

Charlotte Soil and Water Conservation District Performance Review

Prepared for:
The Florida Legislature's
Office of Program Policy Analysis
and Government Accountability
(OPPAGA)

August 19, 2024



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Key Takeaways

- Charlotte Soil and Water Conservation District’s Board of Supervisors met most months during the review period (October 1, 2020, through April 30, 2024), and has experienced moderate Supervisor turnover.
- Charlotte Soil and Water Conservation District offers limited programming. The District’s primary activity is participating in or attending outreach and community events.
- Charlotte Soil and Water Conservation District has no vehicles, facilities, major equipment, or regular revenues or expenditures.
- Charlotte Soil and Water Conservation District’s operations are not currently guided by a strategic plan, goal setting, or performance measures.

I. Background

Pursuant to s. [189.0695\(3\)\(b\)](#), *Florida Statutes*, Mauldin & Jenkins (“M&J”) was engaged by the Florida Legislature’s Office of Program Policy Analysis and Government Accountability to conduct performance reviews of the State’s 49 independent soil and water conservation districts. This report details the results of M&J’s performance review of Charlotte Soil and Water Conservation District (“Charlotte SWCD” or “District”), conducted with a review period of October 1, 2020, through April 30, 2024.

I.A: District Description

Purpose

Chapter [582](#) of the *Florida Statutes* concerns soil and water conservation within the State of Florida. The chapter establishes the processes for creation, dissolution, and change of boundaries of districts; the qualifications, election, tenure, and mandatory meetings of District Supervisors; the oversight powers and duties of the Department of Agriculture and Consumer Services (“FDACS”); and the powers and purpose of the districts. The District’s statutory purpose, per [s. 582.02](#), *Florida Statutes*, is “to provide assistance, guidance, and education to landowners, land occupiers, the agricultural industry, and the general public in implementing land and water resource protection practices. The Legislature intends for soil and water conservation districts to work in conjunction with federal, state, and local agencies in all matters that implement the provisions of ch. [582](#), *Florida Statutes*.”

The District provides a definition of its purpose on its website, which reads:

“The Charlotte Soil and Water Conservation District was organized for the purpose of developing a program of management and conservation of the soil, water and related natural resources of the County, and to promote and encourage the voluntary implementation of conservation practices on privately owned land. The Charlotte Soil and Water Conservation District strives to accomplish one of the fundamental roles for the board of supervisors. Our role is to bring together, at the local level, all interested and affected parties, along with the support organizations charged with providing technical and administrative assistance, to develop and implement a plan to address resource concerns. Through a locally led consensus process, priorities are determined for conservation programs. The partners then work to implement programs that provide assistance to landowners, agricultural producers, and local residents. The District works in cooperation with the Florida Department of Agriculture and Consumer Services (“FDACS”) and the United States Department of Agriculture Natural Resources Conservation Service (“USDA/NRCS”).”

The District identifies a mission statement on its website, which reads:

“Providing leadership in helping people achieve success through conserving, improving, and sustaining natural resources and the environment of Charlotte County, Florida. The Charlotte Soil and Water Conservation District will be recognized throughout the County as a leading resource partner with regards to all soil and water conservation projects, concerns, and decisions made within our region.”

Service Area

When the District was established in 1944, the service area included Charlotte County. The current borders and territory are identical to those of Charlotte County. The District's service area includes unincorporated Charlotte County and the County's one city and 10 census-designated places.¹ It incorporates all of Babcock Ranch Preserve, Fred C. Babcock-Cecil M. Webb Wildlife Management, Cape Haze Aquatic Preserve, Ryals Citrus and Cattle Agricultural and Conservation, and Tippecanoe Environmental Park. It also incorporates parts of Gasparilla Sound – Charlotte Harbor Aquatic Preserve, Charlotte Harbor Preserve State Park, and Yucca Pens Unit Conservation.

