OCALA MARION TRANSPORTATION PLANNING ORGANIZATION

Transportation Disadvantaged Local Coordinating Board (TDLCB) Meeting

Marion County Growth Services - Training Room
2710 E. Silver Springs Blvd., Ocala, FL 34470

June 8th, 2023 - 10:00 AM
AGENDA

1. **CALL TO ORDER AND ROLL CALL**

2. **PLEDGE OF ALLIGENCE**

3. **PROOF OF PUBLICATION**

4. **CONSENT AGENDA**
   A. **Minutes March Meeting** (Page #2)

5. **PRESENTATION**
   A. **Marion Transit Service Area Study** (Page #11)

6. **ACTION ITEMS**
   A. **Transportation Disadvantaged Service Plan Update** (Page #52)

   B. **2023-24 Marion Transit Trip Rate Model** (Page #138)

7. **COMMENTS BY TDLCB MEMBERS**

8. **COMMENTS BY TPO STAFF**

9. **COMMENTS BY TRANSPORTATION COORDINATOR (CTC)**

10. **PUBLIC COMMENT –** (Limited to two (2) minutes)

11. **ADJOURNMENT**

The next regular meeting of the Ocala Marion Transportation Disadvantaged Local Coordinating Board will be held on
September 14th, 2023.

Transportation Disadvantaged Local Coordinating Board (TDLCB) Meeting
Marion County Growth Services Training Room
2710 E. Silver Springs Blvd., Ocala, FL 34470
March 9, 2023
10:00 AM

MINUTES

Members Present:

Michelle Stone
Jeffrey Askew
Glorybee Perez
Susan Hanley *(arrived at 10:07am)*
Carlos Colon
Elizabeth Watson
Andrea Melvin
Anissa Pieriboni *(arrived at 10:08am)*
Steven Neal *(alternate Ji Li attended)*
Keith Fair

Members Not Present:

Lauren Debick
Tracey Sapp
Iris Pozo
Jeff Aboumrad
Ronald Graham

Others Present:

Rob Balmes, TPO
Shakayla Irby, TPO
Elizabeth Mitchell, TPO
Major Forrest McIntyre, Salvation Army

Clayton Murch, Marion Senior Services
Karen Williams, Marion Senior Services
Herman Schulz, Marion Senior Services

Item 1. Call to Order and Roll Call

Chairwoman Michelle Stone called the meeting to order at 10:04am. Secretary Shakayla Irby called the roll and a quorum was present.

Item 2. Pledge of Allegiance

Chairwoman Stone led the board members in the Pledge of Allegiance.

Item 3. Proof of Publication

Secretary Shakayla Irby stated that the meeting had been published March 2, 2023 online on the TPO website and Facebook and Twitter pages, the City of Ocala, Belleview, and Dunnellon websites. The meeting was also published to the March 2, 2023 edition of the Ocala Star Banner.

Item 4a. Major Forrest McIntyre – Salvation Army

Major Forrest McIntyre with the Salvation Army presented to the board on the services that the Salvation Army provided.

Some of the key services of the Salvation Army were as follows:

- The Center of Hope- Trained staff that provide case management, clothing vouchers, ID cards, and other necessary assistance.
- Community Feeding- The Center of Hope provided two meals a day to thousands of homeless and low-income people every year.
- Family Thrift Store- Donations of goods, gently used items from caring people in Marion County enable the Salvation Army Family Thrift Store to provide household goods and clothing to those in need.
- Senior Housing- The Evangeline Booth Apartment complex has 64 apartments for low-income seniors. The housing is subsidized by HUD and thus adheres to all regulations.
- Emergency Shelter- The Salvation Army offer a 42-bed men's dorm, a 20-bed female dorm, and transitional housing for six family rooms.
- Holiday Programs- The Ocala Corps provides holiday meals at Thanksgiving and Christmas to those who would otherwise go without.
- Corrections Program- The ministry of the Salvation Army extends to prisoners and parolees. The Salvation Army operates Marion County's Misdemeanor Probation Dept., working with Marion County courts to assist clients in fulfilling their court-ordered obligations.

A Salvation Army brochure was provided to the board. The brochure is attached to pages 8-9 of this set of minutes for reference.

Item 5a. Community Transportation Coordinator (CTC) Evaluation

Ms. Liz Mitchell presented to the TDLCB and said that the Florida Commission for the Transportation Disadvantaged designated a Community Transportation Coordinator (CTC) for each county/service area. The CTC was responsible for coordinating and/or providing transportation services to individuals who are transportation disadvantaged.

Citizens were considered "transportation disadvantaged" due to age, income, or a disability, unable to drive, or do not have access to other transportation options.

Access was provided to medical appointments, employment, educational and other life sustaining services, including, groceries, shopping, meals, and social events, to those who are eligible.

In accordance with Florida Statutes, Chapter 427, and the Florida Commission for the Transportation Disadvantaged the Marion County Community Transportation Coordinator (CTC) evaluation had been conducted annually by members of the Transportation Disadvantaged Local Coordinating Board (TDLCB) with assistance from the Ocala Marion Transportation Planning Organization (TPO) as the Designated Official Planning Agency (DOPA). The TDLCB evaluates the CTC to ensure quality of service is being provided in the most cost effective and efficient manner.

This is accomplished through:
- audits
- series of interviews
- quality checks
- rider call surveys
- ride-along for observation

The evaluation encompassed management, operations, service, safety, vehicle maintenance, drivers and training, performance standards, grievance/complaint procedures, and quality assurance, utilizing the Commission for the Transportation Disadvantaged CTC Evaluation Workbook.

Ms. Mitchell said that the TPO found that all the required policies and procedures, contracts and contract management, grievance/complaint procedures, performance, quality and safety standards were in place and being adhered to. All vehicles were on a maintenance schedule and in good working order. The drivers are trained with continual training updates. There is a zero-tolerance substance abuse policy enforced complete with pre-employment drug and alcohol background checks. The riders speak highly of the overall system and feel that they are being provided a quality service.

The TPO had a few recommendations as well as commendations as a result of the evaluation.

Recommendations: The pertinent phone numbers on each bus continued to be too small. Due to the fact that service is geared for the disadvantaged, many were unable to get up close to view

the Ombudsman and complaint phone numbers. The numbers needed to be larger and centralized so that those seated on opposite sides of the isle were still able to see the numbers. Also, for distance viewing from the back of the bus, and the wheelchair riders that were secured in the very back.

Commendations: Marion Transit continued to make the changes required to maintain happy riders. Last year the TPO recommended a sealed drop box for comments so that riders could provide input on an ongoing basis. This led to an additional day being added to the Blue line in Dunnellon. The comments were unanimous that the riders wanted Friday added to the Blue Line.

The TPO commended Marion Transit for readily and eagerly making the necessary changes requested by their riders.

Ms. Mitchell thanked volunteers that took time out of their work schedules to call TD riders for a quick survey and/or a ride-along.

Volunteers included:
Call Survey: Susan Hanley, Tracey Sapp, Brandon Palermo, Jeffrey Askew
Ride-along: Andrea Melvin and Liz Mitchell

Mr. Clayton Murch made a comment that all pertinent phone numbers had since been made larger.

Mr. Carlos Colon, Transit Project Coordinator with FDOT asked to be added to the list for the next Marion Transit ride-along. Mr. Colon also gave praises to Marion Transit saying that they were on point and doing a great job.

Mr. Colon made a motion to approve the CTC Evaluation. Ms. Melvin seconded, and the motion passed unanimously.

Item 6. Consent Agenda

Mr. Askew made a motion to approve the Consent Agenda. Mr. Colon seconded, and the motion passed unanimously.

Item 7a. Next Meeting Workshop Topics

Ms. Mitchell informed the board that in June there would be a TD Public Workshop in addition to the regularly scheduled meeting. The workshop would be designed to provide an instructional, educational and/or training environment keeping TD at the forefront.

The board engaged in conversation about workshop topic ideas.

The board ultimately decided on the next TD Public Workshop being a facilitated brainstorming type session to discuss identified issues and challenges that each organization and their clients had been facing.

Chairwoman Stone asked TPO staff that the June meeting agenda be very concise so that the workshop could follow.

Item 7b. Transportation Disadvantaged (TD) Paratransit Service Study

Mr. Rob Balmes, TPO Director gave a presentation to the board on the TD Paratransit Service Study.

The purpose of the service study would be to conduct a service area analysis to identify areas of the county/community that may be served or better served by Marion Transit- Transportation Disadvantaged, Rural 5311 program. Also, to maximize existing funding and services to meet the community's needs.

Mr. Balmes shared some of the background with the board:
- Critical Need Disadvantaged Population is 23% or 84,900 residents – 9% Trip Growth 2025
- Over 65 is the largest population group in Marion County at 29% or 109,000 residents
- Changes from the 2020 US Census
    - No longer two types of urban areas "Urbanized Area" or "Urban Cluster"
    - Now only "Urban" or "Rural"
    - Impacts to Marion Transit (5311)
    - Study Area – Marion County
        - Small Urban and Rural Areas- excludes large Urban Areas (over 50,000)

The tasks would include:
- 2020 Census Urban Area and Demographic Analysis
    - Identify all targets populations
    - Assess Demand and Needs
- Development of Service Options
    - On-Demand, Zone-Based, etc.

The deliverables included:
- Feedback, Coordination with TDLCB members and Marion Transit
- Complete a Service Analysis Report
- Presentation to TDLCB at the June 8 Meeting

7c. 2020 Census Update

Mr. Balmes gave a brief update on the 2020 Census and said the FDOT Central Office and Federal Highway Administration (FHWA) had been coordinating the results of the 2020 Census Urban Areas in Florida, including the geographic boundaries and upcoming TMA designations.

The Ocala Urban Area totaled a population of 182,647 and fell short of the 200,000 threshold to become a TMA.

Mr. Balmes mentioned that an appeal could have been made to the Governor, however FDOT Central office received response from FHWA stating that an MPO could become a TMA but if the population was under 200,000 there would be no access to additional funding. The funding would be the main driving force to become a TMA. Ocala Marion would not have that option because the population was under 200,000.

Also, following the February TPO board meeting the TPO board members had decided not to pursue an appeal to the Governor.

Item 8. Comments by TDLCB Members

Ms. Anissa Pieriboni gave comments that the Florida Center for the Blind was very busy and had doubled clients. Over 11,000 vision screenings had been completed for the Marion County Public Schools and had identified about 15-20% of children that needed correction. Also, huge progress had been made on the expansion of the Florida Center for the Blind facility. In the next several of months the Florida Center for the Blind would be expanding services to not just children but adults as well.

Ms. Carressa Hutchinson with the Central Florida Community Action Agency said that they had been working with the weatherizing of the homes for energy efficiency and providing utility and rental assistance. When Covid happened there was a huge spike with assistance especially in rent and utilities and the spike had since continued. In the past there had been outreaches hosted by the Central Florida Community Action Agency but with Covid still present they were still not having large outreach gatherings and have since increased the number of applications that can be submitted online.

Mr. Ji Li with the SunTran gave a comment that ridership had increased significantly pre-Covid.

Item 9. Comments by TPO Staff

There were no comments by TPO Staff.

Item 10. Comments by CTC

Mr. Murch gave the following comments:
- On March 1, 2023 Marion Transit celebrated 100 days incident free.
- 1.95% increase in the number of Marion Transit trips

Item 11. Public Comment

There was no public comment.

Item 12. Adjournment

Chairwoman Stone adjourned the meeting at 11:19am.

Respectfully Submitted By:

_____
Shakayla Irby, TPO Administrative Assistant

CORRECTIONS PROGRAM

The ministry of The Salvation Army extends to prisoners and parolees. The Salvation Army operates Marion County's Misdemeanor Probation Department.

DISASTER SERVICES

During natural or man-made disasters, we provide victims and emergency responders with food, hydration, shelter, counseling, and communications.

VOLUNTEER OPPORTUNTIES

- Food Pantry
- Haircuts
- Meals in our community dining room twice a day
- Tutoring
- Seasonal: Angel Tree program—online applications, toy bag preparations, and Red Kettle bell ringers
- Senior Programs—Provide/assist in parties, educational programs, service projects and more.

YOUTH MINISTRIES

The Salvation Army offers character-building programs, music training, and summer camp.

SENIOR HOUSING

Our Evangeline Booth Apartment complex has 64 apartments for low-income seniors. The facility offers recreational activities geared to their interests and enjoyment.

The Salvation Army Chapel

Sunday:	*9:30 am*	*Sunday School*
	10:45 am	*Worship Service*
Wednesday	*6:00 pm*	*Bible Study*

Contact

The Salvation Army

Chapel, Comm Ctr & Admin Office

2901 NE 14th St

Ocala, FL 34470-4817

Mail: PO Box 3628

Ocala, FL 34478-3628

(352) 629-2004

Center of Hope

320 NW 1st Ave

Ocala, FL 34475-8800

(352) 732-8326

Evangeline Booth Garden Apts.

2921 NE 14th St

Ocala, FL 34470-8816

(352) 671-2870

Family Thrift Store

120 NW 10th St

Ocala, FL 34475-5137

(352) 732-4469 for Donation Pickups

DOING THE MOST GOOD

THE SALVATION ARMY
Ocala, FL

Serving Marion County Since 1927
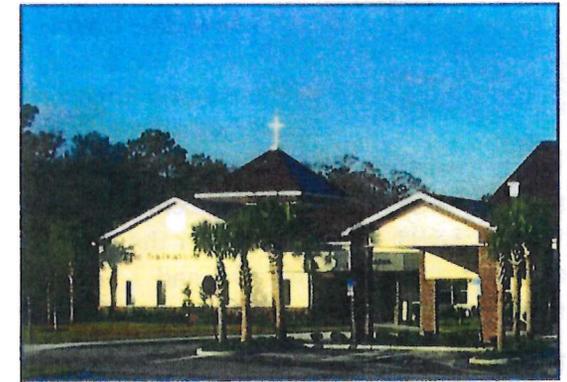
MISSION STATEMENT

The Salvation Army, an international movement, is an evangelical part of the universal Christian Church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the Gospel of Jesus Christ and to meet human needs in His name without discrimination.

Corps Officers
Majors Phillip and Lynn Irish

THE SALVATION ARMY IN MARION COUNTY

The Salvation Army offers a variety of programs to help clients become self-supporting. We also offer weekly programs for spiritual growth of adults, youth and children.

Our Community Center on NE 14th Street houses our chapel, administrative offices, youth and adult ministries. Behind the Community Center are the Evangeline Booth Garden Apartments for low-income seniors.

Our Center of Hope in Downtown Ocala extends the hand of God's love to the homeless and impoverished 24-hours a day. The Center's mission is to effect a true change in the life of individuals through education and spiritual enlightenment.

Caseworkers help equip the homeless with tools necessary to get their lives on track. Trained staff provide case management, clothing vouchers, personal hygiene items, ID cards, daytime sleeping accommodations for individuals who work at night, transportation to medical appointments, and referrals to other agencies. We offer washers and dryers, showers, and a safe place for parents who are not yet working or have day-care.

Through collaboration with other agencies, we also provide mental health counseling, anger management, work support group, online connection with CLM Workforce Connection, VA counseling, assistance with applications for Food Stamps and Social Security disability.

EMERGENCY SERVICES

Our Family Emergency Services program assists families attempting to keep homes and jobs providing help with food, clothing, furniture, utilities (as funds are available), and housing.

COMMUNITY FEEDING

The Center of Hope provides two meals a day to thousands of homeless and low-income people every year. The meals offer balanced nutrition to men, women and children of Marion County who otherwise would go hungry. This program not only relieves the economic pressure on governmental and other social service agencies, but promotes health and well-being.

EMERGENCY SHELTER

For the homeless and victims of tragedies in Marion County, the Center of Hope provides a critical safety net. We provide emergency shelter for women, men, and families with a 40-bed men's dorm and a 20-bed women's dorm.

TRANSITIONAL HOUSING

The Center of Hope houses six family rooms for those who have become homeless due to job loss or other tragedy. The program offers a safe and secure home, three meals a day, laundry facility, and limited transportation. Adults can work or further their education to secure permanent housing and employment.

COUNSELING

The Centers through collaboration with The Center of Hope provides professional staff, attuned to spiritual and emotional needs, which help individuals to face their problems and find long-term solutions. Appointments are made for further evaluation, counseling, and the medical clinic.

FAMILY THRIFT STORE

Donations from caring people in Marion County enable The Salvation Army Thrift Store in Ocala to provide household goods and clothing to those in need. Funds generated through sales assist clients of The Salvation Army.

