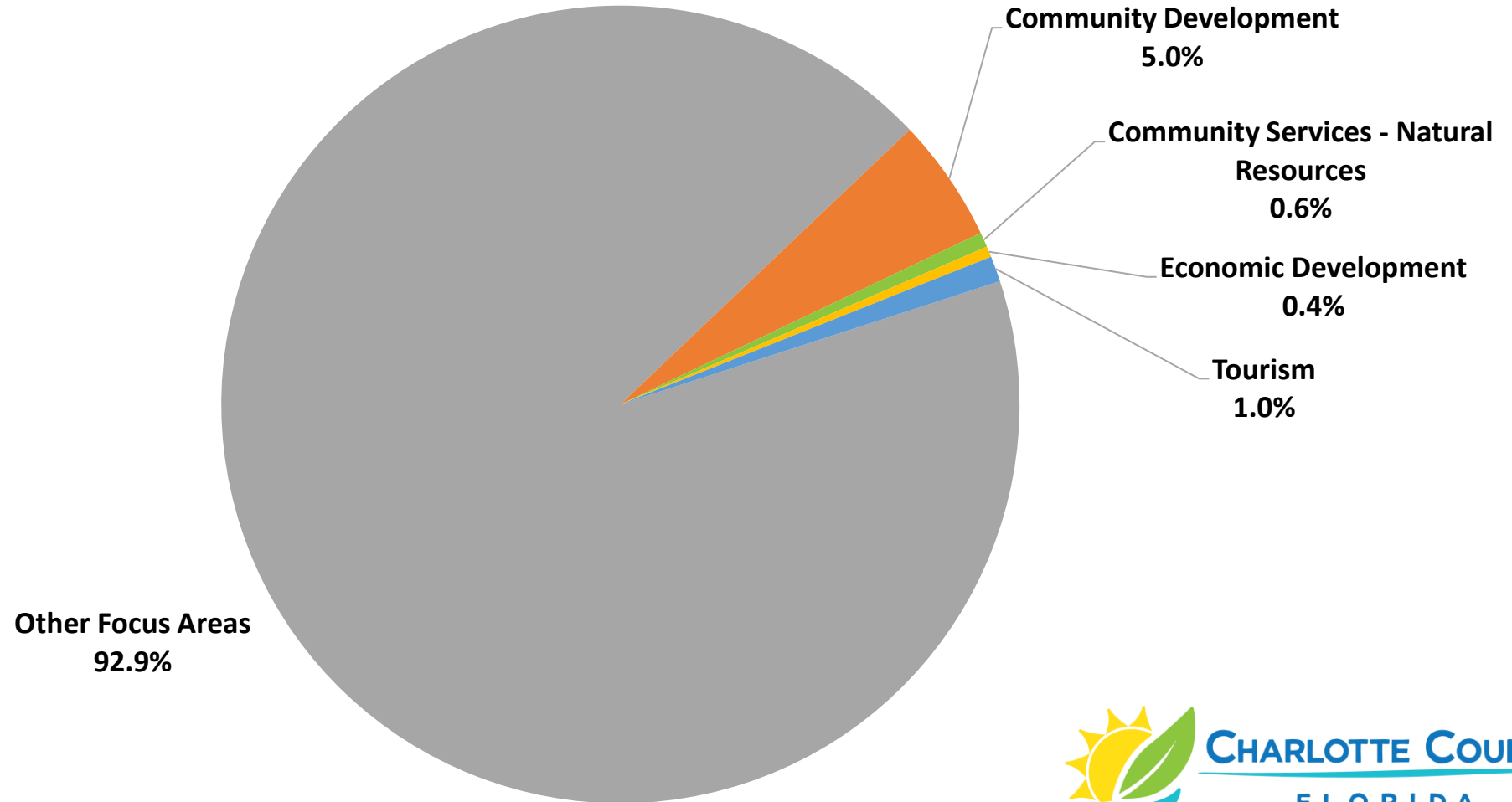
Natural Resources

Tourism

Economic Development

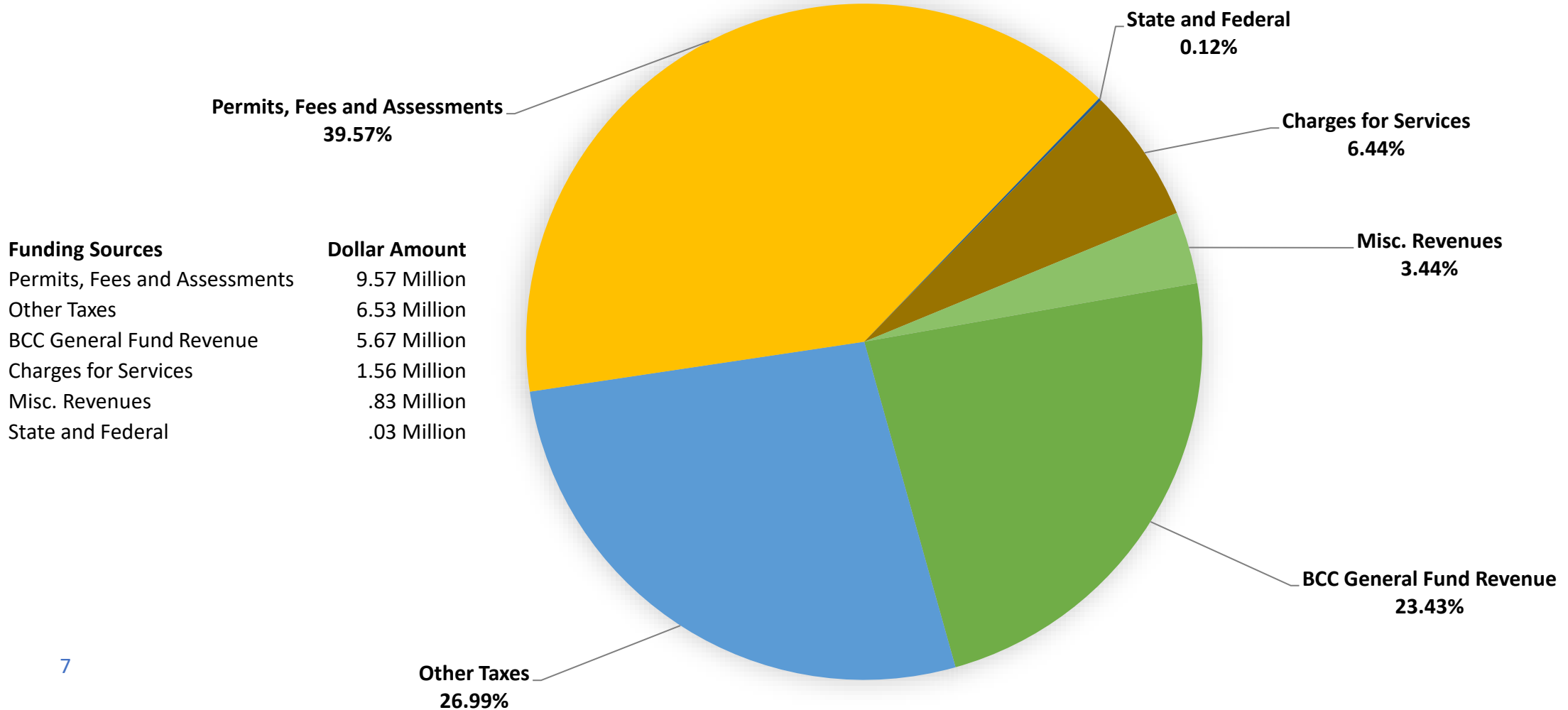
Where does the money go?