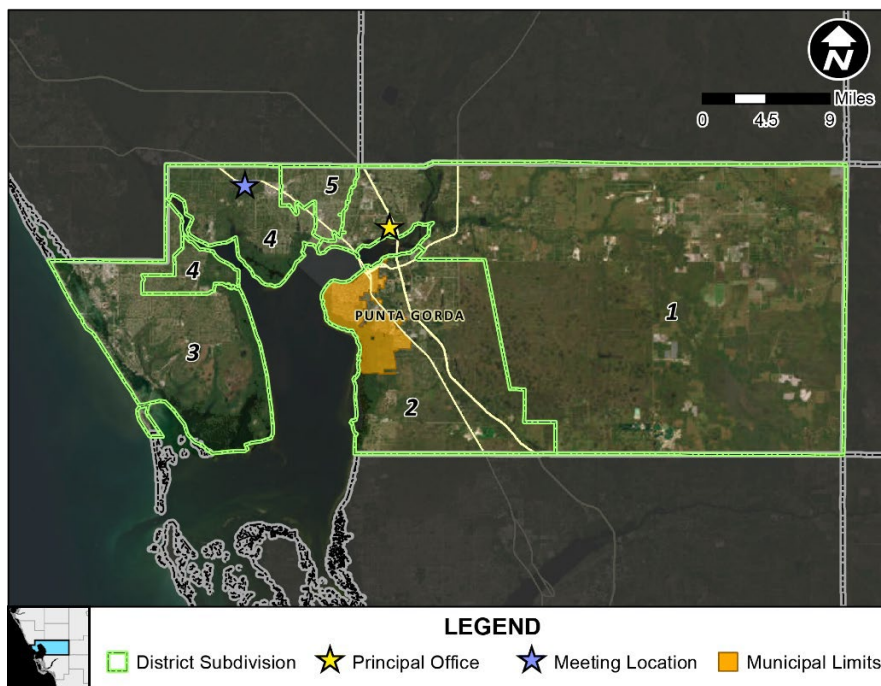
The District is bounded on the north by DeSoto County, northwest by Sarasota County, northeast by Highlands County, east by Glades County, south by Lee County, southeast by Hendry County, and west by the Gulf of Mexico. The total area within the District is 858 square miles, with 680 square miles of land and 178 square miles of water.

The District's primary office is located at 25550 Harbor View Road, Unit 3, Port Charlotte, FL 33980, in the East Point Environmental Campus. The District meets at 1120 Centennial Blvd, Port Charlotte, FL 33953, which is the UF/IFAS Extension building.

Figure 1 is a map of the District's service area, based on the map incorporated by reference in [Rule 5M-20.002\(3\)\(a\)5, Florida Administrative Code](#) showing the District's boundaries, electoral subdivisions, major municipalities within the service area, the District's principal office, and a secondary meeting location used by Supervisors for monthly workshop meetings, which are open to the public but do not usually include the conduct of regular business.

¹ Cities: Punta Gorda. Towns: None. Census-designated places: Charlotte Harbor, Charlotte Park, Cleveland, Englewood (part, shared with Sarasota), Grove City, Harbour Heights, Manasota Key, Port Charlotte, Rotonda, and Solana.

Figure 1: Map of Charlotte Soil and Water Conservation District



(Source: Charlotte County GIS, Florida Commerce Special District Profile)

Population

Based on the Florida Office of Economic and Demographic Research population estimates, the District's service area population was 204,126 as of April 1, 2023.

District Characteristics

Charlotte Soil and Water Conservation District is located on the southwest coast of Florida. Charlotte County describes itself as an eco-tourist destination with sailing, canoeing, kayaking, and biking featured. Charlotte Harbor is the 2nd largest estuary in the state, encompassing 270 square miles. There are 830 miles of shoreline, with 84 percent preserved. Canoe/Kayak Blueway trails total 193 miles. There are 170,227 acres of land under conservation.² The economy of the Charlotte service area is primarily a retirement community with no large corporate or manufacturing entities. Retail, service, and healthcare are the main businesses.³ The area is also a golf destination for tourists and residents.

The acreage of agriculture in Charlotte County has decreased from 217,222 in 2012 to 99,711 in 2022. Revenue generated from agricultural products was \$67 million in 2022, with 53% coming from vegetables and melons. Fruits, tree nuts, and berries generated 13 percent of 2022 revenue, and livestock and poultry recorded 12% of 2022 revenue.⁴ Charlotte County ranks 9th in the state for citrus production.⁵

² (Charlotte County Budget and Administrative Services n.d.) <https://www.charlottecountyfl.gov/departments/budget-administrative-services/transparency/scorecard/quality-of-life.shtml>

³ (Charlotte County Board of County Commissioners 2023) <https://www.charlottecountyfl.gov/departments/public-safety/emergency-management/flood/watershed-master-plan.shtml>

⁴ (USDA n.d.) https://www.nass.usda.gov/Publications/AgCensus/2022/Online_Resources/County_Profiles/Florida/cp12015.pdf

⁵ (FDACS 2022) <https://ccmedia.fdacs.gov/content/download/114369/file/Florida-Ag-by-the-Numbers-2022-Final.pdf>

The Charlotte County Board of County Commissioners contracted with Florida Atlantic University in 2023 to create a Watershed Master plan to be adopted in late 2024. The area does not fall under an existing Basin Management Action Plan with the Florida Department of Environmental Protection.⁶

The District topography has a low elevation around the Charlotte Harbor, with some hills in eastern areas. Urban areas include Punta Gorda, Port Charlotte, and Englewood. The area is at risk of storms, flooding, and droughts. Charlotte was hit by Hurricane Ian in September 2022 and sustained significant damage. The cleanup costs from Hurricane Ian exceeded \$100 million in Charlotte County.

