2019

STATE OF THE CITIES

FLC

FLORIDA LEAGUE OF CITIES

STATE OF THE CITIES

For more than 90 years, the Florida League of Cities has been the voice for Florida's municipal governments. The League believes in **"local voices making local choices"** and the importance of recognizing and empowering municipalities.

Our membership consists of **more than 400 unique cities**, **towns and villages** in the Sunshine State – each one as diverse in geography, population and culture as the residents who call them home.

The *State of the Cities* report is an overview of the current state of Florida cities and, in some cases, how they have changed over the past eight years. These changes come as Florida's cities are embracing innovation, protecting local authority and providing a better quality of life for their residents.

The results in this report are based on the annual **CityStats survey** and the **MiniSurvey series**, produced by the Florida League of Cities Center for Municipal Research (CMR). 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 Center's surveys.

This report is a snapshot of some of the most notable highlights pulled from numerous CMR data analyses, which are available in full on the League's website or through request to CMR staff.

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. Unless otherwise noted, all stats are from the CMR CityStats surveys 2011-2019. All population data is obtained from the University of Florida's Bureau of Economic & Business Research, April 2018 estimates. All millage rate data is obtained from the Florida Department of Revenue.

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INTRODUCTION

Florida's cities, towns and villages are centers of economic, social and cultural energy. As the state's population and demographics change, so too do the needs of each city as new residents bring fresh perspectives, ideas and desires.
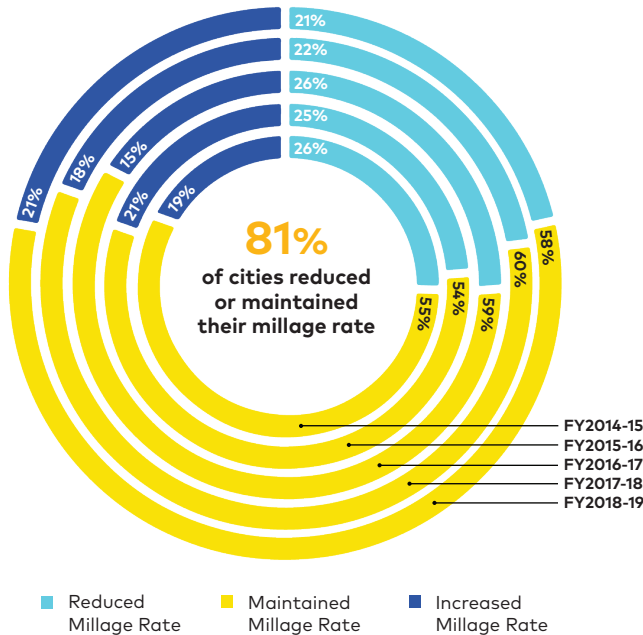
Cities strive to provide their services both efficiently and effectively. Each day, cities are solving problems, collaborating with their communities and identifying opportunities to improve the quality of life for their citizens.

Our member cities reflect in their organization and activities the rich diversity of the residents who call them home. By allowing local voices to make local choices, we ensure cities have the resources and authority necessary to respond to the unique demands of their residents.

BUDGET

While property (ad valorem) tax is an important revenue source for most cities, it provides **less than half of the revenue**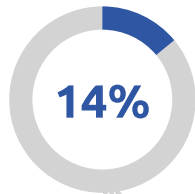 upon which municipalities rely statewide. Service taxes, permitting fees, franchise and impact fees, and state and federal grants, along with interest earnings, provide the largest share of most municipalities' revenue.

81% of cities reduced or maintained their millage rate

21%
22%
26%
25%
26%

21%
18%
15%
21%
19%

55%
54%
59%
60%
58%

FY2014-15
FY2015-16
FY2016-17
FY2017-18
FY2018-19

- Reduced Millage Rate
- Maintained Millage Rate
- Increased Millage Rate

Commonly Used Municipal Revenue Sources
(3-year average percentage of city use)

90% Communications Services Tax

86% Local Business Tax

84% Franchise Fees

2

14%
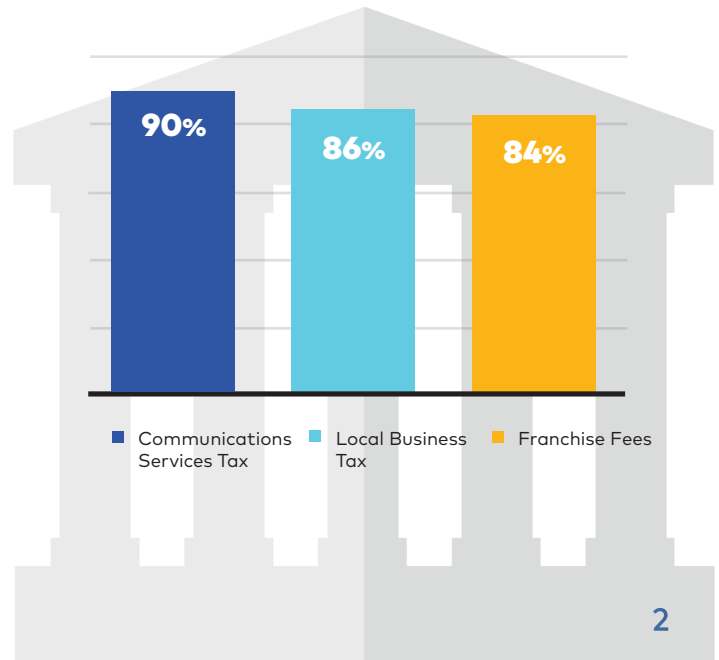
Only 14% of cities in **Northwest** and **Northeast Florida** use **non-ad valorem assessments** as a revenue source.*

Other regions of the state utilize them as follows:
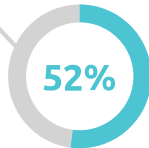
52% — **Central Florida**

62% — **Southwest Florida**

60% — **Southeast Florida**

95%

95% of cities **statewide** use **ad valorem (property tax)** as a revenue source

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EMPLOYMENT

Staffing levels in Florida cities vary greatly. The number of municipal employees needed to deliver services in each city is based not only on the city's population, but also on the number and level of services provided.
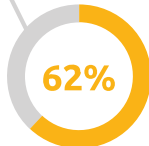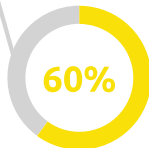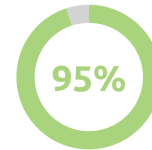
Cities, like all employers, must **compete for and retain a workforce** with the skills necessary to deliver the services their "customers" (residents, business and property owners, visitors) desire. **More than half** of Florida cities were able to provide pay raises of 1% to 3% in 2019 to enhance their ability to retain a skilled workforce.