HOLIDAY PROGRAMS

The Salvation Army provides holiday meals at Thanksgiving and Christmas to those who would otherwise go without. Food baskets, toys and clothing are provided to individuals and families who are unable to provide for their families.

ANGEL TREE

TO: **TDLCB Board Members**

FROM: **Liz Mitchell, Grants Coordinator/Fiscal Planner**

RE: **2023 TD Area Study**

Summary

The TPO and MT in partnership had an analysis of the transportation disadvantaged and rural transportation service area done. The focus was communities throughout the County currently not being serviced. This analysis will show the impacts from the 2020 Census and help us to identify areas of the County currently not being provided service but also what areas have the highest demand. It will look at the communities with our aging population that are unable to transport themselves, critical need disadvantaged population, and low income. The results of this analysis will allow us to meet the growing demand, maximize service, and target those most in need immediately.

Attachment(s)

TD Area Study Presentation by Kimley Horn - Omar Peerzada, and Amber Gartner

Action Requested

Informational only

Any additional comments and/or suggestions please contact Liz Mitchell, liz.mitchell@marionfl.org.

MARION TRANSIT SERVICES ANALYSIS

DRAFT REPORT

MAY 2023

Prepared by

Kimley»Horn
Expect More. Experience Better.

MARION TRANSIT

T PO OCALA MARION TRANSPORTATION PLANNING ORGANIZATION

Marion Transit Service Analysis

DRAFT REPORT

Prepared for:

Ocala Marion Transportation Planning Organization (TPO)

Marion Transit Services

Prepared By:

Kimley-Horn & Associates, Inc.

Table of Contents

Section 1. Introduction

The Ocala Marion Transportation Planning Organization (TPO) works with Marion Transit (MT) to provide public transportation services throughout Marion County. MT makes use of Federal Transit Authority (FTA) Section 5311 Program funding to provide public transportation services to areas of the County outside of Census and FTA defined urban areas. As the Community Transportation Coordinator (CTC), MT also assumes responsibility for coordinating local transportation services for individuals who are transportation disadvantaged (TD) consistent with the rules defined by the Florida Commission for the Transportation Disadvantaged (FCTD). That responsibility includes provision of door-to-door paratransit services to meet the transportation needs for medical, life-sustaining, educational, work, business, and recreational activities for Marion County's TD population, as well as other recipients in the County.

The TPO and MT are working together to reevaluate transportation disadvantaged and rural public transportation service levels based on recently published 2020 Census data. The 2020 Census data redefines urban areas and, in turn, the boundaries of FTA Urban Areas. The resulting changes have impacts on the use of FTA funding.
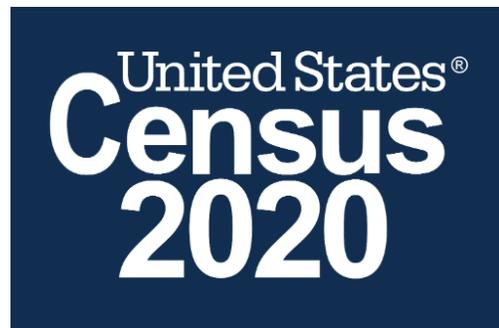
This report documents an evaluation of the 2020 Census data and its impact to existing MT service. The service evaluation is designed to result in modified transportation disadvantaged and rural transportation services that are consistent with the 2020 Census urban/rural designations and that meet growing transportation demand in the community. In addition, an important aspect of this project is identifying areas and/or communities that will maximize use of the existing levels of available transit service funding. This report supports the implementation of Goal 1 of the Transportation Disadvantaged Service Plan (TDSP): "To provide the best possible transportation service to those in the service area".

Report Content
Including this Introduction, this report is organized into four sections. They include the following:

- **Section 2** provides background information on the 2020 Census and the changes to the definition of urban areas. A map series is presented to illustrate the changes to FTA Urban Areas from 2010 to 2020 based on decennial Census data.

- **Section 3** describes the evaluation framework applied to identify modified and new rural public transportation services. This section also describes the actions taken as part of each step in the evaluation framework and the resulting service alternatives developed. A map series is presented to illustrate each proposed service alternative.

- **Section 4** describes short-term actions for implementation of proposed service alternatives. A tentative timeline along with responsible parties for each action identified is also presented.

Section 2. Urban Area Boundary Changes

The 2020 Census establishes new definitions and geographies for urban areas. Urban areas are delineated by applying specific criteria to the decennial census data. Rural areas encompass all population, housing, and geography not included within a Census Urban Area delineation. The 2020 Census defines an urban area as follows:

> *"… a densely settled core of census blocks that meet minimum housing unit density and/or population density requirements. This includes adjacent territory containing non-residential urban land uses. To qualify as an urban area, the territory identified according to criteria must encompass at least 2,000 housing units or have a population of at least 5,000."*

There are three key changes to the 2020 Census approach to delineating urban areas: (1) An area can now qualify as an urban area by meeting the minimum housing unit *or* population threshold, (2) the minimum population threshold was raised from 2,500 to 5,000 people, and (3) housing unit density is now used in place of population density to define an urban area. In addition, the 2010 Census grouped Urban Areas into urban areas and urban clusters, based on a population above or below 50,000 people. The 2020 Census no longer distinguishes between different types of urban areas.

For FTA programs, the U.S. Census Bureau's urban area classifications delineate geographic boundaries for both urban and rural areas. Consequently, the delineations impact the funding distribution and eligibility for FTA's various discretionary and formula grant funding programs. For the purposes of its grant programs, FTA still defines an urban area as an urban area encompassing a population of 50,000 or more. **Figure 1** illustrates the impact from the 2020 Census on FTA Urban Areas that include portions of Marion County. There are three Census-delineated urban areas that include portions of Marion County and meet the FTA's population threshold of 50,000 people or more to be classified as an Urban Area:

- Ocala Urban Area
- The Villages-Lady Lake Urban Area
- Beverly Hills-Homosassa Springs-Pine Ridge Springs Urban Area

As shown in the map series, the impact to the FTA Urban Areas consists of expansion of the geographic coverage of two of the three urban areas: the Ocala Urban Area and Lady Lake-The Villages Urban Area. There was a negligible amount of expansion within Marion County for the Homosassa Springs-Beverly Hills-Citrus Springs Urban Area.

Existing Services

The impact of the 2020 Census urban area delineation presents a favorable environment for users of MT's existing rural public transportation services. The two existing services, the Blue Line and Gold Line, are deviated fixed-route services that follow a designated route but provide on-demand trips for riders within a reasonable distance from designated destinations (i.e., service points such as banks, post office, medical facilities, etc.). Riders may also make same day reservations if the bus is able to deviate from its route and stay within its advertised schedule.

The Gold Line operates Monday through Friday from 9:00 AM to 4:30 PM and provides services to the Marion Oaks Area. The Blue Line operates Monday through Friday from 9:00 AM to 5:00 PM and provides services to the Dunnellon Area. **Figure 2** shows the general service areas for the Gold and Blue Lines, respectively. Based on the revised FTA Urban Areas, both routes could continue to operate with only limited modifications to their geographic service area.

Figure 1: 2010 vs. 2020 Urban Areas (Populations Greater Than 50,000)

Figure 2: Marion Transit Services Blue and Gold Line Service Areas
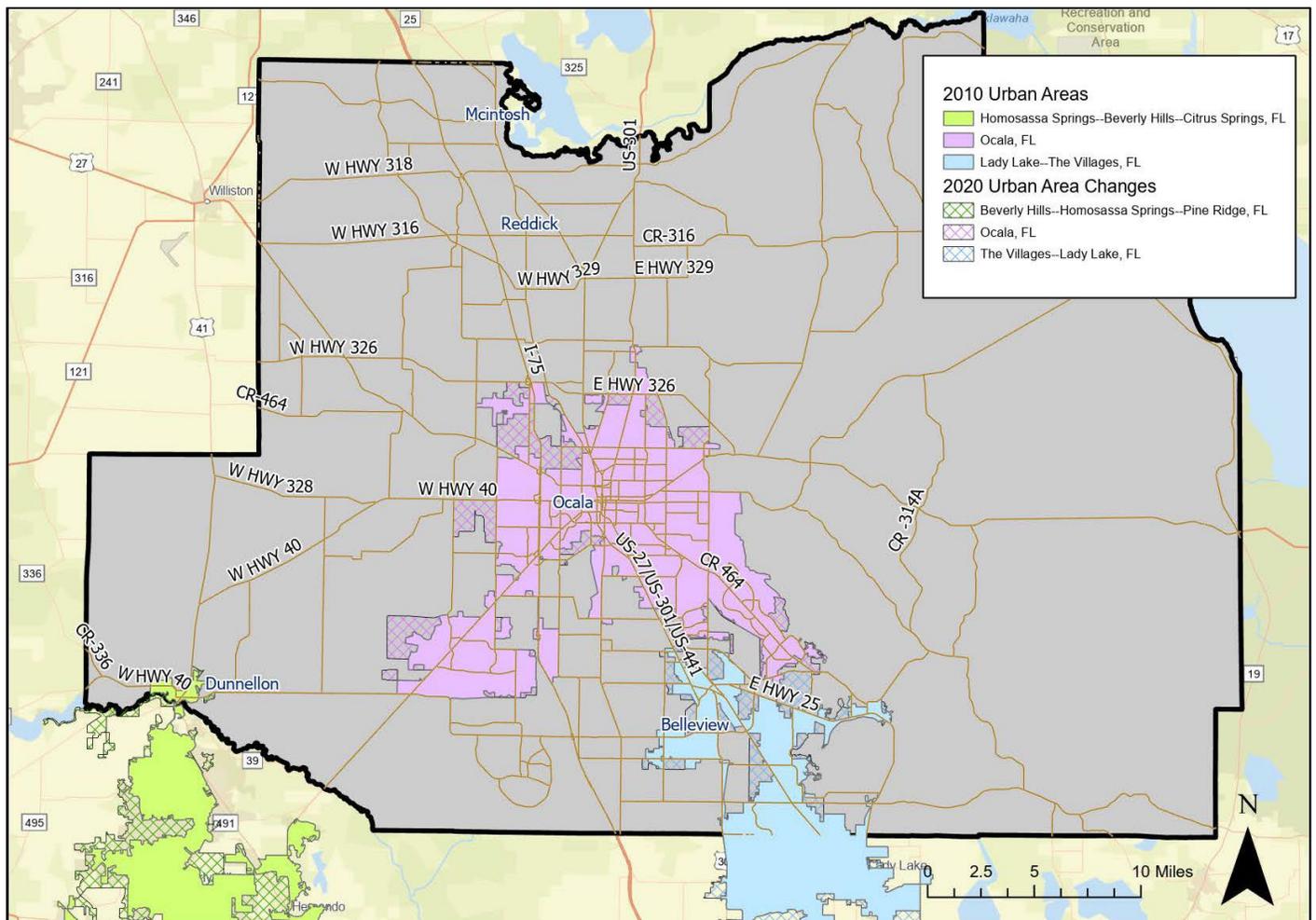
Section 3. Evaluation Framework and Service Alternatives

An evaluation framework was developed to guide the identification and prioritization of service alternatives. The evaluation framework consists of five major steps, as illustrated in **Figure 3**. Each step is described in the following section, including supporting data used, data sources, the decision criteria, and the conclusions that can be drawn from the analysis.

Figure 3: Evaluation Framework
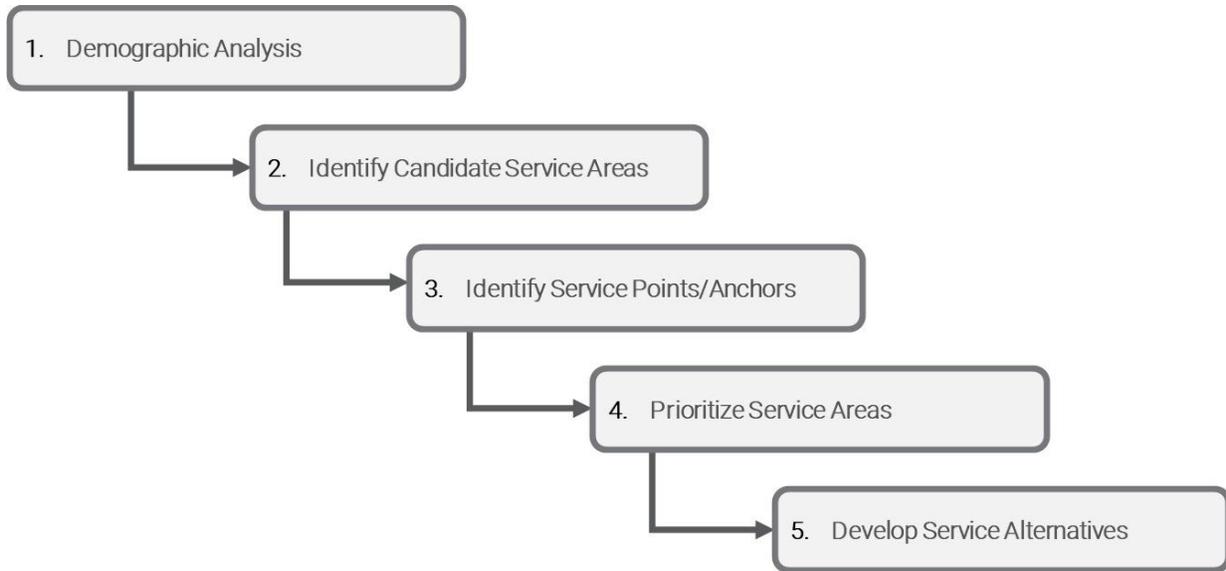
Step 1: Demographic Analysis

Step 1 of the evaluation framework consists of the analysis of demographic data. The demographic data analyzed help to identify populations that are more likely to be transit dependent. Transit dependent populations are characterized differently based on the operating environment. In Marion County, transit dependent populations are defined as exhibiting one or more of the following characteristics:

- *Older Adults:* Individuals aged 60 and older
- *Zero-Vehicle Households:* Households where no individuals own a vehicle
- *Low-Income Households:* Households that are at or below the poverty line
- *Persons with a Disability:* Individuals with an identified disability characterized as a difficulty with either hearing, vision, cognitive, ambulatory, selfcare, and/or independent living

The demographic analysis is presented on the following pages by each of the above transit dependent indicators and is accompanied by maps to illustrate where concentrations of these populations reside within the County. Data was sourced from 2021 American Community Survey (ACS) 5-year estimates at the Census tract and block group levels.

Older Adults

Figure 4 illustrates the percentage of individuals aged 60 and over by block group. Overall, 37 percent of the population of Marion County is aged 60 or over. **Figure 4** is symbolized using three categories to display the highest and lowest concentrations of individuals aged 60 and over:

- Below average (below 37%)
- Average to 150% of the average (37% to 56%)
- Above 150% of average (above 56%)

The highest concentrations of individuals aged 60 and older are in block groups located in the areas of Marion Oaks, Dunnellon, Belleview, Ocala National Forest, and east of Fort McCoy.