I.B: Creation and Governance

Charlotte SWCD was chartered on March 20, 1944, as the Charlotte Soil Conservation District, following a successful referendum of local landowners and a subsequent petition to the Florida State Soil Conservation Board. The District was created under the authority of the State Soil Conservation Districts Act (herein referred to as “ch. [582](#), *Florida Statutes*”).⁷ The Florida Legislature amended ch. [582](#), *Florida Statutes*, in 1965, to expand the scope of all soil conservation districts to include water conservation, which renamed the District to the Charlotte Soil and Water Conservation District.⁸

The District is governed by a Board of Supervisors. Supervisors are unpaid, nonpartisan public officials elected by the voters within the service district. M&J analyzed the Supervisors’ elections, appointments, and qualifications within the in-scope period pursuant to applicable *Florida Statutes*.⁹

As of this report, the District has five Supervisors. M&J is not able to confirm the qualifications of any Supervisor who has served within the review period (October 1, 2020, through April 30, 2024). During the review period, there have been at least two vacancies on the Board, as illustrated in Figure 2. Meeting minutes prior to April 2022 were not provided by the District and are not available on the District’s website.

The District had vacancies from November 2022 to March 2023 and from November 2022 to August 2023. Additional analysis of the District’s electoral patterns and record retention processes are detailed in Section II.D (Organization and Governance) of this report.

⁶ (Charlotte County Public Safety Department 2023) <https://www.charlottecountyfl.gov/departments/public-safety/emergency-management/flood/watershed-master-plan.shtml>

⁷ [s. 582](#), *Florida Statutes*

⁸ ch. [65-334](#), *Laws of Florida*

⁹ Including [s. 582.15](#), *Florida Statutes*, [s. 582.18](#), *Florida Statutes*, [s. 582.19](#), *Florida Statutes*, [Rule 5M-20.002](#), *Florida Administrative Code*, and ch. [2022-191](#), *Laws of Florida*

Figure 2: Supervisor Terms

Seat	FY21				FY22				FY23				FY24		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
1	Not Provided				Mike Elfenbein				Sue Hill				ME		
2	Not Provided				Patrick Sutherland				David Schutz				PS		
3	Not Provided				H Lisa Baird				Patrick Maley				Lisa Baird		
4	Not Provided				David Schutz				Mike Elfenbein				DS		
5	Not Provided				Sue Hill				Lisa Baird				Sue Hill		

Legend for FY22

Forest Hecker (H)

Legend for FY24

Mike Elfenbein (ME)

Patrick Sutherland (PS)

David Schutz (DS)

(Source: District Meeting Minutes)

During the review period, the District met 35 times¹⁰ and met the mandatory meeting requirement of s. 582.195, Florida Statutes to meet at least once per calendar year with all five Supervisors for both 2022 (May, September, and October) and 2023 (August, September, October, and November). The District additionally met three times without a quorum. M&J has determined that the District did properly notice each meeting and workshop. Additional assessment of the District’s pattern of providing meeting notices and adherence to relevant statutes is detailed in Section II.D (Organization and Governance) of this report.

Neither Charlotte County nor the in-district municipalities have adopted any local regulations for the District.

I.C: Programs and Activities

The following is a list of programs and activities conducted by the District within the review period (October 1, 2020, through April 30, 2024), along with a brief description of each program or activity. The District’s programs and activities will be described in detail in Section II.A (Service Delivery) of this report.

- The District’s Supervisors attend local events to perform outreach – including farmer’s markets, gardening fairs, and youth programs.

I.D: Intergovernmental Interactions

The following is a summary of federal agencies, State agencies, and/or public entities with which the District interacts, including the means, methods, frequency, and purpose of coordination and communication.

¹⁰ Meetings occurred in January, February, March, April, May, June, August, September, October, and November 2021 (reported by District, not confirmed by provided minutes); January, February, March, April, May, June, August, September, October, and November 2022; January, February, March, April, May, June, July, August, September, October, and November 2023; and January, February, March, and April 2024.

