

**POLICY STATEMENT**

**CHARLOTTE ASSEMBLY 1998**

**Sponsored by**  
**The Charlotte County Board of Commissioners**

**Planned by**  
**The Charlotte Assembly '98 Steering Committee**

**Port Charlotte Cultural Center**  
**Port Charlotte, Florida**  
**April 23-25, 1998**

**FINAL**

# **POLICY STATEMENT**

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At the close of their discussion, the participants of this assembly reviewed and adopted as a group the following statement. The statement represents general agreement. However, no one was asked to sign it. Furthermore, it should not be assumed that every participant subscribes to every recommendation.

### **I. INTRODUCTION**

A. With the support for the Charlotte County Board of Commissioners and the County Administration, many active citizens in Charlotte County have been working together for several years to forge a blueprint for the county's future and to put their ideas into action. This report is from the Charlotte Assembly '98. An earlier Assembly in 1996 laid the foundation for the present discussion. The citizenry is committed to sustained involvement in County politics, planning, and action.

B. Charlotte County is a place of natural beauty and Old Florida ambiance. It has the potential to prosper in many ways, and yet it also faces serious challenges. Residents are concerned that population growth may undermine the quality of life, that taxes may rise beyond some homeowners' ability to pay, that the local economy will not provide adequate wages or jobs, and that in other ways the community may deteriorate. The organizers of and participants in the Charlotte Assemblies have stepped forward to assist the community in thinking through these issues and opportunities.

C. The County 's Assembly in 1996 had a major impact on Charlotte's comprehensive planning process, which is required under Florida's system of growth management. Shortly after the 1996 Assembly delivered its recommendations, the county's comprehensive plan was revised

to reduce by half the size of the county's urban services area. This will help preserve the area's community character, protect the harbor, and promote compact, contiguous urban development. Also flowing from the Charlotte Assembly '96 were policies to, among other things, address the county's platted lands problem, attract new businesses, and make growth pay its own way.

D. The Charlotte Assembly '98 was held at the Port Charlotte Cultural Center on April 23-25, 1998. More than one hundred people participated. The Assembly was planned by a Steering Committee of 19 members with diverse backgrounds and interests. The Steering Committee selected participants to reflect many aspects of the county, including geography, business, government, civic groups, religion, minorities, retirees, youth, agriculture, the environment, education, and others. The questions covered at the Assembly, which were also developed by the Steering Committee, addressed the participants' vision for the county's future; community growth; government; human services; economic development; and infrastructure.

Following are the Assembly's conclusions and recommendations.

## **II. VISION**

A. Charlotte County is evolving. The county is becoming increasingly urbanized, more diverse socially and economically, and less centered on the lifestyles of retirement. These changes can be problematic, and they can easily cause political conflict and bad feelings. We do not want to stop growth and change, but we do want to manage and influence them. We have a progressive vision for the County, where positive growth is promoted while the best of what we already have is preserved and nurtured. We also want fairness. Neither the burdens nor the benefits of progress should be concentrated on any single age group, economic sector, or geographic area.

B. Charlotte County is a wonderful place to live. But the whole region of Southwest

Florida has been changing because of rapid population growth. Between 1970 and 1998, Charlotte County's population expanded from less than 30,000 residents to more than 131,000, which is a fourfold increase. This population growth is expected to continue for the foreseeable future.

C. Until recently, the county's population growth had been fueled predominately by senior citizens. Thousands of seniors, with modest pensions, came to Charlotte County in search of a pleasant and affordable retirement, and over the past quarter century they have dramatically changed the county's way of life. From politics and the arts to education and the economy, Charlotte County's retirees are leaving an indelible mark. Their influence on everything from where people live to how they make a living to the quality of health care is profound.

D. After seniors settled here in large numbers, young adults began to move here to fill the jobs that retirement spending generated. The percentage of the population that was 65 years old or older declined from almost 46 percent in 1970 to one-third in 1990. It is projected to decline further to 31.7 percent by 2010.