Economic & Community Development Proportional to All FY21 Expenditures



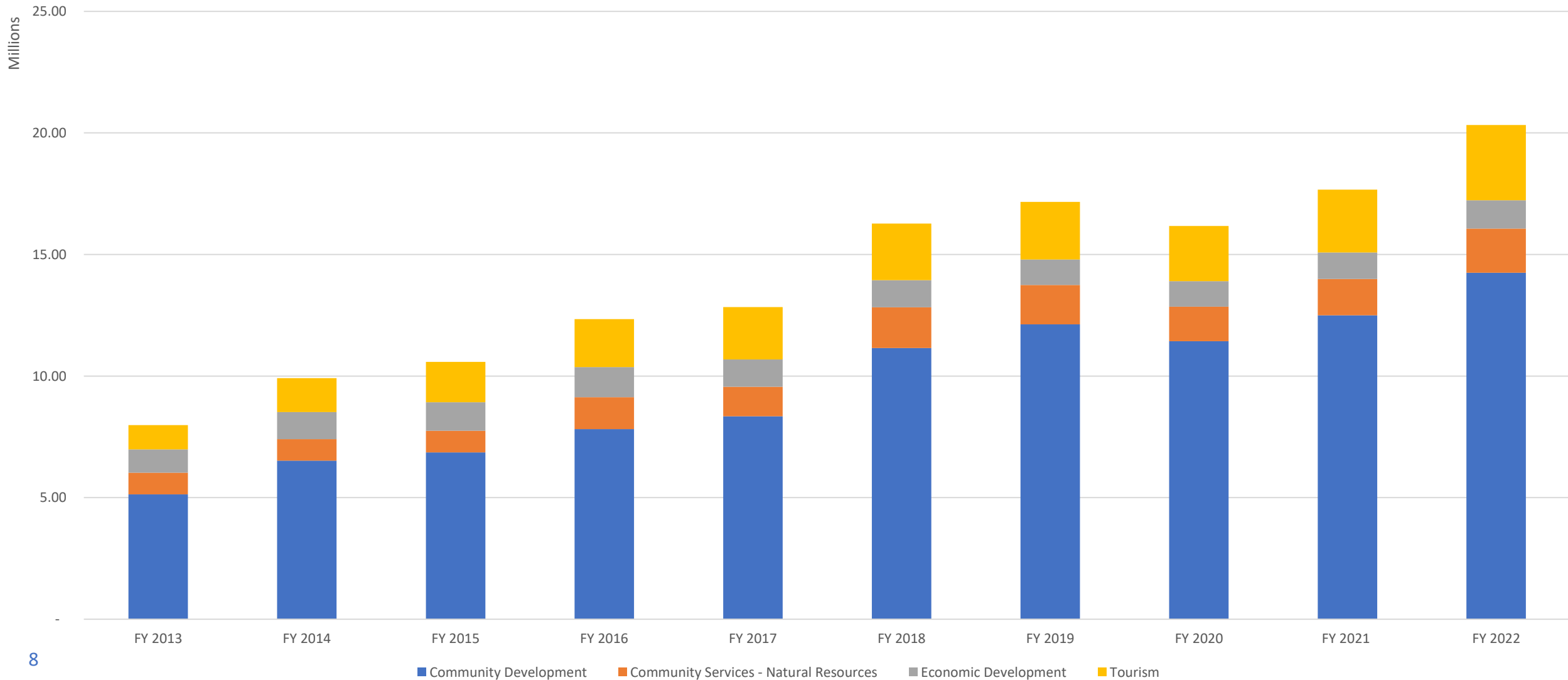
Where does the money come from?