Distribution of Full-time Municipal Employees by City Population
(percentage in 2019)

	General Employees	Firefighters	Police Officers
<5K	55%	17%	28%
5K-<15K	68%	13%	19%
15K-<60K	63%	15%	22%
>60K	64%	15%	21%
Statewide	62%	16%	22%

■ General Employees ■ Firefighters ■ Police Officers
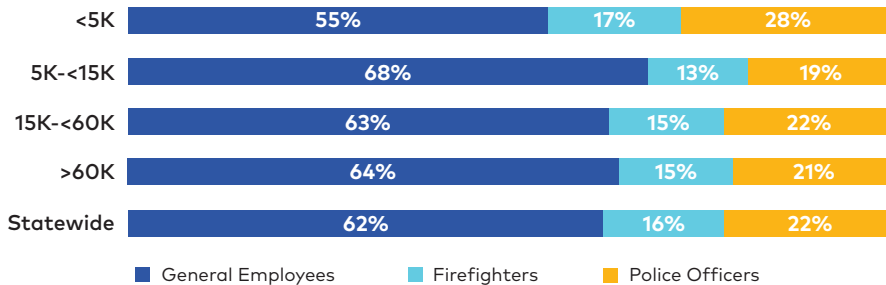
29% of cities have a position dedicated to **resiliency or sustainability work** or have a staff member with **resiliency and sustainability functions** included within their duties.

Per the CMR November 2019 Resiliency Officer Quick Survey, response rate 34%.

86%
of cities contract out for city attorney services

58%
of cities do not participate in the Florida Retirement System (FRS)

110:1
median number of residents for every one municipal employee

90%
of cities have five or fewer employees in the city clerk's office *(per the CMR November 2019 City Clerks MiniSurvey, response rate 75%)*

66%
of cities gave employees a modest pay raise of 1-3% *(5-year average percentages)*

15%
of cities were not able to give employees pay raises *(5-year average percentages)*

ECONOMY

Improving economic conditions for their cities and citizens is a multifaceted effort for municipal officials and staff. Economic development incentives to spur business growth can include **expedited permitting procedures**, **favorable development regulations** and **tax breaks**.

The two economic development tools most widely used by Florida cities:

38%
CRAs

36%
Expedited Permitting

In cities with **populations greater than 60,000**, use of those economic development tools increases greatly.

70%
CRAs

68%
Expedited Permitting
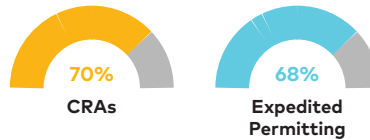
▶ **67%** of cities have **kept their permit fees the same** since 2016 as it relates to the Florida Building Code.

Per the CMR February 2019 Housing and Permitting Fees MiniSurvey, response rate 42%.

Does your city...

24% Assess an impact fee for affordable housing? (Yes)
71% Assess an impact fee for affordable housing? (No)

9% Charge a mobility fee? (Yes)
90% Charge a mobility fee? (No)

Yes
No
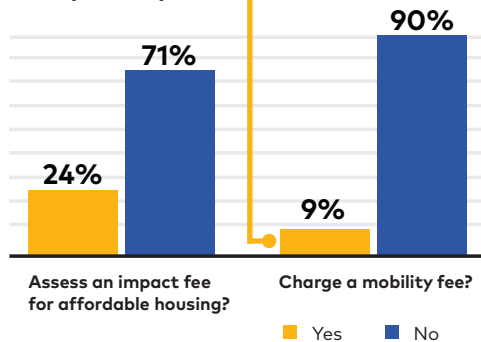
Is the mobility fee assessed for affordable housing?
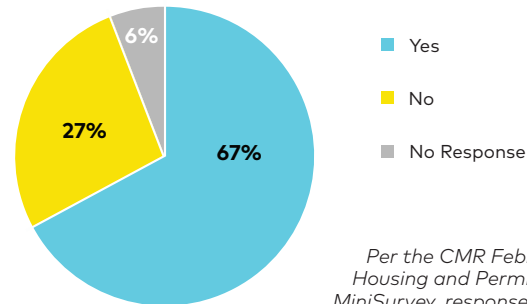
67% Yes
27% No
6% No Response

■ Yes
■ No
■ No Response

Per the CMR February 2019 Housing and Permitting Fees MiniSurvey, response rate 42%.

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POPULATION

Florida is predominantly a state of **small cities**. The median population of the 412 cities in Florida for 2019 was 5,970. **Twelve new cities**, with a total population of more than 350,000, have been incorporated in Florida since 2000. Today, the majority of Floridians (50.7%) live in cities.

