2015 STATE OF THE CITIES

INTRODUCTION

2015 was a year of many positive changes in Florida. The recovery of the national and state economy continued, though perhaps not as completely as hoped. Florida's unemployment rate continued to improve as it had since late 2010, falling more than half a percent to 5.1 percent by December. Florida's real estate market, an important driver of economic activity and government revenue, continued to improve as well. The number of single-family home sales was up 2.9 percent year-over-year in December 2015, and the median price of an existing single-family home was up 11.9 percent[1].

Challenges also persisted. The long-term unemployed (those unemployed for more than 27 months) still numbered in excess of 2 million people nationwide. And a relatively new threat to well-being, opioid overdoses, continued its dramatic rise.

As is true each year, Florida's cities in 2015 kept working, day in, day out, to meet the changing needs of their residents while exercising responsible stewardship over the revenues with which they were entrusted. This report provides an overview of how Florida's cities are fulfilling those responsibilities.

The following is a snapshot of the current state of Florida cities and, in some cases, how they have changed over the past five 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 primary 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.

[1]Sources: http://data.bls.gov/timeseries/LASST120000000000003?data_tool=XGtable; http://media.floridarealtors.org/fla-s-housing-market-median-prices-continue-to-rise-in-dec-2015/; http://www.bls.gov/news.release/empsit.t12.htm; http://www.cdc.gov/mmwr/preview/mmwrhtml/mm6450a3.htm

BUDGET, EMPLOYMENT & ECONOMY

BUDGET

While the majority of municipal revenues statewide comes from service taxes, building permits, franchise and impact fees, state and federal grant funding, and interest earnings, municipal property taxes form another key revenue stream for cities. Since 2005, the statewide overall average year-to-year fluctuation in municipal property taxes levied is less than 2 percent, or just under $6 per capita.
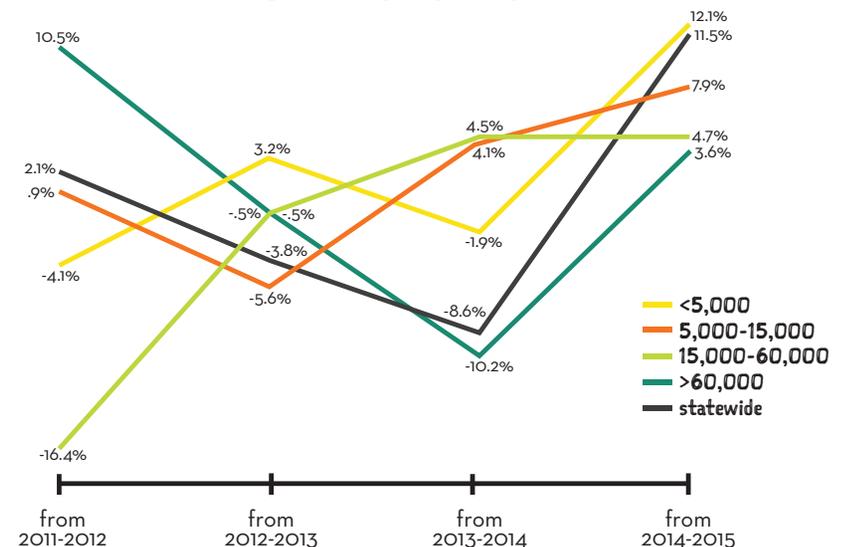
MEDIAN PER CAPITA MUNICIPAL PROPERTY TAX LEVIED

YEAR	MEDIAN PER CAPITA TAX LEVIED	MEDIAN YEAR-TO-YEAR CHANGE STATEWIDE
2005	$287.21	
2006	$331.89	15.6%
2007	$335.41	1.1%
2008	$331.76	-1.1%
2009	$316.51	-4.6%
2010	$294.24	-7.0%
2011	$284.57	-3.3%
2012	$278.11	-2.3%
2013	$287.60	3.4%
2014	$293.30	2.0%
2015	$307.93	5.0%
AVERAGE		0.9%
MEDIAN		0.9%

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 2014 to December 2015 was -1.0%. Between 2011 and 2015, the average increase to the municipal cost index was 1.6% annually. (municipal cost index as compiled by *American City & County* magazine)