Economic & Community Development FY21 Revenue Sources



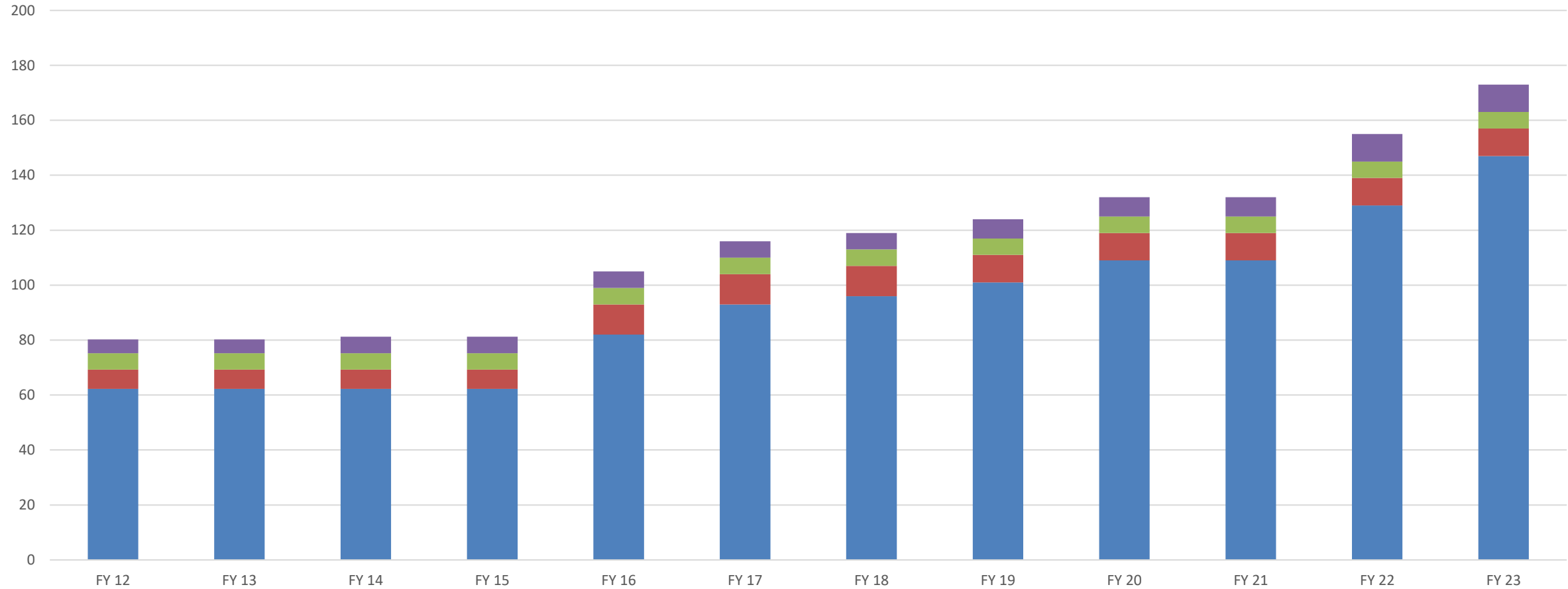
Historical Trend

Total Expenditures by Department



Historical Trend

Total FTE by Department

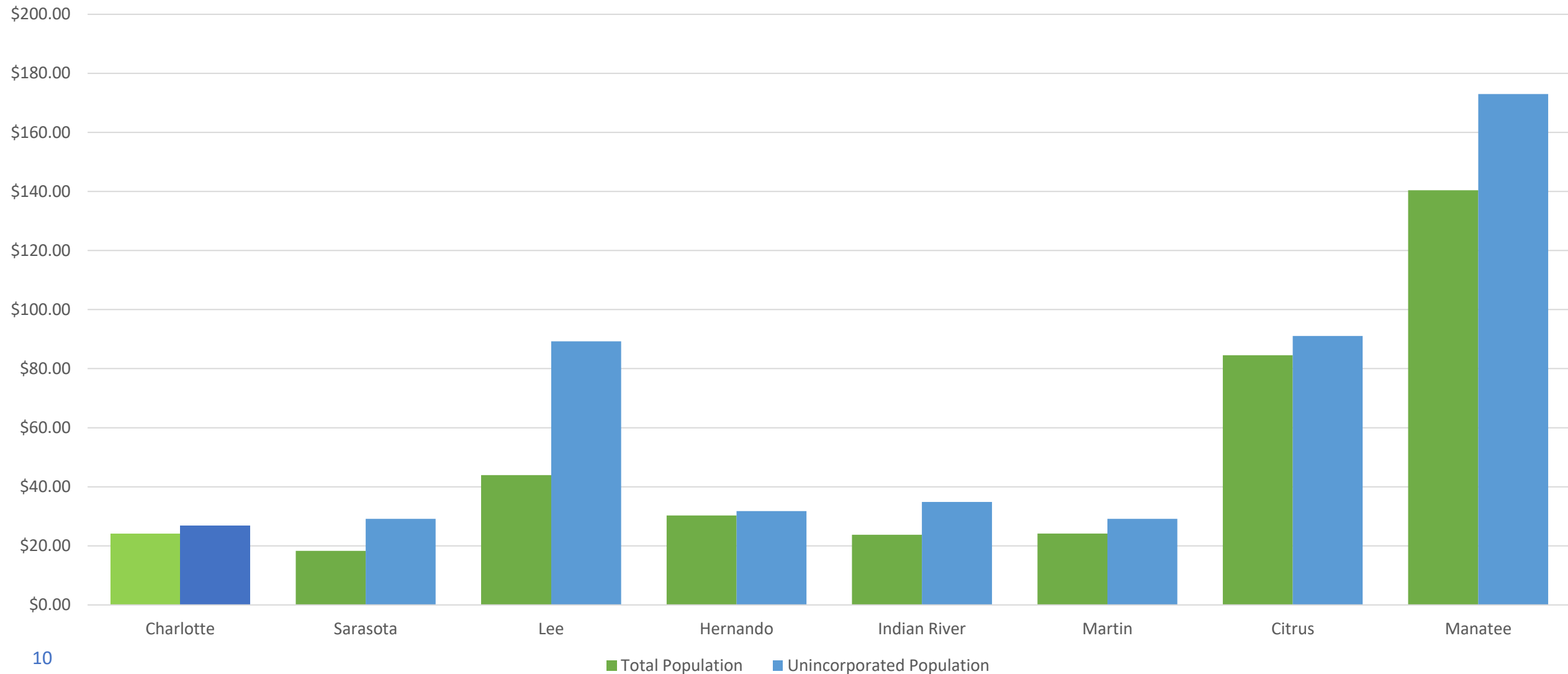


■ Community Development ■ Community Services Natural Resources ■ Economic Development ■ Tourism

Large variances between PY and CY in some other county budgets due to CARES funding noted in ACFRs.