Cities Within Each Population Range

<5,000:
187 cities – 45.4%

15,001-60,000:
88 cities – 21.4%

| 10.7% | 9.0% | 25.7% | 13.5% | 8.3% | 9.5% | 11.9% | 6.1% | 5.3% |

5,001-15,000:
90 cities – 21.8%

>60,000:
47 cities – 11.4%
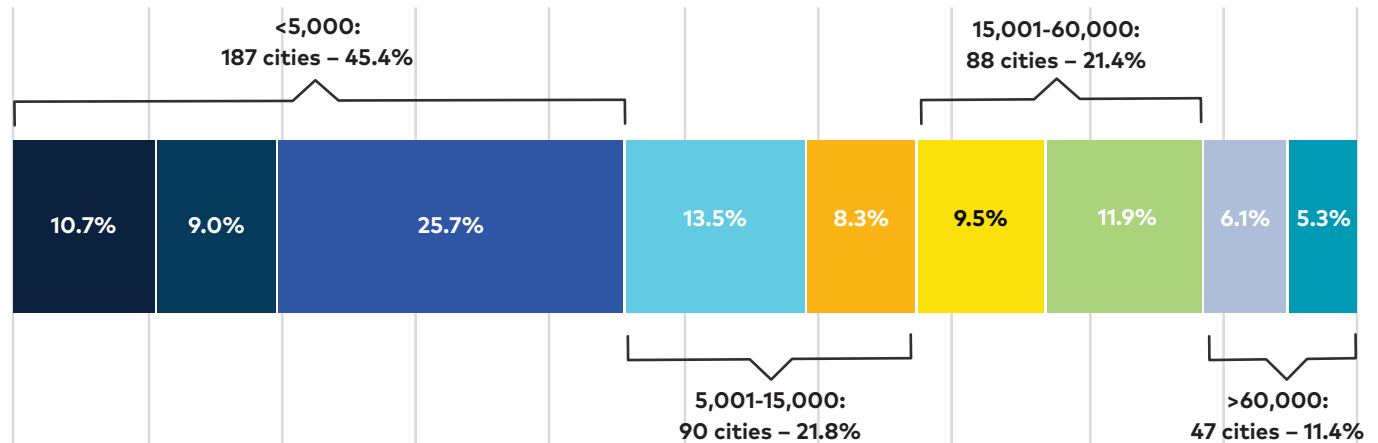
Legend: ■ <500 ■ 501-1,000 ■ 1,001-5,000 ■ 5,001-10,000 ■ 10,001-15,000 ■ 15,001-25,000 ■ 25,001-60,000 ■ 60,001-100,000 ■ >100,000

2019 Top 10 Largest Cities

Jacksonville	907,093
Miami	481,333
Tampa	378,531
Orlando	285,099
St. Petersburg	266,076
Hialeah	238,906
Tallahassee	192,381
Port St. Lucie	185,843
Fort Lauderdale	182,827
Cape Coral	180,204

2019 Top 10 Smallest Cities

Marineland	8
Weeki Wachee	9
Bay Lake	22
Lake Buena Vista	24
Lazy Lake	26
Westlake	29
Indian Creek	84
Belleair Shore	118
Otter Creek	122
Bascom	125

47%
Miami - Florida's second largest city - is 47% smaller than Jacksonville

5,970
Statewide median population

73%
of cities in the northwest region are under 5,000 population*

50.7%
of Florida's population lives in a city

41%
of the municipal population lives in the southeast region*
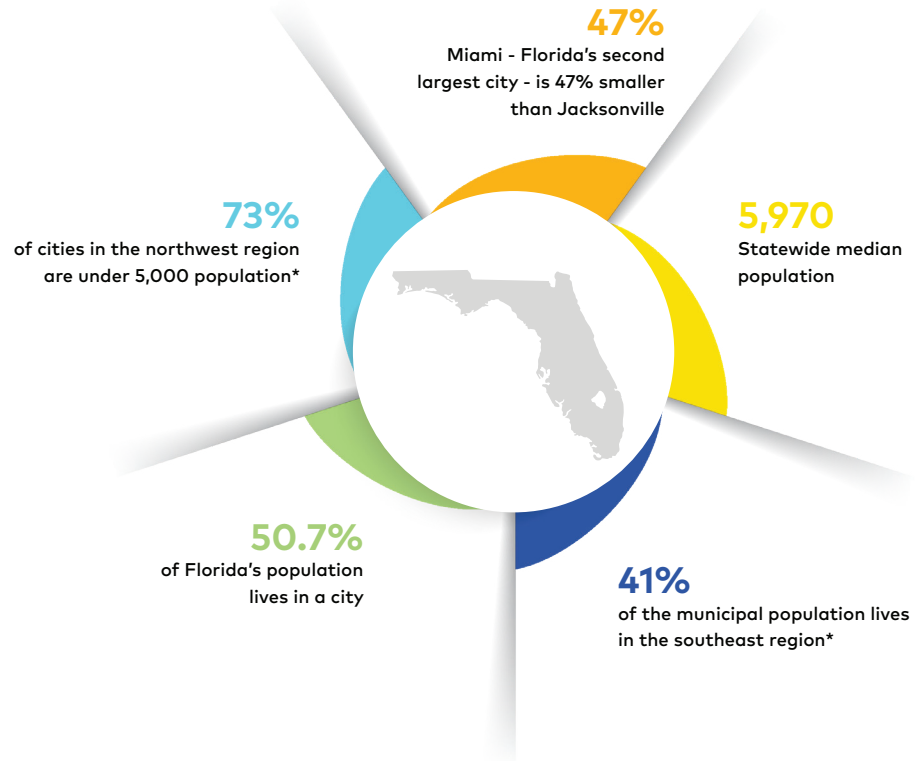
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GOVERNANCE

The citizens of a municipality determine through the **city charter** what form of government, governing body and election procedures work best for their communities. Statewide, the most prevalent form of city government is **council-manager** and the most common council/commission size is **five** members.

<5,000
Cities of less than 5,000 people are equally likely to have a council-manager form of government (40%) as a council-weak mayor (40%).

70%
of the municipal population in Florida lives under the council-manager form of government.

28%
of the municipal population in Florida lives under the council-strong mayor form of government.

5
The most common council/commission size is five members (69% of cities).

3-20
City councils in Florida can vary in size from three members to 20 members.

