



2014

STATE OF THE CITIES

“SLOW AND STEADY.”
This was the approach to sound municipal government throughout the past year.



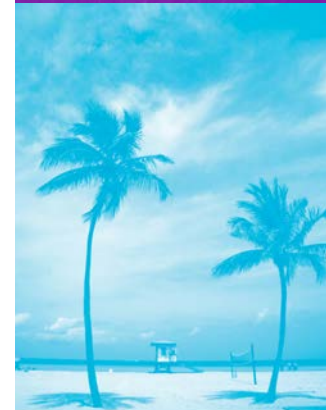
INTRODUCTION

2014 was a year of incremental growth for Florida’s municipalities. Cities experienced minor population growth that mirrored the growth of the state as a whole. Cities also saw an incremental rise in revenues, which in turn allowed for small increases in municipal full-time employment.

At the same time, cities concentrated on municipal services provided to strengthen the quality of life of their citizens. Throughout the recent economic challenges facing both the public and private sectors, Florida’s cities worked to maintain quality services, to be responsive to the citizens they serve and to initiate efforts to put people to work.

The following is an overview of the current state of Florida cities and, in some cases, how they have changed over the past four years. The results are based on the annual CityStats survey, produced by the Florida League of Cities Center for Municipal Research and Innovation. The Center serves as the central source of local government research and resources at the League. Data is collected from various research institutes across the state and nation, as well as through the CityStats survey.

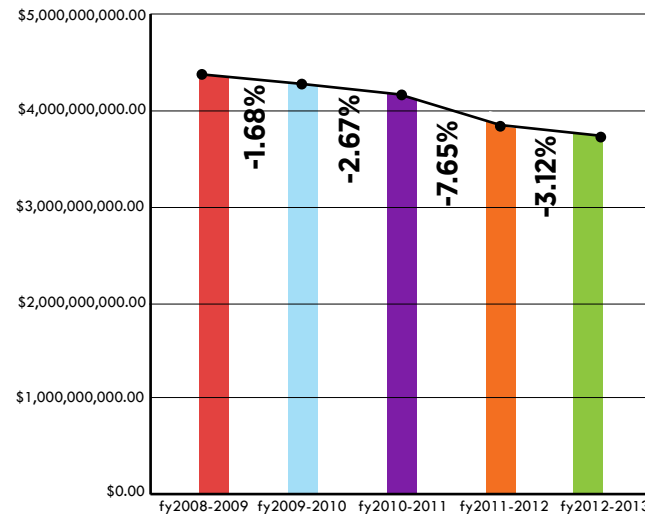
In Florida, a city, town or village is a municipal government. There is no legal difference between the three. In this document, the words municipality and city are used interchangeably.



BUDGET, ECONOMY & EMPLOYMENT

Municipal budgets can be greatly affected by changes to available revenue sources such as property taxes, state funding, and revenues from services and fees. The bulk of municipal revenues statewide comes from property taxes, service fees, building permits, franchise and impact fees, state and federal grant funding and interest earnings. **Property taxes make up an average of 17% of the revenue stream for cities in Florida.** Nineteen Florida cities rely on property taxes for more than half of their annual revenue while 22 Florida cities don't assess a property tax at all, relying entirely on other taxes, fees and intergovernmental revenues to fund municipal services. **Since the recession began in 2008, municipal property tax collection has decreased statewide by more than 14%.**

STATEWIDE MUNICIPAL PROPERTY TAX



“Property taxes make up an average of 17% OF THE REVENUE STREAM for cities in Florida.”

MEDIAN GENERAL FUND BUDGETS

MEDIAN GENERAL FUND BUDGETS FOR:	FY2010-2011	FY2013-2014	AVERAGE YEAR-TO-YEAR % CHANGE	CUMULATIVE % CHANGE
Population range:				
<5,000	\$1,540,042.00	\$1,575,126.00	0.8%	2.3%
5,000-15,000	\$9,114,740.00	\$9,868,738.00	2.7%	8.3%
15,000-60,000	\$25,369,414.00	\$24,129,808.00	-1.4%	-4.9%
>60,000	\$93,354,710.00	\$101,579,726.00	2.9%	8.8%
statewide median	\$8,198,598.00	\$8,468,856.00	1.8%	3.3%

NATIONAL STAT

Based on construction, consumer and producer price indexes, the year-over-year “cost-of-living” increase – or municipal cost index – to run a municipal government from December 2013 to December 2014 was 1.51%. Between 2011 and 2014, the average municipal cost index was 2.2% annually. (municipal cost index as compiled by *American City & County Magazine*).