County Comparison

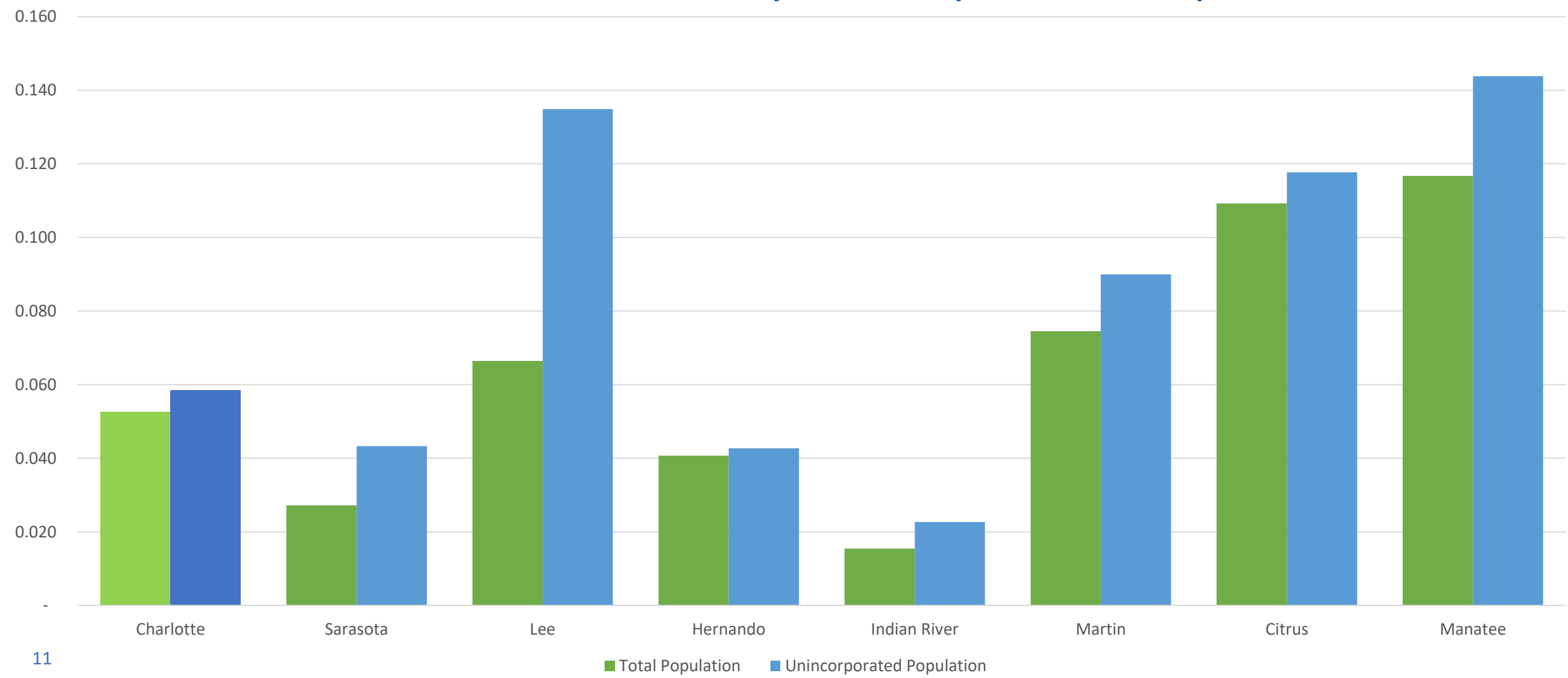
Total Economic & Community Development Expenditures per Capita



Large variances between PY and CY in some other county budgets due to CARES funding noted in ACFRs.

County Comparison

Total Economic & Community Development FTE per 10,000



Population data

Charlotte	Population	Percentage
Punta Gorda	19,637	10.30%
Unincorporated	170,933	89.70%
Total Population	190,570	100.00%

Indian River	Population	Percentage
Fellsmere	4,824	2.98%
Indian River Shores	4,264	2.64%
Orchid	518	0.32%
Sebastian	25,454	15.74%
Vero Beach	16,402	10.14%
Unincorporated	110,240	68.17%
Total Population	161,702	100.00%

Martin	Population	Percentage
Indiantown	6,580	4.14%
Jupiter Island	800	0.50%
Ocean Breeze	325	0.20%
Sewall's Point	1,997	1.26%
Stuart	17,684	11.12%
Unincorporated	131,667	82.78%
Total Population	159,053	100.00%

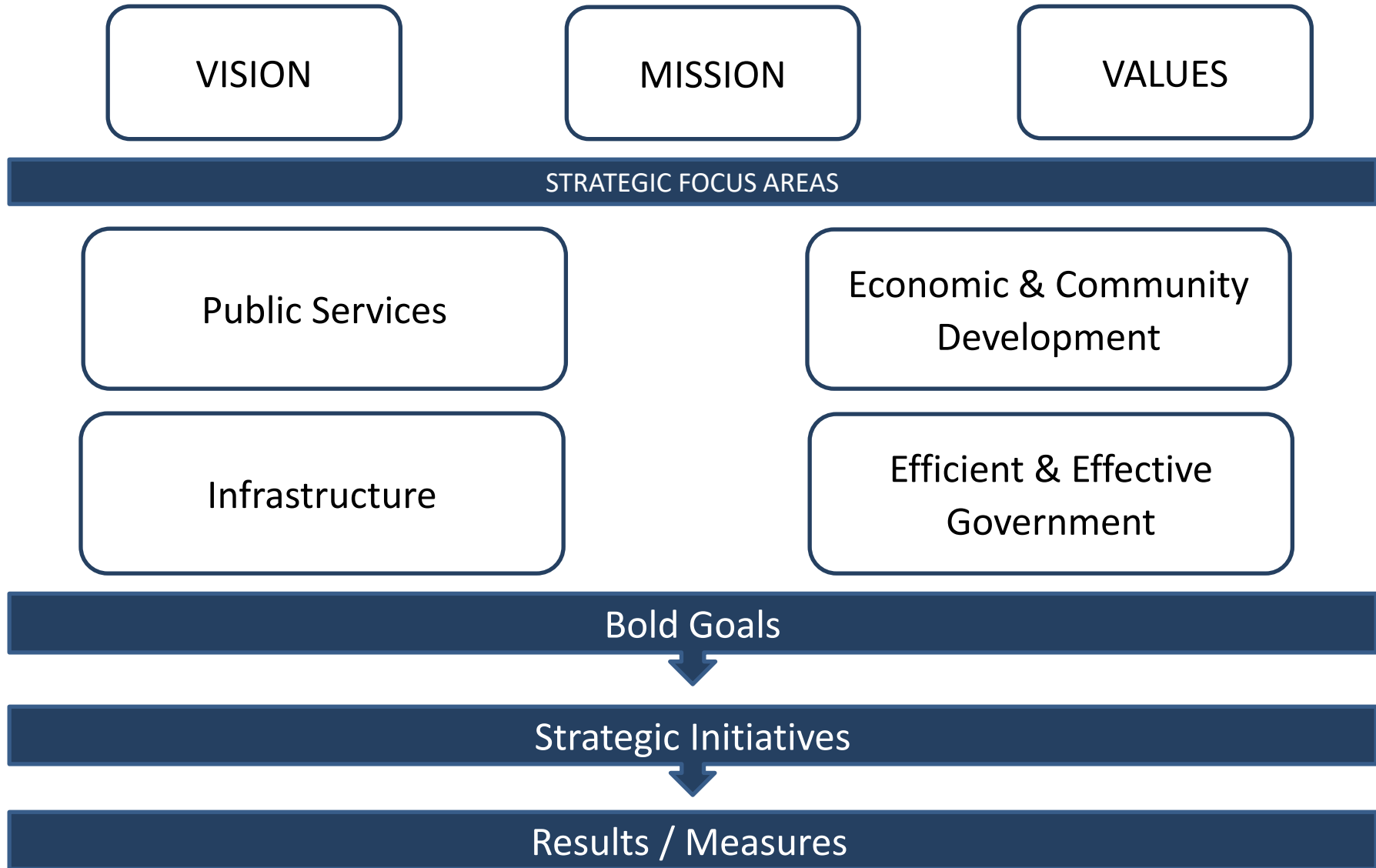
Citrus	Population	Percentage
Crystal River	3,429	2.20%
Inverness	7,765	4.99%
Unincorporated	144,421	92.81%
Total Population	155,615	100.00%