How Cities Are Handling Medical Marijuana Dispensaries

Region	Allow	Prohibit	Moratorium	No Response
Northwest	53%	22%	18%	7%
Northeast	38%	12%	40%	10%
Central	41%	28%	21%	10%
Southwest	31%	38%	15%	16%
Southeast	29%	51%	11%	9%
Statewide	39%	32%	20%	9%

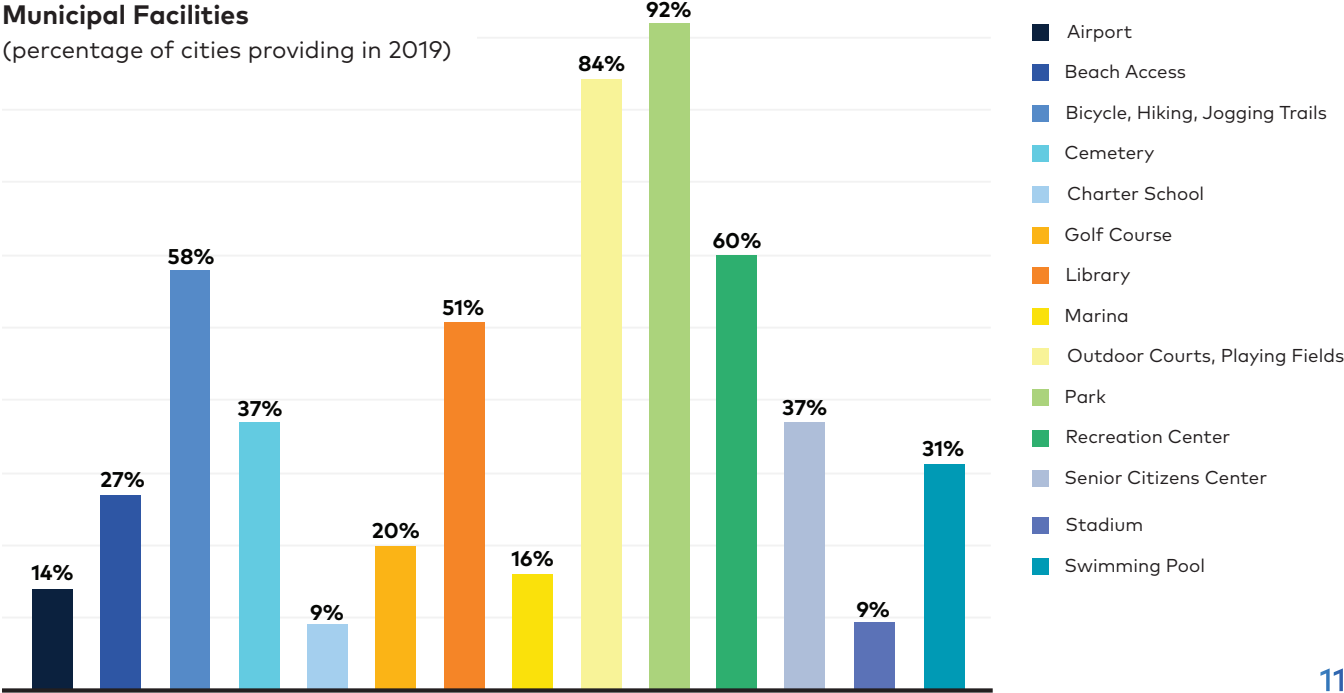Legend: ■ Allow ■ Prohibit ■ Moratorium ■ No Response
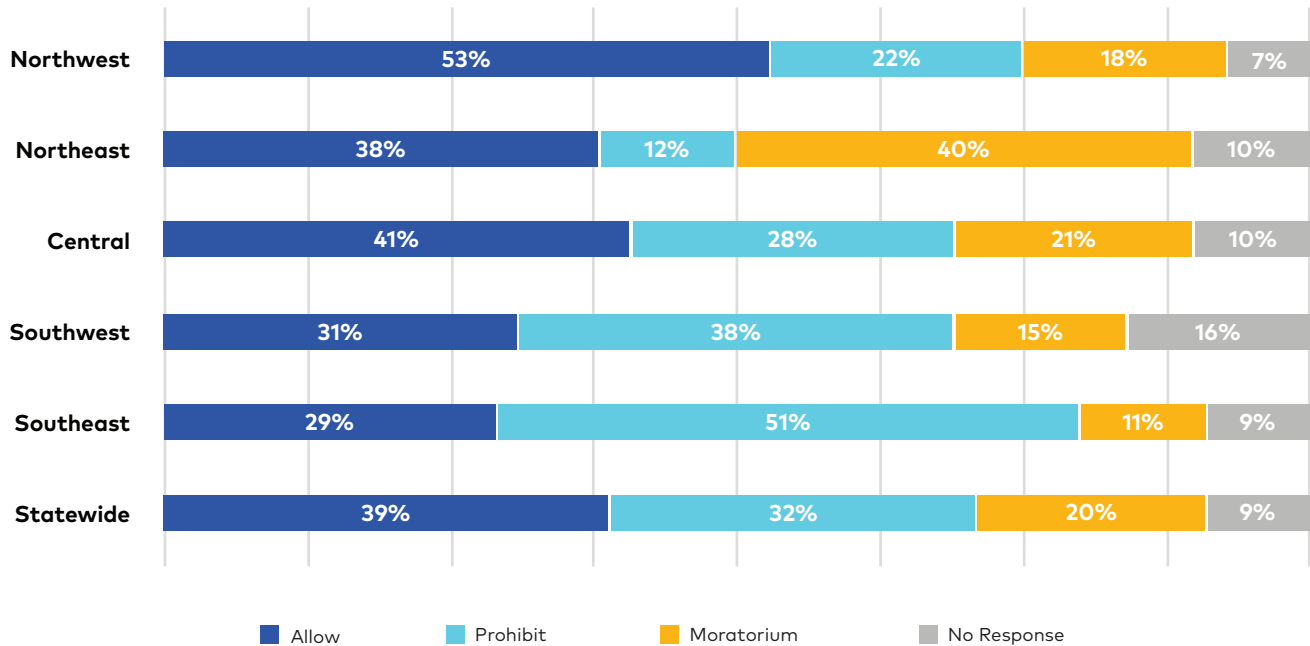
*See regional map, p.18.

CITY-RUN FACILITIES

New to the CityStats survey in 2019, we now have a snapshot of the variety of **city-owned facilities** across the state. While the majority of cities provide parks and other outdoor recreation areas, some cities also own and manage facilities ranging from airports to cemeteries to stadiums.

