

Key West Vision 2020

Ten Year Progress Review

Draft J - November 2008

During 1998 and 1999 the Key West Chamber of Commerce crafted a vision for the future of Key West. This vision was drafted through a series of community forums. That process was intended to take into account what were seen as likely developments and preferences of residents and businesses to envision Key West in the year 2020 under the belief that unless we understood and agreed upon where we wanted Key West to be, we would “end up in a place we probably would not have chosen.” The original 14 goals enumerated by the Key West Chamber’s Vision 2020 at that time were conceived as building blocks for a “where to go” piece rather than a “how to do it” piece.

In 2004, the Chamber revisited this Vision with a Five Year Progress Review (“Draft I” of May, 2004). This attempted to measure progress and to determine where we need to go. This review updates trends and progress since that time to further gauge whether these goals continue to be appropriate and realistic or need to be modified. Further, this review is anticipated to be helpful in focusing objectives for the Key West Chamber of Commerce in the coming years.

By the Year 2020:

Vision 2020 Goal 1: We will have achieved a balance of workforce to housing availability and affordability achieving the goal of no more than one third of income (when compared to 45% in 1998) necessary to fund housing costs of workers in our community.

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Despite the recent downturn in the local as well as national real estate markets, the affordable housing crisis has worsened since 1998. The median single family home in Key West sold for \$238,250 in 1998 and more than tripled in price to \$800,000 at its peak in 2005. Market correction during 2006 and 2007 saw 2007 prices for the median Key West single family home fall to \$572,500, still almost 2½ times the 1998 level. Preliminary data from the same source (*the Monroe County Property Appraiser’s Office recorded transactions through August, 2008*) indicates a further drop to \$550,000 not including short sales and foreclosures. Lest we believe the market has already taken care of the problem, consider this: a moderate income family earning the median \$65,200 HUD income limit would need to amass \$110,000 to achieve a 20% down payment. Even after having done so, the percentage of income paid for housing assuming a 6¼% interest rate would be closer to 66% now compared with the 45% level in 1998.

The partnership for Community Housing in partnership with the Rodel Foundation of Key West commissioned an Affordable Housing Needs Assessment for Monroe County by the Metropolitan Center of Florida International University. The findings were released in February, 2008 and, respecting the standard 30% of income ration for housing, showed “that 57 percent of owner households in Monroe County earning less than the area median income (AMI) are cost burdened. A striking 85 percent of renter households earning less than the AMI are cost burdened.” The study noted that the second-home market plays a prominent role in the Key’s real estate market and the vacancy rate representing seasonal, recreational or occasional usage, had risen from 17% of total

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housing units in 1990 to 38% in 2006. This growth in the second home market and the accompanying rise in housing prices has been an important factor in the imbalance in the county's affordable housing supply since it has contributed to the substantial loss of the County's rental housing supply including mobile homes. Moreover, the study found that 91.3% of all jobs in Monroe County were in service-providing industries where the "vast preponderance of employment is found in low-wage earning occupations. In fact, Monroe County's 2006 median annual wage for all occupations was only \$31,155." The study concludes that the current housing affordability gap cannot be addressed without deep subsidies and/or a heightened level of new affordable housing production. Finally, the study notes that since Key's employment concentrations are in four cities and limitations on land development exist in unincorporated areas of Monroe County, affordable housing policies and strategies should focus on infill development opportunities within these existing residential and job centers.

Although a seemingly dire outlook, the affordable housing issue in Key West is not without progress. A preliminary inventory of housing units drafted by the Key West Community Housing Committee indicates over 1,600 units of affordable housing exist in the city. Of these, 903 rental units are controlled by the Key West Housing Authority. These include the Senior Citizen Plaza (199 units), Poinciana Plaza (154 units from the Navy BRAC Commission), Porter Place (128), George Allen (117), Fort Village (84), Robert Gabriel (53), Key Plaza A (28 Section 8 units), Key Plaza B (38 Section 8 units), Paterson & 3rd Streets (6) and the Roosevelt Gardens Complex completed in the spring of 2004 (96 units).