Lee	Population	Percentage
Bonita Springs	54,746	7.00%
Cape Coral	201,554	25.76%
Estero	37,213	4.76%
Fort Myers	91,544	11.70%
Fort Myers Beach	5,584	0.71%
Sanibel	6,443	0.82%
Unincorporated	385,495	49.26%
Total Population	782,579	100.00%

Sarasota	Population	Percentage
Longboat Key (part)	4,762	1.08%
North Port	78,129	17.70%
Sarasota	55,386	12.54%
Venice	26,103	5.91%
Unincorporated	277,128	62.77%
Total Population	441,508	100.00%

Hernando	Population	Percentage
Brooksville	9,165	4.66%
Unincorporated	187,375	95.34%
Total Population	196,540	100.00%

Manatee	Population	Percentage
Anna Maria	976	0.24%
Bradenton	56,442	13.73%
Bradenton Beach	900	0.22%
Holmes Beach	3,017	0.73%
Longboat Key (part)	2,757	0.67%
Palmetto	13,348	3.25%
Unincorporated	333,769	81.17%
Total Population	411,209	100.00%



Economic & Community Development

Revised Goals

- Averaging 200 new affordable housing units added to the community inventory per year, 1000 total units added in 5 years
- Develop and implement the One Charlotte One Water integrated water resource management plan before the end of FY2024
- Increase # of internships to 20 students for FY2024 and 2025.

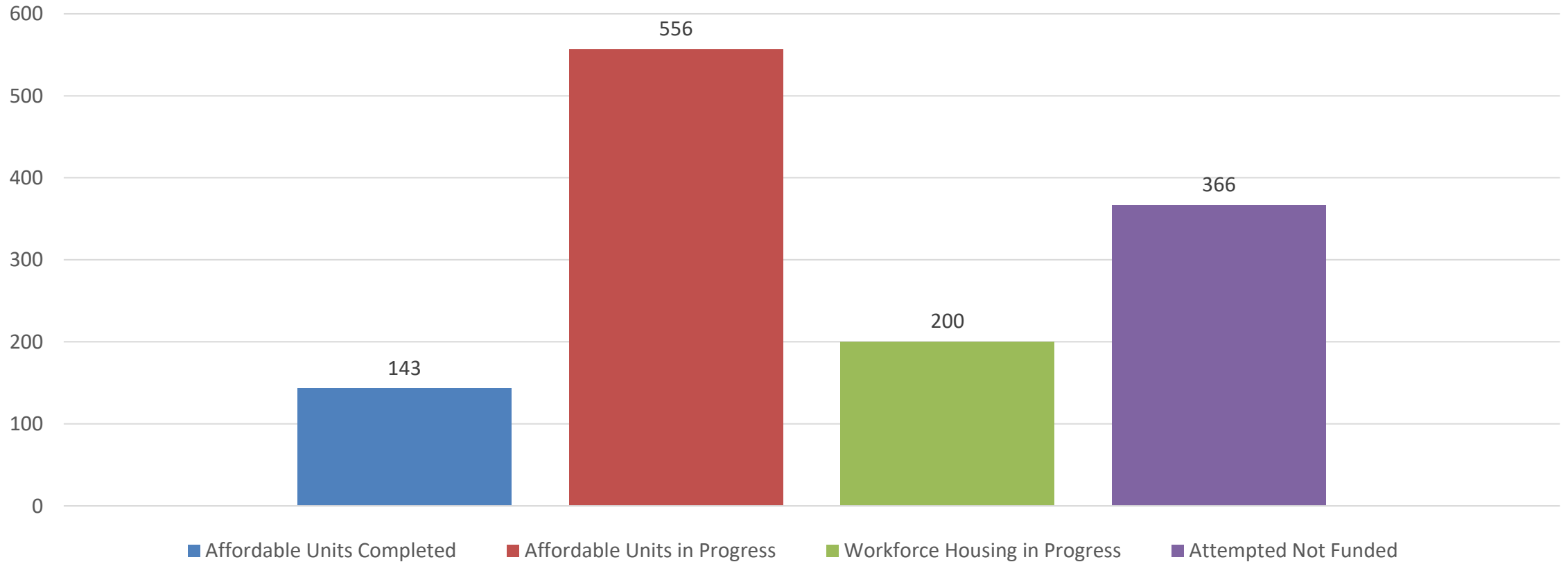
Affordable Housing



Affordable Housing Accomplishments

- Creation of taskforce and strategic “Tool Kit”
- Creation of Charlotte HOME
 - Process that awards density, subsidizes fees, waives impact fees, removes barriers
- Creation and investment in Affordable Housing Trust Fund-\$2.3M balance
- Process for Local Government Area of Opportunity (LGAO) and property transfer to qualified non-profits
- Expanded and strengthened Affordable Housing Advisory Committee

Affordable Housing Progress Since 2020



Additional Opportunities

- Hurricane Ian Resources
 - Prioritization of Charlotte County
 - Capitalize on short-term resources for long term impacts
- Live Local Act
 - Sadowski Fund
 - Zoning
 - Property Tax Exemptions

A large graphic in the background features a yellow sun with rays on the left, a green leaf on the right, and a teal leaf at the bottom. The sun and green leaf are partially overlapping.

Live Local Act – SB-102

(BCC Strategic Focus Area Workshop 04-20-2023)

Charlotte County Board of County Commissioners



CHARLOTTE COUNTY
FLORIDA

What Is It?

- A multi-pronged bill creating new regulations and opportunities for affordable and workforce housing
- Affects zoning and land use
- Provides for tax exemptions & credits

What Is It?

- Allows a county to circumvent its comprehensive plan and zoning regulations when approving the development of statutorily defined affordable housing on any parcel zoned for commercial, industrial, or mixed-use, subject to certain conditions.
- Specifically, current law provides that a county may approve a residential project on any parcel zoned as residential, commercial or industrial without the need to follow local rules and regulations (for example, without the need to rezone the parcel) as long as: (i) at least 10% of the units included in the project were used for affordable housing; and (ii) the developer did not apply for or receive SAIL funding.