Figure 4: Percentage of Age 60 and Over Individuals by Block Group (2021 ACS 5-Year Estimates)
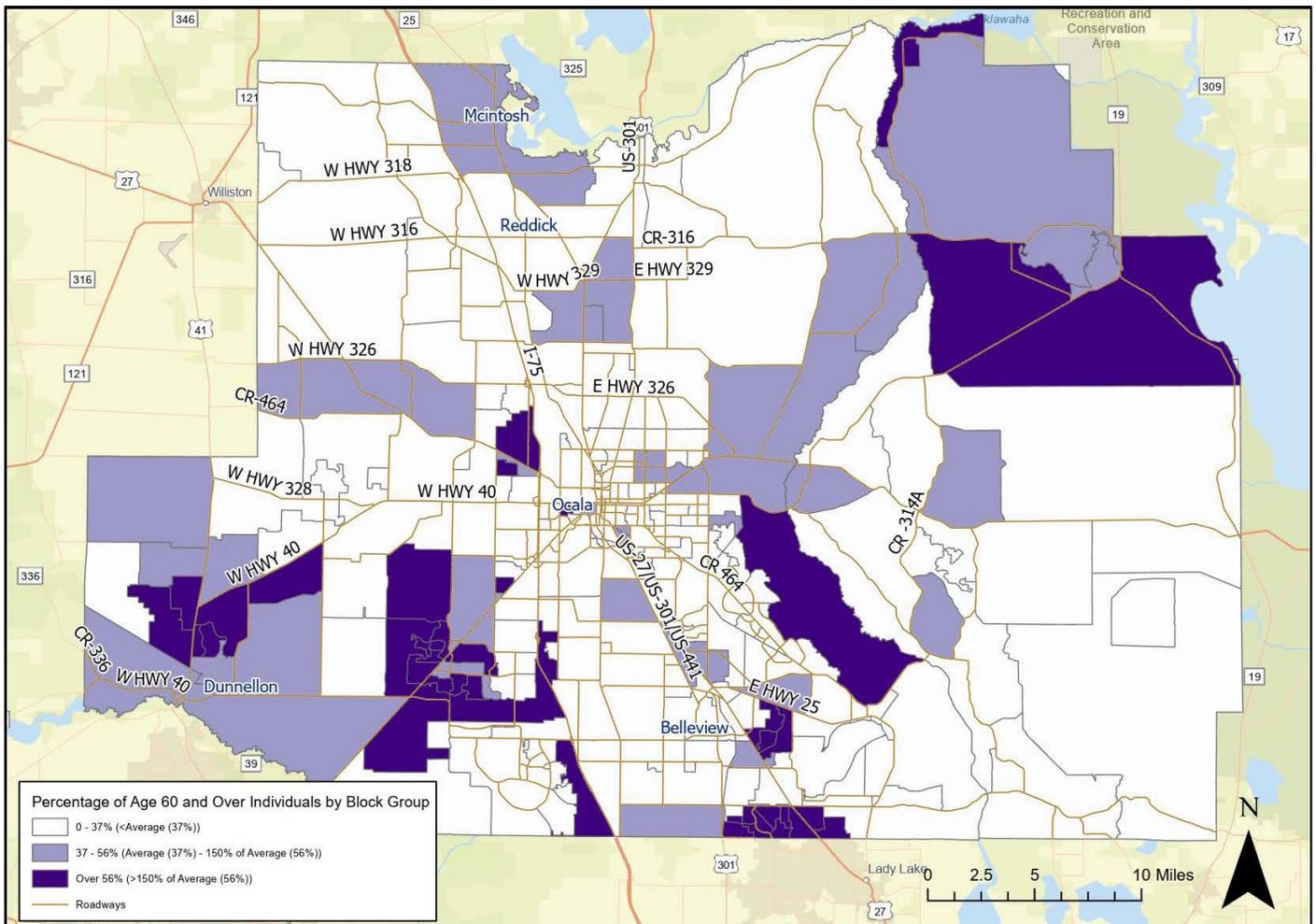
Zero-Vehicle Households

Figure 5 illustrates the percentage of zero-vehicle households by block group. Overall, 5 percent of households in Marion County are classified as zero-vehicle households. **Figure 5** is symbolized using three categories to display the highest and lowest concentrations of households with zero-vehicles:

- Below average (below 5%)
- Average to 150% of the average (5% to 8%)
- Above 150% of average (above 8%).

The highest concentrations of zero-vehicle households are in block groups located in the areas of Citra, Reddick, Fairfield, Dunnellon, Umatilla, Ocala, Salt Springs, and Southeast of Marion Oaks.

Figure 5: Percentage of Zero-Vehicle Households by Block Group (2021 ACS 5-Year Estimates)
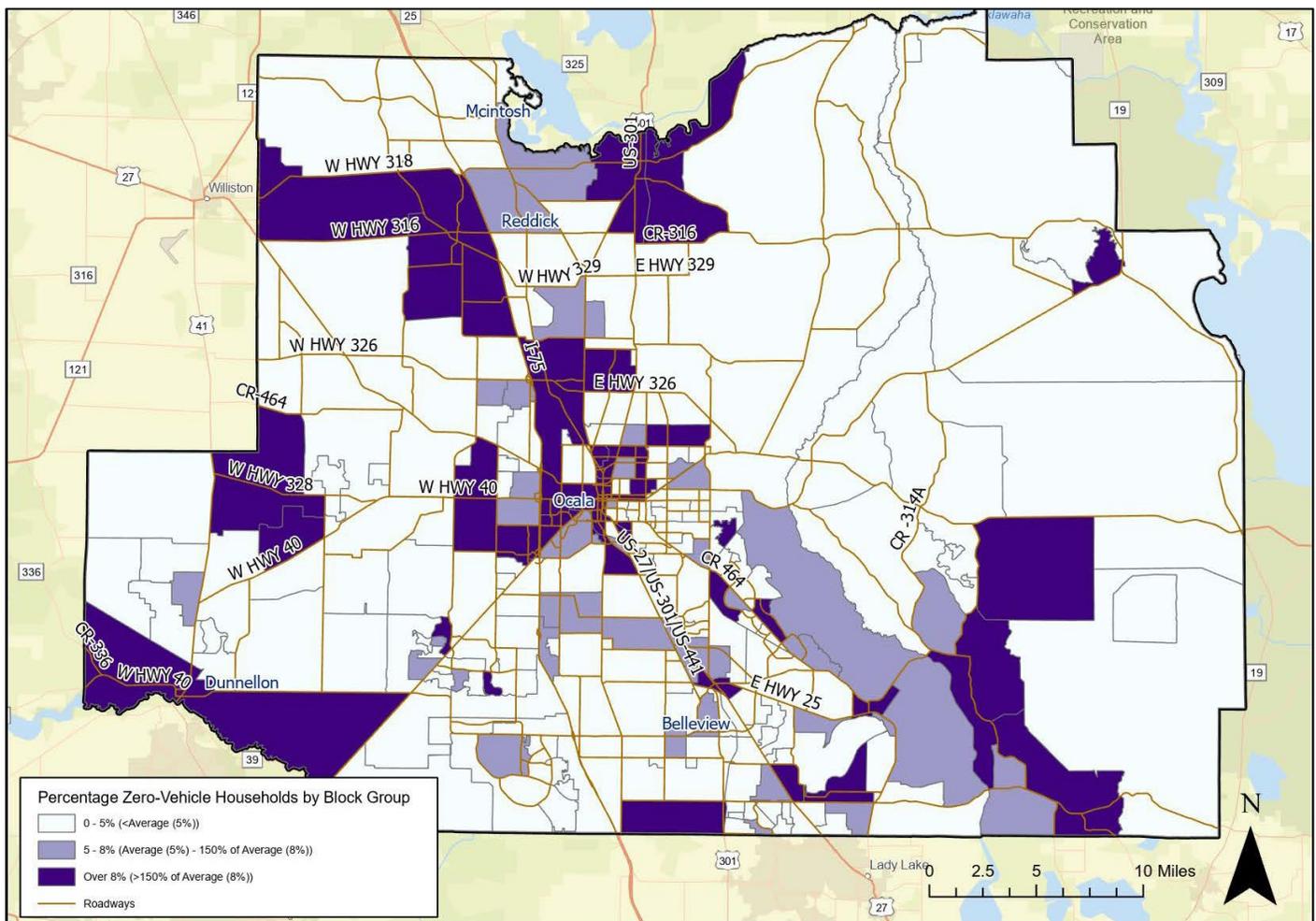
Low-Income

Figure 6 illustrates the percentage of individuals by poverty status by block group. Overall, 14 percent of the population of Marion County is considered low-income. **Figure 6** is symbolized using three categories to display the highest and lowest concentrations of individuals by poverty status:

- Below average (below 14%)
- Average to 150% of the average (14% to 21%)
- Above 150% of average (above 21%)

The highest concentrations of individuals with poverty status are in block groups located in the areas of Citra, Reddick, Fairfield, Fort McCoy, Dunnellon, Umatilla, Ocala, Ocala National Forest, Salt Springs, and Southeast of Marion Oaks.

Figure 6: Percentage Individuals by Poverty Status by Block Group (2021 ACS 5-Year Estimates)
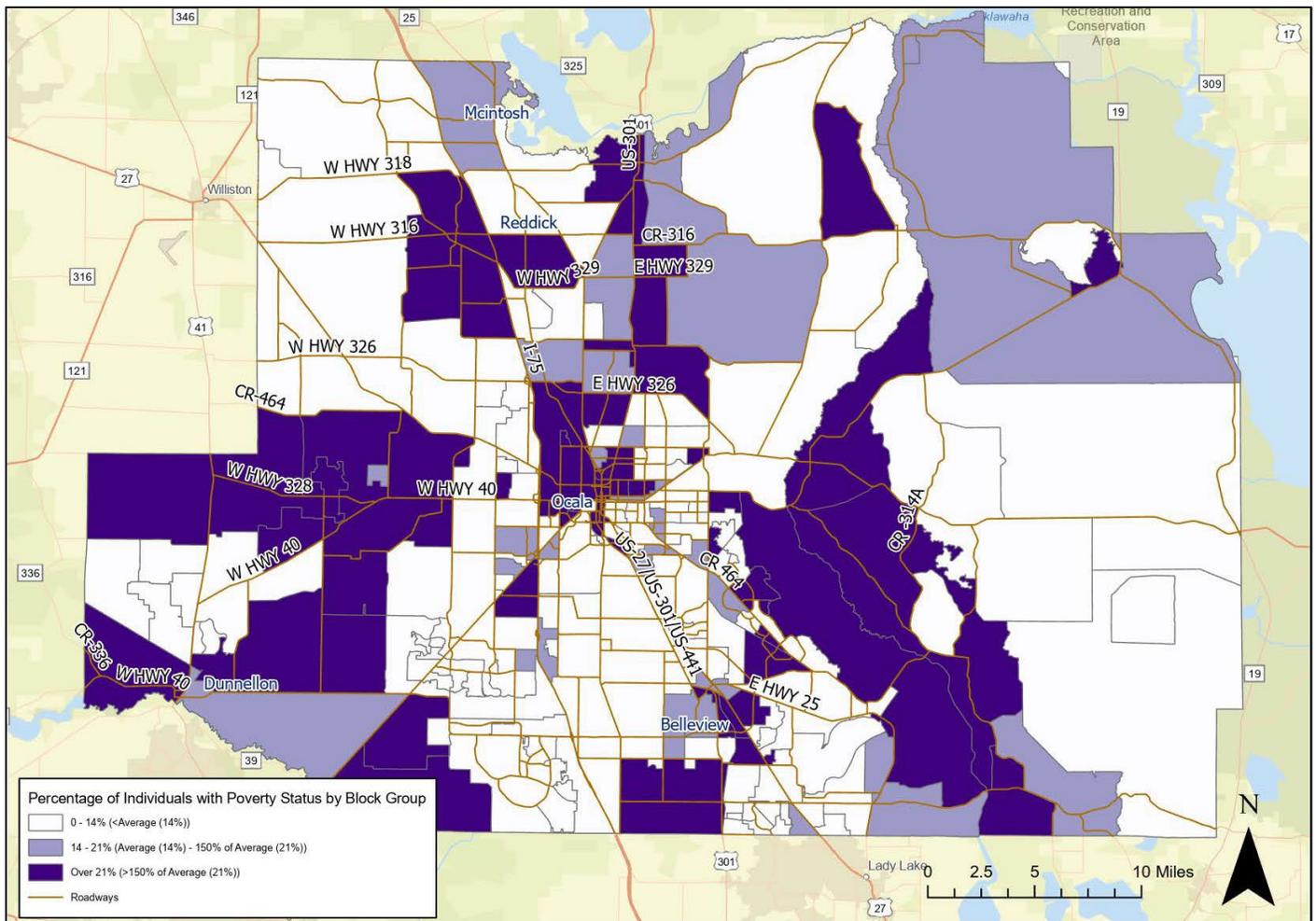
Persons with Disabilities

Figure 7 illustrates the percentage of individuals with a disability by census tract, which was the most granular level of data available for 2021 ACS 5-year estimates of disability status. Overall, 17 percent of the population of Marion County identify as having a disability. **Figure 7** is symbolized using three categories to display the highest and lowest concentrations of individuals by disability status:

- Below average (below 17%)
- Average to 150% of the average (17% to 25%)
- Above 150% of average (above 25%)

The highest concentrations of individuals with an identified disability are in census tracts located in the areas of McIntosh, Salt Springs, and southeast of Dunnellon.

Figure 7: Percentage of Individuals with a Disability by Census Tract (2021 ACS 5-Year Estimates)
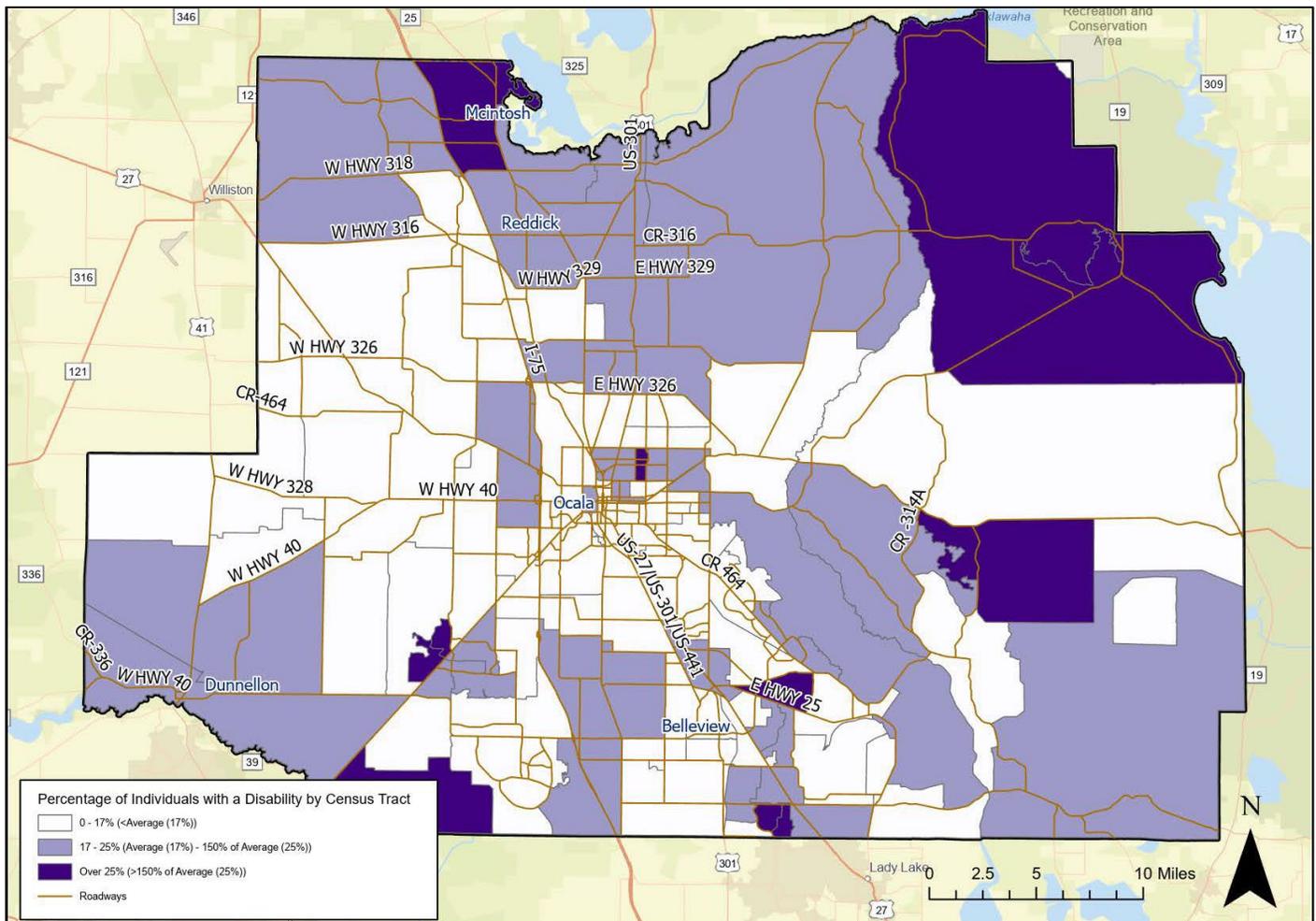
Transit Propensity Index

An overlay analysis of the demographic data was prepared to understand where concentrations of transit dependent populations exist within the County. This type of overlay analysis is typically referred to as a Transit Propensity analysis or a Transit Orientation Index (TOI). The process of overlaying the demographic data provides for a composite representation of transit dependent populations, as defined within the local operating environment. The result is areas with higher concentrations of more than one transit dependent characteristic can be easily and visually distinguished from other areas on a map or other geographic format.

Figure 8 illustrates a map of the transit propensity index analysis that was developed to provide an overview of areas containing the highest concentration of transit dependent populations (older adults, zero-vehicle, low-income, and disabled populations) in Marion County. This allows for the identification of zones that could be considered for new or expanded rural transportation services. The darker shaded areas reflect areas with higher transit propensity based on the four transit dependent characteristics evaluated.