E. It is perceived that on top of these changes, the retirement population itself is changing in at least four ways. One is that the seniors who are moving here now are more affluent than they were in the past. Second, seniors are more active now, because people are healthier later in life than they used to be. Third, people are retiring at a younger age, because the economy has been so strong. And fourth, retirees appear to expect more cultural and recreational amenities than they did in the past. These seniors will have a profound impact on Charlotte County.

F. The key to Charlotte County's future lies in our ability to bring people together to share their ideas, dreams and aspirations. Several areas will require special attention if we are to maintain the unity of purpose necessary to head off problems and take advantage of opportunities.

1. Diversity with Community Attachment. The diversity in Charlotte County is an asset. This diversity includes not only different age groups, economic activities, and lifestyles, but also neighborhoods and regions. Charlotte County is comprised of a variety of communities, the major ones are: West County/Englewood, Port Charlotte/Murdock, and Punta Gorda. Similarly, many residents are permanent while others are seasonal. The challenge is to balance divergent interests with a commitment to the health of the overall county.

2. Frugality with Responsibility. Citizens want local governments and the school board to spend tax dollars wisely and to show them they are good stewards of the public trust. At the same time, they point out that action must be taken now in a number of areas--platted lands, infrastructure, education, economic development--or Charlotte County could experience a decline in its economy and quality of life. Charlotte County needs to reach a timely agreement through public dialogue on what are wise investments for the future.

3. Education and Jobs. A prosperous future will require development of both human capital and business capital. Quality public education is vital in preparing youth to become economically independent in the future. We must also cultivate economic growth so our community has jobs and business opportunities. Some citizens are concerned that the youth will be forced to move to other parts of the state or country in search of employment and career opportunities. Charlotte County could lose the investment made in its children.

4. Economic Development and Environmental Protection. Charlotte Harbor, Lemon Bay, Peace River, and Myakka River are environmental jewels, national estuaries supporting wildlife, boating and fishing. Economic development is needed, but not at the expense of Charlotte County's natural environment.

### **III. COMMUNITY GROWTH**

A. Charlotte County must aggressively refine its zoning and land use regulations to manage future growth. The county faces major growth management challenges that will require sustained attention: platted lots, new development, and community fragmentation.

B. Platted Lots. Charlotte County has more than 200,000 vacant platted lots that are laid out in an antiquated, grid-like pattern and lack adequate roads, drainage, schools, fire stations, parks, and other infrastructure. These lots, if fully developed, would lead to a population of more than 750,000 people spread across 215 square miles. The cost of providing infrastructure is estimated to be billions of dollars.

1. The Charlotte County Board of Commissioners has made progress in addressing the platted lands problem and is a state leader in this effort. The techniques currently being used include:

- a. acquiring vacant platted lands using local dollars;
- b. using State funding (Florida Communities Trust and CARL) to purchase environmentally sensitive lands;
- c. vacating plats on environmentally sensitive lands to facilitate public acquisition;
- d. encouraging voluntary donation of lots;
- e. purchasing lots at tax auctions;
- f. imposing full cost recovery impact fees and utility connection fees; and
- g. reducing the area for future sewer extension while considering more environmentally sound septic system for the remainder of the County.

2. We strongly endorse and appreciate the County's platted lands programs. We

recommend that these programs be expanded and accelerated, and the County explore other innovative ideas such as private-public partnerships for development.

C. New Development. Development generates tax revenues because the value of the land is increased. However, developed property imposes a cost on local government because it requires services and infrastructure, e.g., roads, drainage, police protection, fire protection, etc. When comparing taxes generated with services given, residential growth generally results in a net cost. Charlotte County suffers, taxwise, from an abundance of modest-value homes in residential neighborhoods.

1. If Charlotte's growth remains concentrated at the low end of the residential market, current and future county residents will end up paying the cost of growth one way or another. Either taxes will have to be raised, or the price will be paid in a degraded quality of life, i.e., with traffic, crowded schools, polluted water, flooding problems, etc.