The newest addition to workforce housing are the Railway Condominiums, 38 one and two bedroom units located adjacent to the market rate Steam Plant luxury condominiums. These ranged in price from \$170,000 to \$250,000, with monthly mortgage payments spanning \$1,000 to \$1,700, not including taxes and condominium fees which include insurance.

AIDS Help, a local non-profit has applied for \$12 million in state funding from the Florida Housing Finance Corporation to build 50 new one-bedroom apartments at the Poinciana Plaza.

Although not in the City of Key West, Stock Island is considered a source of affordable housing for Key West workers. Tortugas West, an 18 unit development was built and sold at the end of Maloney Avenue followed in 2006 by the 40 unit Park Village affordable housing development. The Islander Village is an affordable housing complex of eighty-nine 2 and 3 bedroom units currently under construction. The developer is also offering a rent-to-purchase alternative to qualified persons in this complex.

Habitat for Humanity has been a mainstay of affordable community housing for many years. The local organization, Habitat for Humanity of Key West and the Lower Florida Keys was organized in 1999. Since that time, over 200 homes have been renovated and made available at affordable prices to the Lower Keys community. Additionally, Habitat for Humanity has built 19 new housing units, has 18 units under construction and an additional 44 in process of planning and permitting.

As a gauge of political will, the City of Key West has established a Community Housing Committee to coordinate workforce and affordable housing initiatives and funds a consultant to direct those efforts. Ordinances include those enacted October 2005 which established requirements of affordable work

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force housing to be in a ratio of 30% of all new market-rate multifamily residential housing or, in lieu of same, a \$200,000 per unit fee shall be contributed to the affordable housing workforce trust fund. (That fund has a \$300,000 balance). Another ordinance passed in September 2008 established a Homebuyers Assistance Program wherein the City would provide loans of up to \$20,000 interest free to help eligible persons meet down payment requirements to be approved by mortgage lenders for home loans. Although this ordinance will need to be supplemented by Local Homebuyer's Assistance Program guidelines to be drafted and approved prior to implementation, this program could be a solution to overcoming an important obstacle to home ownership of affordable housing units.

A voter referendum to permit an Assisted Living and Independent Living Facility for Senior Citizens on Truman Waterfront land conveyed to the City by the Navy was overwhelmingly approved. In October 2008, a resolution to approve a 99 year lease to implement that referendum concept was approved. Of the 135 proposed units, 28 will be subsidized by the remaining 107 market-rate units.

This past spring, the City attempted to create a dedicated funding source for its affordable housing initiatives by adding affordable housing to the list of State of Florida approved uses and activating an additional cent of Tourist Development taxes that is already authorized by the State of Florida for Monroe County as an Area of Critical Concern. The attempt was unsuccessful at that time. However, a resolution by the City urging the Florida State Legislature to assist in implementing funding sources dedicated to the creation and retention of affordable workforce housing was postponed from the October 21st City Commission agenda.

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Vision 2020 Goal 2: Greater Key West's resident population will have grown slowly, increasing by about 10% to 30,000.

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The 2007 estimate of Key West population was 22,082 as reported by the *U.S. Census Bureau, American FactFinder* database. This is a significant **13% decline** in population compared with the 25,478 reported in the 2000 census and equates to a compound annual loss of 2% of the population. This is a greater loss than for Monroe County as a whole which is estimated to have lost 8% in population over the last seven years. Florida, on the other hand, has grown by over 14% during that time while the U.S. population is estimated to have grown by over 7%.

The age profile of the Keys is significant. Although it is true that the United States has aged (from a median age of 32.9 years in the 1990 census to an estimated 37.9 years of age in 2007), Monroe County has aged faster and is significantly older (from a median age of 38.7 year in 1990 to an estimated 47.3 years in 2007). Decreases in the proportion of 20-34 year olds coupled with declining school populations indicate an exodus of young families. The increase in the 45-64 year olds, some immigrating with greater wealth could lead to a different consumer base. However, this could have potentially serious ramifications for sustaining a stable workforce. Unfortunately, age demographics for Key West are not available between censuses so that a 2007 picture cannot be drawn directly. However, because the Key West is a significant part of Monroe County and its trend is reflected in the County's statistics, there is probably not a great variance between the County and City aging trends. This is also reinforced by school population trends between the County and City that are closely aligned.