AVERAGE INCREASE/DECREASE TO MUNICIPAL GENERAL FUND BUDGETS

Legend:
- <5,000
- 5,000-15,000
- 15,000-60,000
- >60,000
- statewide

Data points:
- 10.5%, 2.1%, .9%, -4.1%, -16.4% (from 2011-2012)
- 3.2%, -.5%, -.5%, -3.8%, -5.6% (from 2012-2013)
- 4.5%, 4.1%, -1.9%, -8.6%, -10.2% (from 2013-2014)
- 12.1%, 11.5%, 7.9%, 4.7%, 3.6% (from 2014-2015)

EMPLOYMENT

In 2015, the average statewide municipal staffing level was one municipal employee to every 109 municipal residents. 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. Florida's cities made modest expansions in their full-time workforces in FY 2014-2015. The majority of Florida's cities gave raises to their employees last year; 70 percent of those raises were for 3 percent or less. Slightly more than one-fifth of Florida's cities did not give any raises in FY 2014-2015.

FULL-TIME EMPLOYEE RAISES

- ■ 1% raise
- ■ 2% raise
- ■ 3% raise
- ■ 4% raise or more
- ■ Didn't recieve a raise
- ■ Didn't respond to survey

2% · 7% · 22% · 40% · 8% · 21%
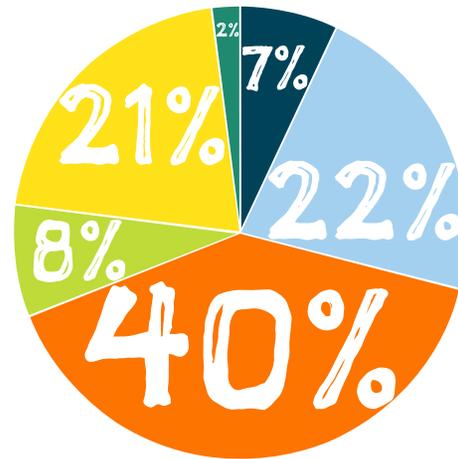
AVERAGE PER CAPITA NUMBER OF RESIDENTS TO ONE FULL-TIME EMPLOYEE

97 STATEWIDE AVERAGE FOR CITIES WITH <5,000 POPULATION

95 STATEWIDE AVERAGE FOR CITIES WITH 5K-15K POPULATION

110 STATEWIDE AVERAGE FOR CITIES WITH 15K-60K POPULATION

112 STATEWIDE AVERAGE FOR CITIES WITH >60K POPULATION
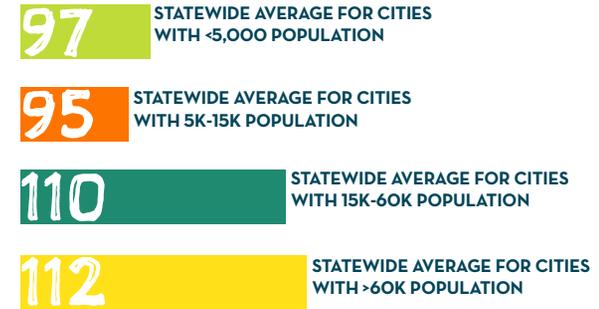
AVERAGE NUMBER OF EMPLOYEES BY SIZE OF MUNICIPAL POPULATION

	STATEWIDE AVERAGE FOR CITIES <5,000	STATEWIDE AVERAGE FOR CITIES 5,000-15,000	STATEWIDE AVERAGE FOR CITIES 15,000-60,000	STATEWIDE AVERAGE FOR CITIES >60,000
Police Officers	6	22	63	256
Firefighters	3	14	41	163
Part-time Employees	5	18	41	179
Full-time Employees	19	95	295	1,107

ECONOMY

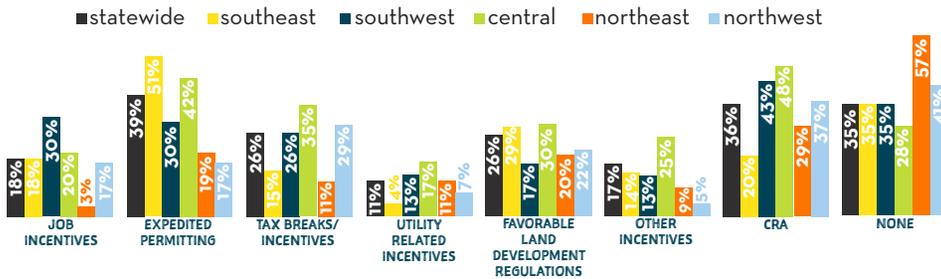As the economy continues to recover, Florida municipalities offer economic development incentives to encourage business within their jurisdictions. Among other efforts, more than 25 percent of cities statewide offer expedited permitting processes, tax breaks and favorable land development regulations to spur the economy.