Figure 8: Transit Propensity Index (2021 ACS 5-Year Estimates)
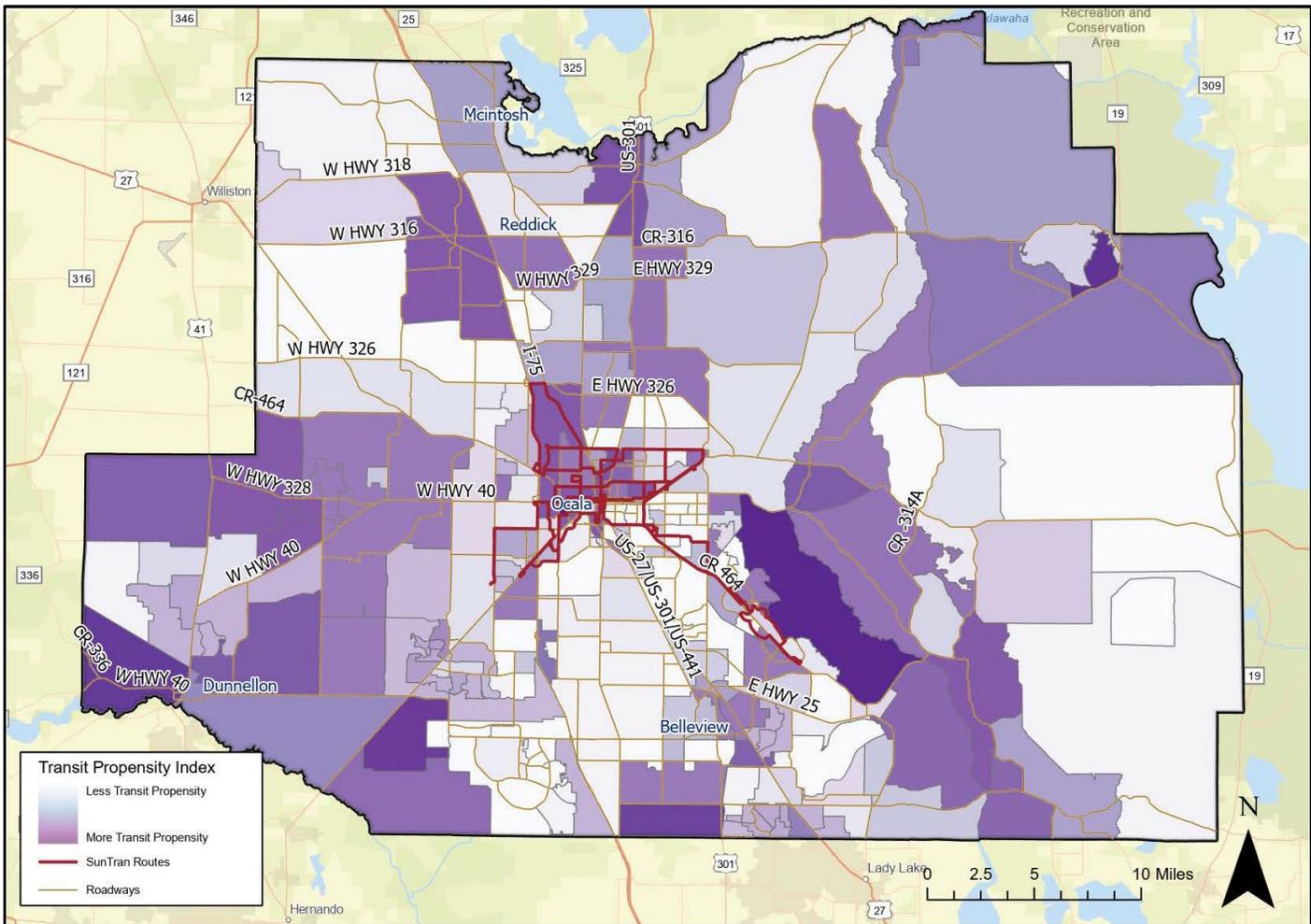
Step 2: Identify Candidate Service Zones

As indicated, the overlay analysis allows for a visual representation of where transportation disadvantaged populations are concentrated throughout the County. The overlay facilitates identification of candidate zones (i.e., block groups) that could be targeted for public transportation services. That identification of candidate zones is premised on the probability that more bus ridership demand can be met in areas that have a higher transit propensity. Based on the overlay analysis illustrated in **Figure 8**, 15 zones are identified for further evaluation and consideration for rural public transportation service. Candidate zones include the following are illustrated in **Figure 9**.

- Citra
- Dunnellon
- East Lake Weir
- Fairfield
- Forest (Southeast Ocala)
- Forest Corners
- Fort McCoy
- North Dunnellon
- Reddick
- Salt Springs
- Silver Springs
- South Marion Oaks
- Southeast Marion Oaks
- West Dunnellon
- West Marion Oaks

Consistent with the focus of this analysis, candidate zones include high transit propnsity areas located outside of the FTA's 2020 Urban Areas (i.e., rural areas).

Step 3: Identify Service Points

The analysis is insufficient if focused solely on where target populations reside. Therefore, the evaluation framework must also include the identification of service points where transit dependent populations would likely travel to. Specifically, the question stated was, *"Where within, or near, each candidate service zone do people need to go to perform life-sustaining activities?"*

Multiple service points are identified within and around each candidate zone. Service points include essential services such as grocery stores, post offices, pharmacies, medical services, banks, and libraries. Service points were identified and considered based on their location within or near each candidate zone, as well as locations that exist along the service routing to and from Marion Senior Services in Ocala. In addition, existing MT service points from the current MT Blue and Gold Lines were added to the list. **Figure 9** identifies service points for the candidate zones. A comprehensive list of all the identified service points, including zone served, location name, type of services provided, and address, is included in **Appendix A**.

Figure 9: Marion Transit Services: Service Points
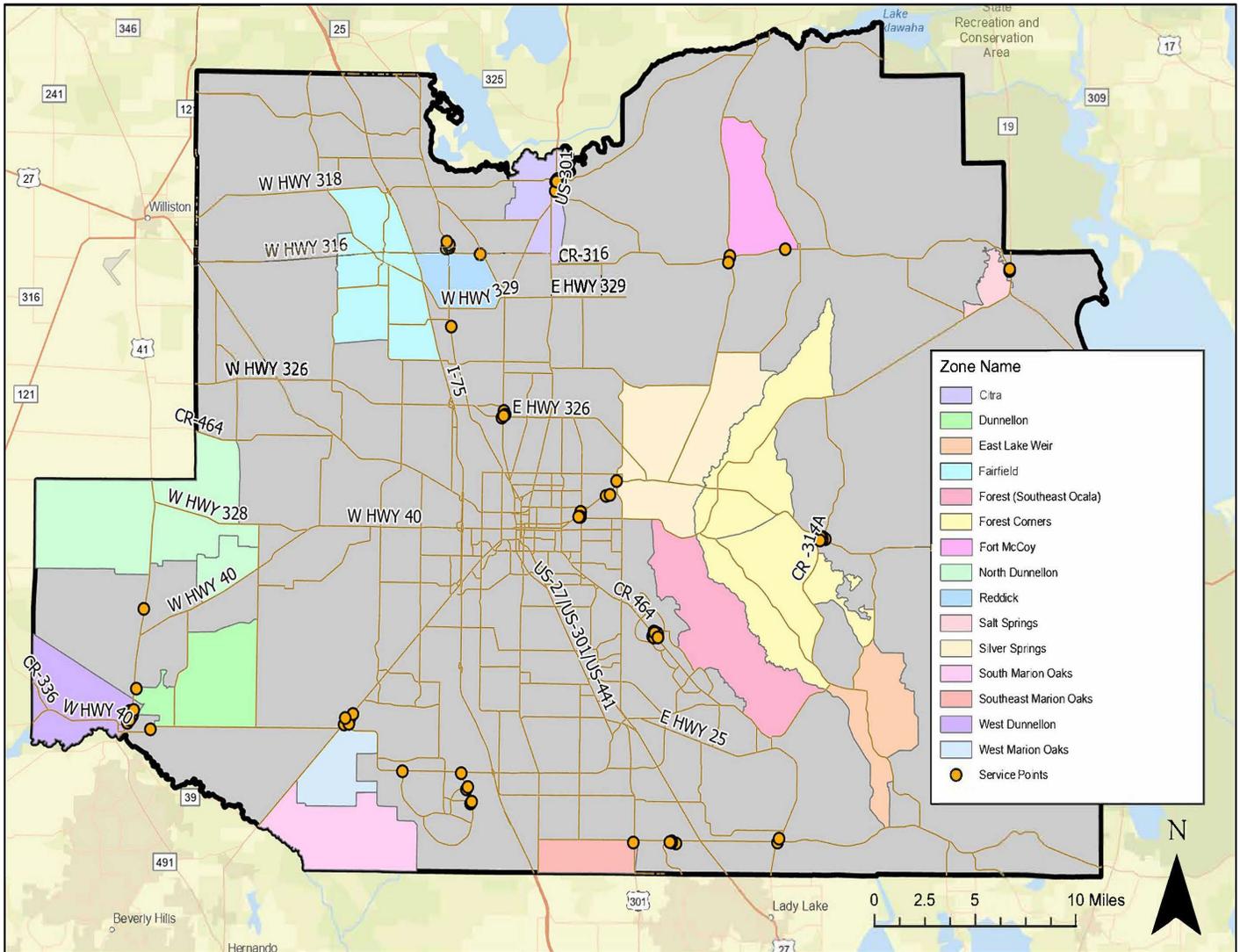
Step 4: Prioritize Candidate Service Zones

The limited resources available through FTA funding sources require that any new or modified services are prioritized in the candidate zones identified in Step 3. To that end, four prioritization criteria were developed to filter through the candidate service zones and identify those that meet service delivery operational requirements, potential productivity levels, and proximity to life-sustaining activities. The four criteria including the following:

- **Demographic Data** – The demographic data and resulting overlay analysis reveal high concentrations of transit dependent populations within each candidate zone. Candidate zones are given point scores for each demographic group (older adults, zero-vehicle households, low-income households, persons with disabilities) where the proportion in the candidate zone is higher than the countywide average.

- **Number of Service Points** – Improving access to life-sustaining activities is the primary charge of transportation service provision. Zones with proximity and access to more service points are given a higher prioritization score for this criterion.

- **Population Density** – Large tracts that exhibit high transit propensity may be difficult to serve if population densities are low. Travel to and from dispersed, low-density, and very rural operating environments create service and scheduling inefficiencies and decrease opportunities to reach more people and service points. As a result, zones with a higher population density are given a higher score for this criterion.

- **Distance** – The distance buses need to travel to service start points is an important consideration as longer distances equate to more travel time to and from target communities, thus putting a constraint on daily operating hours. Furthermore, distance from the operations hub adds complexity to potential operational issues such as breakdowns, incidents, and other unforeseen issues that could impact service. As a result, candidate zones that were closer to the Marion Senior Services transit hub were given a higher score in this criterion.

Table 1 shows the prioritized rank order of the 15 candidate zones based on these criteria. Detailed metrics and corresponding scoring for each criteria are included in **Appendix B**.

As shown in **Table 1**, scoring for the various candidate zones ranged from seven to fourteen, with the higher number indicating a higher prioritization. The Citra, Reddick, and West Dunnellon zones rank highest while the North of Dunnellon, Silver Springs, and Fairfield zones rank the lowest. **Table 1** also groups high priority zones that could potentially be served by the same service route through color-coding (e.g., the orange-colored zones, Citra and Reddick, could potentially be served by the same route). More details of the grouping are described in Step 5.

Table 1: Candidate Zone Prioritization Scores

Zone Name	Score
Citra	14
Reddick	14
West Dunnellon	14
Forest (Southeast Ocala)	13
Forest Corners	12
Dunnellon	11
South Marion Oaks	11
Southeast Marion Oaks	11
West Marion Oaks	11
Fort McCoy	10
Salt Springs	10
East Lake Weir	9
North of Dunnellon	8
Silver Springs	8
Fairfield	7

Step 5: Develop Service Alternatives

Based on the prioritization performed in Step 4, service alternatives were narrowed down to the five following proposed routes:

- Dunnellon Route
- Citra-Reddick Route
- Fort McCoy Route
- Forest Corners Route
- Marion Oaks Route

Each of these routes are proposed to run as "point-deviated services," where vehicles follow a fixed schedule around multiple destinations (i.e., service points) and can deviate anywhere within a defined service zone to pick up and drop off riders who request service. Point-deviated service is currently utilized for the MT Blue and Gold Lines.

Figures 10 through 14 show each of the five routes mentioned above. For each proposed route, a quarter-mile buffer area and a one-mile buffer area around the proposed service route is shown. The buffer areas depict service area ranges based on distance and not on travel time. These ranges represent the approximate distance a driver may be able to go to pick up a rider who requested service. A path from Marion Senior Services in Ocala to the route is shown as the vehicle travels outside of the urban area into the non-urban service area. The service points along the route are identified on the primary map and inset map. The service alternatives presented were developed in coordination with Marion Transit and Ocala Marion TPO staff.

Service Alternative #1: Dunnellon Route

Figure 10 shows the proposed Dunnellon Route. This route was modeled to serve a similar geography and service points to the existing MT Blue Line. The Dunnellon Route would serve areas along SR 40 between Marion Senior Services and Dunnellon in the southwestern portion of the county. This service is unique compared to other service alternatives due to it serving a non-urban area between two urban areas: Ocala and the Beverly Hills-Homosassa Springs-Pine Ridge Urban Area.

The route is proposed to connect to ten identified service points, also shown in **Figure 10**. Those service points include medical, grocery, post office, banking, and community service locations. The service would benefit patrons by connecting them to both Ocala and Dunnellon via SR 40.

Service to the Dunnellon area was a high priority based on the Step 4 prioritization exercise, specifically when looking at demographic data. The demographic analysis shows higher concentrations of transportation disadvantaged populations when compared to the countywide average in the following categories:

- 22% of individuals below the poverty line (Dunnellon and West Dunnellon)
- 11% of households with zero-vehicles (West Dunnellon)
- 51% of individuals aged 60 and over (West Dunnellon)
- 24% of individuals with an identified disability (West Dunnellon)

Figure 10: Service Alternative #1: Dunnellon Route

Service Alternative #1: Dunnellon Route

Service Points

1. Heart of Florida
2. Save-a-Lot
3. USPS
4. Walgreens
5. Publix
6. Dollar Tree
7. Walmart
8. Boys and Girls Club
9. Winn-Dixie
10. Dollar General

Legend

● Marion Senior Services
● Service Points
— Roadways
▪▪▪ Marion Senior Services to Dunnellon Route
— Dunnellon Route Alignment
▨ Quarter-Mile Buffer Outside Urban Area
▨ One-Mile Buffer Outside of Urban Area
▨ 2020 Urban Areas

0   0.75   1.5   3 Miles

Service Alternative #2: Citra-Reddick Route

Figure 11 shows the proposed Citra-Reddick route. This route would serve areas along US 301 north of Marion Transit Services towards the Citra and Reddick communities in Marion County. These two areas were identified as the top candidates for service expansion resulting from the transit propensity analysis and prioritization process as part of Step 2 of this analysis. Thirteen service points were identified along the route and those locations include essential services in Citra, Reddick, and areas north of Ocala.