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Vision 2020 Goal 3: We will have an expanded 10-month tourist season. Our visitors will more likely to arrive by boat or fly, arriving at improved dock facilities or the new, improved airport.

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The estimate of Key West visitors for 2007 was for 2.1 million people, down significantly from the 2003 estimate of 2.6 million visitors. To be sure, 250,000 or half of the total reduction, has been in cruise ship passenger arrivals. From its zenith of 1,067,000 passengers in 2003 to 817,000 passengers in 2007, there has been a further decline to 583,000 passengers arriving through October 2008. This would indicate that the year will total about 721,000 passengers, the lowest level since 2001. Overnight visitors were also down by 215,000 (1,309,000 in 2003 to 1,064,000 in 2007). The current year will probably show a further decline based on performance to-date.

Vision 2020 was conceived and unveiled in 1998-99. The five-year progress review completed in 2004 stated, "While visitor counts for all months have increased since Vision 2020 was first drafted in 1998, visitor counts during the traditionally slow shoulder months have grown at a higher rate than the annual growth rate demonstrating evidence of an expanded season." The latest five-year trends present a different picture.

An analysis of airport arrivals as a gauge of overnight visitor activity would show that, **overall**, this latest five-year period (2004 thru 2008) is up by less than 2% over the previous five-year period (1999 thru 2003) and 1999 thru 2003 was 5% up compared to the 1994 thru 1998 period. However, the seasonal breakdown would show Off Season to be 11.6% **down** when comparing the latest five year period with 1999-2003 and the Shoulder Season **about even** (0.1% up) as can be seen below:

Pct Inc/-Decr from prior period:	<u>1994-1998</u>	<u>1999-2003</u>	<u>2004-2008</u>
High Season – January-April	46.4%	3.8%	8.0%
Off Season - August-Sept	19.6%	0.1%	-11.6%
Shoulder - May-July & Oct-Dec	33.4%	7.3%	0.1%
Total Year	36.0%	5.0%	1.7%

The above table uses all five years worth of data in a five-year period and compares it with all five years worth of data from the immediately prior five-year period. Therefore, the four months of January through April from 1999 through 2003 represent five years of data (20 data points) that are compared with the same 20 data points from 1994 through 1998 to calculate the 3.8% increase.

This data does not criticize improving facilities or conceiving new non-season events in efforts to expand to a ten-month season, however, it is a sobering reminder that other factors, such as weather risk and national economic fluctuations, may be very powerful determinants of the tourism season that are difficult to overcome.

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Vision 2020 Goal 4: We will have protected and enhanced our culture, image and experience as “America’s Caribbean Island.”

2008 Ten Year Progress Review:

There were 8 specific areas envisioned under this category to be protected and enhanced. The categories and the results are listed below

- **Eco-Tourism** - The 6,400 sq. ft. *Florida Keys Eco-Discovery Center* was opened January 13, 2007 on Truman Annex waterfront grounds. It provides interactive exhibits depicting the biodiversity of the Florida Keys and focuses on habitat and human interaction with those habitats.
The *Key West Botanical Gardens*, established in 1930, comprises 7½ acres consisting of an arboretum, botanical garden, wildlife refuge and educational center and is home to many endangered and threatened tropical flora and fauna. It is also a major migratory stopping point for neo-tropical birds from places as far as South America, as well as being home to many rare birds in the Florida Keys. The Botanical Gardens is embarking on a \$750,000 project to restore a fresh water pond, building boardwalks and providing native orchids and landscaping that is scheduled to open March, 2009.
- **Marine Sanctuary** - In 2002, the International Maritime Organization designated 3,000 square nautical miles as a Particularly Sensitive Sea Area (PSSA), one of only twelve in the world. As such, strict limits to vessel size, fishing activity and No Discharge Zones exist. The Florida Fish & Wildlife Conservation Commission (FWC) Sanctuary Enforcement team patrols the area. As the “nation’s only living barrier coral reef,” including all of the Keys and extending to the Dry Tortugas, The Florida Keys National Marine Sanctuary hosts an estimated 4 million domestic and foreign visitors annually.
- **History** – Our commitment to preserving our history was perhaps best demonstrated in First Lady Laura Bush recently honoring Key West with her “Preserve America” award. Key West was one of eight cities nationwide that were honored and the only city in Florida.