TOURISM & MUNICIPAL GOVERNMENTS

Tourism is a major economic driver in the Sunshine State. Just over half of Florida's cities – 55 percent – consider themselves a tourist destination and more than 80 percent of those cities have seen an increase in tourism during the past year.
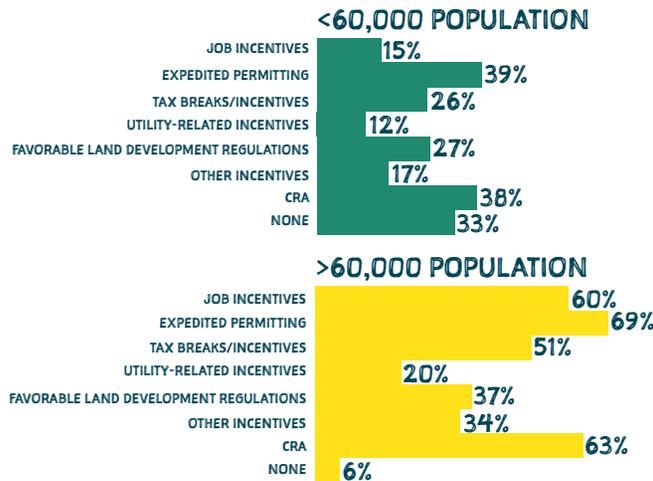
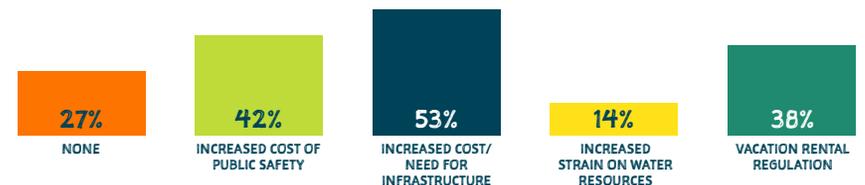## ECONOMIC DEVELOPMENT INCENTIVES BY GEOGRAPHIC REGION

Legend: ■ statewide ■ southeast ■ southwest ■ central ■ northeast ■ northwest

JOB INCENTIVES: 18%, 18%, 30%, 20%, 3%, 17%
EXPEDITED PERMITTING: 39%, 51%, 30%, 42%, 19%, 17%
TAX BREAKS/INCENTIVES: 26%, 15%, 26%, 35%, 11%, 29%
UTILITY RELATED INCENTIVES: 11%, 4%, 13%, 17%, 11%, 7%
FAVORABLE LAND DEVELOPMENT REGULATIONS: 26%, 29%, 17%, 30%, 20%, 22%
OTHER INCENTIVES: 17%, 14%, 13%, 25%, 9%, 15%
CRA: 36%, 20%, 43%, 48%, 29%, 37%
NONE: 35%, 35%, 35%, 28%, 57%, 41%

ECONOMIC DEVELOPMENT INCENTIVES BY POPULATION

<60,000 POPULATION

- JOB INCENTIVES: 15%
- EXPEDITED PERMITTING: 39%
- TAX BREAKS/INCENTIVES: 26%
- UTILITY-RELATED INCENTIVES: 12%
- FAVORABLE LAND DEVELOPMENT REGULATIONS: 27%
- OTHER INCENTIVES: 17%
- CRA: 38%
- NONE: 33%

>60,000 POPULATION

- JOB INCENTIVES: 60%
- EXPEDITED PERMITTING: 69%
- TAX BREAKS/INCENTIVES: 51%
- UTILITY-RELATED INCENTIVES: 20%
- FAVORABLE LAND DEVELOPMENT REGULATIONS: 37%
- OTHER INCENTIVES: 34%
- CRA: 63%
- NONE: 6%