Natural Resources Conservation Service

The District has a memorandum of agreement with the United States Department of Agriculture’s Natural Resource Conservation Service (“NRCS”), which outlines a statement of mutual benefit and cooperation on conservation objectives, including promoting NRCS programs. An NRCS District Conservationist, through the memorandum of agreement, occasionally attends Board of Supervisor meetings and provides reports related to NRCS program progress and related news on NRCS activities.

University of Florida/Institute of Food and Agriculture Sciences Charlotte Extension

The District uses the University of Florida/Institute of Food and Agriculture Sciences (“UF/IFAS”) Charlotte Extension building for its Board meetings. The meeting space is used through a verbal agreement with UF/IFAS, and the District does not pay to use the space.

I.E: Resources for Fiscal Year 2022 – 2023

The following figures quantify and describe the District’s resources for Fiscal Year 2022 – 2023 (October 1, 2022, through September 30, 2023, herein referred to as “FY23”). Figure 3 shows the total amount of revenues, expenditures, and long-term debt maintained by the District in FY23. Figure 4 shows the number of paid full-time and part-time staff, contracted staff, and volunteers by employer. Figure 5 shows the number and type of vehicles, number and type of major equipment, and number and type of facilities owned, leased, and used by the District. Descriptions of the District’s resources and the change in resources over the review period (October 1, 2020, through April 30, 2024) will be included in Section II.B (Resource Management) of this report.

Figure 3: FY23 Finances

	Revenues	Expenditures	Long-term Debt
Total for Year	Not Provided	\$393	\$0

(Source: District Meeting Minutes, Interview with District Supervisors)

Figure 4: FY23 Program Staffing

	Full-time Staff	Part-time Staff	Contracted Staff	Volunteers
District-employed Staff	0	0	0	0
Board of County Commissioners-employed staff	0	0	0	0
Total	0	0	0	0

(Source: District Meeting Minutes, Interview with District Supervisors)

Figure 5: FY23 Equipment and Facilities

	Number	Ownership Status	Type(s)
Vehicles	0	N/A	N/A
Major Equipment	0	N/A	N/A
Facilities	0	N/A	N/A

(Source: District Meeting Minutes, Interview with District Supervisors)

II. Findings

The Findings sections summarize the analyses performed and the associated conclusions derived from M&J's analysis. The analysis and findings are divided into the following four subject categories:

- Service Delivery
- Resource Management
- Performance Management
- Organization and Governance

II.A: Service Delivery

Overview of Services

District Supervisors attend local events focused on providing outreach and awareness services to local producers, such as the farmer's market, gardening fairs, and youth programs. While requested by M&J, no further detail was provided by the District. M&J also reviewed the District meeting minutes, which resulted in no additional events or activities hosted by or participation by District Supervisors being described in the minutes. The District reported no revenues or expenditures within the review period (October 1, 2020, through April, 30, 2024). District contributions to the events it participates in are solely time donations on the part of District Supervisors and not monetary support.

Analysis of Service Delivery

M&J evaluated the District's participation in local events, assessed whether the participation aligns with the District's statutory purpose and authority, and referenced the statute most relevant to the event.

The District's participation in local educational events is within the scope of the District's statutory purpose and authority. Activities meant to provide or assist in providing training and education align with the District's purpose of conducting conservation education programs.

The District is currently not able to effectively provide soil and water conservation programs to residents within the District's service area due to a lack of funding. Until the District can budget for a recurring source of revenue to fund programs and activities, no findings regarding cost-reducing measures can be made.

Recommendation: The District should identify new sources of revenue to fund District outreach and conservation programming. The District could consider identifying grant opportunities from the U.S. Department of Agriculture, the Florida Department of Agriculture and Consumer Services, the National Association of Conservation Districts, or another public or private conservation-related entity. The District could also consider proposing an agreement with the Charlotte County Board of County Commissioners to allow for the District to present an annual budget request, which would be subject to approval by the Board of County Commissioners.

Comparison to Similar Services/Potential Consolidations

Charlotte SWCD does not solely manage any programs or services. All programs and services that the District participates in are in cooperation with other public entities within the District's service area. The following soil and water conservation programs are provided by other public entities within the District's service area:

- The University of Florida/Institute of Food and Agriculture Sciences ("UF/IFAS") Charlotte Extension partners with the local 4-H chapter to provide agriculture and conservation educational programming for youth within the District's service area, and serves as a resource between agriculture scientists and the local community.
- The Natural Resources Conservation Service ("NRCS") provides technical advice and data collection assistance to landowners implementing conservation practices.
- The Charlotte County Utilities Department performs water conservation outreach and services, including a water restrictions hotline and publishing water conservation guidelines on its website.