2. The County Commission should implement several policies to address this issue:

a. Apply zoning to diversify the county's future housing stock. The aim should be to achieve a better mix of high- and middle-value residential properties which produce revenues that at least equal to cost.

b. Invest in infrastructure, economic development, and cultural amenities to enhance the value of existing property.

c. Encourage the development of high tax value, low services cost commercial property, including light industry, medical facilities, and conference/entertainment centers.

d. The majority opinion is that the County should not consider raising the existing 35 feet height limitation on development along the waterways.

e. The County should consider beautification programs and an improved sign ordinance to enhance the community's appearance.

D. Community Fragmentation. Charlotte County is already characterized by a certain amount of fragmentation. There are several residential pockets in the community, defined by the natural barriers, the geographic boundaries of past developments, places of worship and, in some instances, schools. Port Charlotte, Englewood and Punta Gorda each has its own identity and a sense of pride. As population growth continues, the number of regions, communities, and neighborhoods with distinct characteristics will expand. The County should initiate several policies to help foster county-wide cohesion:

1. Infrastructure should be constructed where feasible to link neighborhoods together. Such facilities include bike paths, street lights, sidewalks, recreational centers, ballfields and parks;

2. The County should take several actions: encourage the creation of a multi-function performing arts center, promote countywide social functions, and improve communication among civic groups, such as the YMCA, social services organizations and business groups, to educate the various neighborhoods about activities available in the county.

3. The County's policy of creating Municipal Service Benefit Units (MSBU's) should be revisited. MSBUs are important and useful mechanisms for (a) providing a clear linkage between the payment of an assessment and the benefit received, and (b) for having owners of vacant lots share fairly in the tax burden for services. Some people think that MSBUs can diminish the sense of county identity because the improvements do not apply to

everyone and they also create greater distinctions between neighborhoods. Furthermore, residents who currently receive the benefits of MSBUs may be less likely to push for improvements that serve the County overall. A reduction in the number of MSBUs could be accomplished by a reasonable division between those most suitable to enhance a sense of community countywide and those most suitable for neighborhoods. This would also reduce administrative costs. Alternative mechanisms, such as creating individual taxing districts or municipalities, should also be explored to reduce the number of MSBUs.

#### **IV. Government**

A. It is important for all local governments to remember that it is in their best interests to work together. We encourage the City, the County, Edison Community College, and the School Board to cooperate to become more cost efficient without sovereignty and territorial issues becoming the driving factor. There are some examples of intergovernmental cooperation, including:

1. The County is placing playground equipment at a local school so that playgrounds can supplement parks for after-school play.

2. The School board has applied for a \$500,000 grant to build a performing arts center at Charlotte High School that will be available for community use.

3. Edison Community College, Manatee Community College and the School Board have expanded their dual enrollment programs.

B. Citizens demand ongoing intergovernmental cooperation. Currently, there are quarterly meetings among officials, but more than this may be necessary. Local governments may need another vehicle for ongoing communication. (Previously, the Council on

Intergovernmental Relations provided such a forum.) A mechanism to promote cooperation, fairness and ongoing communication would promote a higher level of trust and mutual understanding. Projects offering mutual benefits and saved tax dollars could be identified with a specific timetable for implementation. Interlocal agreements, joint projects and other creative techniques could be employed to promote cooperation.

C. Any opportunities to eliminate duplication of services and/or functions, such as management information services, fleet management and other support services, should be considered. There is some support for combining the economic development function of the County, the airport and the Development Authority and combining city and county fire stations in close proximity through interlocal agreements.

D. Privatization should be explored for certain services. Once privatization of a function is examined, the Charlotte County Board of Commissioners should fully explain the rationale behind whatever decision is finally made.

## **V. Human Services**

A. Charlotte County does not have a comprehensive and unified system of human services. It is clear that many residents need assistance beyond what is currently available to them. We believe that several cost-effective actions can be taken to improve this situation.

1. Community Spirit. An effort should be made to put a face on poverty, so that residents become more highly motivated to provide time and resources to those in need and to human service providers. The County should work with radio, television and newspapers to personalize the problems of the poor and to elevate this issue in the public's awareness. Residents may also need more exposure to and better information about the programs that are available. Public and private human services providers should make an effort to communicate factual

information in a simple, direct fashion.