Municipal Facilities
(percentage of cities providing in 2019)

Legend:
- Airport
- Beach Access
- Bicycle, Hiking, Jogging Trails
- Cemetery
- Charter School
- Golf Course
- Library
- Marina
- Outdoor Courts, Playing Fields
- Park
- Recreation Center
- Senior Citizens Center
- Stadium
- Swimming Pool

Values: 14%, 27%, 58%, 37%, 9%, 20%, 51%, 16%, 84%, 92%, 60%, 37%, 9%, 31%
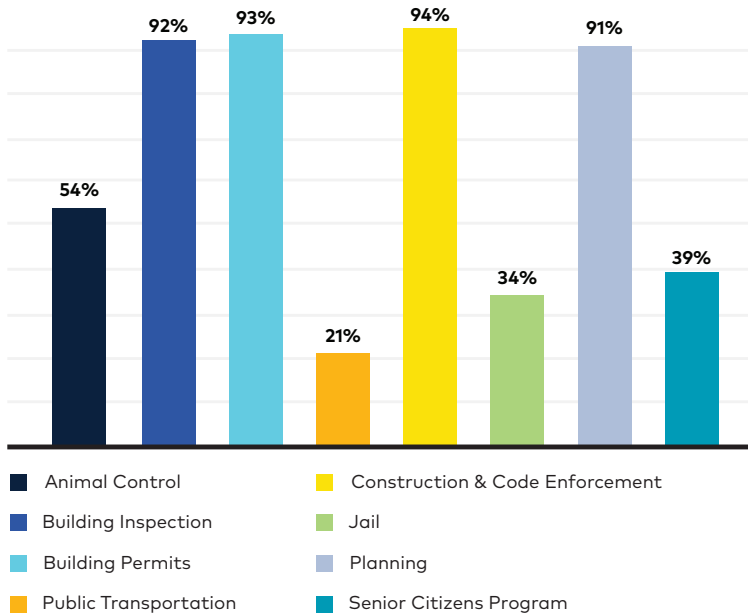
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CITY-RUN SERVICES

Municipalities provide a wide **range of services** at varying levels, depending upon the needs and desires of their citizens.
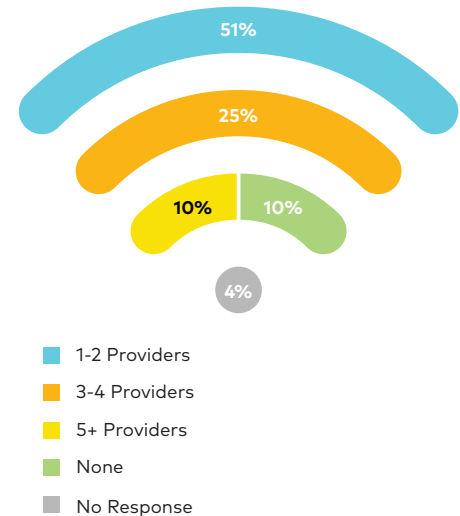
Municipal Services
(percentage of cities providing in 2019)
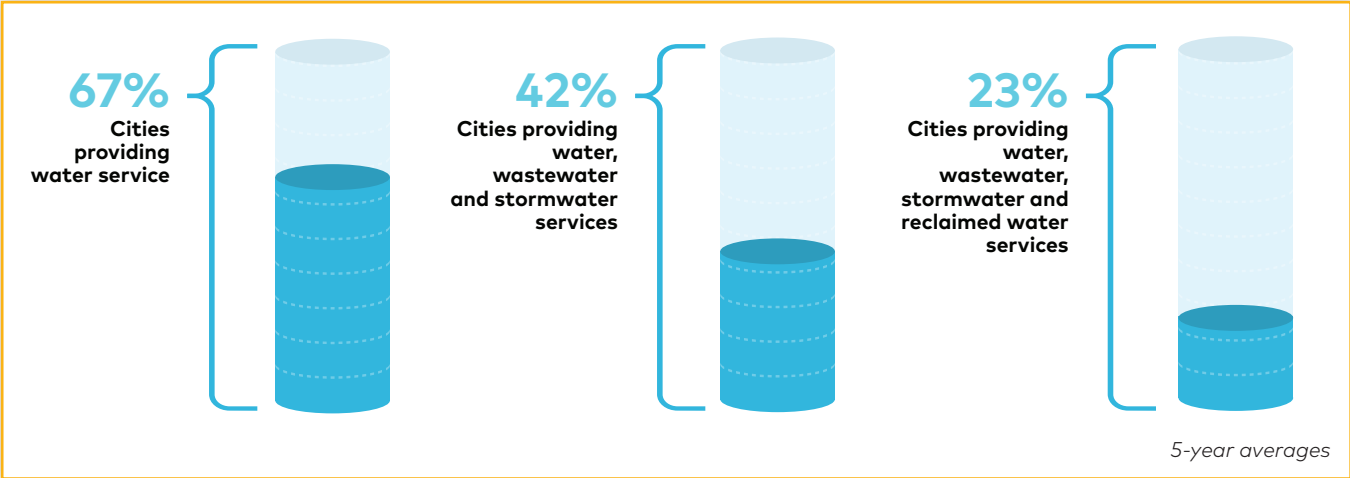
Broadband Providers Operating in Each City
(percentage of cities with each option)

Municipal Services chart:
- Animal Control: 54%
- Building Inspection: 92%
- Building Permits: 93%
- Public Transportation: 21%
- Construction & Code Enforcement: 94%
- Jail: 34%
- Planning: 91%
- Senior Citizens Program: 39%

Legend:
- Animal Control
- Building Inspection
- Building Permits
- Public Transportation
- Construction & Code Enforcement
- Jail
- Planning
- Senior Citizens Program

Broadband Providers:
- 51% — 1-2 Providers
- 25% — 3-4 Providers
- 10% — 5+ Providers
- 10% — None
- 4% — No Response

Per the CMR October 2019 Digital Divide MiniSurvey, response rate 33%.

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UTILITY SERVICES

Most Floridians also rely upon cities for **basic and essential services** like water, sanitary sewers and stormwater management.