Recommendation: The District should consider identifying opportunities within its service area that align with its statutory purpose and authority and address the unique soil and water conservation needs identified through a strategic planning process. The District could consider identifying opportunities to develop community farming programs and provide additional youth conservation education programs.

II.B: Resource Management

Program Staffing

The District does not independently employ or pay the salary of any full-time, part-time, or contract employees. The District has not used volunteers to conduct its operations or programs and activities. As the District has no consistent revenues or expenditures, the District's form of contribution to the collaborative events it participates in consists of a donation of Board Supervisors' respective time and does not include financial support.

Equipment and Facilities

Charlotte SWCD does not own or rent any equipment or facilities. The District holds its in-person Board meetings in the University of Florida's Institute of Food and Agricultural Sciences Extension office in Charlotte County ("UF/IFAS Extension") at no cost to the District through a verbal agreement.

Current and Historic Revenues and Expenditures

Charlotte SWCD does not develop an annual budget or track annual revenue and expenditure data. In both its FY21 and FY22 Annual Financial Reports, the District reported \$0 in revenues, expenditures, and cash balance.

The District provided a single bank statement from November 2023, showing a deposit of \$393 from the Association of Florida Conservation Districts ("AFCD"), reimbursing Supervisors for expenses incurred to attend an AFCD meeting in September 2023. The District did not receive the \$393 reimbursement until FY24 (November 2023) but the initial \$393 expenditure was incurred in FY23 (September 2023). This deposit increased the cash balance from \$1,061 to \$1,454. Additional information on this bank account has been requested by M&J, but not provided.

Recommendation: The District should consider developing and adopting a balanced budget for each fiscal year. The budget should include expected revenues, including the source of each revenue or category of each revenue (e.g., administrative fees, donations, government grants, fees for equipment rentals, etc.). The budget should also include expected expenditures, including both regular expenses and categorization of other expenditures (e.g., sponsorship of programs and activities, property improvements, reimbursements for conference or regional meeting attendance, etc.). The budgeted expenditures should not exceed budgeted appropriations or total expected revenues, per the requirements of s. [189.016\(3\)](#), *Florida Statutes*.¹¹

Recommendation: The District should consider identifying new revenue sources and developing an annual budget that meets the requirements of s. [189.016\(3\)](#), *Florida Statutes* in order to determine the level of programs and activities the District can fund with future revenue sources.

Trends and Sustainability

The District currently has no recurring funding and provides assistance through volunteering Supervisor time at local events. From the information provided, the District had no revenue or expenditure activity for FY21 or FY22. From the minimal information provided to M&J for FY23, revenues outpaced expenditures, and the District's cash balance increased to \$1,454. The District does not have any immediately apparent sustainability issue related to its financials. Without more details about the District's revenues and expenditures for FY23, M&J cannot accurately assess the District's fiscal trends later in the review period.

II.C: Performance Management

Strategic and Other Future Plans

Charlotte SWCD does not have an adopted strategic plan. The District provided a list of goals to M&J in response to the review, but the District has not taken the steps necessary to develop them into a strategic plan. To develop a strategic plan, the District would need to define and provide goals and actionable steps to achieve those goals.

Recommendation: The District should consider developing and then adopting a strategic plan that builds on the District's purpose and vision. The strategic plan should not simply describe the District's current programs or contracts, but rather reflect the District's long-term and short-term priorities based on the needs of the community and in response to changing land use patterns within the District's service area. Goals and Objectives

The District provided a short list of goals to M&J in response to the review, stating its strategic goals in 2023 and 2024 are to attend more local events, increase outreach to local producers, and expand its network of local agriculture contacts. These goals were not formally adopted by the Board. In developing a strategic plan, the District should consider actionable and measurable goals focused on community outreach and expanding District services.

Recommendation: As part of the strategic planning process, the District should consider revising its existing goals and objectives to better align with its statutory purpose, as defined in s. [582.02\(4\)](#), *Florida Statutes* and the Board's vision and priorities as established in the District's strategic plan. The goals and objectives should contemplate measurable progress, capturing the results of the District's efforts and ensuring a consistent direction forward for the District's future prioritization of programs and activities. Board of Supervisors should then adopt the goals and objectives as part of the strategic plan.