What Does It Do?

- Removes a county's ability to approve affordable housing developments pursuant to the statutory process on parcels zoned in residential areas, but also removes the restriction on developers who have applied for/or received SAIL funding for parcels zoned in commercial or industrial areas.

Income Brackets

- The amendment provides that a county **must** authorize proposed multifamily and mixed-use residential projects as an allowable use in **any area zoned for commercial, industrial, or mixed use** if the project will provide the following:
 - At least 40% of the residential units are affordable;
 - Affordable means: that the monthly rents, including taxes, insurance, and utilities do not exceed 30% of the AMI for extremely-low-income persons (i.e., 30% AMI) (“ELI”), very-low-income persons (i.e., 50% AMI) (“VLI”), low-income persons (i.e., 80% AMI) (“LI”), and moderate-income persons (120% AMI) (“MI”);
 - Period of at least 30 years; and
 - For a mixed-use project at least 65% of the total square footage of the improvement on the parcel must be used for residential purposes.

Land Use and Zoning

- For proposed multifamily developments meeting the above requirements and that are to be located in areas zoned for commercial, industrial, or mixed use, a county may no longer require the owner to obtain a zoning or land use change, special exception, conditional use approval, variance, or comprehensive plan amendment for building height and densities. With respect to density and building height, a county may not:
 - Density – restrict density below the highest allowed density on any unincorporated land in the county where residential development is allowed;
 - Height – restrict the height of the proposed development below the highest allowed height for a commercial or residential development located in its jurisdiction within one mile of the proposed development, or three stories, whichever is higher.

Land Use and Zoning

- It should be noted that a proposed development authorized under this section must still satisfy the county's land development regulations (i.e., setbacks, parking, etc.) and be administratively approved, with the exception of provisions establishing allowable densities, height, and land use.
 - Further, there is no requirement to blend the AMI limits. All of the units could be 120% AMI.
- A county also must consider a reduced parking requirement for projects containing at least 40% affordable units if the parcel is located within a half-mile of a major transit stop.
- These provisions will expire on Oct. 1, 2033

County Requirements

- Requires county to publish a list of county-owned properties available that may be suitable for affordable housing development
 - Real Estate Services currently does this, but may need to modify their procedures
- Encourages creation of inclusionary housing ordinances and inclusionary zoning
 - Staff is trying to reconcile this provision with other statutory provisions which discourage inclusionary zoning, or require a developer to be “made whole”

Tax Exemptions and Funding

- Affordable housing property tax exemptions
 - Already have impact fee exemptions and Charlotte HOME program
- Other provisions revolving around state lands and use of state funding
- Prevents local governments from enacting any type of rent control ordinance

Tax Exemptions and Funding

- Affordable housing property tax exemptions:
 - The bill adds an exemption for land owned by a nonprofit that meet the following;
 - Land is 100% owned by a nonprofit;
 - Nonprofit leases the property for a minimum of 99 years;
 - Land is predominately used for providing housing to ELI, VLI, LI, or MI persons.
 - This bullet three is meet if more than 50% of the improvements on the land are used for providing housing to the ELI, VLI, LI, or MI persons.
- First applies to the 2024 tax roll and is repealed Dec. 31, 2059

Tax Exemption and Criteria

- The Missing Middle
- The bill adds an ad-valorem property tax exemption for portions of property in a multifamily project up to:
 - 75% of the assessed value if the project provides housing to natural persons or families whose annual household income is greater than 80% but no more than 120% AMI; or
 - 100% of the assessed value if the project provides housing to natural persons or families whose annual household income does not exceed 80%AMI.

Tax Exemption and Criteria

- Requirements:
 - Project must be newly constructed meaning that the improvements were substantially completed within five years before the earlier of (i) the date of an applicant's first submission of a request of certification; or (ii) an application for an ad-valorem exemption
 - Note, the definition of newly constructed may include substantial rehabilitation.
 - Project must contain more than 70 units dedicated to persons or households whose household incomes do not exceed 120% AMI.
 - Units must be rented for the lesser of (i) an amount that does not exceed the amounts specified by the most recent multifamily rental program income and rental limit chart posted by FHFC (derived from HUD); or (ii) 10% below the market rate.
 - Units must not be subject to an agreement with Florida Housing.
 - Cannot be used with the exemption provided in Paragraph G below.

Tax Exemption and Criteria

- Compliance:
 - To receive an exemption, the property owner must submit to the property appraiser an application along with a certification notice from Florida Housing by March 1st.
- Applicability:
 - First applies to the 2024 tax roll and sunsets on Dec. 31, 2059

Tax Exemption and Criteria

- Affordable Housing Property Tax Exemption.
- Allows counties and municipalities to adopt an ordinance to exempt portions of property used to provide affordable housing.
- To be eligible, the portions of the property must meet the following:
 - Used to house persons or families whose annual income is no greater than 60%AMI;
 - Must contain more than 50 residential units of which at least 20% will be used to provide affordable housing;
 - Units must be rented for the lesser of (i) an amount that does not exceed the amounts specified by the most recent multifamily rental program income and rental limit chart posted by FHFC (derived from HUD); or (ii) 10% below the market rate; and
 - The property must not have been cited for three code violations in the preceding 24 months and must not have outstanding code violations or related fines before final determination on a property's qualification.

Tax Exemption and Criteria

- Amount of exemption:
 - If all units in the development are used for affordable housing, then the local government can exempt up to 100% of the assessed value of each residential unit used to provide affordable housing;
 - If less than 100% of the units are used for affordable housing, then the local government can exempt up to 75% of the assessed value of each residential unit used to provide affordable housing.
- Compliance:
 - To receive an exemption the property owner must submit to the property appraiser an application along with a certification of qualified property by March 1st.
- Applicability:
 - First applies to the 2024 tax roll.

Other Provisions

- Building Materials Sales Tax Refund
- Corporation Tax Donation Credit or the "Live Local Credit"
- State-owned lands for Affordable Housing
- Job Growth Grant Fund
- Prohibition of Rent Control

Practical Applications

- Maximum heights and densities
 - Up to 65 units per acre
 - Height - highest developed height within one mile of proposed project, or 60 ft, whichever is higher
- Parking reductions if near fixed-route transit location
- Constraints on commercial and industrial properties
 - Less inventory for non-residential uses
 - Less/no property taxes

Practical Applications

- Income levels for affordable housing are defined, but not prioritized or even required.
- Workforce housing (120%) will be the most likely income targeted by developers.

What Doesn't It Do?