67%
Cities providing water service

42%
Cities providing water, wastewater and stormwater services

23%
Cities providing water, wastewater, stormwater and reclaimed water services

5-year averages

44%
Cities providing water service to another jurisdiction
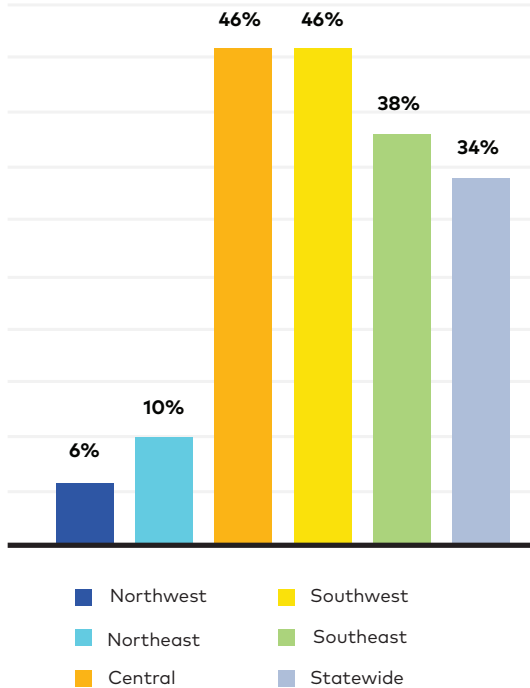
36%
Cities providing wastewater service to another jurisdiction

22%
cities providing curbside residential recycling
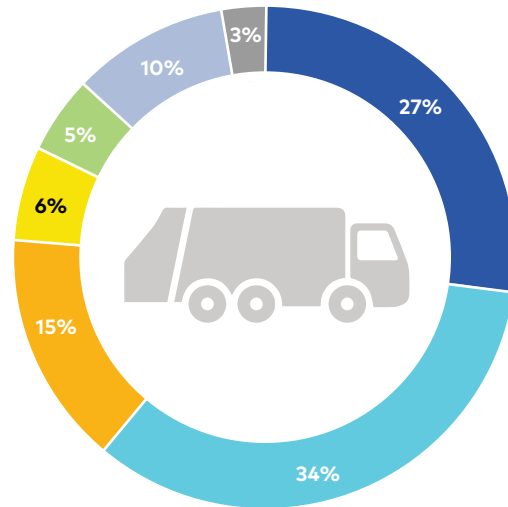
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Cities with Fertilizer Ordinances
(percentage of cities in 2019)

- Northwest: 6%
- Northeast: 10%
- Central: 46%
- Southwest: 46%
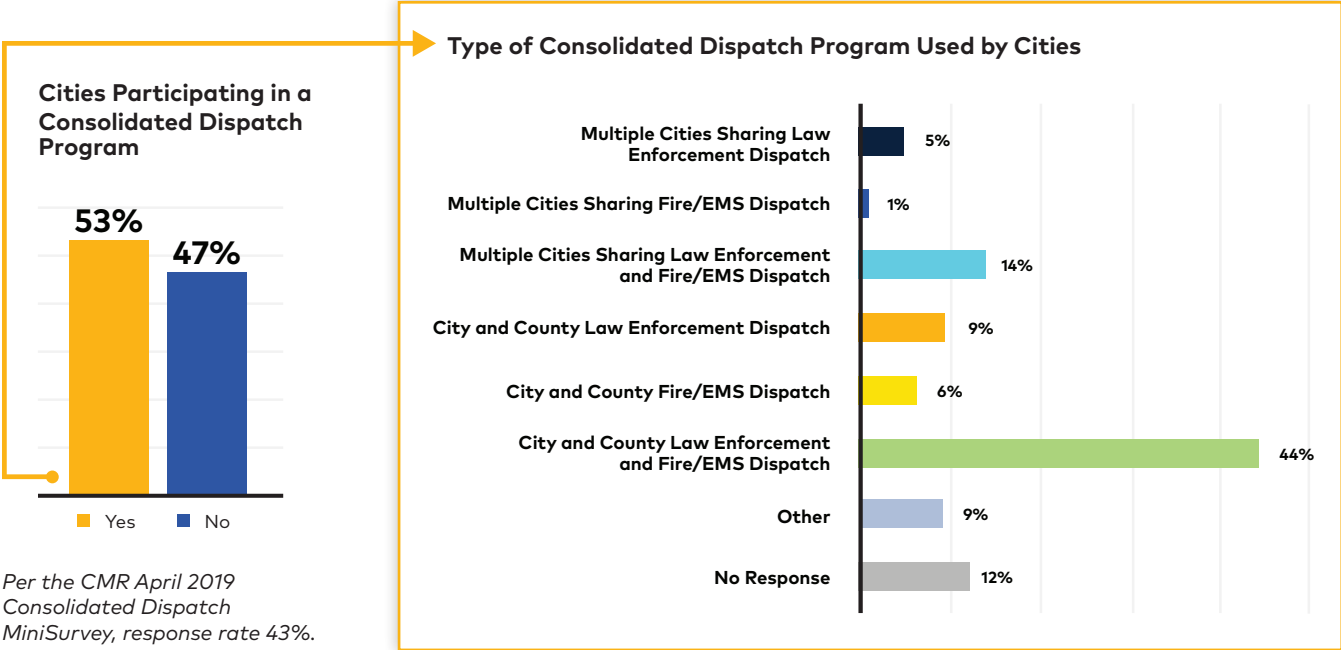- Southeast: 38%
- Statewide: 34%

See regional map, p.18.

How Solid Waste Collection Services Are Provided
(5-year average percentage)

- City-Owned and -Operated: 27%
- City-Operated Through a Franchise Agreement: 34%
- Affiliated with Regional Independent Entity: 15%
- Obtained from Another Government Entity: 6%
- Combination of Above: 5%
- Not Applicable: 10%
- No Response: 3%

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Public safety remains a priority for cities. Most provide **police, fire** and **emergency medical services**, whether directly with city employees or through contracts with other government agencies.

Cities Participating in a Consolidated Dispatch Program

53%

47%

■ Yes   ■ No

Per the CMR April 2019 Consolidated Dispatch MiniSurvey, response rate 43%.