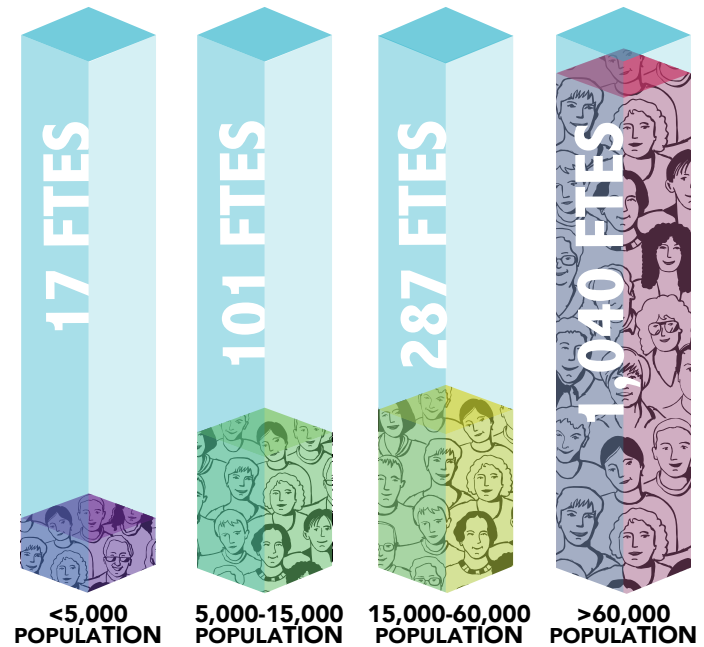
BUDGET, ECONOMY & EMPLOYMENT

The number of municipal employees needed to deliver services in each city varies based on a city's population as well as the level and number of services provided. Two-thirds of Florida's cities have populations of less than 15,000 with an average staffing level of one employee to every 93 citizens. Staffing levels in Florida's cities can range from less than 10 employees in smaller cities, up to more than 800 employees in larger cities. In FY 2013-2014, nearly two-thirds of Florida cities were able to give modest raises to their employees; however, the remaining third held staff pay steady.

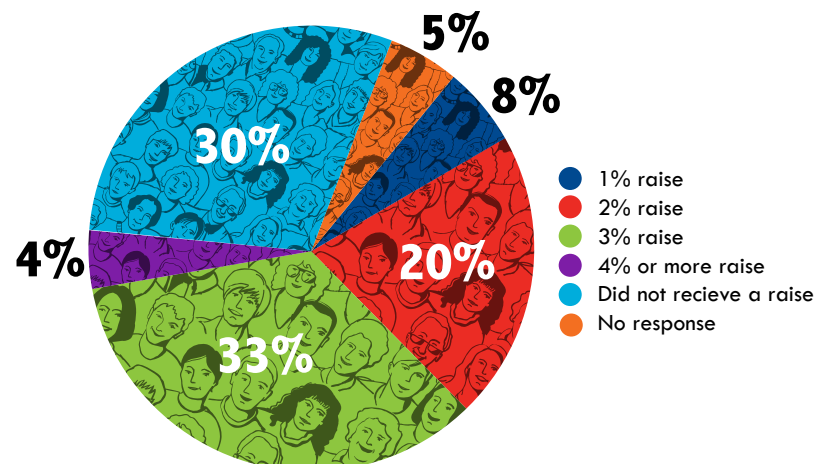


FULL-TIME EMPLOYEES FOR 2014

STATEWIDE AVERAGE FOR:



FULL-TIME EMPLOYEE RAISES



BUDGET, ECONOMY & EMPLOYMENT

ECONOMIC DEVELOPMENT

In an effort to increase economic development within their cities, nearly 60% of Florida municipalities offer economic development incentives to encourage business. The most common are expedited permitting and favorable land development regulations. More than half of cities larger than 5,000 in population utilize a community redevelopment agency.

