County Budget Sets the Stage For Progress and Resilience

By Francine Lisby

October 1 marks the beginning of a new budget year for Charlotte County, a pivotal moment that sets the course for the year ahead. Each fiscal year is more than a financial reset, it is an opportunity to realign resources, advance community priorities, and continue fulfilling our mission of delivering exceptional service to residents.

Charlotte County Government develops its budget through a two-year cycle that balances stability with flexibility. The first year's budget is formally adopted, while the second year is approved as a planned budget that can be adjusted as conditions change. This approach keeps resources aligned with community priorities while preparing the organization for economic uncertainties.

The FY26 and FY27 budgets reflect months of work by County leadership and staff, guided by the strategic plan. As in every cycle, financial stewardship remains central. For local governments, a budget is more than a list of expenditures, it is a framework that sets priorities, establishes policy direction, and serves as both a long-range financial plan and an operational guide.

Work on the FY26 and FY27 budgets began in late 2024 with a review of financial conditions and capital needs. Early workshops gave commissioners and staff the opportunity to analyze revenue and expenditure forecasts, property values, and the fiscal impacts of inflation, storm recovery, and population growth. In February 2025, the Board held a Capital Needs Assessment Workshop and a Strategic Plan Workshop to identify infrastructure priorities and align funding with long-term goals.

In the spring, departments presented budgets organized by strategic focus areas — Public Services, Economic & Community Development, Efficient & Effective Government, and Infrastructure — showing how proposed investments support the County's mission and bold goals. Key initiatives included advancing affordable housing, planning for future economic development, supporting water quality projects, ensuring adequate industrial land and open space, developing a transportation plan, implementing a long-range operational and staffing strategy, continuing resiliency and recovery efforts, and expanding resident communication and outreach. These initiatives are driven by the challenges and opportunities that come with the exponential growth our community is experiencing.

Recent years have tested County resources and staff. Multiple major hurricanes caused widespread damage to County facilities and assets, far exceeding the reimbursements received so far. While FEMA support is anticipated, the process moves slowly, leaving a significant gap between damages and funding. Thanks to conservative financial planning and healthy reserves, the County has been able to move forward with repairs and recovery without compromising services — a clear demonstration of organizational resiliency.

Public engagement has been central throughout the process. Resident feedback, collected through surveys and workshops, informed funding priorities. Staff also reviewed reserve levels, financial policies, and long-term forecasts to ensure fiscal stability. Continued voter support for the 1% local option sales tax has been critical, funding major capital projects and freeing other revenues for operations. This flexibility has helped maintain service levels despite inflationary pressures on materials, utilities, and contracted services.

In July 2025, staff presented the tentative FY26 budget and FY27 plan to the Board, balancing daily operations with significant capital investment. Workshops in August refined details, including Municipal Service Benefit Units (MSBUs) and other specialized funding sources. Public hearings in September provided residents with another opportunity for direct input before final adoption of the FY26 budget and approval of the FY27 planned budget. As part of this adoption, the Board reaffirmed its commitment to reducing the tax burden by lowering millage rates.

Looking forward, the County remains mindful of uncertainties that could affect its fiscal outlook. These uncertainties include land acquisition costs, housing demands, hurricane recovery expenses, service level expectations, and changes in state or federal policies such as FEMA reimbursements or property tax reform.

Charlotte County's FY26 and FY27 budgets embody a forward-looking approach that balances growth, resiliency, and responsible stewardship of community assets. With strong reserves and a commitment to data-driven decision making, the County is positioned well to deliver high-quality services, advance the Board's Strategic Plan, and remain flexible in the face of future challenges.

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