TOURISM ACTIVITY PARTICIPATION FOR "TOURIST DESTINATION" CITIES

TOURISM ACTIVITIES	PARTICIPATION
City-sponsored festivals/musical events	78%
Eco-Tourism	77%
Privately sponsored festivals/musical events	70%
Boating	69%
Beach/Ocean	52%
Museum	51%
Shopping	48%
Historical Site	46%
Nightlife	44%
Art Gallery	42%
Sporting Event - participants	37%
Lake/Springs/River	34%
Sporting Event - spectator	31%
Aquarium/Zoo/Botanical Garden	17%
Theme Park	7%
Other	17%

PERCENT AFFECTED BY CHALLENGES RESULTING FROM TOURISM

- NONE: 27%
- INCREASED COST OF PUBLIC SAFETY: 42%
- INCREASED COST/NEED FOR INFRASTRUCTURE: 53%
- INCREASED STRAIN ON WATER RESOURCES: 14%
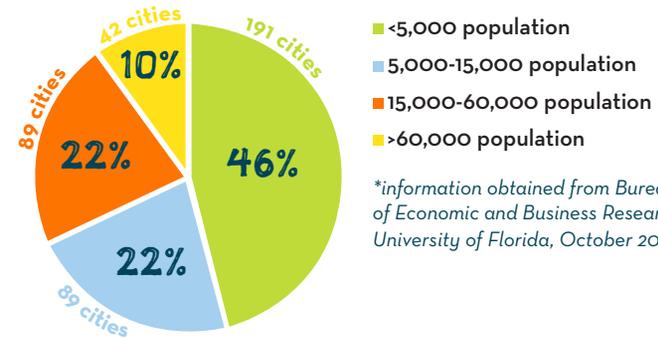- VACATION RENTAL REGULATION: 38%

MUNICIPAL POPULATION & FORM OF GOVERNMENT

In 2015, Florida's incorporated population increased 2 percent to 10,018,127, mirroring statewide population growth. Just over half of the 19,815,183 citizens in the state choose to live in one of our state's 411 cities. More than two-thirds of Florida cities have a population of less than 15,000 people, with nearly half under 5,000. Only six municipalities in Florida have a population greater than 200,000, while seven municipalities have a population of less than 100.
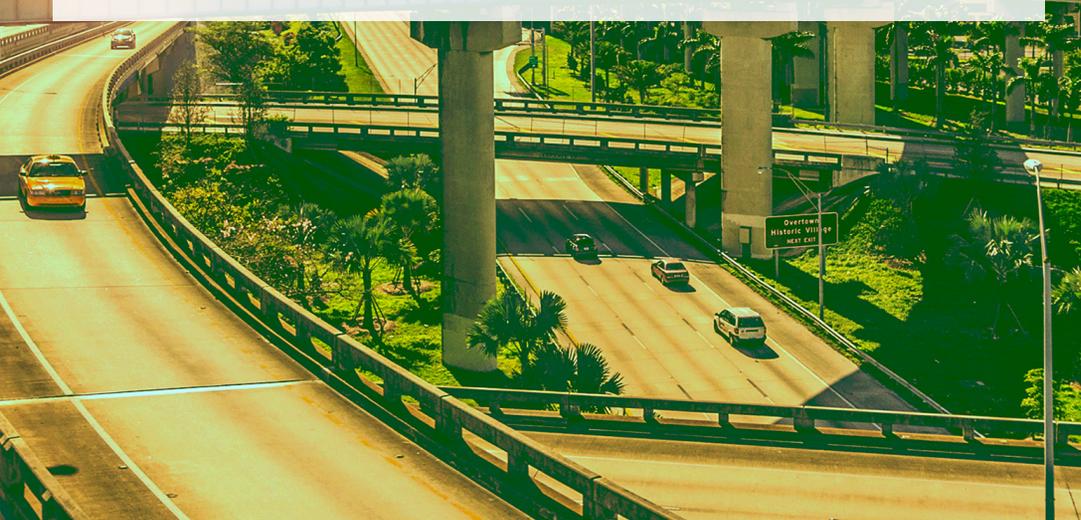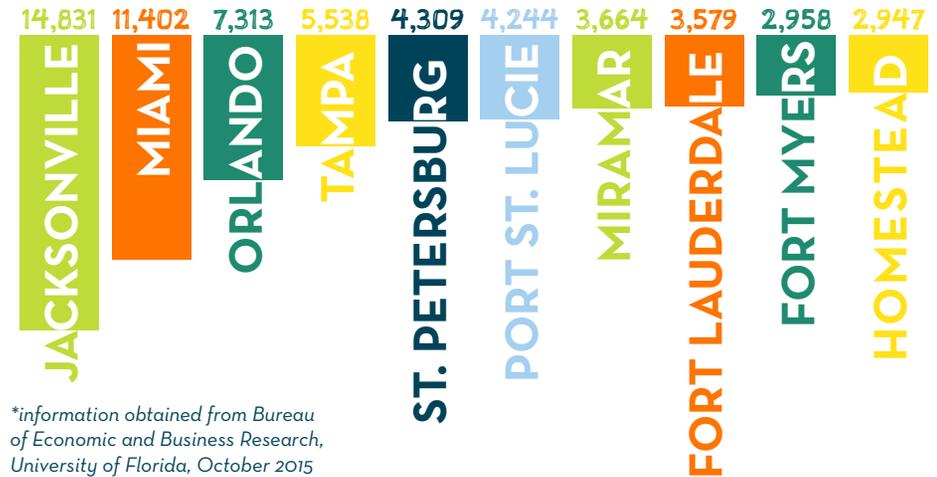
HOW LARGE ARE FLORIDA'S CITIES?