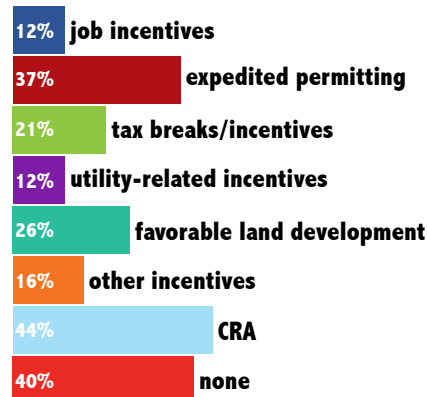
BUILDING PERMITS

FY2012-2013 BUILDING PERMITS	<5,000 POPULATION	5,000-15,000 POPULATION	15,000-60,000 POPULATION	>60,000 POPULATION	STATEWIDE
Single-Family	2,786	8,539	26,372	30,169	67,866
Multi-Family	1,529	2,811	4,328	9,779	18,447
Commercial	539	2,938	9,239	14,397	27,113
Total Permits Issued	4,854	14,288	39,939	54,345	113,426

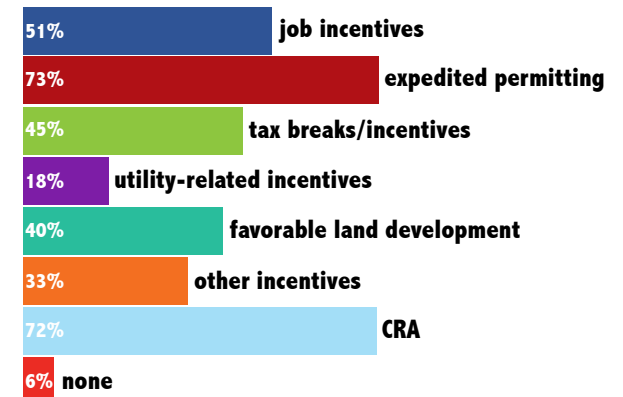
Data collected May-July 2014

ECONOMIC DEVELOPMENT INCENTIVES - CITIES

<60,000 POPULATION



>60,000 POPULATION

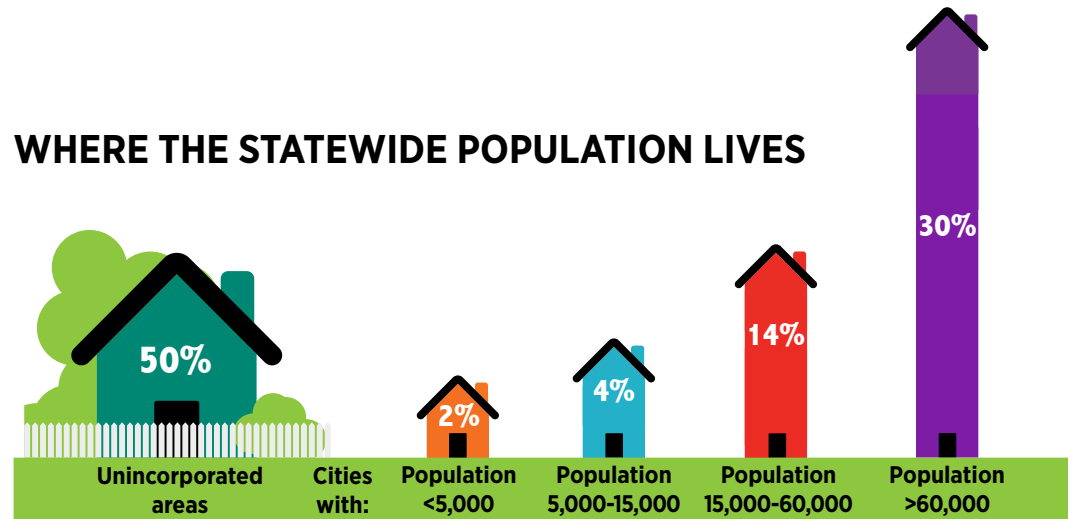


MUNICIPAL POPULATION

In 2014, the State of Florida's population grew to 19,507,369 with just over 50% of those citizens choosing to live in a city. Between 2011 and 2014, Florida's cities have experienced population growth of 3.25%, slightly higher than the statewide average. Currently, more than 9.8 million people in Florida live in a city.