Further strides have been made to preserve our history and culture through our museums and theatres. The Mel Fisher Maritime museum attained the highest recognition that a museum can achieve accreditation by the American Association of Museums (AAM). A nine year, \$9 million restoration of the custom house was been completed by the Key West Art & Historical Society and the Customs House was saluted as the Best Museum in Florida by the Florida Monthly Magazine. The Red Barn theatre has also undergone extensive renovations thanks in part to TDC bed tax funding and the Tropic Cinema is scheduled to expand its renovated facilities also thanks in part to TDC funding. Honoring a great American playwright, the Tennessee Williams Theater on the campus of the Florida Keys Community College hosts a variety of cultural events.

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The Key West Sculpture Garden, conceived and funded by local residents, inaugurated its final bust and stands open to all residents and visitors as a testament to important figures in our history. Mallory Square also features the Key West-Florida Keys Historic War Memorial. The memorial project, conceived and undertaken by local residents in partnership with the military, was completed in 2003. The memorial consists of 10 stations, nine of which offer historical information regarding different military actions in which Key West or the Florida Keys played a major role.

In June of 2003, in honor of the 50th anniversary of the end of Truman's presidency, the Harry S. Truman Little White House held the first ever Truman Symposium. The symposium began an annual series exploring the legacy of President Truman and its effects upon today's society

- **Lifestyle** - Key West's unique lifestyle continues to be honored in many ways. The slogan developed by resident J.T. Thompson "One Human Family" became the official city philosophy in 2000 and continues to be heard as a voice of tolerance around the world. As reported in The Citizen Newspaper, then-Mayor Weekley said the motto was chosen "so others can find inspiration to grow beyond the artificial limitation of racism, nationalism, sexism, classism, monotheism, prejudice and homophobia."

In 2003, Key West garnered national attention and inspired a documentary film as over 2,000 resident and visitor volunteers unfurled a massive rainbow banner down Duval Street touching both oceans. Documentary filmmaker Talmadge Heyward summed up the sentiment of the City by saying, "In Key West I found a society that really had no blinders on. People saw others as individuals, and not what color they were or what their sexual orientation was."

Key West is also making strides toward improving resident lifestyles by building more green space for its residents to enjoy. Plans for the Truman Waterfront property conveyed to the City by the Navy include a mandatory 60% of the 33 acres for a park.

- **Duval Street Corridor Improvements** – The City has worked closely with the Duval Street businesses and Waste Management to clean up Duval Street. Since 1989 the Key West Chamber of Commerce has acted as a catalyst in this effort through its *Clean and Green Committee*. Waste Management has been an ally to the City in determining the most unobtrusive and efficient ways of storing and removing garbage. The City has invested in a street cleaner to further improve the streets. Street cleaning after Fantasy Fest parades are routinely and efficiently begun at parade end and finished by noon of the following day. A volunteer campaign to improve the image of the city by removing T-shirts with offensive language from Duval storefronts had short-lived success. Ideas to test a "pedestrian mall" approach to Duval Street by initiating a pilot program to close several blocks of the upper end on Duval Street to vehicular traffic to prototype the pedestrian mall concept has been twice pulled from consideration at City Commission meetings.

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- **Special promotions for locals sponsored by businesses organized by the Key West Chamber** - Key West Chamber members continued to offer special discounts to restaurants, bars, lodging, retail stores, water activities, attractions other professional services to local residents. The Chamber-sponsored “We Love Locals” campaigns were begun in the summer of 2007 and were met with great success whereas the Thanksgiving-Christmas holiday venue for the same promotion was only moderately successful.
- **Address Street Hawkers** – The City passed ordinances in 2002 and 2003 to make aggressive panhandling and panhandling in Clinton Square, Mallory Square and the Southernmost Point a punishable offense.