2. Program Coordination. A strength of Charlotte County is its many volunteers, but donations of money to social services agencies are very difficult to obtain. Charlotte County must coordinate federal, state, city, county, school board, and private programs to maximize the impact of limited funds. The best role of the County may be to form public-private partnerships or to assist private agencies rather than to provide services directly. However, programs cannot be coordinated without agreement on goals. One objective of the county's human services programs should be to promote family self-sufficiency. The services that should be brought to bear on this goal include, among others, affordable, competent day care, employment skills occupational training, transportation, affordable housing, and state and federally funded health insurance for children.

3. Supporting the Family. Families should be recognized as including grandparents, single-parents, stepchildren, and foster parents and foster children, etc. Agencies should also recognize the privacy rights of families. People do not want government or social service agencies unreasonably or unnecessarily telling them how to be a family. A better legal balance needs to be achieved between protecting family rights and protecting potential victims at risk. We as a community should become more sensitized to the importance of treating people, especially the unwed pregnant teenage girl, with respect. All people have the right to have their questions answered and their concerns addressed in a respectful manner. Some people feel that children should be taught the work ethic early in life and see it demonstrated in their home.

4. Family Planning. Teen pregnancy may feed into a cycle of poverty and lost opportunities. Every effort should be made to educate male and female teenagers about sexuality and family planning to stem the rising tide of teen pregnancy.

5. Onsite Day Care. The County and the School Board should lead the private sector, especially hospitals and medical facilities, in offering or contracting for onsite or near-the-work-site child care for their working employees. Perhaps the county could offer incentives to encourage private sector firms to offer on-site day care.

6. Subsidized Day Care. While there are different views on the issue of subsidizing day care for children, some think the County and private sector employers should consider increased subsidies for day care. We should maximize the use of federal and state grants using public-private partnerships.

7. Affordable Housing. There is a need in Charlotte County for affordable housing, particularly rental housing, that will meet the needs of lower- and middle-income individuals and families. Affordable housing is typically provided today through federal tax credits to private sector developers. County government should assist developers and citizens in the siting of affordable housing to prevent false rumors and to assure that citizens' concerns are properly addressed. City and County SHIP monies must be available to all types of affordable housing.

8. Dial-a-Ride. We support a demonstration project of the dial-a-ride program. Some expressed reservations about the ability of this program, at a minimal demonstration level, to meet the needs of welfare recipients who are being expected to leave welfare and move into the workforce. With Charlotte County's relatively low density development pattern, it is very difficult for people to connect to jobs, medical care, and shopping. While there may be a need for public transportation in Charlotte County, the County should recognize that there are private sector companies currently providing transportation services to citizens of the county. The County should work together with the private sector, and not against

it, while considering a subsidized transportation program.

9. Training Programs. The County should play a coordinating role in promoting training programs for the unemployed. Some would like to see the county form public-private partnerships to promote and expand training programs.

B. The community should consider holding a future American Assembly for human services to work through the issues of what action should be taken, by whom, and when.

## **VI. Economic Development**

A. Charlotte County is in a challenging economic, political, and cultural situation. The county has a large residential property base which generates demands for services but produces comparatively little in the way of taxes to pay for those services. To meet demands for increased services and to try to assure that all properties contribute their fair share, the County has created a large number of MSBUs, which are cumbersome to administer, may increase disparities between some neighborhoods, and can contribute to undermining residents' attachment to the county as a whole. Unless action is taken, the county's continued population growth, which is inevitable, will exacerbate this fragmentation, lead to overburdened countywide services, and erode the quality of life for all residents.

B. One approach to this situation is to expand and diversify the county's economy. The County should financially support economic development efforts to promote existing business as well as try to recruit new business and industry to Charlotte County. If existing companies can be nurtured so that they succeed and expand, and if new companies can be attracted to the county, part of the tax burden can be shifted from residential properties to commercial properties as population growth necessitates the expansion of urban services. In turn, as County services and facilities are upgraded, economic development will be easier.

C. The County, the City, and other local governments should review their rules and regulations to ensure that permitting is streamlined to meet the processing time of surrounding counties. Government agencies should be thorough and service-oriented. Availability of water and sewer at a reasonable cost is important to local economic development. Some urge that the County should become more competitive in charges for connection fees and impact fees.