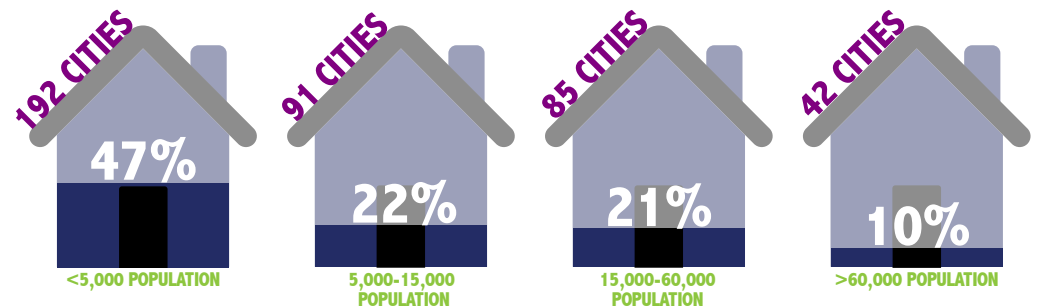
Florida's cities vary greatly in population – from more than 800,000 in Jacksonville to less than 10 in Weeki Wachee. Nearly half of Florida cities have a population of less than 5,000 people. Only six municipalities in Florida have a population of greater than 200,000, while seven municipalities have a population of less than 100.

WHERE THE STATEWIDE POPULATION LIVES



Source: Bureau of Economic and Business Research, University of Florida, 2014 population estimates.

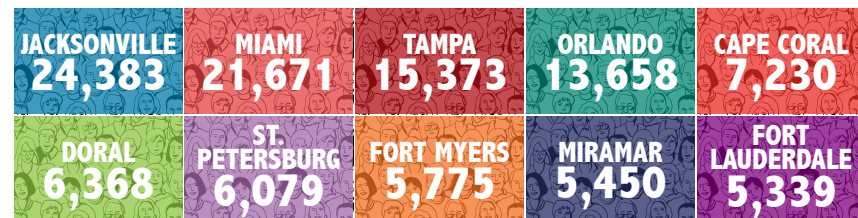
HOW LARGE ARE FLORIDA'S CITIES?



Source: Bureau of Economic and Business Research, University of Florida, 2014 population estimates.

TOP 10 CITIES BY POPULATION GROWTH

POPULATION INCREASE 2011-2014



Source: Bureau of Economic and Business Research, University of Florida, 2014 population estimates.

MUNICIPAL SERVICES & UTILITIES

Cities place a high priority on quality-of-life services such as parks and recreation and provide basic services like garbage collection and some level of water service. Services provided by cities are far-reaching and vary depending on the needs of their citizens. From ensuring drinking water is regularly tested and contaminant-free, sewage is quickly removed and treated, and storm water is properly handled, to providing parks, recreation centers and public transportation, cities enhance their citizens' quality of life.

LEISURE SERVICES

- 91%** provide municipal parks
- 57%** provide municipally run recreation centers
- 34%** provide libraries directly or in partnership with their county
- 17%** provide a marina

WATER SERVICES

- 65%** provide water services
- 38%** offer water, waste water and storm water services
- 22%** offer water, waste water, storm water and reclaimed water services
- 40%** provide water/waste water services to other jurisdictions
- 28%** of those impose a surcharge to provide the service

SOLID WASTE SERVICES

- 85%** provide solid waste collection
 - 30%** directly by the city
 - 32%** through a franchise agreement
 - 13%** through affiliation with a regional independent entity
 - 5%** through another government entity
 - 5%** through some combination of the above
- 72%** provide recycling services

ADDITIONAL MUNICIPAL SERVICES

- 33%** provide municipal cemeteries
- 11%** provide a health clinic for employees
- 9%** provide electric services - mostly through distribution only
- 7%** provide natural gas services

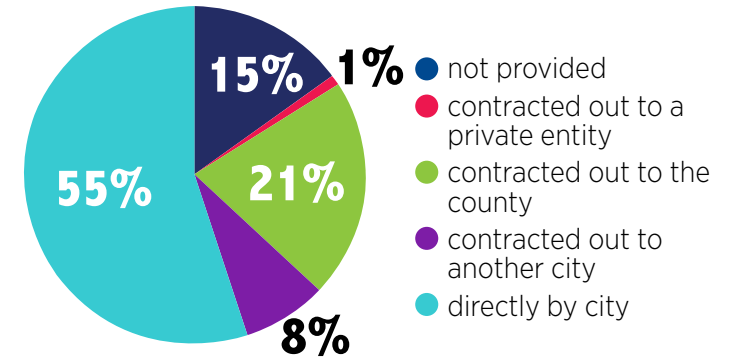
PUBLIC SAFETY

Cities work hard to ensure their residents are safe. Police, fire and emergency medical services are consistently among the top municipal services provided. Police services include crime prevention and investigation, in addition to uniformed patrol and response. Fire services include fire prevention, suppression and rescue.