Vision 2020 Goal 5: We will be recognized as one of the “cleanest small cities” in the U.S. as measured against an objective national standard.

2008 Ten Year Progress Review:

An extensive search for an objective national standard had been done in 2004, however, no objective national standard could be found for comparison. However, a well-organized *Keep Key West Clean and Green Committee* has re-emerged from the original 1998 *Clean Key West Task Force* which has as its vision “To have a noticeable lack of litter on the City’s rights-of-way, beaches and shores, and on private property so that Key West will remain an unspoiled uniquely wonderful place to live.” The committee meets twice monthly in the Angela Street City Hall with a formal agenda, list of assigned tasks and actions items. The committee meetings are regularly attended by appropriate city department heads and relevant private business concerns in addition to members of the citizenry at large and benefits from a dedicated facilitator. Accomplishments include having organized twelve grass-roots city clean-up days this year and doubling the city’s fleet to four street sweeping vehicles. Current goals are to institute mandatory recycling, promote the use of a reusable “Go Cup” for events, and enforcing the litter ordinance and improving signage (“Hemingway didn’t litter here”). The existence of this group directly supports this Vision 2020 Goal. The Key West Chamber of Commerce has also acted as a catalyst in this effort through its *Clean and Green Committee*.

Florida Keys GLEE (Green Living & Energy Education) is another organization that, through its regular dissemination of information, attendance at events and annual expo seeks to educate individuals, businesses and policy makers within the Florida Keys to promote sustainable living through efficient and renewable energy and the conservation of water and land resources.

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Vision 2020 Goal 6: **Beaches along the entire South side of Key West will be restored and accessible by the public.**

2008 Ten Year Progress Review:

Smathers Beach restoration was completed in 2000. South Beach, Rest Beach and White Street Pier had been significantly restored. Southernmost monument has been restored and protective barrier built. The FDOT road rebuilding program for South Roosevelt Boulevard has been completed providing smooth four-lane traffic as well as a wide walking/biking promenade. However, closing the “bridle-path” parking on South Roosevelt across from Smathers Beach discourages beach use by forcing metered parking.

Higgs Beach, owned by Monroe County, continues to be a controversial issue respecting police patrols. Although offered to the City of Key West by the County, budget considerations for required capital improvements for deferred maintenance items and operating cost projections for morning to sundown security led the City to decline the offer.

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Vision 2020 Goal 7: We will be a highly walkable and bikeable island – walking the waterfront on publicly accessible beaches, sidewalks or boardwalks from East Martello Tower to the Key West Bight will be possible.

2008 Five Year Progress Review: New boardwalks along Key West Bight and a bridge in Mallory Square behind the aquarium now makes walking along the waterfront on the bay side of the Island from the Conch Republic Marina and Land's Edge Village to Truman Waterfront possible. Also on the bay side of the island, walkers and bicyclists can follow sidewalks along the waterfront from the entrance to Key West along North Roosevelt to the other side of the Palm Ave Bridge.

On the Atlantic side of the Island, walking and biking on pathways and sidewalks is possible along the waterfront from the entrance to Key West along South Roosevelt to the Southernmost point monument, with a few interruptions from private waterfront properties.

With the City's acquisition of the Truman Waterfront property, more plans are being discussed for connecting boardwalks to extend the path even further. Tentative plans have been discussed for a floating bridge to be built within the Truman Waterfront Property intended to link the Outer Mole dock to Mallory Square. With these extensions nearly the entire waterfront will be pedestrian accessible, except for the Navy properties.

Elsewhere along the island, other improvements have been made to increase its pedestrian and bicyclist accessibility. A bridge has been built at the end of Staples Avenue to connect bicyclists and pedestrians to the adjoining neighborhood and allow better access to North Roosevelt sidewalks. Beach improvements and major roadway and pedestrian promenade construction along South Roosevelt have provided a scenic uninterrupted 3½ mile trail frequented by locals and visitors alike from the entrance to Key West to Atlantic Avenue.