The route would serve the Citra and Reddick candidate zones identified in Step 2 of this analysis. The Citra and Reddick zones have population densities that indicate service may be more heavily utilized in these areas (i.e., 187 and 119 persons per square mile, respectively). Additionally, the demographic analysis shows higher concentrations of transportation disadvantaged populations when compared to the countywide average in the following categories:

Citra:

- 45% of individuals below the poverty line
- 9% of households with zero-vehicles
- 17% of individuals with an identified disability

Reddick:

- 24% of individuals below the poverty line
- 7% of households with zero-vehicles
- 20% of individuals with an identified disability

Figure 11: Service Alternative #2: Citra-Reddick Route
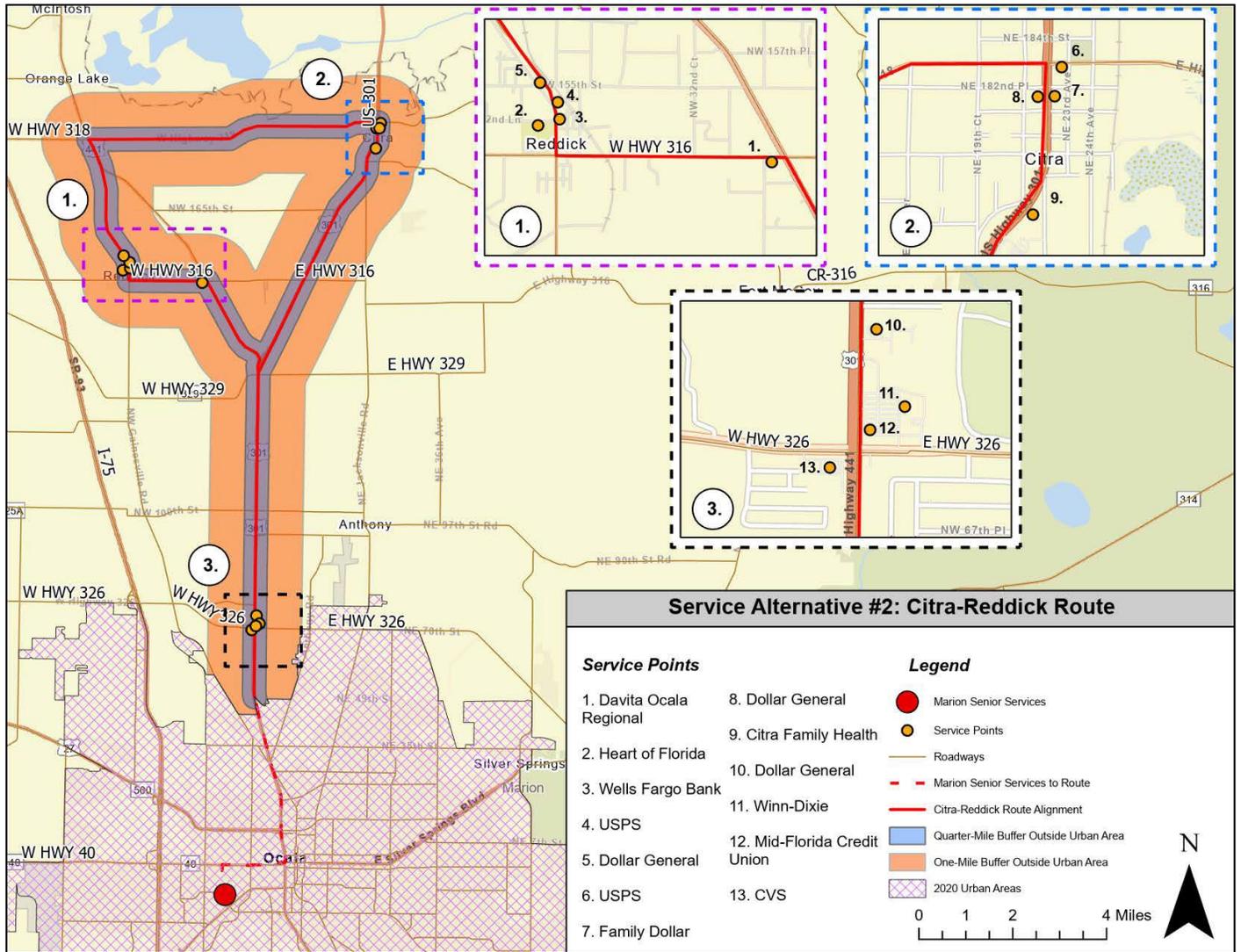
Service Alternative #3: Fort McCoy Route

Figure 12 shows the proposed Fort McCoy Route. The Fort McCoy Route would serve areas north of Marion Transit Services towards the Fort McCoy area along CR 315. The Fort McCoy Route would benefit residents by providing connections between the Fort McCoy area, the urban areas of Ocala and Silver Springs, and the eleven identified service points.

The Fort McCoy Route was selected as alternative due to expressed interest in providing transit connections to the Fort McCoy area and its higher concentrations of transportation disadvantaged populations when compared to the countywide average in the following categories:

- 46% of individuals below the poverty line
- 67% of individuals aged 60 and over
- 21% of individuals with an identified disability

Figure 12: Service Alternative #3: Fort McCoy Route
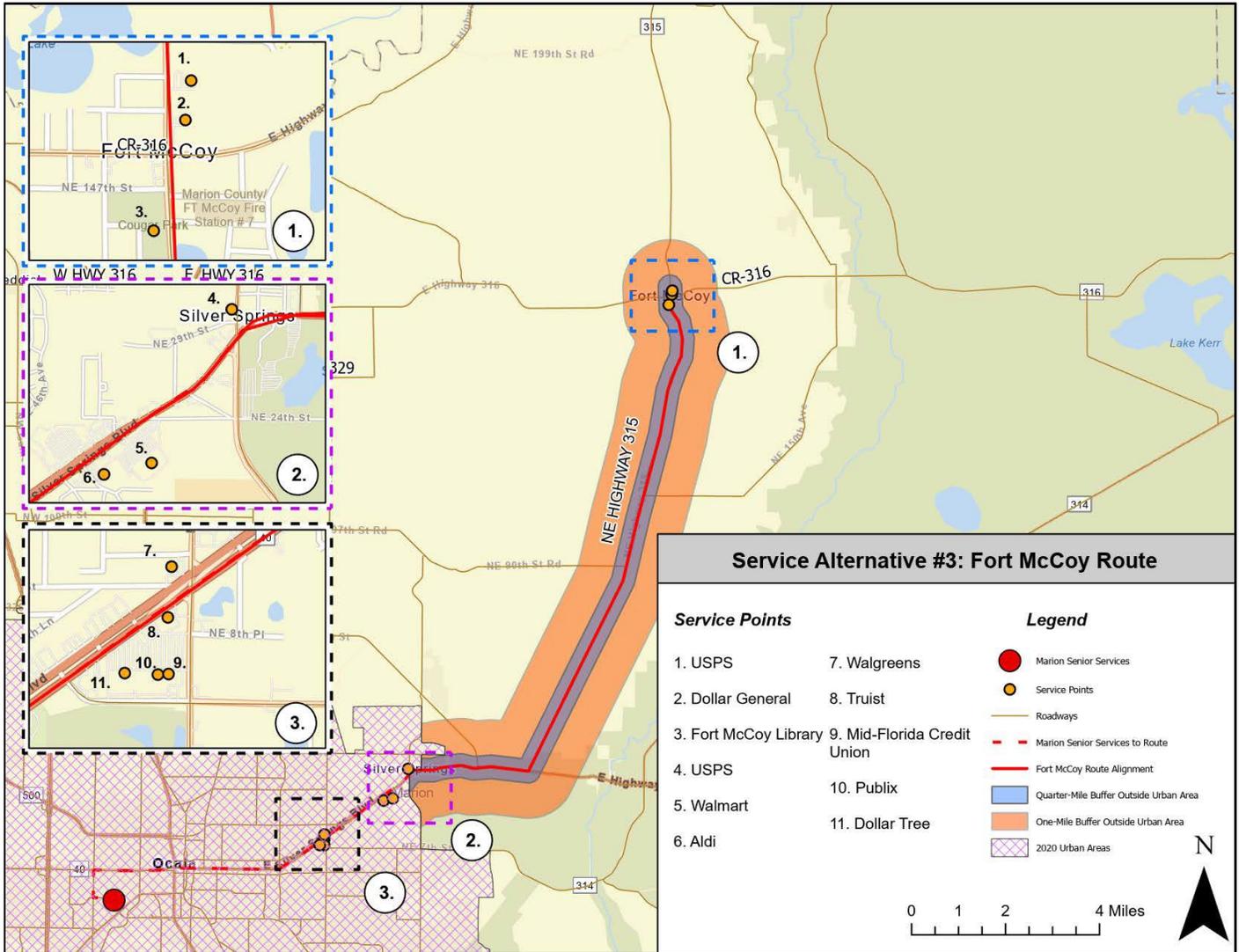
Service Alternative #4: Forest Corners Route

Figure 13 shows the proposed Forest Corners Route. The Forest Corners Route would serve areas east of Ocala along SR 40, connecting Marion Senior Services towards Silver Springs and the Ocala Forest community. The Forest Corners Route would benefit residents by providing connections to the ten identified service points identified in the Ocala Forest area located within the Forest Corners Shopping Plaza located at the intersection of SR 40 and CR 314A, the Forest Community Center, as well as those identified in the Silver Springs area's Six Gun Shopping Plaza.

The route would serve both the Forest Corners and Silver Springs candidate zones identified in Step 2 of this analysis. The demographic analysis shows higher concentrations of transportation disadvantaged populations when compared to the countywide average in the following categories:

Forest Corners

- 28% of individuals below the poverty line
- 18% of individuals with an identified disability

Silver Springs

- 48% of individuals aged 60 and older

Figure 13: Service Alternative #4: Forest Corners Route

Service Alternative #4: Forest Corners Route

Service Points

1. Dollar General
2. Tax Collector's Office
3. Family Dollar
4. Dollar Tree
5. Winn Dixie
6. Forest Community Center
7. Regions Bank
8. USPS
9. Walmart
10. Aldi

Legend

- ● Marion Senior Services
- ● Service Points
- —— Roadways
- – – Marion Senior Services to Route
- —— Forest Corners Route Alignment
- Quarter-Mile Buffer Outside Urban Areas
- One-Mile Buffer Outside Urban Areas
- 2020 Urban Areas

0   0.75   1.5   3 Miles

N

Service Alternative #5: Marion Oaks Route

Figure 14 shows the proposed Marion Oaks Route. This route was modeled to service a similar geography and service points to the existing MT Gold Line. The major focus of the Marion Oaks Route includes service to the rural parts of the Marion Oaks community. The path would travel to the Marion Oaks area via I-75 southbound, taking the exit towards CR 484 and traveling through neighborhoods in Marion Oaks outside of the urban area. The route would provide access a high concentration of residents who live in the Marion Oaks area.

The route is proposed to connect riders to five service points concentrated in the Country Oaks Shopping Plaza at the intersection of CR 484 and SR 200. The service would benefit riders through its ability to connect a concentrated population of those who live in the neighborhoods identified in Marion Oaks towards services in and near the Country Oaks Shopping Plaza. Service to the Marion Oaks neighborhoods area would include areas of three different candidate zones identified in Step 2 of this analysis: South Marion Oaks, Southeast Marion Oaks, and West Marion Oaks. Based on the prioritization criteria developed, the Marion Oaks neighborhood was found to contain of the following levels of transportation disadvantaged populations:

South Marion Oaks

- 32% of individuals below the poverty line
- 8% of households with zero-vehicles
- 28% of individuals with an identified disability

Southeast Marion Oaks

- 27% of individuals below the poverty line
- 8% of households with zero-vehicles
- 37% of individuals aged 60 or over

West Marion Oaks

- 35% of individuals below the poverty line
- 72% of individuals aged 60 or over

Figure 14: Service Alternative #5: Marion Oaks Route
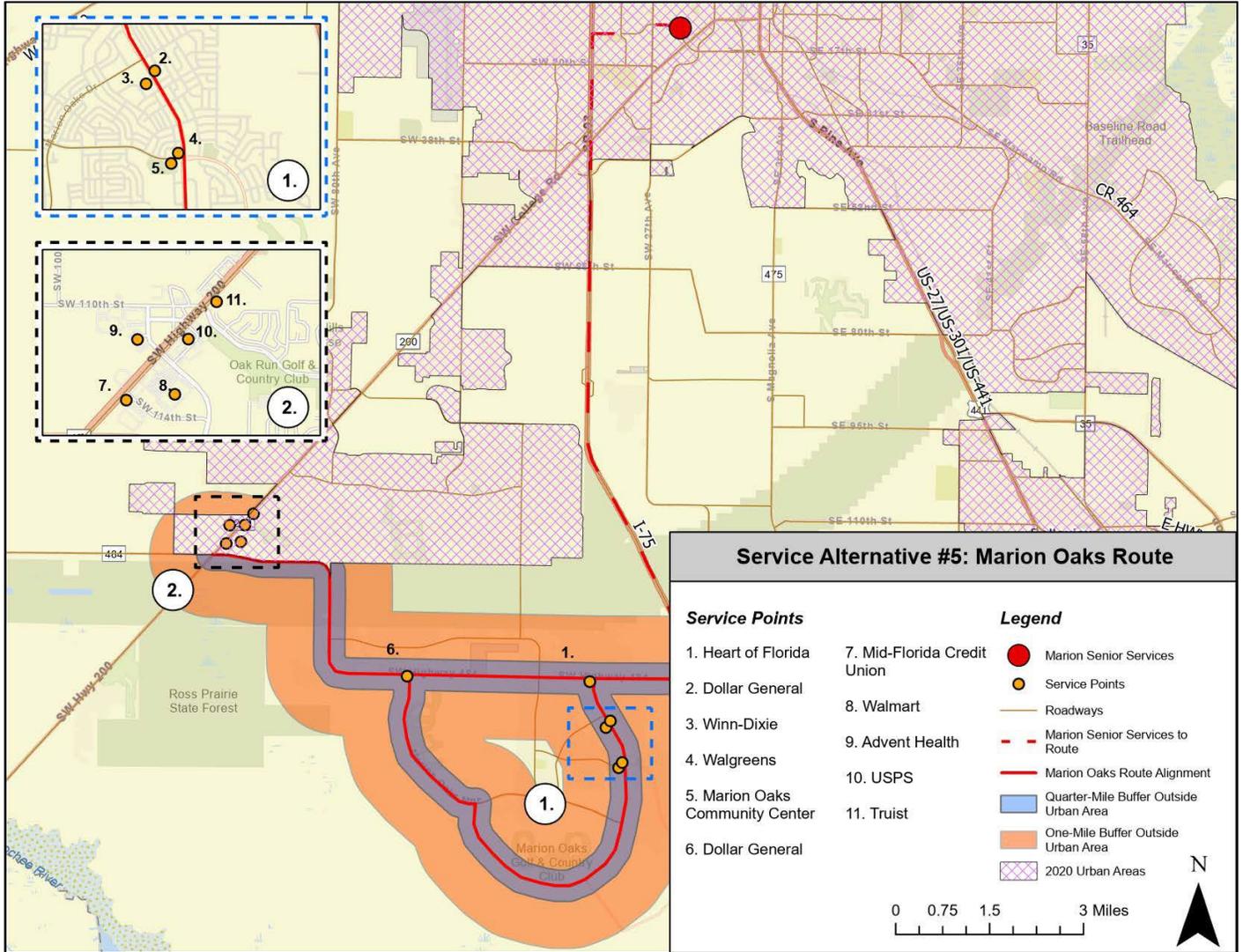
Section 4. Implementation Actions

Key implementation actions are presented to facilitate the delivery of proposed new services. These implementation actions are an important element to any planning activity as they enable plan proposals to move forward into meaningful results. Consequently, this section describes key components required to deliver new, expanded, and high-quality rural transportation services that are consistent with the demographic and service evaluation presented in this report.

Point-Deviated Service

New service alternatives are proposed to operate consistent with the service delivery model currently implemented by MT via the Blue and Gold Routes. Point-deviated fixed-route services follow a general route alignment with designated "anchor" stop locations with set pick up and drop off times. Buses are allowed to deviate off the alignment for on-demand stop requests within a reasonable distance from anchor stops. Anchor stops, or service points in the case of MT, consist of life-sustaining activity locations such as banks, post offices, shopping locations, and medical facilities, among others. Riders may also make same day reservations if the bus is able to deviate from its route and stay within its advertised schedule.

Staffing and Fleet Requirements

Each service alternative is proposed to initially be implemented with one additional vehicle and one new operator work shift. Monday through Friday service will equate to at least one full-time employee (FTE) position. This approach simplifies the development of daily operator and equipment work assignments. As demand develops over time, modifications to the schedule could be enacted to adjust schedule to add or subtract service hours or to address periods of peak demand.

Routing and Scheduling

Published Schedules

Development of a detailed schedule to be published and made available to the public is paramount. That schedule, along with specific pick up and drop off timing, will need to be developed in cooperation with the MT transportation operations team. Given the service is proposed to operate as a point-deviated service, enough travel time along with buffered timing that allows for on-demand trip reservations will need to be factored into any route cycle time.

Days of Service

Service can be deployed in a variety of combinations depending on the availability of staffing and equipment resources, as well as service demand. For example, high-demand/high-volume routes, such as the existing Dunnellon and Marion Oaks services, should continue to be deployed five days a week, Monday through Friday. For new services (Fort McCoy, Forest Corners, Citra/Reddick), five days a week service could be applied to any one route or, alternatively, specific days of service could be identified for each new route over the course of the week. Such an approach results in a lower level of service but expands the service area coverage, or reach, of MT's rural transportation services. An example of how this would work includes the following: 1) Citra/Reddick – Service on Mondays, Wednesdays, and Fridays; 2) Fort McCoy – Tuesdays and Thursdays.