- Does **not** exempt:
 - Floodplain management
 - Concurrency
 - **Transfer of Density Units**
 - Other code provisions
 - Only exempts parking (when located near fixed-route transit), density, and height

Next Steps

- Staff is still determining proper route for implementation
 - Utilizing Incentive Density
 - Modifying Charlotte HOME?
 - Other options

SHIP Strategies Around the State

COUNTY	22/23 SHIP	23/24 SHIP (projected)	HHR (first 1/3)	Purchase assistance	Owner-occupied rehab	Emergency repairs	Special Needs	Multi-Family	Nonprofit Construction	Demo/Reconstruction	Acquisition/Rehab/Resale	Rental Development	Rapid Re-housing	Homeless Prevention	Single Fam Construction	Nonprofit/Special Needs/Low Income	Foreclosure Prevention	Water/Sewer Connect	Disaster
Charlotte	1,824,463	2,260,559	2,273,260	X	X	X		X		X	X		X	X	X				X
DeSoto	356,001	409,396	677,680	X	X	X				X		X	X						
Hernando	1,896,694	2,282,869	N/A	X	X	X	X	X	X		X								X
Sarasota	4,237,875	5,182,320	1,549,420	X	X		X				X	X							X
Lee	4,690,399	5,688,301	5,403,406	X	X						X		X	X	X	X			X
Ft. Myers	877,481	1,106,466	1,010,871	X	X	X				X						X			X
Cape Coral	1,931,959	2,379,911	2,225,643	X	X	X									X	X	X	X	X

Affordable Housing Initiatives in Progress

- Incorporate “Live Local” legislation into planning and processes
- Local Housing Assistance Plan (LHAP) strategies that incorporate hurricane recovery
- Accessory Dwelling Unit (ADU) pilot program
- Planning for County becoming an entitlement community
- Support Community Land Trust and work to become Community Housing Development Organization (CHDO)

Affordable Housing Potential Initiatives

- Define affordable and workforce housing in the Comprehensive Plan
- Consider broadening Charlotte HOME to include some truncated incentives for workforce housing
- Strengthen partnerships and increase capacity with subrecipient agreements where possible and appropriate
- Resolution to accept donated properties for affordable housing
- Create a land bank
- Create strategies to leverage Live Local opportunities and preserve critical commercial zoned areas
- Consider the purchase of hotels

Water Quality

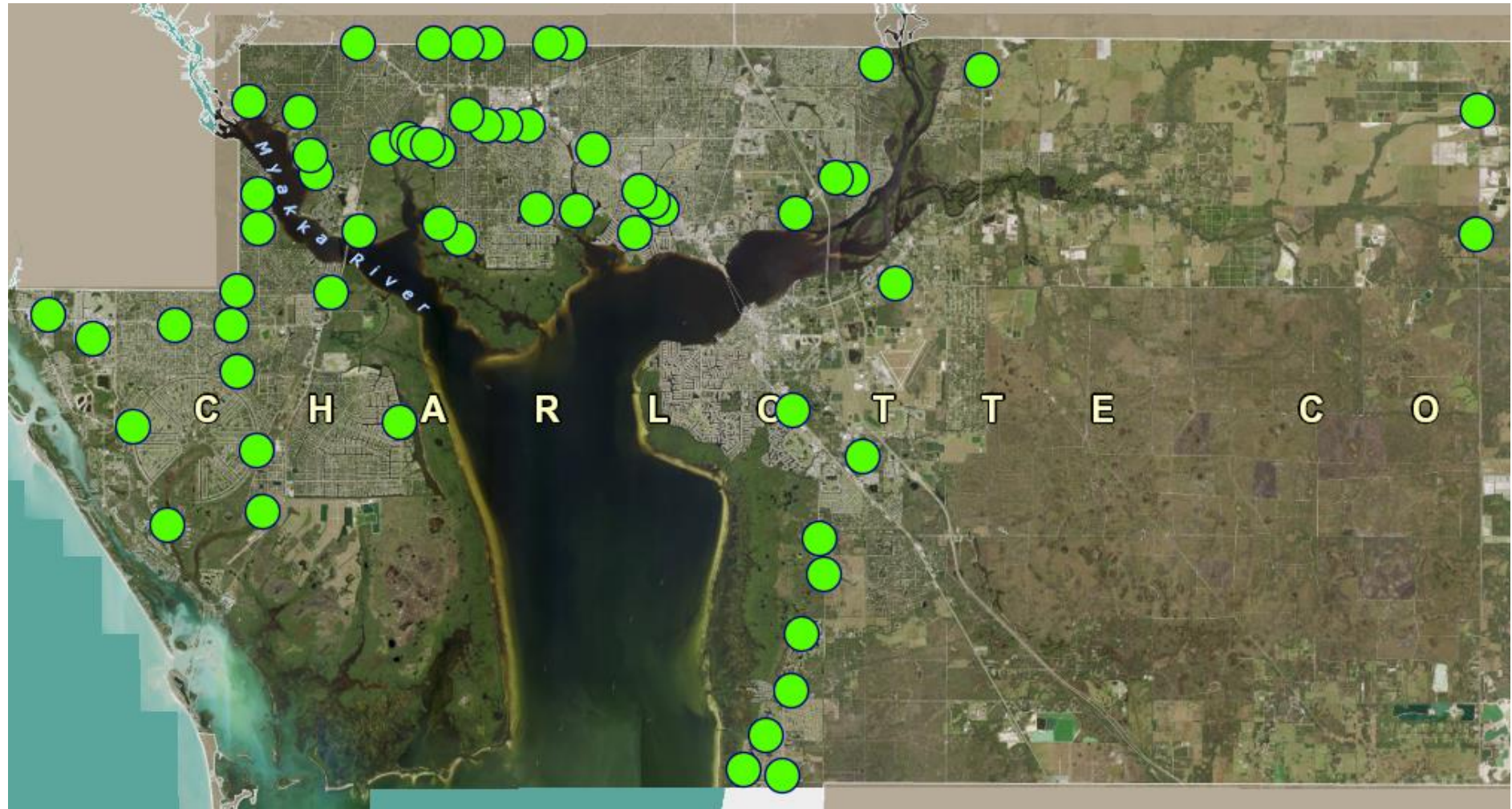


Strategic Plan Initiatives- Monitoring

- Implementation of county water quality monitoring strategy
 - Design countywide water quality monitoring program
 - Review/refine water quality monitoring program
- Publish GIS map and data reporting tool
 - Inventory & spatially map current efforts
 - Develop online data reporting tools

In Progress: WQ Monitoring

- Initiated June 2022
- 60 Locations sampled monthly
- Currently in initial data review and QA/QC



Next Steps: WQ Monitoring

- Finalize county water quality dashboard
- Finalize data review and transmission of results to Watershed Information Network
- Review/refinement of program (part of One Charlotte, One Water Plan development)

Next Steps: WQ Monitoring

Charlotte County Water Quality Dashboard

Map showing monitoring stations in Charlotte County, Florida. Major locations include Venice, North Port, Port Charlotte, Englewood, and Charlotte Harbor State Park.