The Florida Keys Overseas Heritage Trail is a multi-use bicycle and pedestrian facility currently under design and construction by the Florida Department of Environmental Protection using FDOT construction. Stretching from mile marker 106.3 in Key Largo to mile marker 0 in Key West, the project will provide an alternative transportation route throughout the Keys for foot and bicycle traffic. There are currently 60 miles of existing bike paths spread throughout the Key that are included in the project the longest section of which is from mile marker 106 to the Village of Islamorada. Plans include connecting the Key West Botanical Gardens to the trail in conjunction with expansion of the gardens.

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***Vision 2020 Goal 8:* Our City's infrastructure, i.e. communications, power, water and sewer lines, roads, sidewalks, city buildings and equipment will be in good shape and will be on a coordinated maintenance plan extending out until at least 2040. Most power and cable lines will be underground.**

2008 Five Year Progress Review: Enormous progress has been made and the City's successful utility projects have become a model for the rest of the county. The City has completed its rebuilding of the sanitary sewer system.

The Army Corps of Engineers has authorized retroactive billing against a total of \$3 million in funding for Key West stormwater improvement projects. We also have received \$2 million in funding from the South Florida Water Management District and other federal grants.

The State Legislature has allocated \$1.5 million in federally sourced funds for the city's stormwater projects. The stormwater projects for Front Street at the Simonton Street Beach area and Patricia and Ashby Streets are now operational and flooding has been reduced. We have received \$3.4 million from the State of Florida in the past four years.

Our telecommunications infrastructure improvements include ISDN, DSL, digital cable city-wide, and point-to-point wireless networks in city facilities only, all of which did not exist in 1998. The City is further driving Key West's information age expansion by awaiting a Request for Qualifications for a fiber optic network with funds allocated in the budget which will offset existing connectivity costs.

Improvements have been made in connection services to our public utilities. Keys Energy now offers next day hook up service, and in many cases, can offer same day connections.

Street and sidewalk improvements continue throughout the City. The City has already requested approximately \$3.8 million in transportation funds for road, sidewalk, and bike lane improvements for Flagler Ave., Duck Ave., and College Road. The City has entered into an interlocal agreement with the County to contribute \$180,000 toward the County and FDOT Joint Participation Agreement 1.3 million dollar Flagler Ave. improvement project. The FDOT is also working on plans to improve North and South Roosevelt.

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Vision 2020 Goal 9: A linkage will exist with Cuba for the benefit of Key West.

2008 Ten Year Progress Review:

Travel restrictions have further tightened since the 2004 review. Notwithstanding, two fact-finding trips were taken wherein Key West Chamber officials met with counterparts from the Havana Chamber of Commerce as well as a highly positioned representative of the Ministry of Tourism. Additionally, meetings were held with Pedro Alvarez Borrego, Chairman & CEO of Empresa Comercializadora de Alimentos (ALIMPORT), a key relationship for future United States/Cuba business dealings.

The death of Fidel Castro and the assumption of leadership by his brother, Raul, and the change in Presidential administrations following elections in the United States will require the Chamber to continue to keep a close eye on Cuba and the potential for more open relations between the two nations.

The opening of the ferry terminal and the targeted March 2009 opening of an improved Key West international airport terminal are positive steps toward future linkage with Cuba. Moreover, plans included in the Navy's Economic Conveyance of the Truman Waterfront property called for a City marina that would service mega-yachts and plans in-process for a privately owned and operated deep-water marina at Safe Harbor on the Stock Island waterfront would further enhance that linkage.

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Vision 2020 Goal 10: Discharge of Key West generated water pollutants will have been reduced by at least 80%.

2008 Ten Year Progress Report:

The City has made enormous progress and this vision is likely to become a reality far ahead of schedule. By 2010, an 80% reduction in Key West generated water pollutants is expected to be achieved. The rebuilding of the sanitary sewer system has taken the City a long way towards achieving this goal. The City is now working towards improving its stormwater system.