Service Routing/Testing

Specific routing and/or stop sequencing will also be important to create realistic schedules for both operators and passengers. This can most often be accomplished by running a vehicle in the field and along the proposed route. Benefits of this approach include the following:

- Confirms safe access into and within service points
- Validates travel times to and from MT offices and between service points and neighborhoods where trip requests could originate
- Surveys neighborhoods for safety issues, access, dirt roads, low-hanging tree limbs, and other operational conflicts that could pose a risk hazard
- Confirms safe pick up and drop off locations for passengers who could not otherwise be picked up at their door. For example, gated communities, unpaved access, or steep grades could prevent access but riders could still come out to the curb or another nearby location to board vehicle if they are able to

Funding/Match Requirements

FTA Section 5311

Currently, Marion Transit uses FTA Section 5311 funding to support existing Blue and Gold Line operations. Applications for Section 5311 funding are made to Florida Department of Transportation (FDOT) as it serves as the 5311 Program Manager for all 5311 funds issued to the State of Florida. As program managers, FDOT administers program funding and conducts all required subrecipient oversight. Eligible activities under the 5311 program include planning, capital, operating, job access and reverse commute projects, and the acquisition of public transportation services. The local share for operating assistance is 50 percent, so for every dollar spent on rural operations in Marion County under the 5311 program, the County also has to expend another dollar on rural operations.

FCTD Innovative Service Development Grant

For the last several years, the FCTD has offered a competitive grant opportunity to CTCs throughout the state. The grant program is called the Innovative Service Development (ISD) grants program and is designed to support projects that are more cost effective for the State TD Program and also more time efficient for riders. The maximum award for any one project in the FY 2024 cycle is $750,000 and requires a 10 percent match from the local agency. Typically, the grant application cycle ends in May in advance of the beginning of the State fiscal year, July 1st. More information on the ISD grant program is available on the FCTD website: https://ctd.fdot.gov/Grants.htm.

Notifications/Advertising of Service

Along with the published schedule, notifications and advertising of new services should be issued to area service providers, social service agencies, and neighborhood groups that can help distribute new service media and collateral. The TD local coordinating board (TDLCB) will also serve as an important resource for continued and ongoing promotion of services and their benefits, along with any significant changes to their operation.

Performance Monitoring

It is recommended that all new service is monitored for productivity (i.e., ridership) on a daily, monthly, and annual basis. Supporting ridership data informs decisions on discontinuation of service, reallocation of resources, and/or enhancement of a productive service. For small operations, monitoring service by time of day and/or monthly allows for minor adjustments in service which can make a big difference in reaching populations in need. Furthermore, monitoring service levels as compared to ridership demand justifies the allocation, or reallocation, of limited funding, staffing, or equipment resources.

Appendix A:

Service Points and Locations

Zone	Service Points	Type of Service	Street	City	State	Zip
Citra	Dollar General	Grocery	18210 N US Hwy 301	Citra	FL	32113
Citra	Family Dollar	Grocery	18215 N US Hwy 301	Citra	FL	32113
Citra	Post Office (Citra)	Post Office	2250 E Hwy 318	Citra	FL	32113
Citra	Citra Family Health	Medical	17805 N US Hwy 301	Citra	FL	32113
Citra	Dollar General	Grocery	7371 N US Hwy 441	Ocala	FL	34475
Citra	Winn Dixie	Grocery	7131 N US Hwy 441	Ocala	FL	34475
Citra	Mid Florida Credit Union	Bank	7139 N US Hwy 441	Ocala	FL	34475
Citra	CVS	Pharmacy	1720 FL-326	Ocala	FL	34475
Dunnellon	Winn Dixie	Grocery	10055 US Hwy 41	Dunnellon	FL	34432
Dunnellon	Walmart	Grocery	11012 N Williams St	Dunnellon	FL	34432
Dunnellon	Publix Shopping Center	Grocery	11252 N Williams St	Dunnellon	FL	34432
Dunnellon	Dollar Tree Shopping Center	Grocery	11223 N Williams St	Dunnellon	FL	34432
Dunnellon	Save-A-Lot Shopping Center	Grocery	11582 N Williams St	Dunnellon	FL	34432
Dunnellon	Walgreens	Pharmacy	11283 N Williams St	Dunnellon	FL	34432
Dunnellon	Boys and Girls Club	Library/Community Space	20077 SW 110th St	Dunnellon	FL	34432
Dunnellon	Post Office	Post Office	11432 N Williams St	Dunnellon	FL	34432
Dunnellon	Heart of Florida	Medical	19204 E Pennsylvania Ave	Dunnellon	FL	34432
East Lake Weir	Dollar General	Grocery	13842 SE Hwy 42	Weirsdale	FL	32195
East Lake Weir	Weirsdale Family Health Center	Medical	16400 Co Rd 25	Weirsdale	FL	32195
Fairfield	Florida State Fire College	Library/Community Space	11655 NW Gainesville Rd	Ocala	FL	34482
Forest (Southeast Ocala)	Publix Shopping Center	Grocery	7578 SE Maricamp Rd #100	Ocala	FL	34472
Forest (Southeast Ocala)	Dollar Tree	Grocery	4 Cedar Radial Pass	Ocala	FL	34472
Forest (Southeast Ocala)	Walmart Supercenter	Grocery	34 Bahia Ave	Ocala	FL	34472
Forest (Southeast Ocala)	Walgreens	Pharmacy	89 Midway Rd	Ocala	FL	34472
Forest (Southeast Ocala)	CVS	Pharmacy	7563 SE Maricamp Rd	Ocala	FL	34472
Forest (Southeast Ocala)	Florida Credit Union	Bank	10 Bahia Ave Ln	Ocala	FL	34472
Forest Corners	Winn Dixie	Grocery	15912 FL-40	Silver Springs	FL	34488
Forest Corners	Family Dollar	Grocery	15965 FL-40	Silver Springs	FL	34488
Forest Corners	Regions Bank	Bank	451 S Hwy 314 A	Silver Springs	FL	34488

Zone	Service Points	Type of Service	Street	City	State	Zip
Forest Corners	Dollar General	Grocery	16085 FL-40	Silver Springs	FL	34488
Forest Corners	Forest Public Library	Library/Community Space	905 S HWY	Ocklawaha	FL	34489
Forest Corners	Forest Community Center	Library/Community Space	777 S Hwy 314 A	Ocklawaha	FL	32179
Forest Corners	Dollar Tree	Grocery	15928 FL-40	Silver Springs	FL	34488
Forest Corners	Marion County Tax Collector	Government Service	15956 FL-40	Silver Springs	FL	34488
Fort McCoy	Fort McCoy Grocery Store	Grocery	E Co Rd 316	Fort McCoy	FL	32134
Fort McCoy	Dollar General	Grocery	14823 NE Hwy 315	Fort McCoy	FL	32134
Fort McCoy	USPS	Post Office	14945 NE Hwy 315	Fort McCoy	FL	32134
Fort McCoy	Fort McCoy Public Library	Library/Community Space	14660 NE Co Rd 315	Fort McCoy	FL	32134
North Dunnellon	Dollar General	Grocery	19552 SW 56th Ln	Dunnellon	FL	34431
North Dunnellon	Dollar General	Grocery	11295 FL-40	Ocala	FL	34482
Reddick	Davita Ocala Regional	Medical	2620 W Hwy 316	Citra	FL	32113
Reddick	Heart of Florida	Medical	4500 NW 152nd Ln	Reddick	FL	32686
Reddick	Wells Fargo Bank	Bank	15275 NW Gainesville Rd	Reddick	FL	32686
Reddick	Post Office (Reddick)	Post Office	15373 NW Gainesville Rd	Reddick	FL	32686
Reddick	Dollar General	Grocery	4431 NW 155th St	Reddick	FL	32686
Reddick	Dollar General	Grocery	7371 N US Hwy 441	Ocala	FL	34475
Reddick	Winn Dixie	Grocery	7131 N US Hwy 441	Ocala	FL	34475
Reddick	Mid Florida Credit Union	Bank	7139 N US Hwy 441	Ocala	FL	34475
Reddick	CVS	Pharmacy	1720 FL-326	Ocala	FL	34475
Salt Springs	Post Office (Salt Springs)	Post Office	14100 N FL-19 STE G	Salt Springs	FL	32134
Salt Springs	Dollar General	Grocery	25352 E Hwy 316	Salt Springs	FL	32134
Silver Springs	Aldi	Grocery	2115 NE 49th Ct Rd	Ocala	FL	34470
Silver Springs	Walmart Supercenter	Grocery	4980 E Silver Springs Blvd	Ocala	FL	34470
Silver Springs	USPS	Post Office	3050 NE 55th Ave	Silver Springs	FL	34488
Silver Springs	Truist	Bank	3500 E Silver Springs Blvd	Ocala	FL	34470
Silver Springs	Publix Shopping Center	Grocery	3450 E Silver Springs Blvd	Ocala	FL	34470
Silver Springs	Dollar Tree Shopping Center	Grocery	3436 E Silver Springs Blvd	Ocala	FL	34470
Silver Springs	Walgreens	Pharmacy	3529 E Silver Springs Blvd	Ocala	FL	34470

Zone	Service Points	Type of Service	Street	City	State	Zip
Silver Springs	Florida Credit Union	Bank	3504 E Silver Springs Blvd	Ocala	FL	34470
South Marion Oaks	Walmart	Grocery	9570 SW State Rd 200	Ocala	FL	34481
South Marion Oaks	UPS Store	Post Office	11100 SW 93rd Ct Rd #10	Ocala	FL	34481
South Marion Oaks	Florida Credit Union	Bank	9680 SW 114th St	Ocala	FL	34481
South Marion Oaks	Truist	Bank	9290 SW State Rd 200	Ocala	FL	34481
South Marion Oaks	AdventHealth	Medical	9521 SW State Rd 200	Ocala	FL	34481
Southeast Marion Oaks	Dollar General	Grocery	16630 US-301	Summerfield	FL	34491
Southeast Marion Oaks	Publix	Grocery	8780 SE 165th Mulberry Ln	The Villages	FL	32162
Southeast Marion Oaks	Walgreens	Pharmacy	8591 SE 165th Mulberry Ln	The Villages	FL	32162
Southeast Marion Oaks	Citizens First Bank	Bank	8590 SE 165th Mulberry Ln	The Villages	FL	32162
Southeast Marion Oaks	Mulberry Grove Postal Station	Post Office	8475 SE 165th Mulberry Ln	Summerfield	FL	34491
West Dunnellon	Winn Dixie	Grocery	10055 US Hwy 41	Dunnellon	FL	34432
West Dunnellon	Walmart	Grocery	11012 N Williams St	Dunnellon	FL	34432
West Dunnellon	Publix Shopping Center	Grocery	11252 N Williams St	Dunnellon	FL	34432
West Dunnellon	Dollar Tree Shopping Center	Grocery	11223 N Williams St	Dunnellon	FL	34432
West Dunnellon	Sav-A-Lot Shopping Center	Grocery	11582 N Williams St	Dunnellon	FL	34432
West Dunnellon	Walgreens	Pharmacy	11283 N Williams St	Dunnellon	FL	34432
West Dunnellon	Boys and Girls Club	Library/Community Space	20077 SW 110th St	Dunnellon	FL	34432
West Dunnellon	Post Office	Post Office	11432 N Williams St	Dunnellon	FL	34432
West Dunnellon	Heart of Florida	Medical	19204 E Pennsylvania Ave	Dunnellon	FL	34432
West Marion Oaks	Walmart	Grocery	9570 SW State Rd 200	Ocala	FL	34481
West Marion Oaks	UPS Store	Post Office	11100 SW 93rd Ct Rd #10	Ocala	FL	34481
West Marion Oaks	Florida Credit Union	Bank	9680 SW 114th St	Ocala	FL	34481
West Marion Oaks	Truist	Bank	9290 SW State Rd 200	Ocala	FL	34481
West Marion Oaks	AdventHealth	Medical	9521 SW State Rd 200	Ocala	FL	34481
South Marion Oaks	Winn-Dixie	Grocery	184 Marion Oaks Blvd.	Ocala	FL	34473
South Marion Oaks	Marion Oaks Community Center	Library/Community Space	294 Marion Oaks Lane	Ocala	FL	34473
South Marion Oaks	Dollar General	Grocery	896 Marion Oaks Manor	Ocala	FL	34473
South Marion Oaks	Heart of Florida	Medical	100 Marion Oaks Blvd.	Ocala	FL	34473

Zone	Service Points	Type of Service	Street	City	State	Zip
South Marion Oaks	Dollar General	Grocery	3245 SW 142 Lane	Ocala	FL	34473
South Marion Oaks	Walgreens	Pharmacy	260 Marion Oaks Blvd.	Ocala	FL	34473

Appendix B:

Prioritization Criteria and Scoring

Zone Name	Total Square Miles	Approximate Population (Based on ACS 5-Year Estimates for 2021)	Population Density (Persons Per Square Mile)	Population Density Score (Below 50 =1, 50 to 100 =2, above 100 = 3)	Qualifying Demographic Data (Above Averages on All Criteria)*	Qualifying Demographic Data Score (Low-Income = 3, All Other Characteristics = 1)	Approximate Distance from Marion Senior Services	Drive Distance Score (Below 30 = 1, Above 30 = 0)	Number of Service/Anchor Points	Trip Attractors/Key Destinations Score (Less Than 6= 1, 6 = 2, Greater Than 6 = 5)	Score
Citra	9.87	1,841	186.6	3	Low-Income (45%) Zero Vehicle (9%) Disability (17%)	5	18 miles	1	8	5	14
Reddick	8.72	1,041	119.4	3	Zero-Vehicle HH (7%) Disability (20%) Low-Income (24%)	5	15 miles	1	9	5	14
West Dunnellon	15.72	1,477	94.0	2	Low-Income (22%) Zero-Vehicle HH (11%) Over 60 (51%) Disability (24%)	6	25 miles	1	9	5	14
Forest (Southeast Ocala)	29.31	1,155	39.4	1	Low-Income (25%) Zero Vehicle (8%) Over 60 (67%) Disability (21%)	6	12 miles	1	6	5	13
Forest Corners	59.25	4,558	76.9	2	Low-Income (26%) Disability (18%)	4	19 miles	1	8	5	12
Dunnellon	20.04	1,296	64.7	2	Low-Income (22%)	3	24 miles	1	9	5	11
South Marion Oaks	20.01	1,597	79.8	2	Low-Income (32%) Zero Vehicle (8%) Disability (28%)	5	22 miles	1	5	3	11
Southeast Marion Oaks	7.33	1,464	199.7	3	Low-Income (27%) Zero Vehicle (8%) Over 60 (37%)	4	18 miles	1	5	3	11
West Marion Oaks	9.41	1,391	147.8	3	Low-Income (35%) Over 60 (72%)	4	13 miles	1	5	3	11
Fort McCoy	14.28	660	46.2	1	Low-Income (46%) Over 60 (67%) Disability (21%)	5	21 miles	1	4	3	10

Zone Name	Total Square Miles	Approximate Population (Based on ACS 5-Year Estimates for 2021)	Population Density (Persons Per Square Mile)	Population Density Score (Below 50 =1, 50 to 100 =2, above 100 = 3)	Qualifying Demographic Data (Above Averages on All Criteria)*	Qualifying Demographic Data Score (Low-Income = 3, All Other Characteristics = 1)	Approximate Distance from Marion Senior Services	Drive Distance Score (Below 30 = 1, Above 30 = 0)	Number of Service/Anchor Points	Trip Attractors/Key Destinations Score (Less Than 6= 1, 6 = 2, Greater Than 6 = 5)	Score
Salt Springs	3.17	615	194.0	3	Low Income (34%) Over 60 (41%) Zero Vehicle (12%) Disability (29%)	6	31 miles	0	2	1	10
East Lake Weir	16.90	1,385	81.9	2	Low-Income (28%) Zero Vehicle (5%) Disability (18%)	5	20 miles	1	2	1	9
North of Dunelleon	48.75	4,493	92.2	2	Low-Income (29%) Disability (16%)	4	18 miles	1	2	1	8
Silver Springs	35.94	1,183	32.9	1	Over 60 (48%)	1	8 miles	1	8	5	8
Fairfield	28.84	918	31.8	1	Low-Income (30%) Zero Vehicle HH (25%)	4	18 miles	1	1	1	7

*Qualifying Characteristics: Census Block Groups that contain an amount of 5% or higher households with zero-vehicles, 14% or higher households below poverty, 30% or higher individuals age 65 or older, and Census Tracts with 17% or higher of individuals with an identified disability

TO: **TDLCB Board Members**

FROM: **Liz Mitchell, Grants Coordinator/Fiscal Planner**

RE: **Transportation Disadvantaged Service Plan (TDSP) – 2023 Update**

Summary

The Florida Commission for the Transportation Disadvantaged (FCTD) requires that each Community Transportation Coordinator (CTC) submit a comprehensive TDSP or an annually updated tactical plan that includes the following components for the local transportation disadvantaged (TD) program:

- Development Plan
- Service Plan
- Quality Assurance

The CTC is responsible for arranging transportation for TD persons, and with approval from the Local Coordinating Board (LCB), the CTC may subcontract or broker transportation services to private transportation operators. This is a plan that provides a 5-year vision for the local transportation disadvantaged (TD) program and is updated annually. This TDSP updates the 2020–2025 Plan and fulfills the annual requirement of the FCTD.