42 cities — 10%
89 cities — 22%
191 cities — 46%
89 cities — 22%

- ■ <5,000 population
- ■ 5,000-15,000 population
- ■ 15,000-60,000 population
- ■ >60,000 population

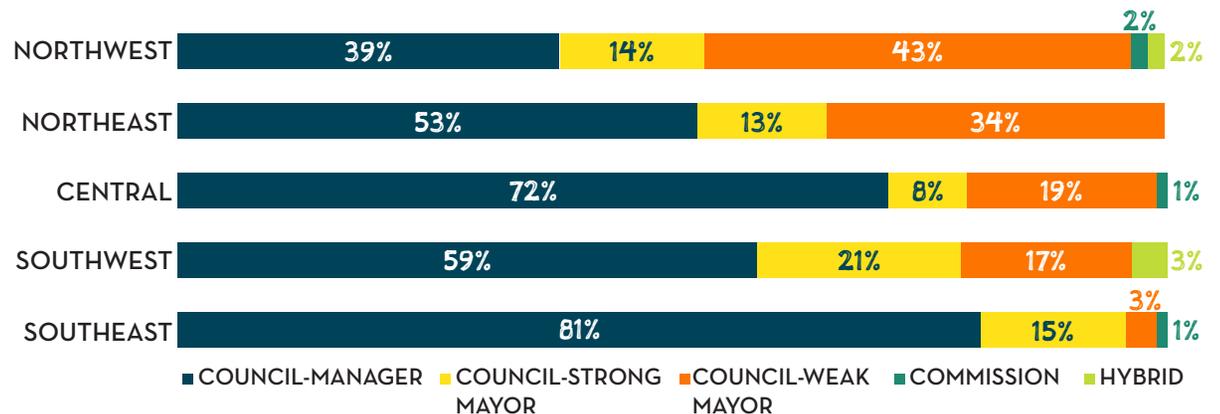*information obtained from Bureau of Economic and Business Research, University of Florida, October 2015

TOP 10 CITIES BY POPULATION GROWTH IN 2015

City	Growth
JACKSONVILLE	14,831
MIAMI	11,402
ORLANDO	7,313
TAMPA	5,538
ST. PETERSBURG	4,309
PORT ST. LUCIE	4,244
MIRAMAR	3,664
FORT LAUDERDALE	3,579
FORT MYERS	2,958
HOMESTEAD	2,947

*information obtained from Bureau of Economic and Business Research, University of Florida, October 2015

FORM OF GOVERNMENT

Statewide, the most prevalent form of city government is council-manager (66 percent) and the most common council size is five members (68 percent). In cities with populations above 5,000, 89 percent use the council-manager form of government. Municipalities with less than 5,000 population equally use the council-manager and council-weak mayor forms of government (40 percent for each form).