Respecting waste water treatment, the City received four top awards at the 2007 Florida Water Resources conference held by the Florida Water Environment Association, including first place in the Advanced Secondary Treatment category. It also won the Collection System award based on inflow and infiltration reduction, the Operations Excellence Award and the Top Ten Safety Award. In 2008, the city announced that, for the third time, the city's wastewater treatment was awarded one of two Phelps awards, which has been described as an unprecedented achievement in the state of Florida. By 2010, all waste water plants are to conform with the so-called "5,5,3 and 1" measurement of 5 parts per million (ppm) of Biochemical Oxygen Demand, 5ppm of total suspended solids, 3ppm of ammonia/nitrogen and 1ppm of total phosphorous. The City's plant already meets this criterion.

The City tests both public and private laterals for infiltration and exfiltration. During 1998-1999, the city undertook its first test of private property laterals. The City tested 14,266 and failed 8,462 (59% failure rate). They retested and were able to pass all but 17 after repairs. In its second test of private property laterals the City tested 6,282 and failed 2,732 (43%). Aggressive testing and remedial action is credited with reducing overall wastewater inflows at the treatment plant almost in half with concurrent Influent & Infiltration level reductions.

In addition, a stormwater capital plan has been developed to prevent flooding, divert stormwater flow from outfalls, and reduce/eliminate discharge of pollutants and contamination of near shore waters. The plan provides for a more comprehensive management system and includes installation of pump-assist injection wells, elimination and/or retrofit of 63 outfalls, installation of 293 injection wells and retrofit of existing injection wells. Vertical French drains have already been designed and installed addressing small areas of standing water in an affordable, cost effective way.

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Vision 2020 Goal 11: We will have a viable seafood industry.

2008 Ten Year Progress Review:

Since 1993 poundage and dollar value of commercial fishing in Key West had, until recently, shown Key West to be ranked in the top ten commercial fishery landings in the United States. At its zenith in 1995-1996 when Key West had landed over 23 million pounds each year valued at over \$62 million Key West was ranked as high as 4th in dollar production among US fisheries. The size of the catch has decreased since that time. Nonetheless, Key West still ranked 5th as a commercial fishing port by dollars landed (\$54.4 million) in 2006 but slipped to 17th position in 2007 landing a catch valued at \$40.5 million (heavily influenced by a poor harvest of Key West Pinks).

The industry has been heavily regulated, a factor that has forced consolidation so that over the past 20 years, the fleet has shrunk from 2,000 to 250 boats. Much of the former fleet was comprised of part-time fishermen who no longer found the permitting, licensing and mandated equipment costs economical and were, moreover, adverse to what they perceived as arduous reporting requirements. The consolidation has resulted in fewer, but generally stronger, fisherman. This trend is projected to continue by at least some in the industry as competition from unregulated foreign fisheries and increased domestic regulation continue to squeeze the local fisherman. A recent example of that regulatory muscle was felt when the South Atlantic Fishery Management Council voted to close Florida Keys waters to shallow water fishing for grouper in order to protect the stocks of Gag grouper which are caught in minimal numbers in these waters. The Key West Chamber strongly protested that ban and will continue to act whenever required to further this goal of a viable seafood industry.

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Vision 2020 Goal 12: The cost of government will be effectively managed to produce a greater value for taxes and fees paid. Annual budget increases for the past 20 years (referring to the period 1999 thru 2020) on the same services provided in 1999 will have been less than inflation. The percentage of local government income from property taxes will have declined.

2008 Ten Year Progress Review:

It is difficult to objectively measure the “value” delivered by government.

Key West

Respecting *budget control* as reflected in taxes levied, the City of **Key West** had, in years prior to 2006, often reduced millage rates to achieve roll-back rates so that the rising tide of property values was moderated as they affected ad valorem taxes. That changed in 2006 and brought city ad valorem taxes from the \$12 million level to a \$15 million level. In absolute dollar terms, 1998-09 property taxes levied were \$9.6 million, 2003-04 levies were \$11.8 million (a 4.1% annual increase over the 1997-98 fiscal year), and 2008-09 budget levies are \$15.5 million (a 5.6% annual increase over the 2003-04 fiscal year). Inflation adjusted, the 2003-04 levies should have been \$10.9 million and the 2008-09 budget levies should have been \$13.4 million. If there are no more services delivered now than there were in 1999, this would indicate the goal to provide services at a cost less than inflation had not been met. Absent the measurability of “value”, a question that might be asked could be, “Since current year property taxes are \$15.5 million compared with an inflation-adjusted \$13.4 million, are the citizens receiving \$2.1 million (or 16%) more value now than in 1999?”