D. One of the keys to economic development is an airport, since an airport is important for business travel and for product delivery. The new information-based economy allows many businesses to locate in suburban areas like Charlotte County, because they can be connected electronically to customers, suppliers, and other offices.

1. The future development of the Charlotte County Airport is limited by its finances. Only 5 percent (30 acres) of the airport land available for industrial development is fully supported with infrastructure. However, the Charlotte County Development Authority, which controls the Airport, lacks necessary revenues for maintenance, new improvements, or expansion.

2. Most think the Charlotte County Development Authority should be eliminated. The Airport, its land, and its functions should be placed under the County Commission.

E. The County should continue to expand its economic development program. An incentive program, available to existing and new business, should be established that is based on cost-benefit analysis, including its impact on ad valorem taxes.

## **VII. Infrastructure**

A. Charlotte County has a long list of infrastructure needs. The following list includes, but is not limited to, these needs. The list is not in any particular order.

1. Bridge repair;

2. Expansion of the cultural center;
3. Additional ballfields;
4. Improvements to hurricane evacuation routes;
5. Continued purchase of environmentally sensitive lands;
6. School construction, or upgrading school construction to be suitable as a hurricane shelter;
7. Hiking trails;
8. A linear park along Bayshore Drive;
9. Upgrading local libraries/media centers;
10. Support for arts and humanities,
11. Construction of sidewalks and bike paths;
12. Fine arts performance hall;
13. Beautification of the right-of-ways;
14. Water and sewer;
15. Road construction, maintenance and repair; and
16. Parks.

B. Because needs are pressing and resources are limited, we must maximize the utility of our existing facilities. More public-private partnerships, such as the Franz Ross Park-YMCA, need to be explored. The County and the School Board should enter into additional cooperative agreements to maximize utilization of facilities. Similarly, school auditoriums should serve double-duty.

C. There are no obvious areas where funding could be reduced to free-up monies for use in paying for needed infrastructure.

D. We recommend extension of the One Cent Infrastructure Sales Tax, which is scheduled to expire in March 1999. The County should establish a citizens advisory committee to recommend priority projects and provide estimated capital and operating costs. One group felt that prioritization should be handled by the Board of County Commissioners.

E. One group proposed that a Citizens' Committee be established to explore possible options for financing infrastructure projects beyond the projects identified above. Options to be considered included a gasoline tax, user fees, state and federal funding, and general obligation bonds. If it proposes any new revenue source, the Committee should specify the number of years to be covered by a funding source and specifically identify the projects to be supported.

### **VIII. Revisiting the Vision**

A. We hold much the same vision for Charlotte County that we expressed at the 1996 Assembly, but we see at least three issues a little differently.

1. In 1996, we recognized the changes occurring in the makeup of our population, the need for economic development and environmental protection, the value of diversity, and the importance of civility. But we may not have paid adequate attention to the need for attachment to the county as a whole. We recommend changing the second sentence of the vision statement to read as follows (the change is underlined): "The development of a countywide sense of community as well as neighborhoods with their own identities should be encouraged."

2. We think it would be helpful to have a summary statement of the vision, as follows: "Our vision of Charlotte County is of a community that manages growth to achieve a diversity of population, income, housing and economic, cultural and recreational opportunities, and that encourages and nurtures public-private partnerships to achieve

its goals while still protecting the natural features which are its greatest assets."

3. This need not require a change in the vision statement or in the summary statement, but we believe that the County needs to aggressively promote appropriate economic development and to pay more attention to intergovernmental coordination. With resources as limited as they are in Charlotte County, we cannot afford to pay for duplication of services such as fire stations that are located virtually next door to each other.

B. In general, we support the direction the County government has taken in the past two years and strongly encourage them to continue their progress. One noticeable success is the marked improvement in civility at public meetings. We applaud these achievements.

C. We recommend that the Charlotte Assembly '98 Steering Committee continue meeting to monitor progress in the implementation of our recommendations, and that a new steering committee convene another Assembly at the appropriate time. Topics for the next assembly should include human services, race relations, transportation, youth in crisis, and legal services.

-END-