Region	Council-Manager	Council-Strong Mayor	Council-Weak Mayor	Commission	Hybrid
NORTHWEST	39%	14%	43%	2%	2%
NORTHEAST	53%	13%	34%		
CENTRAL	72%	8%	19%	1%	
SOUTHWEST	59%	21%	17%		3%
SOUTHEAST	81%	15%	3%	1%	

- ■ COUNCIL-MANAGER
- ■ COUNCIL-STRONG MAYOR
- ■ COUNCIL-WEAK MAYOR
- ■ COMMISSION
- ■ HYBRID

MUNICIPAL SERVICES, UTILITIES & PUBLIC SAFETY

City service levels are as unique as the needs of their citizens. Cities place a high priority on quality-of-life services like parks and recreation with more than **90 percent providing city parks and 60 percent providing recreation centers**. Well over two-thirds of municipalities provide basic services like garbage collection, police and fire protection services, and some level of water service. Some cities also provide services such as libraries, cemeteries, marinas, public transportation, electric and natural gas utilities and charter schools. As technology develops, cities continue to look for ways of integrating new processes to improve service delivery to their citizens. In 2015, 26 percent of cities were using online mobile apps for service delivery, with more than half of those cities reporting citizens engaging with the apps multiple times weekly.

FOR CITIES WITH MOBILE APPS, TYPES OF APPS USED

	MUNICIPAL ONLINE APPS
Road Repairs/Potholes	55%
Code Enforcement	55%
Billing/Utilities Billing	43%
Citizen Engagement/ Town Hall	42%
Graffiti Reporting	38%
Utilities Outages	32%
Traffic Reporting	22%
Mobile 3-1-1	15%
Procurement	8%
Parking Tickets/ Meter Payment	8%
Parking Availability	2%
Other	35%

CITIES THAT PROVIDE WATER UTILITIES SERVICES

RECLAIMED WATER SERVICE **28%**

STORM WATER SERVICE **60%**

WASTE WATER SERVICE **62%**
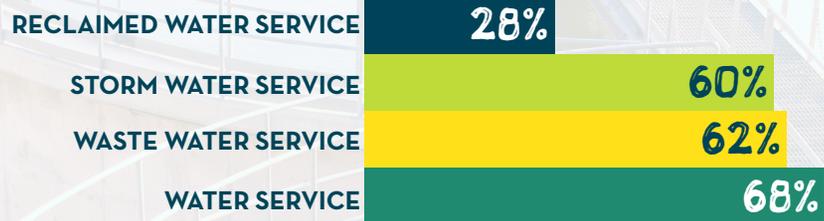
WATER SERVICE **68%**

CITIES THAT PROVIDE MULTIPLE WATER UTILITIES SERVICES

WATER, WASTE WATER, STORM WATER & RECLAIMED WATER SERVICES **24%**

WATER, WASTE WATER & STORM WATER SERVICES **42%**

DOES YOUR CITY PROVIDE WATER/WASTE WATER SERVICES TO OTHER JURISDICTIONS?

NO **43%**

YES **46%**

N/A **11%**

DOES YOUR CITY IMPOSE A SURCHARGE FOR THESE WATER SERVICES?

YES **77%**

NO **23%**

AVERAGE PERCENTAGE SURCHARGE IMPOSED **22%**

SOLID WASTE UTILITIES SERVICES

DOES YOUR CITY PROVIDE SOLID WASTE SERVICES?

NO **13%**

YES **87%**

26%

35%

8%

6%

12%
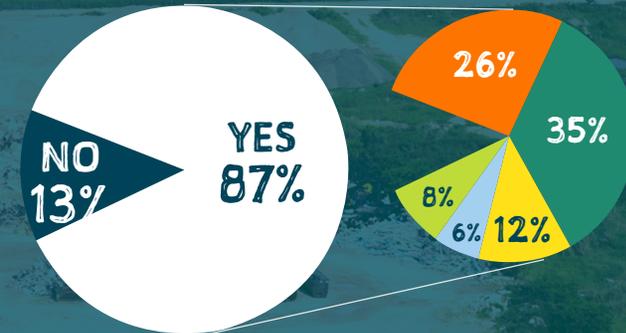
- directly by the city
- through a franchise agreement
- through affiliation with a regional independent entity
- through another government entity
- through some combination of the above