Type of Consolidated Dispatch Program Used by Cities

Category	Percentage
Multiple Cities Sharing Law Enforcement Dispatch	5%
Multiple Cities Sharing Fire/EMS Dispatch	1%
Multiple Cities Sharing Law Enforcement and Fire/EMS Dispatch	14%
City and County Law Enforcement Dispatch	9%
City and County Fire/EMS Dispatch	6%
City and County Law Enforcement and Fire/EMS Dispatch	44%
Other	9%
No Response	12%

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Police

How Police Services Are Provided
(5-year average percentage)

- ■ Directly by the City
- ■ Contracted Out to Another City
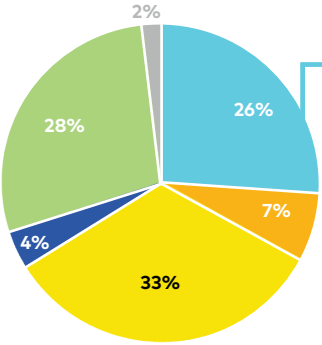- ■ Contracted Out to County
- ■ Not Provided
- ■ No Response

1%
8%
64%
26%
1%
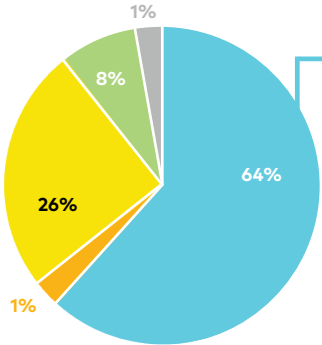
77% of cities in **Southwest Florida** provide police services directly*

EMS

How Emergency Medical Services Are Provided
(5-year average percentage)

- ■ Directly by the City
- ■ Contracted Out to Another City
- ■ Contracted Out to County
- ■ Contracted Out to Private Entity
- ■ Not Provided
- ■ No Response

2%
26%
28%
7%
4%
33%

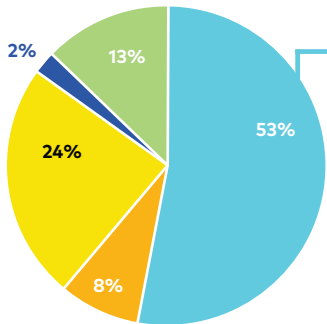**51%** of cities with populations **>15,000** provide EMS directly

See regional map, p.18. 16

Fire

How Fire Services Are Provided
(5-year average percentage)

- Directly by the City
- Contracted Out to Another City
- Contracted Out to County
- Contracted Out to Private Entity
- Not Provided

53%

24%

13%

8%

2%

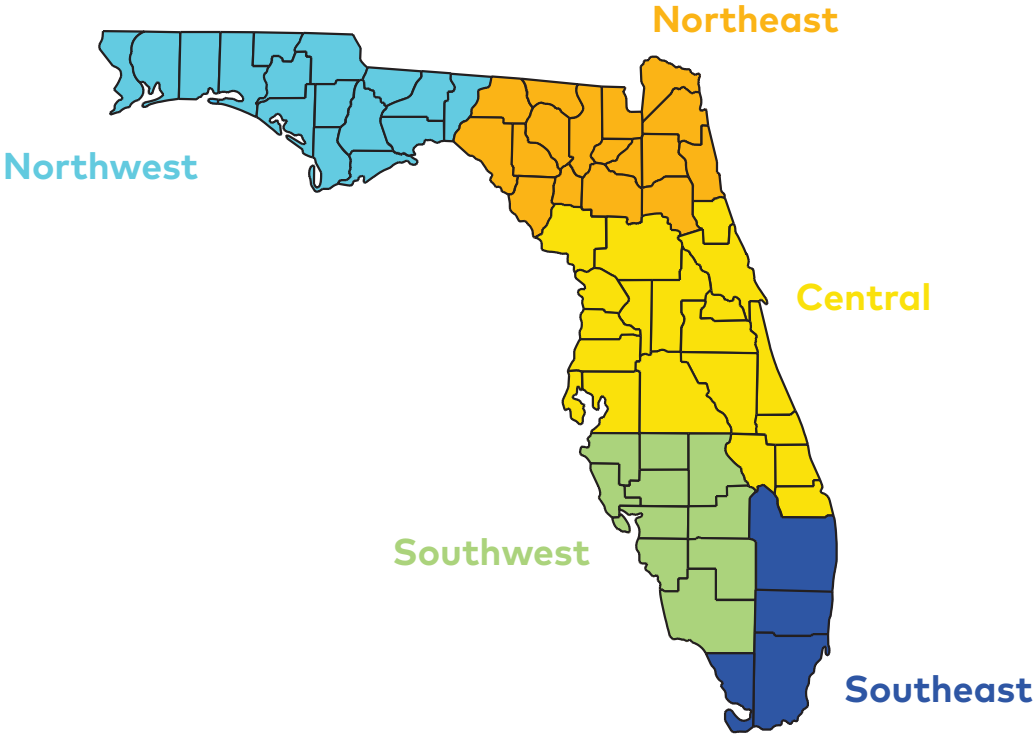**83%** of cities with populations **>60,000** provide fire services directly

How Municipal Fire Departments Are Staffed
(5-year average percentage)

9%	4%	9%	78%

39% of fire departments in **Northwest Florida** are all volunteers.*

See regional map, p.18.

- All Volunteers
- Volunteer Staff/Paid Chief
- Combination Volunteer and Employee
- No Volunteers