Attachment(s)

Updated 2023 TDSP Plan
TDSP Presentation

Action Requested

TPO staff is requesting the LCB review and approve the TDSP prior to submission to the FCTD for final action.

Any additional comments and/or suggestions please contact Liz Mitchell, liz.mitchell@marionfl.org.

DRAFT
Marion County
Transportation Disadvantaged
Service Plan (TDSP)
2020 - 2025

Prepared by:
Ocala Marion Transportation
Planning Organization
and
Marion Transit

OCALA MARION TRANSPORTATION PLANNING ORGANIZATION

To be adopted:
June 8, 2023

Website: Ocalamariontpo.org
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TDSP CERTIFICATION

The Ocala/Marion County Local Coordinating Board (LCB) for the Transportation Disadvantaged (TD) hereby certifies that an annual evaluation of the Community Transportation Coordinator (CTC) was conducted consistent with the policies of the Commission for the Transportation Disadvantaged and that all recommendations of the CTC evaluation have been incorporated in this Plan.

We further certify that the rates constrained herein have been thoroughly reviewed, evaluated, and approved. The Transportation Disadvantaged Service Plan (TDSP) will be reviewed in its entirety and approved by the Board at an official meeting held on June 8th, 2023.

_____

Date

_____

Commissioner Michelle Stone, TDLCB Board Chairperson

_____

Date

_____

TPO Director

Approved by the Commission for the Transportation Disadvantaged:

_____

Date

_____

David Darm, Executive Director

RED DENOTES UPDATES

TDLCB ROLL CALL VOTE

For Approval of Marion County's TDSP Update   **Approved Date: June 8, 2023**

NAME	REPRESENTING	YES	NO	ABSENT
Michelle Stone	Board of County Commissioners (Chair)			
Jeffrey Askew	Marion County Veterans Office			
Glorybee Perez	Agency for Healthcare Administration			
Carressa Hutchinson	Florida Community Action Association			
Tracey Sapp	Dept. of Health			
Susan Hanley	Dept. of Elder Affairs			
Iris Pozo	CLM Workforce			
Elizabeth Watson	Agency for Persons with Disabilities			
Andrea Melvin	Center for Independent Living (Vice-Chair)			
Anissa Pieriboni	Florida Center for the Blind			
Steven Neal	City of Ocala-SunTran			
Jeff Aboumrad	Department of Education			
Keith J. Fair	Housing Finance Authority			
Ronald Graham	DCF-Dept of Children and Families			
Carlos Colon	FDOT (Non-voting Member)			
Lauren Debick	Marion County School Board			

_____   _____

Date   Commissioner Michelle Stone, TDLCB Board Chairperson

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PUBLIC DISCLOSURE STATEMENT*:*

The Ocala Marion Transportation Planning Organization (TPO) is committed to ensuring that no person is excluded from the transportation planning process and welcomes input from all interested parties, regardless of background, income level or cultural identity. The Ocala Marion TPO will not exclude from participation in, deny the benefits of, or subject to discrimination, anyone on the grounds of race, color, national origin, sex, age, disability, religion, income or family status. The Ocala/Marion TPO welcomes and actively seeks input from the public, to help guide decisions and establish a vision that encompasses all area communities. Anyone requiring special assistance under the Americans with Disabilities Act (ADA), or requiring language assistance (free of charge) should contact Liz Mitchell, Title VI/Nondiscrimination Coordinator at (352) 438-2634 or [liz.mitchell@marioncountyfl.org.](mailto:liz.mitchell@marioncountyfl.org)

Introduction to this Plan

The Transportation Disadvantaged Service Plan (TDSP) is an annually updated tactical plan that includes the following components for the local transportation disadvantaged (TD) program:

- Development Plan
- Service Plan
- Quality Assurance
- Cost/Revenue Allocations and Fare Justification

The Community Transportation Coordinator (CTC) is responsible for arranging transportation for Transportation Disadvantaged (TD) persons, and the Florida Commission for the Transportation Disadvantaged (FCTD) approves the CTC selection every five years. The FCTD requires that each CTC submit a comprehensive TDSP to run simultaneously with the CTC's 5-year Agreement. The Commission's mission is to maximize state, federal and other revenues for cost-effective transportation investment strategies that connect communities, people, and goods, along with identifying any deficiencies or areas where transit service is under provided.

With approval from the Transportation Disadvantaged Local Coordinating Board (TDLCB), the CTC may subcontract or broker transportation services to private transportation operators. Each year, the CTC reviews all transportation operator contracts before renewal to ensure that the contracts comply with the standards of the FCTD.

This TDSP has been prepared in accordance with the requirements of Chapter 427, Florida Statutes, Rule 41-2 Florida Administrative Code and the guidelines provided by the FCTD. The TDLCB will review and approve the TDSP prior to submission to the FCTD for final action.

Section 1: Development Plan

Introduction to the Service Area

1. *Background of Transportation Disadvantaged Program*

The Commission for the Transportation Disadvantaged (CTD) was created by the Florida Legislature in 1989 to accomplish the coordination of transportation services provided to the transportation disadvantaged.

The Commission sets policies and provides direction in the areas of quality assurance, program evaluation, technical assistance, training, review of policies and procedures, contract management and financial accountability. It functions as an independent agency located in the Florida Department of Transportation (FDOT) for administrative and fiscal purposes. The CTD operates independently with rule-making and budget authority. The CTD created Local Coordinating Boards (LCB) to enhance local participation in the planning and delivery of coordinated transportation services. The CTD selects and has oversight responsibility for the Community Transportation Coordinators (CTCs) to carry out the paratransit services for each of the 67 counties in Florida. The CTCs manage the TD program with the assistance of the Local Coordinating Board and the MPO and/or TPO staff.

MPO's are designated by law in all urban areas over 50,000 in population if federal money is to be spent on transportation in that area. MPO's main responsibility is to coordinate and develop the area's transportation plans by making sure that a fair and impartial setting for effective transportation decision making is established and managed. This is done by having a governing board, an executive director, a professional staff and advisory committees. MPO's work with FDOT and other partner agencies to develop federal and state required transportation plans and programs for their regions. All designated agencies or MPO's are required to include a Transportation Disadvantaged (TD) element in their Transportation Program. The Ocala Marion Transportation Organization (TPO) serves as the designated MPO for the urbanized areas of Marion County.

The purpose of the TD is to ensure the availability of efficient, cost-effective, and quality transportation services for the transportation disadvantaged population. Older adults who are lower income and/or have a disability are often considered transportation disadvantaged, are unable to drive due to disability or a medical illness, unable to afford a vehicle, or lack access to transit services, and have limited access to other transportation options. Transportation disadvantage is compounded further with obstacles that impede access to healthcare services, nutritious food, social connectivity, and community engagement. The program was established shortly after FDOT and the Department of Health and Rehabilitation Services (HRS) entered into an interagency agreement to address concerns about duplication and fragmentation of transportation services. The mandate to coordinate transportation services designed to meet the needs of the transportation disadvantaged was created in 1979 with the enactment of Florida Statute (F.S.) Chapter 427.

> *… those who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education, shopping, social activities, or children who are handicapped or high-risk or at-risk as defined in Section 411.202, F.S.*

The TD program concept is to offer a level of service comparable to that provided to persons without disabilities who use the fixed-route system. To incorporate the use of a paratransit service, meaning a specialized service that will provide door-to-door transportation assistance for disabled persons, or economically disadvantaged.

Figure 1.1 provides an organizational chart that identifies the parties involved in the provision of Florida's TD transportation services.

Figure 1.1: Florida's Coordinated Transportation System

2.   TDLCB Board

The composition of the TDLCB is in accordance with Rule 41-2.012, F.A.C., and brings together local area stakeholders. TDLCB members constitute a broad-based group including individuals from agencies that purchase trips or have a role in public transit, representatives of the disabled, elderly and economically disadvantaged in the area, as well as an elected official appointed by the TPO Board who serves as TDLCB Chair.

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The TDLCB coordinates transportation needs of the disadvantaged, including individuals with physical and economic challenges and senior citizens facing mobility issues. The TDLCB assists the TPO in identifying local service needs and provides information, advice, and direction to the CTC on services to be provided to the transportation disadvantaged community.

3.   *History of the Community Transportation Coordinator*

The Community Transportation Coordinator (CTC) is the agency responsible for providing coordinated transportation services for the transportation disadvantaged citizens in the county.

The CTC ensures that operations, administration, coordination and delivery of transportation disadvantaged services is provided on a full-time basis. Every five years, it is the responsibility of the TPO to arrange for the selection of a CTC for their designated planning area. To complete this task, the TPO administers a competitive proposal process to select the most qualified candidate for the CTC position. Once a selection has been made the planning agency recommends the CTC to the Florida Commission for the Transportation Disadvantaged for final approval.

Marion Transit (MT) was selected as the CTC to continue serving the community on July 1, 2020. MT began serving the transportation needs of older populations in 1976. MT has been designated as the Marion County CTC since 1982, for all non-emergency medical transportation and for those needing wheelchairs or other assistance, pursuant to Chapter 427, F.S. and Rule 41-2 of the Florida Administrative Code (FAC).

As the CTC, MT assumes responsibility for ensuring coordination of local transportation services to the maximum extent possible. MT provides door-to-door paratransit services to meet transportation needs for medical, life-sustaining, educational, work, business, and recreational activities for Marion County's TD citizens as well as other recipients in the county. MT's existing fleet of 43 small cutaway-type buses serve an area of more than 1,600 square miles. Trip priorities are established by a subcommittee of the TDLCB and the TPO.

Currently, service is provided according to the following needs as space is available:

Medical › Life-Sustaining Activities › Education › Work › Business › Recreational

MT currently has coordination contracts with two entities that provide transportation services to

their own residents: Advocacy Resource Center Marion, Inc. (ARC), and Florida Center for the Blind, Inc. The MT fare is $2.00 per one-way trip. MT accepts cash or passes for fare payment, and the fare must be paid upon boarding the vehicle; drivers are unable to provide change.

Medicaid transportation services are provided through the Statewide Medicaid Managed Care program. The Managed Care Plan is not obligated to follow the requirements of the CTC or the TDLCB as set forth in Chapter 427, F.S., unless the Managed Care Plan has chosen to coordinate services with the CTD. At this time, MT does not have a coordinated services agreement with Medicaid.

Marion County's public transit service, SunTran, is provided by the City of Ocala and managed by RATPDev. The service began operating in 1998 and currently operates a scheduled, fixed-route system six days per week to riders of all age groups. The regular full cash fare is $1.50, with discounts offered for youth, students, older adults, and individuals with disabilities. Reduced rate passes are also available for youth/students and older adult/disabled passengers. SunTran contracts with Marion Transit Services (MT) for the required complementary Americans with Disabilities Act (ADA) paratransit services within ¾-mile of the SunTran fixed-route system.

4. *Summary of Other Plans and Documents*

This major update to the Transportation Disadvantaged Service Plan is consistent to the maximum extent possible with Comprehensive Plans from local governments within the service area, Regional Plans, Transit Development Plans, and Commission for Transportation Disadvantaged Annual Performance Reports, TPO Long-Range Transportation Plans and Transportation Improvement Programs. The plans which have just been mentioned have been summarized to demonstrate their applicability to this planning process, and to highlight how this plan is consistent with their goals, objectives, and vision for the future. A summary of the plans mentioned is included in **Appendix A.**

5. *Public Participation*

Public participation is at the center of the transportation planning process, as transportation networks affect the public in many ways. Therefore, the voice of the public is essential in ensuring that the transportation decisions that are made, are efficient, and effective at serving the residents they impact. The transportation network affects economic vitality, personal and freight mobility, and local/regional priorities, it is critical for the voices of everyone to be heard and documented. The TPO is the Designated Official Planning Agency (DOPA) for the TDLCB. Public participation has always been an important priority of the TPO.

The TPO works with area government entities, businesses and social groups to ensure that all plans encompass the requirements to improve county transportation systems. The TPO intends to utilize the TPO's Public Involvement Plan (PIP) in the development of any transit plans.

An ongoing opportunity for citizens to participate in the development of local transit plans and to address other transit concerns is provided at all TDLCB meetings, Committee meetings, and TPO Board meetings. Prior to each meeting, workshop, or event, the TPO advertises in the local newspaper to allow the county citizens the opportunity to attend in person in order to participate, comment and express their concerns, approval or disapproval.

Surveys are utilized as a form of gathering information and insight from the public. The TDLCB surveys <u>as needed</u> in order to receive comments first hand from the public. The TPO also participates in community outreach programs such as the "Marion County Day" which is designed to inform the community of the programs available within the County as well as, allowing residents to enjoy the outdoors while learning the countywide plans and activities.

The TPO maintains an interactive website and social media platforms such as Twitter and LinkedIn for citizens to provide comments, and/or requests at any time. All plans, programs, surveys, committee and board meeting minutes, along with any interactive maps, can be found on the TPO website for review at any time.

This document is updated annually and revised as transit-related information is gathered for other documents such as the Long-Range Transportation Plan (LRTP), Transportation Improvement Plan (TIP), Public Participation Plan (PPP), Congestion Management Plan (CMP), and the Safety Action Plan (SAP).

Service Area Profile and Demographics

1. Service Area Description

Marion County is located in northern central Florida, just north of Lake and Sumter counties, east of Levy County, and south of Alachua County. The county seat of Ocala is centrally located within the county. Ocala is the largest incorporated city in Marion County, followed by the cities of Belleview and Dunnellon. Marion County has two other incorporated areas, McIntosh and Reddick, which are located in northern Marion County. The Villages, which is a census designated place is one of the fastest growing retirement communities in the entire United States. The Villages are predominately located in Lake and Sumter counties to the south, with a growing portion in southern Marion County. The eastern part of the county is dominated by the Ocala National Forest. A major interstate, I-75 runs north and south on the western edge of the City of Ocala. The area has seen a great influx of distribution centers due mostly to the availability of land, and the close proximity to I-75, which connects some of the state's major metropolitan areas such as Orlando, Tampa, and Jacksonville, to Marion County. **Table 1.1** provides an overview of the study area.

Table 1.1: Ocala Marion TPO Planning Area

2. Demographics/Land Use

As part of the analysis for this plan was the relationship between land use and transportation. As an update to the TDSP, land use was reviewed for both the City of Ocala and Marion County. Both the City of Ocala and Marion County have an array of land uses, similar to other municipalities. These uses range from residential, multi-family, commercial, and industrial. Therefore, the relationship between land use and transportation are vitally important. TPO staff works diligently with planners and engineers at all of our local partners to ensure that the level of service on roadways are adequate to support the demand for whatever uses are adjacent to a particular corridor.

The TPO is served by two advisory committees, the Technical Advisory Committee (TAC) and the Citizen Advisory Committee (CAC). These committees review all plans, studies, and proposed projects before recommending to the TPO Board for approval. A component of all reviews is considering what the relationship between land use and transportation are. Staff is always considering how the land is used currently, and how it could possibly be used in the future. Incorporating the land use information into project and plan review, allows the projects and plans to be more efficient and useful for the citizens of Marion County.

3. Population Composition

Population changes are important indicators for the economy, as they have an impact on education, healthcare, housing, recreation and transportation. Those changes affect many types of public funding and in turn requires the best possible planning. The demographic characteristics include the age, gender structure, and race/ethnicity. In addition, the economy, employment opportunities, and housing availability also influence population change. Along with characteristics, economic cycles contribute to the demographic makeup.   Projecting these economic cycles however can be difficult, the information provided is conservative in order to properly account for long term trends.