Performance Measures and Standards

Charlotte SWCD does not have any performance measures or standards, written or unwritten, related to program offerings that the District provides or activities for which the District participates. The District is not party to any contracts that contain a requirement for tracking performance metrics.

Recommendation: The District should consider identifying performance measures and standards as part of the development of a strategic plan, such as the number of interactions at outreach events. The District should then track the identified performance measures against established standards and use the collected data to monitor the District's performance, evaluate progress toward the goals and objectives the District adopts, and support future improvements to the District's service delivery methods.

Analysis of Goals, Objectives, and Performance Measures and Standards

Charlotte SWCD does not have a written plan or performance measures and standards. While District Supervisors have a list of goals and objectives including improving outreach to producers and attending more local events, the goals and objectives are too broad for the District to communicate any meaningful progress.

As stated earlier in this section of the report, M&J recommends that the District consider developing and adopting a strategic plan, and subsequently performance measures, performance standards, and revised goals and objectives, to provide the District direction and ensure that current and future programs and activities align with its intended statutory purpose, as defined in [s. 582.02\(4\), Florida Statutes](#).

Annual Financial Reports and Audits

Charlotte SWCD is required per [s. 218.32, Florida Statutes](#) to submit an annual financial report to the Florida Department of Financial Services within nine months of the end of the District's fiscal year (September 30).

Pursuant to [s. 218.32, Florida Statutes](#), the District is required to submit an Annual Financial Report every fiscal year by the compliance deadline nine months after the end of the fiscal year (June 30 of the following year). The District filed its FY21 Annual Financial Report within the compliance deadline, but its FY22 Annual Financial Report was filed three months after the compliance deadline. In addition, the District did not submit its FY23 Annual Financial Report by the compliance deadline of June 30, 2024.

Charlotte SWCD does not meet the criteria in [s. 218.39, Florida Statutes](#), to require the District to submit an annual financial audit report, as the District's annual revenues and combined expenditures and expenses are below the \$50,000 threshold, the lowest requirement threshold for special districts.

Recommendation: The District should consider refining its timeline for preparing and submitting the Annual Financial Report to the Florida Department of Financial Services to ensure that the District is meeting the requirements of [s. 218.32\(1\)\(a\), Florida Statutes](#).

Performance Reviews and District Performance Feedback

During the review period, Charlotte SWCD did not receive any performance reviews for District operations. The District has not engaged in any documented collection of feedback from members of the public or other stakeholders regarding its programs and activities.

Recommendation: The District should consider implementing a system for collecting feedback from partners, agricultural producers that the District serves, and other conservation stakeholders. As the District develops and implements programming, the District should consider creating a process to systematically review feedback. The District should consider using the findings from the review of feedback to refine the District's future service delivery methods.

II.D: Organization and Governance

Election and Appointment of Supervisors

Supervisors are required by [s. 582.19\(1\)\(b\), Florida Statutes](#), to sign an affirmation that they meet certain residency and agricultural experience requirements. These signed affirmations are required of both elected and appointed Supervisors. Beginning with the November 2022 Supervisor elections, Chapter [2022-191, Laws of Florida](#), amended [s. 582.19\(1\), Florida Statutes](#) required that candidates for election to a Supervisor seat had to live in the district and have agricultural experience, as defined by the Florida Legislature. Candidates in the November 2022 election were required by [s. 582.19\(1\)\(b\), Florida Statutes](#) to sign an affirmation that they met the residency and qualification requirements. Since the start of the January 2023 term, two Supervisors have been appointed.

In response to the performance review, M&J requested from the District but has not received a written list of the qualifications that meet the agricultural experience requirements of [s. 582.19\(1\), Florida Statutes](#) for the Supervisors who held a seat at any point since January 2023. In addition, M&J requested but has not received requested qualification documentation from the Charlotte County Supervisor of Elections. Therefore, M&J is unable to confirm if any of the Supervisors signed an affirmation of qualifications. If the District failed to require Supervisors to complete documentation that affirmed their compliance with the residency and qualification requirements of [s. 582.19\(1\), Florida Statutes](#), the District may have unqualified and/or ineligible Supervisors occupying seats.

Two of the five Supervisor seats are up for election in November 2024.

Recommendation: The District should consider collaborating with the Charlotte Supervisor of Elections to ensure that appointed Supervisors complete the affirmations necessary to document each Supervisor's compliance with the requirements of [s. 582.19\(1\), Florida Statutes](#).