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MAP OF REGIONS USED FOR CITYSTATS ANALYSIS

Northeast

Northwest

Central

Southwest

Southeast

2019 CITYSTATS RESPONDENTS

Alachua	Branford	Cutler Bay	Glen Ridge
Anna Maria	Briny Breezes	Dade City	Glen Saint Mary
Apalachicola	Bristol	Dania Beach	Golden Beach
Apopka	Bronson	Davenport	Golf
Arcadia	Brooker	Daytona Beach	Graceville
Archer	Brooksville	Daytona Beach Shores	Grand Ridge
Astatula	Bunnell	Deerfield Beach	Grant-Valkaria
Atlantic Beach	Bushnell	DeFuniak Springs	Green Cove Springs
Atlantis	Callahan	DeLand	Greenacres
Auburndale	Callaway	Delray Beach	Greensboro
Aventura	Campbellton	Deltona	Greenwood
Bartow	Cape Canaveral	Destin	Gretna
Bascom	Cape Coral	Doral	Groveland
Bay Harbor Islands	Caryville	Dunedin	Gulf Breeze
Bay Lake	Casselberry	Dunnellon	Gulf Stream
Bell	Center Hill	Eagle Lake	Haines City
Belle Glade	Chattahoochee	Edgewater	Hallandale Beach
Belle Isle	Chipley	Estero	Hampton
Belleair	Cinco Bayou	Esto	Haverhill
Belleair Beach	Clearwater	Eustis	Hawthorne
Belleair Bluffs	Clermont	Everglades City	Hialeah Gardens
Belleair Shore	Clewiston	Fellsmere	High Springs
Belleview	Cloud Lake	Fernandina Beach	Highland Beach
Beverly Beach	Cocoa	Flagler Beach	Hillcrest Heights
Biscayne Park	Cocoa Beach	Fort Lauderdale	Hilliard
Blountstown	Coconut Creek	Fort Meade	Hillsboro Beach
Boca Raton	Cooper City	Fort Myers Beach	Holly Hill
Bonifay	Coral Gables	Fort Pierce	Hollywood
Bonita Springs	Coral Springs	Fort Walton Beach	Holmes Beach
Bowling Green	Cottondale	Fort White	Homestead
Boynton Beach	Crestview	Freeport	Horseshoe Beach
Bradenton	Cross City	Frostproof	Hypoluxo
Bradenton Beach	Crystal River	Fruitland Park	Indialantic

2019 CITYSTATS RESPONDENTS

Indian Creek
Indian Harbour Beach
Indian River Shores
Indian Rocks Beach
Indian Shores
Indiantown
Interlachen
Inverness
Islamorada, Village of Islands
Jacksonville Beach
Jacob City
Jasper
Jay
Juno Beach
Jupiter
Jupiter Inlet Colony
Jupiter Island
Kenneth City
Key Biscayne
Key Colony Beach
Key West
Keystone Heights
Kissimmee
La Crosse
LaBelle
Lady Lake
Lake Alfred
Lake Butler
Lake City
Lake Hamilton
Lake Helen
Lake Mary

Lake Park
Lake Placid
Lake Wales
Lake Worth Beach
Lakeland
Lantana
Largo
Lauderdale Lakes
Lauderdale-By-The-Sea
Lauderhill
Laurel Hill
Layton
Lee
Leesburg
Lighthouse Point
Live Oak
Longboat Key
Longwood
Loxahatchee Groves
Lynn Haven
Macclenny
Madison
Maitland
Malabar
Malone
Manalapan
Mangonia Park
Marathon
Marco Island
Margate
Marianna
Marineland
Mary Esther

Mascotte
McIntosh
Melbourne
Melbourne Beach
Melbourne Village
Mexico Beach
Miami
Miami Lakes
Miami Shores
Miami Springs
Micanopy
Milton
Miramar
Monticello
Montverde
Mount Dora
Mulberry
Naples
Neptune Beach
New Port Richey
New Smyrna Beach
Newberry
Niceville
Noma
North Bay Village
North Lauderdale
North Miami Beach
North Palm Beach
North Port
Oak Hill
Oakland
Oakland Park
Ocala

Ocean Breeze
Ocean Ridge
Ocoee
Okeechobee
Oldsmar
Opa-locka
Orange City
Orange Park
Orchid
Orlando
Ormond Beach
Otter Creek
Oviedo
Pahokee
Palatka
Palm Bay
Palm Beach
Palm Beach Gardens
Palm Beach Shores
Palm Coast
Palm Springs
Palmetto
Panama City
Panama City Beach
Parker
Parkland
Pembroke Park
Pembroke Pines
Penney Farms
Pensacola
Perry
Pierson
Pinecrest

2019 CITYSTATS RESPONDENTS

Pinellas Park
Plant City
Plantation
Polk City
Pomona Park
Pompano Beach
Ponce De Leon
Ponce Inlet
Port Orange
Port Richey
Port St. Joe
Port St. Lucie
Punta Gorda
Reddick
Redington Shores
Riviera Beach
Rockledge
Royal Palm Beach
Safety Harbor
Sanford
Sanibel
Sarasota
Satellite Beach
Sebastian
Sebring
Seminole
Sewall's Point
Shalimar
Sneads
Sopchoppy
South Bay
South Daytona
South Palm Beach

South Pasadena
Southwest Ranches
St. Augustine
St. Augustine Beach
St. Cloud
St. Leo
St. Lucie Village
St. Marks
St. Pete Beach
St. Petersburg
Starke
Stuart
Sunrise
Surfside
Tallahassee
Tamarac
Tampa
Tarpon Springs
Tavares
Temple Terrace
Tequesta
Titusville
Treasure Island
Trenton
Umatilla
Valparaiso
Venice
Vernon
Virginia Gardens
Wauchula
Wausau
Webster
Weeki Wachee

Wellington
West Melbourne
Weston
Wewahitchka
White Springs
Wildwood
Williston
Wilton Manors
Windermere
Winter Garden
Winter Haven
Winter Park
Winter Springs
Worthington Springs
Yankeetown
Zephyrhills
Zolfo Springs

CENTER FOR MUNICIPAL RESEARCH

About the Florida League of Cities Center for Municipal Research
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 policymakers and administrators. The Center conducts multiple surveys annually, the cornerstone being the CityStats survey.

CityStats Survey
Unless otherwise noted, all information included in the State of the Cities is from Florida League of Cities' CityStats surveys, 2011-2019, and 2015-2019 MiniSurvey series.

The FLC Center for Municipal Research has conducted the CityStats survey since 2011. The survey consists of approximately 40 questions about municipal operations, budgets, policies and services. In 2019, surveys were collected from 346 of Florida's 412 municipalities, equaling 84 percent of all cities and 80 percent of the total statewide municipal population.

The Center's MiniSurvey series is intended to gather pertinent, targeted data on a narrow topic through a brief 5-10 question format. MiniSurveys are sent electronically to all 412 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 flcities.com under the Research & Resources tab.

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flcities.com

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