PUBLIC SAFETY – BY GEOGRAPHIC REGION

HOW POLICE SERVICES ARE PROVIDED

NORTHWEST: 59% directly by city, 21% contracted out to county, 20% not provided

NORTHEAST: 54% directly by city, 20% contracted out to county, 26% not provided

CENTRAL: 70% directly by city, 1% contracted out to another city, 25% contracted out to county, 3% not provided, 1% no response

SOUTHWEST: 78% directly by city, 13% contracted out to county, 9% not provided

SOUTHEAST: 67% directly by city, 2% contracted out to another city, 27% contracted out to county, 4% not provided
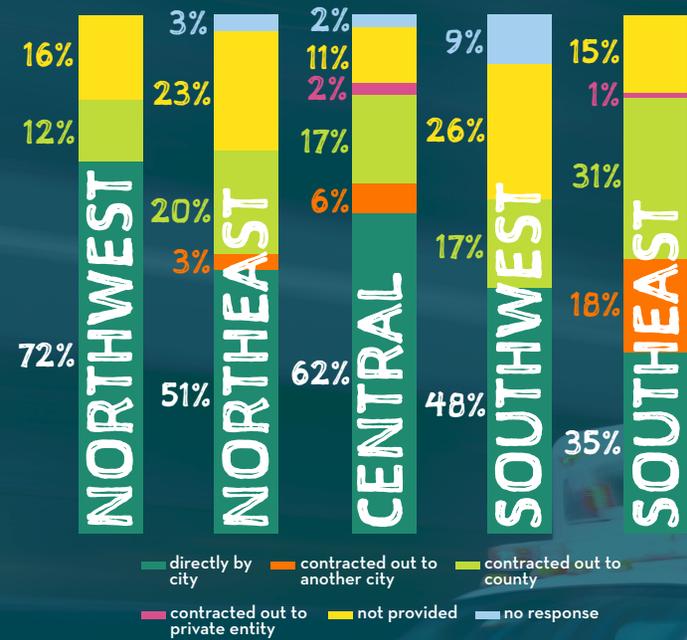
Legend: directly by city | contracted out to another city | contracted out to county | not provided | no response

Cities that do not provide police services rely on the county sheriff for law enforcement
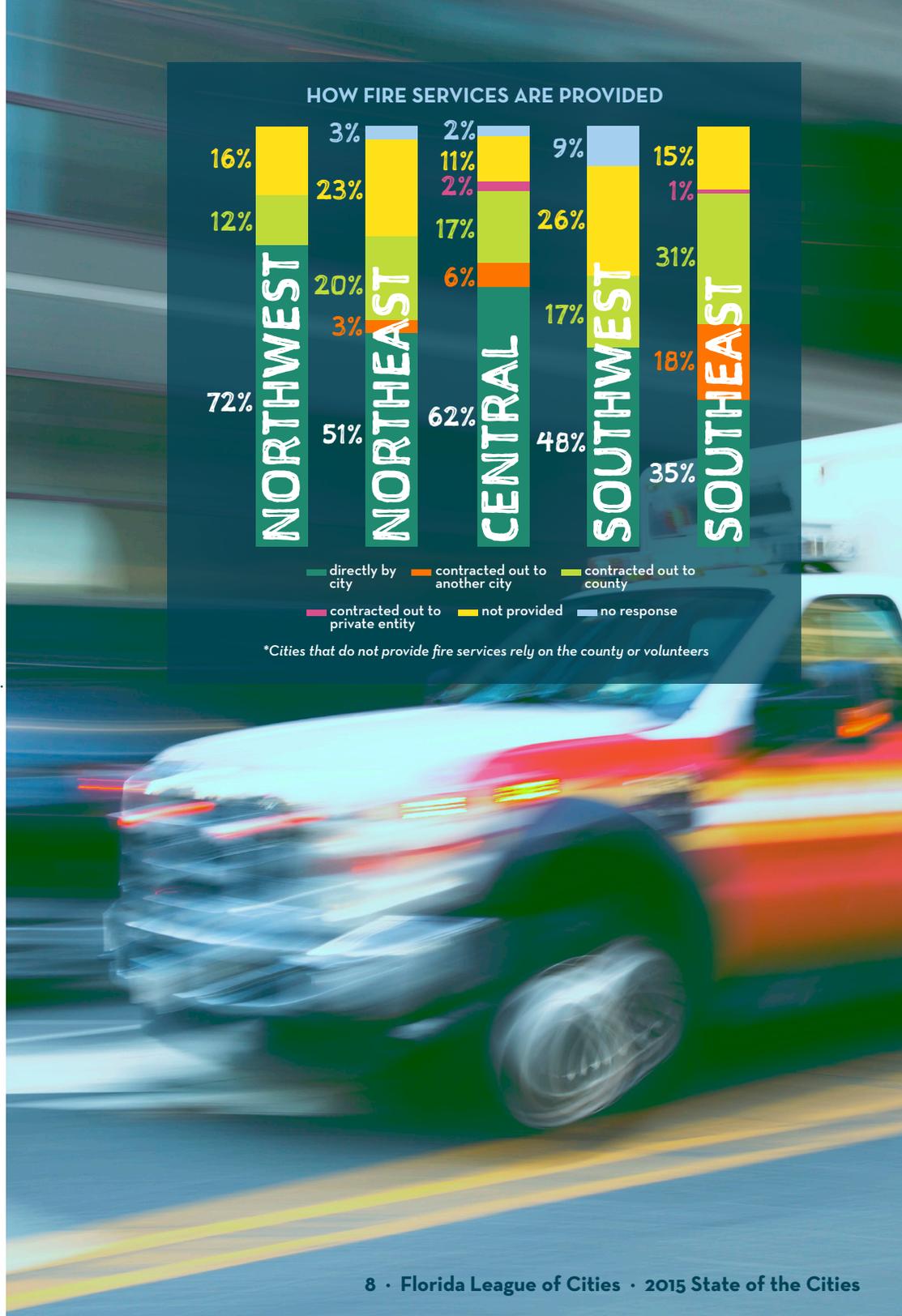
HOW EMERGENCY MEDICAL SERVICES ARE PROVIDED