Notices of Public Meetings

Section [189.015](#), *Florida Statutes*, requires that all Board meeting minutes be publicly noticed in accordance with the procedures listed in ch. [50](#), *Florida Statutes*. This chapter has been amended twice during the review period, and M&J reviewed for compliance with the governing statute in effect at the time of each meeting date and applicable notice period.

During the review period (October 1, 2020, through April 30, 2024), the District posted notice of its meetings on its public Facebook page and public website. M&J searched [floridapublicnotices.com](#), the State of Florida's designated repository of public notice publications, and did not identify notices posted for any Board of Supervisors ("Board") meetings held during the review period. M&J also searched the Florida Administrative Register and identified inconsistent notices posted for Board meetings held during the review period. Notices were posted for all meetings held in 2021 and 2024, while only one meeting notice was posted in 2022 and none were posted in 2023.

M&J's review concluded that the District notices did not meet the requirements of the version of ch. [50](#), *Florida Statutes* in effect at the time of each meeting date and applicable notice period. Prior to January 2023, ch. [50](#), *Florida Statutes* required any board located in a county with a county-wide newspaper to publish meeting notices in that newspaper. The District did not meet this requirement for meetings held in 2021 and 2022. Since January 2023, ch. [50](#), *Florida Statutes*, has permitted publication of meeting notices on a publicly accessible website (such as the Florida Administrative Register) as long as the board publishes a notice once a year in the local newspaper identifying the location of meeting notices and stating that any resident who wishes to receive notices by mail or e-mail may contact the board with that request. The District did not meet this requirement for meetings held in 2023 and 2024.

Failure to provide appropriate notice may deny the public an opportunity to attend meetings and participate in District business. Violation of ch. [50](#), *Florida Statutes*, may subject District Supervisors and staff to penalties, including fees, fines, and misdemeanor charges, as outlined in [s. 286.011](#), *Florida Statutes*. Additionally, business conducted at such meetings may be invalidated.

Recommendation: The District should consider improving its meeting notice procedures to ensure compliance with [s. 189.015](#) and ch. [50](#), *Florida Statutes*, that governed notice requirements at the time of each meeting date's applicable notice period. The District should retain records that document its compliance with the applicable statutes.

Retention of Records and Public Access to Documents

The District maintains a record of meeting agendas and minutes from April 2022 through the most recent meetings, and the agendas and minutes were available on the District's public website. The District was able to provide some of the existing records and documentation requested by M&J for this performance review but has not been able to produce meeting minutes from before April 2022 or financial information for FY23. M&J concludes that there are notable issues with the District's records retention and public access to information as required [s. 119.021](#), *Florida Statutes*.

Recommendation: The District should consider improving record retention procedures and access to public records in accordance with ch. [119](#), *Florida Statutes*, to enhance transparency and avoid loss of institutional knowledge. The District could consider duplicating records to be stored in separate locations to mitigate loss of records due to technology failures, accidental disposition of records, or natural disasters and other acts of God. The District could further consider designing or acquiring an electronic recordkeeping system, either independently or through partnership with a local government, another soil and water conservation district, or other public entity.

III. Recommendations

The following table presents M&J’s recommendations based on the analyses and conclusions in the Findings sections, along with considerations for each recommendation.

Recommendation Text	Associated Considerations
<p>The District should identify new sources of revenue to fund District outreach and conservation programming. The District could consider identifying grant opportunities from the U.S. Department of Agriculture, the Florida Department of Agriculture and Consumer Services, the National Association of Conservation Districts, or another public or private conservation-related entity. The District could also consider proposing an agreement with the Charlotte County Board of County Commissioners to allow for the District to present an annual budget request, which would be subject to approval by the Board of County Commissioners.</p>	<ul style="list-style-type: none"> • Potential Benefit: Expand the District’s ability to provide services to the community. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.

Recommendation Text	Associated Considerations
<p>The District should consider developing and adopting a balanced budget for each fiscal year. The budget should include expected revenues, including the source of each revenue or category of each revenue (e.g., administrative fees, donations, government grants, fees for equipment rentals, etc.). The budget should also include expected expenditures, including both regular expenses and categorization of other expenditures (e.g., sponsorship of programs and activities, BMP Cost-Share Program-related expenses], property improvements, reimbursements for conference or regional meeting attendance, etc.). The budgeted expenditures should not exceed budgeted appropriations or total expected revenues, per the requirements of s. 189.016(3), Florida Statutes.</p>	<ul style="list-style-type: none"> • Potential Benefit: Improve the accuracy of the budget process and enable District Supervisors to make more informed planning decisions. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider identifying new revenue sources and developing an annual budget that meets the requirements of s. 189.016(3), Florida Statutes, in order to determine the level of programs and activities the District can fund with future revenue sources</p>	<ul style="list-style-type: none"> • Potential Benefit: Implementation of financial planning to ensure the financial health of the District. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider identifying opportunities within its service area that align with its statutory purpose and authority, and address the unique soil and water conservation needs identified through a strategic planning process. The District could consider identifying opportunities to develop community farming programs and provide additional youth conservation education programs.</p>	<ul style="list-style-type: none"> • Potential Benefit: Ability to develop and prioritize appropriate projects. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.