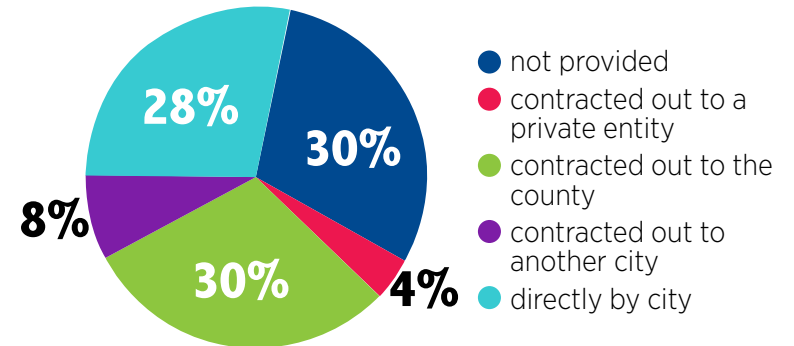
Municipalities typically provide services either directly by city employees or by contracting with another government entity, such as a county. Around half of cities with a population below 5,000 depend on other jurisdictions for law enforcement and fire service assistance.



HOW FIRE SERVICES ARE PROVIDED



HOW EMERGENCY MEDICAL SERVICES ARE PROVIDED



FIRE SERVICES STATS

41% of Florida cities below 5,000 population utilize volunteer firefighters

23% have a volunteer only department

9% have a volunteer staff with a paid captain

9% have a combination of paid and volunteer staff

POLICE SERVICES STATS

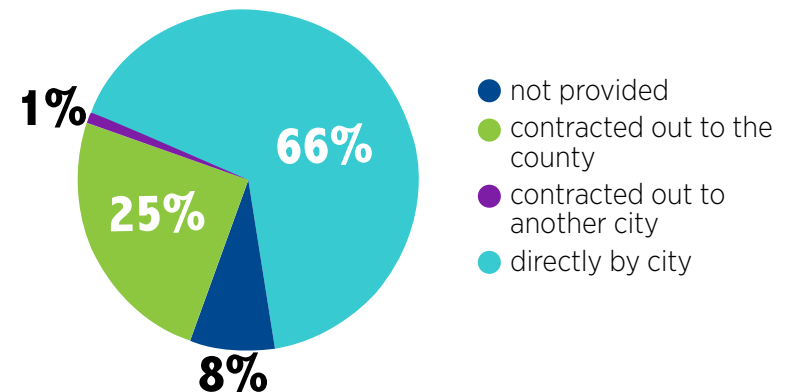
55% of Florida cities below 5,000 population do not have their own police department

36% contract out to the county

16% rely on the county sheriff to patrol within their city

3% contract out to another city

HOW POLICE SERVICES ARE PROVIDED



ABOUT THE FLORIDA LEAGUE OF CITIES CENTER FOR MUNICIPAL RESEARCH AND INNOVATION AND THE CITYSTATS SURVEY

THE CENTER FOR MUNICIPAL RESEARCH AND INNOVATION

The CMRI is the central source of local government research and resources at the Florida League of Cities. It serves as a link between Florida's public policy researchers and municipal governments, bridging the gap between academics and public policy makers and administrators.

CITYSTATS SURVEY

Unless otherwise noted, all information included in the State of the Cities is from Florida League of Cities CityStats Surveys, 2011-2014.

The FLC Center for Municipal Research and Innovation has conducted the CityStats survey since 2011. The survey consists of approximately 40 questions about municipal operations, budgets, policies and services. In 2014, surveys were collected from 293 of Florida's 410 municipalities, equaling 71 percent of all cities and 68 percent of the total statewide municipal population.

A copy of the full survey and the list of respondents are available upon request. Individual municipal profiles and the League's "Find a Peer City" database are available for viewing on the League's website at www.floridaleagueofcities.com/ResearchMaterial.aspx.



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