NORTHWEST: 5% contracted out to another city, 2% (orange), 32% contracted out to county, 2% contracted out to private entity, 59% not provided

NORTHEAST: 14% directly by city, 3% contracted out to another city, 37% contracted out to county, 3% contracted out to private entity, 37% not provided, 6% no response

CENTRAL: 38% directly by city, 2% contracted out to another city, 28% contracted out to county, 5% contracted out to private entity, 24% not provided, 3% no response

SOUTHWEST: 13% directly by city, 39% contracted out to county, 39% not provided, 9% no response

SOUTHEAST: 33% directly by city, 18% contracted out to another city, 27% contracted out to county, 1% contracted out to private entity, 19% not provided, 2% no response

Legend: directly by city | contracted out to another city | contracted out to county | contracted out to private entity | not provided | no response

Cities that do not provide emergency medical services rely on the county

HOW FIRE SERVICES ARE PROVIDED

NORTHWEST: 72% directly by city, 12% contracted out to county, 16% not provided

NORTHEAST: 51% directly by city, 3% contracted out to another city, 20% contracted out to county, 23% not provided, 3% no response

CENTRAL: 62% directly by city, 6% contracted out to another city, 17% contracted out to county, 2% contracted out to private entity, 11% not provided, 2% no response

SOUTHWEST: 48% directly by city, 17% contracted out to county, 26% not provided, 9% no response

SOUTHEAST: 35% directly by city, 18% contracted out to another city, 31% contracted out to county, 1% contracted out to private entity, 15% not provided

Legend: directly by city | contracted out to another city | contracted out to county | contracted out to private entity | not provided | no response

Cities that do not provide fire services rely on the county or volunteers

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

The Center is the primary 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. The Center conducts multiple surveys annually, the cornerstone being the CityStats Survey.

SURVEY DATA

Unless otherwise noted, all information included in the State of the Cities report is from the Florida League of Cities' CityStats Surveys, 2011-2015 and the 2015 MiniSurvey Series.

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 2015, surveys were collected from 308 of Florida's 411 municipalities, equaling 75 percent of all cities and 76 percent of the total statewide municipal population.

The Center's MiniSurvey Series gathers pertinent, targeted data on a narrow topic through a brief 5-10 question format. MiniSurveys are sent electronically to all 411 Florida cities with varying response rates.

Copies of the survey questions and lists 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 *floridaleagueofcities.com/ResearchMaterial.aspx*.

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PO Box 1757, Tallahassee, FL 32302-1757
floridaleagueofcities.com/ResearchMaterial.aspx