Recommendation Text	Associated Considerations
<p>The District should consider developing and then adopting a strategic plan that builds on the District’s purpose and vision. The strategic plan should not simply describe the District’s current programs or contracts, but rather reflect the District’s long-term and short-term priorities based on the needs of the community and in response to changing land use patterns within the District’s service area.</p>	<ul style="list-style-type: none"> • Potential Benefit: An actionable roadmap to address the community’s needs and a more effective method of planning and goal setting. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider revising its existing set of goals and objectives to better align with the District’s statutory purpose, as defined in s. 582.02(4), Florida Statutes, and the Board’s vision and priorities as established in the District’s strategic plan. The goals and objectives should contemplate measurable progress, capturing the results of the District’s efforts and ensuring a consistent direction forward for the District’s future prioritization of programs and activities.</p>	<ul style="list-style-type: none"> • Potential Benefit: Help focus the District resources on objectives that align with the District’s purpose and better serve the community. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider identifying performance measures and standards as part of the development of a strategic plan, such as number of interactions at outreach events. The District should then track the identified performance measures against established standards and use the collected data to monitor the District’s performance, evaluate progress toward the goals and objectives the District adopts, and support future improvements to the District’s service delivery methods.</p>	<ul style="list-style-type: none"> • Potential Benefit: A more effective assessment of the District’s performance towards goals and objectives. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.

Recommendation Text	Associated Considerations
<p>The District should consider refining its timeline for preparing and submitting the Annual Financial Report to the Florida Department of Financial Services to ensure that the District is meeting the requirements of s. 218.32(1)(a), <i>Florida Statutes</i>.</p>	<ul style="list-style-type: none"> • Potential Benefit: Avoiding penalties from Department of Financial Services for late submission. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider implementing a system for collecting feedback from partners, agricultural producers that the District serves, and other conservation stakeholders. As the District develops and implements programming, the District should consider creating a process to systematically review feedback. The District should consider to use the findings from the review of feedback to refine the District’s future service delivery methods.</p>	<ul style="list-style-type: none"> • Potential Benefit: An effective way to collect constituent feedback to better refine District operations to meet their needs. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider collaborating with the Charlotte Supervisor of Elections to ensure that appointed Supervisors complete the affirmations necessary to document each Supervisor’s compliance with the requirements of s. 582.19(1), <i>Florida Statutes</i>.</p>	<ul style="list-style-type: none"> • Potential Benefit: Better transparency and avoidance of business potentially being voided. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.
<p>The District should consider improving its meeting notice procedures to ensure compliance with s. 189.015 and ch. 50, <i>Florida Statutes</i>, that governed notice requirements at the time of each meeting date’s applicable notice period. The District should retain records that document is compliance with the applicable statutes.</p>	<ul style="list-style-type: none"> • Potential Benefit: Avoiding potential compliance issues and the resulting penalties. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.

Recommendation Text	Associated Considerations
<p>The District should consider improving record retention procedures and access to public records in accordance with ch. 119, <i>Florida Statutes</i>, to enhance transparency and avoid loss of institutional knowledge. The District could consider duplicating records to be stored in separate locations to mitigate loss of records due to technology failures, accidental disposition of records, or natural disasters and other acts of God. The District could further consider designing or acquiring an electronic recordkeeping system, either independently or through partnership with a local government, another soil and water conservation district, or other public entity.</p>	<ul style="list-style-type: none"> • Potential Benefit: Improve transparency and avoiding potential loss of important records. • Potential Adverse Consequences: M&J does not anticipate any adverse consequences as a result of implementation of the recommendation. • Costs: M&J does not anticipate any additional funding needed. • Statutory Considerations: M&J does not anticipate any legal, operational, or other issues that may arise from the proposed change.

IV. District Response

Each soil and water conservation district under review by M&J was provided the opportunity to submit a response letter for inclusion in the final published report. Charlotte SWCD did not provide M&J with a response letter for inclusion in the final report.