10/11/2022

WC1991A03

EVENTID	20221011WC1991A03
Location	
Latitude	26.944330
Longitude	-82.217700
Rain Gauge ID	25218
Observations	
Total Depth	0.70
Water Elevation	
Water Elevation Description	medium
Hydrologic Description	flowing
Secchi	0.7
Turbidity	low
Color	yellow
Benthic Description	rock/sand

Observations | Background | How To Use Dashboard | Criteria Info

Date Selector

- 1/12/2023
- 12/12/2022
- 11/1/2022
- 10/11/2022
- 9/12/2022
- 8/29/2022
- 8/18/2022
- 8/4/2022
- 7/11/2022
- 6/28/2022

10/11/2022

0.84 MG/L

WC1991A03 TOTAL NITROGEN

Time Series | Rainfall

46

CHARLOTTE COUNTY
FLORIDA

Strategic Plan Initiatives- One Charlotte, One Water

- Develop draft One Charlotte, One Water Plan
 - Create partnerships and plan impactful projects
 - Identify priority projects & funding

In Progress: One Charlotte, One Water

Multi-Part Adaptive Management Strategy:

1. Identify sources of impairments to our waters and the estuaries/rivers that receive them
2. Recommend mechanisms for reducing negative impacts to our waters
3. Develop strategies for collaboration with public and private interests



Tracking

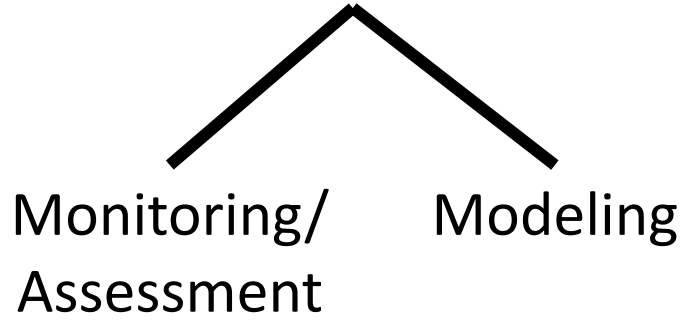
Treatment



Source Control

Communication

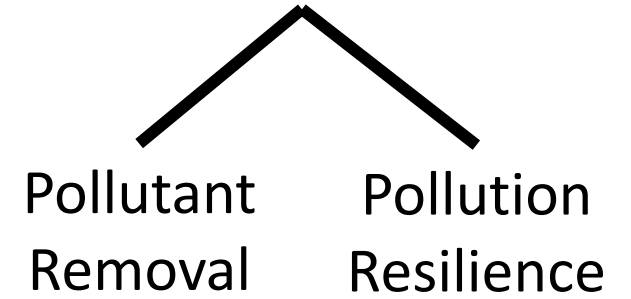
Tracking



Source Control



Treatment



Communication

In Progress: One Charlotte, One Water

Recommendations and funding estimates/source identification for:

- Data Collection and Modeling
 - Review and Analysis of Monitoring Programs
 - Pollutant Loading Model Framework
- Policy Evaluation
 - Review and Recommendations related to County Ordinances, Comprehensive Plan, Stormwater Design Standards, etc



In Progress: One Charlotte, One Water

- Programmatic Recommendations
 - Infrastructure Implementation and Enhancement
 - Public Outreach and Education
 - Community Involvement
 - Public-Private Partnerships
- Watershed-Level Pollutant Reduction Strategies
 - TMDL/Alternative Restoration Plan Evaluation
 - Early-Out Project Identification



Next Steps: One Charlotte, One Water

- Current Tasks: Internal Kickoff, Data and Policy Review
- December- Public Summit
- April 2024- Draft Review Workshops
- September 2024 Finalization and Board Presentation

Workforce Development



Past Accomplishments

- Continued partnerships with local Colleges & High Schools (added 4 new colleges this year)
 - Promotional materials, student job fairs & postings, mock interviews, student mentoring, temporary placements, internships

Past Accomplishments

- **Projects & Programs**

- Airframe & Powerplant Program
- Career exploration & mentoring
- Various partnerships, i.e. Career Source, Big Brothers Big Sisters mentoring, advisory committees, job shadowing

Bold Goal

- Increase internships to 20 students for FY2024
 - The chart below shows the data over several years

Internship Data							
School	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	TOTAL
Bellevue University-new					1		1
Charlotte County Seniors	3	1			5		9
Charlotte Technical College	2	1	3	3	3	1	13
FAU-new					1		1
FGCU	2	4	5	4	4	2	21
Florida International University	1			2			3
FSW	4	3	3				10
Hodges University		1					1
Keiser University							
New College of FL (Sarasota)	1						1
Pennsylvania University-new						1	1
Southern Technical							
State College of FL		2					2
Suncoast Technical							
UCF-new					1		1
Univeristy of Florida							
USF Sarasota-Manatee		4	2	1			7
USF Tampa	3			2			5
TOTAL	16	16	13	12	13		76
					Target	Target	
					15	20	

Paid Internship

Paid Internship Program:	High School:	Trades/Tech:	General:	Professional:	I.T.	Engineering:
High School	\$13.00					
Vocational Tech - Yr 1		\$16.00				
Vocational Tech - Yr 2		\$17.50				
College - Year 1			\$15.00	\$16.00	\$18.00	\$19.50
College - Year 2			\$16.20	\$17.50	\$19.50	\$21.00
College - Year 3			\$17.40	\$19.00	\$21.00	\$22.50
College - Year 4			\$18.60	\$20.50	\$22.50	\$24.00
College Graduate seeking Advanced Degree - Yr 1				\$22.00	\$24.00	\$25.50
College Graduate seeking Advanced Degree - Yr 2				\$23.50	\$25.50	\$27.00

Future Plans

- Continue all of the previous initiatives
- Expand our volunteer & temporary staffing programs, walk-in hiring events
- Create a “Day in Government” for HS Seniors
- Reduce days to fill, increase candidate experience

Questions?