Moreover, in 1999 (fiscal year ended 9/30/99) property taxes represented 34% of general fund revenues. That figure was 35% for the 2003-04 fiscal year and 39% for the 2008-09 fiscal year budget. Therefore, the goal that the percentage of reliance on property taxes as a revenue source is not being met.

Monroe County

In absolute dollar terms, 1998-09 property taxes levied by the County were \$55.4 million, 2003-04 levies were \$64.4 million (a 3.1% annual increase over the 1997-98 fiscal year), and 2008-09 budget levies are \$85.2 million (a 5.7% annual increase over the 2003-04 fiscal year). It is probably fair to say that this amount may have been higher were it not for the State of Florida mandated cap on ad valorem taxes. Note, too, that taxes for the two prior fiscal years were kept artificially low by reducing reserves by as much as \$10 million to balance the budget. Inflation adjusted, the 2003-04 levies should have been \$62.5 million and the 2008-09 budget levies should have been \$77 million. If there are no more services delivered now than there were in 1999, this would also indicate the goal to provide services at a cost less than inflation had not been met. Again, applying the same test for the County as for the City, the question that might be asked, “Since current year property taxes are \$85.2 million compared with an inflation-adjusted \$77 million, are the citizens receiving \$8.2 million (or 11%) more value now than in 1999?”

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Vision 2020 Goal 13: Opportunities for and the quality of life for Key West's youth will have been improved.

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There are year-round sports and activities for Key West youth both through the schools and through youth organizations such as AYSO, the Boys and Girls Club and the Police Athletic League (PAL) and the like. These organizations provide youth baseball, softball, football, soccer, hockey, basketball, boxing and wrestling leagues. Recently, construction was completed on a new roof, floor and lights for the outdoor roller hockey rink and a new gym was constructed at Key West High School. In 2001, renovations were completed on the Fredrick Douglas Community center Gym, home to the PAL. PAL programs include a basketball league, cheerleading, Police Explorers, a recreation room, roller hockey, a computer lab, a learning center, arts & crafts, and wrestling.

Numerous other arts and cultural activities exist such as the Keys Kids Theater and the Audubon House art classes. The Florida Keys Council of the Arts hosts children's arts programs to introduce children to arts and artists, including the Artists in Schools program.

In 1996, the Take Stock in Children program was relatively new to the Keys. Today, 448 children's lives have been enriched by the program with 178 students in college and 270 in Monroe County schools that have signed scholarship contracts requiring them to maintain grades, meet with mentors weekly and remain crime and drug-free. Local charities donate toward Take Stock in Children scholarships which are "double-matched" by a group of Monroe County Leadership Donors and by The State of Florida. With these scholarship matches from the local organizations and the State of Florida, disadvantaged Key West students can receive four full years of college education.

JUST 4 KIDS serves all children in hardship situations, county-wide and year-round, by providing them with tangible items such as new clothing, school supplies and hygiene products as well as items for special events such as homecoming, prom and graduation. JUST 4 KIDS also opened a Community Art Center in the Bahama Village which is open three days a week after school and will begin to operate as an open art recreational center on Saturdays. The center offers free art classes to all children and aims to release children's creativity through a variety of media.

Additionally, educational/recreational summer programs are available at a fee from private organizations such as the Mel Fisher Museum.

Key West Vision 2020

Ten Year Progress Review

Draft J - November 2008

Vision 2020 Goal 14: **Relationships will have improved between local government and the citizens in support of the KEY WEST VISION 2020.**

2008 Ten Year Progress Review: There is a more amicable atmosphere in the city among political interests than there was a few years ago.