Table 1.2: Population by Race

Race	Population	Percent of Population
White	274,241	71.1%
African American	46,465	12%
Two or more races	46,970	12.2%
Asian	6,708	1.7%
American Indian & Alaska Native	-518	0.1%
Other race	11,013	2.9%
Total	385,915	100.00%
*Hispanic/Latino of any race	59,704	15.5%
Source: ACS 2021- 1-year estimates. Items may not add to totals or compute to displayed percent due to rounding.		

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4. Cultural Descriptions

Marion County has a total population of 385,915 according to the American Community Survey's (ACS) 2021 1-year estimates. The chart and graph seen below **Table 1.2 and Figure 1.2** highlight the racial makeup of Marion County.

Figure 1.2: Population by Race

Marion County Population by Race

- White (274,241)
- Hispanic/Latino (59,704)
- African American (46,465)
- American Indian & Alaska Native (-518)
- Asian (6,708)
- Other Race (11,013)
- Two or more races (46,970)

Legend:
- White
- Hispanic/Latino
- African American
- American Indian & Alaska Native
- Asian
- Other race
- Two or more races
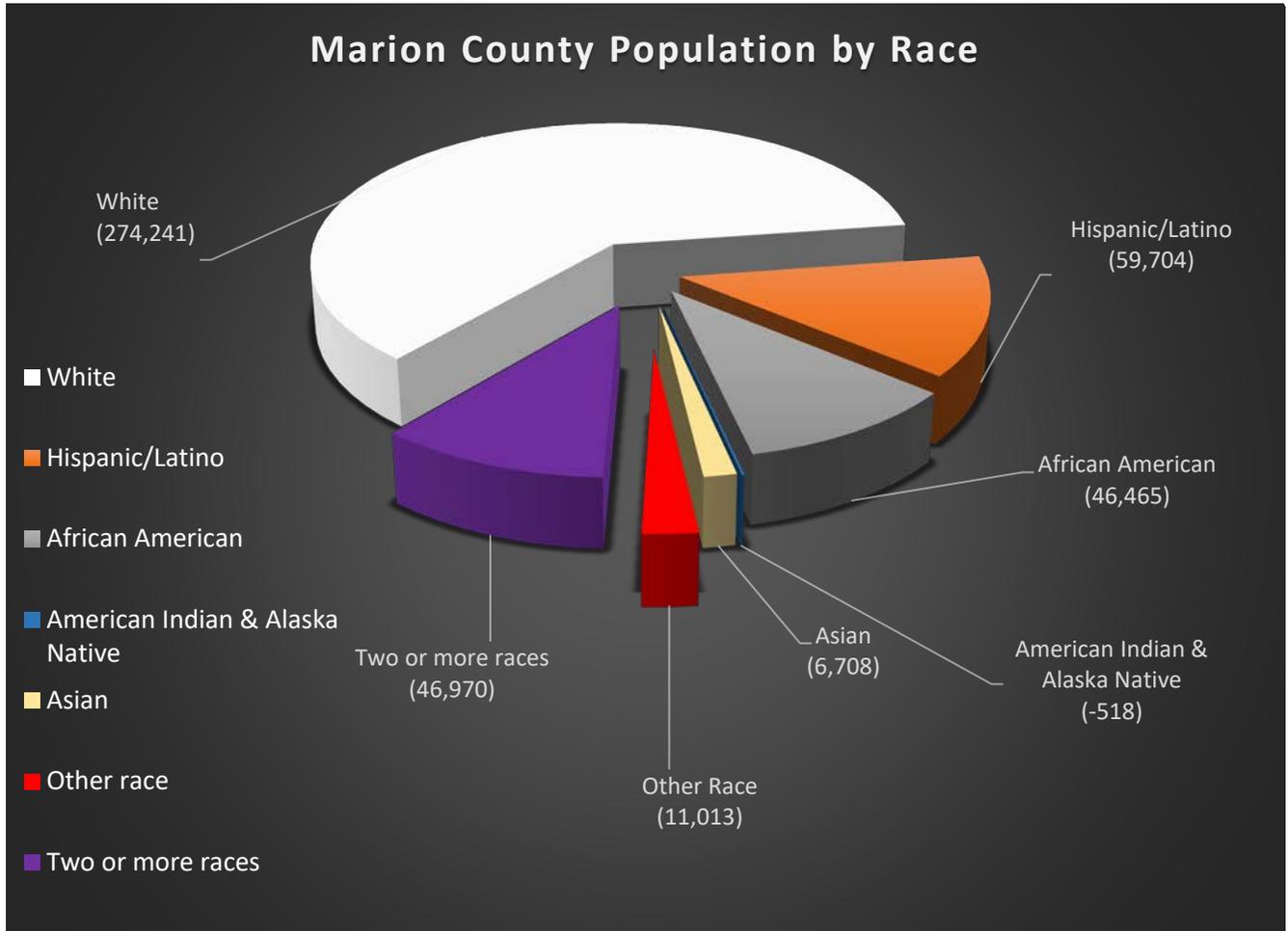
Marion County's population increased from 375,908 persons in 2020 to 381,176 persons in 2021, an overall increase of 1.4%. It is estimated that the population will continue to increase according to the 2021 Population report by the Bureau of Economic and Business Research (BEBR) at the University of Florida. Using BEBR Florida population projections, the population of Marion County is expected to increase by 27% by 2050. **Table 1.3** provides an overview of the population projections for Marion County and Florida from 2021 to 2050. Marion County is experiencing high residential and business growth, which will require a higher demand for transit service in the future.

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Table 1.3: Marion County and Florida Population Growth Projections, 2021-2050

Area	Population Estimate	Population Projections						Population Growth
	2021	2025	2030	2035	2040	2045	2050	2021 - 2050
Marion County	381,176	403,621	426,585	444,625	459,700	472,731	484,315	27%
Florida	21,898,945	23,164,008	24,471,129	25,520,837	26,405,472	27,176,715	27,877,707	27%
Source: BEBR 2025 - 2050 Population Projections, October 2022								

There are five municipalities and towns in Marion County – Belleview, Dunnellon, McIntosh, Ocala, and Reddick. Population trends were reviewed for three municipalities, and two towns throughout Marion County. **Table 1.4** highlights those trends for the mentioned municipalities and towns. As you can see, the majority of the population within Marion County has increased, including the unincorporated areas.

Table 1.4: Marion County Municipalities

Geographic Area	2020	2022	2020 - 2022 Population Change
Marion County	375,908	391,983	16,075
Belleview	5,413	5,770	357
Dunnellon	1,928	1,992	64
McIntosh	463	465	2
Ocala	63,591	64,951	1,360
Reddick	449	471	22
UNINCORPORATED	304,064	318,334	14,270
Source: BEBR Florida Estimates of 2022-Population by County and City, April 2022			

5. Population Density

The densest areas are projected to be within the Ocala urbanized area, in southwest Marion County along SR-40 and SR-200, and in Dunnellon and Belleview. High population density also will be in The Villages and the sprawling On Top of the World development communities located off SW 99th Street Road and south of 103rd Street Road.

6. Age Distribution

Figure 1.3 shows the Marion County and Florida populations by age distribution. According to the 2021 ACS one-year estimates, more than 25% of Marion County's population is 65 years of age or older compared to nearly 18% for Florida. The 65-to-74 age group includes a high percentage of both the Marion County and Florida populations, indicating that the older age group is significant, requiring increased public transportation demand.

Age Distribution

Source: 2021 ACS 5-Yr. Estimates

■ Marion County ■ Florida
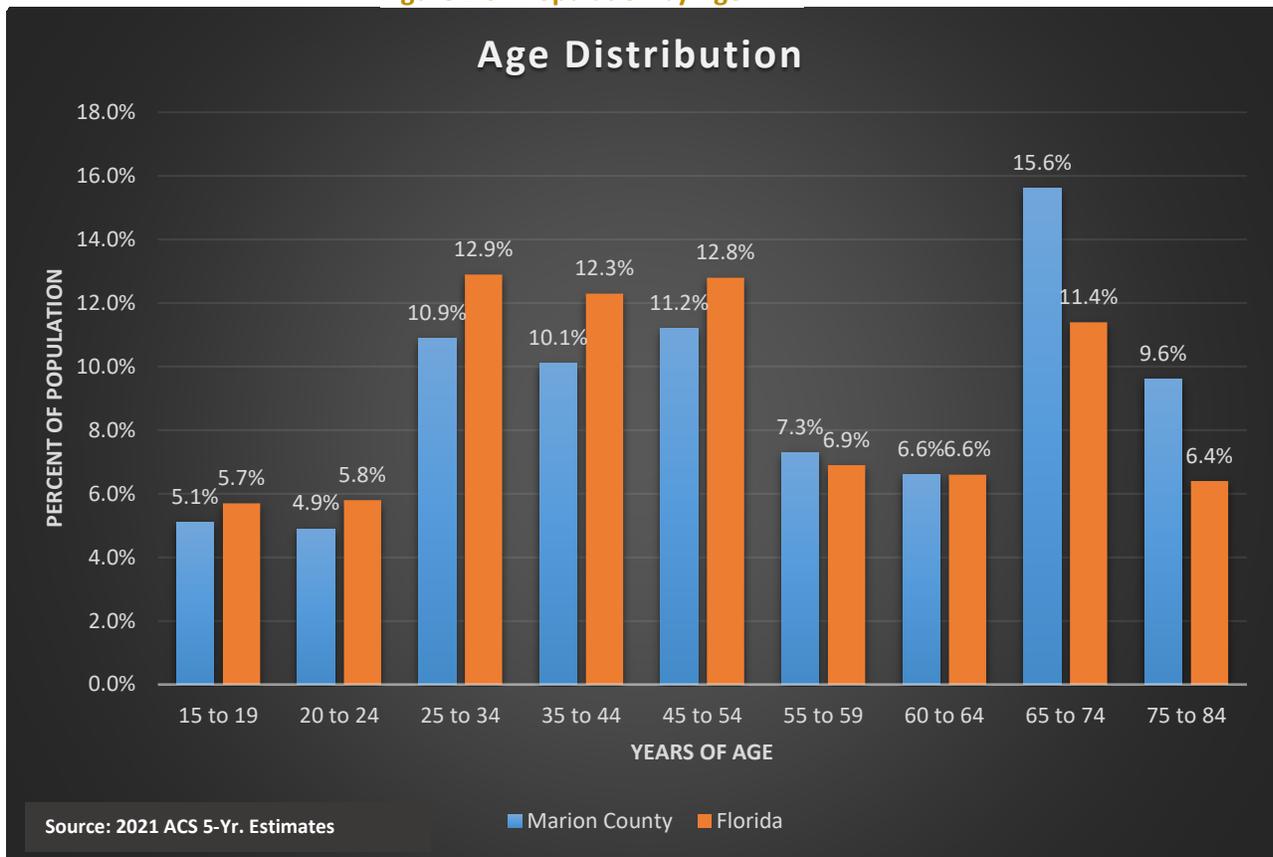
7. Housing and Household Income

There is a direct correlation between population growth and housing units. The growth rates for housing may slightly differ than the rates for population because housing units are smaller than the numbers of persons due to how many are living in one household. During the 12 months ending February 2023, existing home sales increased 15.8 percent representing the largest monthly percentage increase since March 2022. The median property value in Marion County is $274,914, and the homeownership rate is 78.5%. **Figure 1.4** compares the distribution of household income in Marion County and Florida. A larger share of Marion County residents earns an income within the five lowest income categories (below $50,000). Additionally, a smaller share of Marion County residents earns an income slightly lower than the four highest income categories (above $75,000) compared to the Florida state average. The Marion County median household income is approximately 26% lower than Florida, with Marion County's median income at $46,841 and Florida's at $63,062.

Household Income (In 2021 Inflation-Adjusted Dollars)

Household Income	Florida	Marion County
$200,000 or more	7.8%	5.3%
$150,000 to $199,999	6.4%	2.9%
$100,000 to $149,999	15.1%	11.5%
$75,000 to $99,999	12.9%	10.1%
$50,000 to $74,999	18.2%	17.2%
$35,000 to $49,999	12.4%	16.2%
$25,000 to $34,999	8.9%	12.7%
$15,000 to $24,999	8.3%	11.0%
$10,000 to $14,999	3.8%	5.8%
Less than $10,000	6.3%	7.3%

PERCENT OF HOUSEHOLDS

Source: 2021 ACS 1-Yr. Estimates

Florida   Marion County
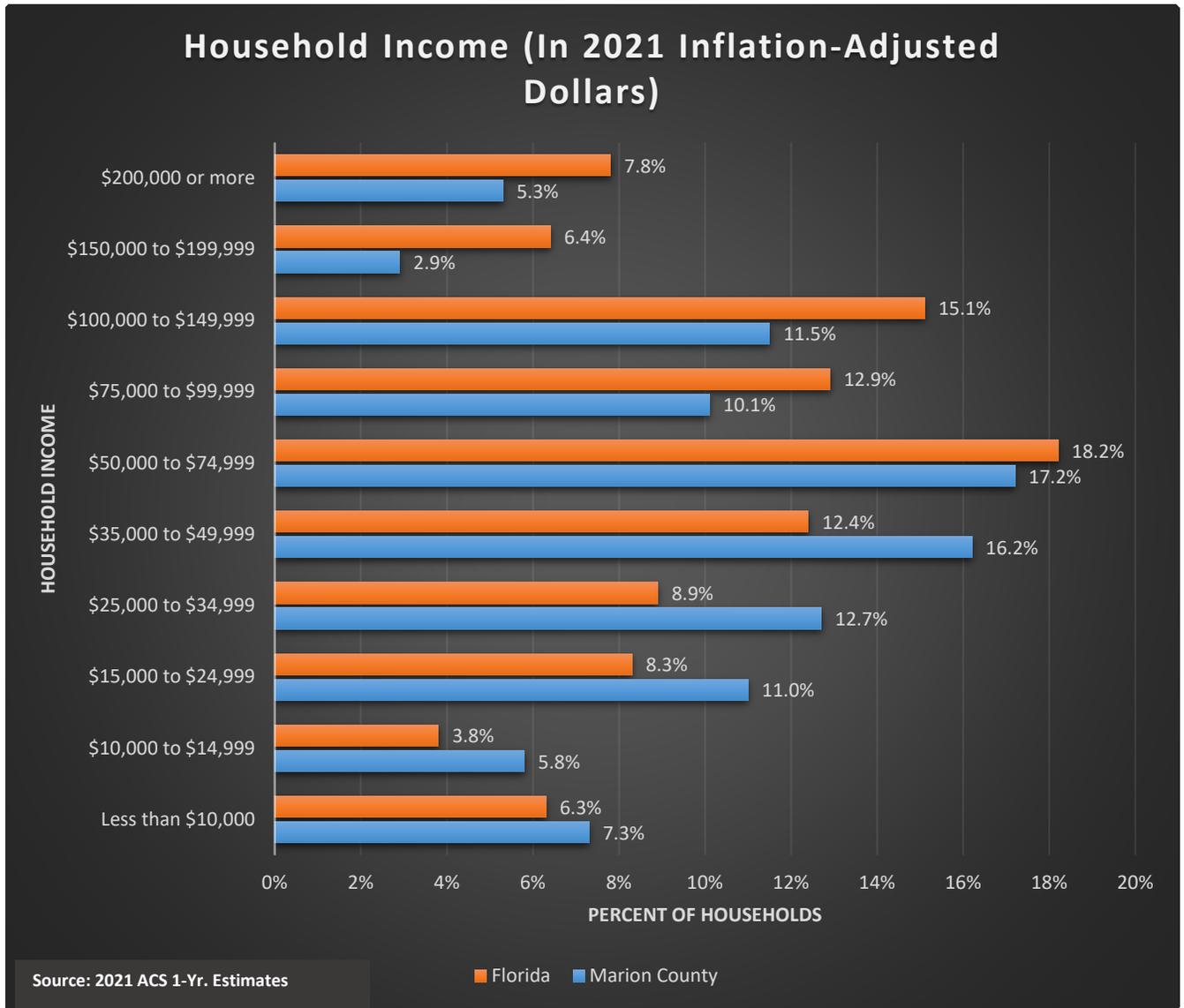
8. Education

The educational attainment of people in Marion County and Florida is shown in **Figure 1.5**. The category with the largest share of both Marion County and Florida residents is high school graduate (includes equivalency), which includes 36.% of Marion County residents and about 28% of Florida residents. Overall, a larger proportion of Florida residents have obtained higher levels of education, including an Associate's degree, Bachelor's degree, graduate and/or professional degree, than Marion County residents.

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Figure 1.5: Educational Attainment Distribution
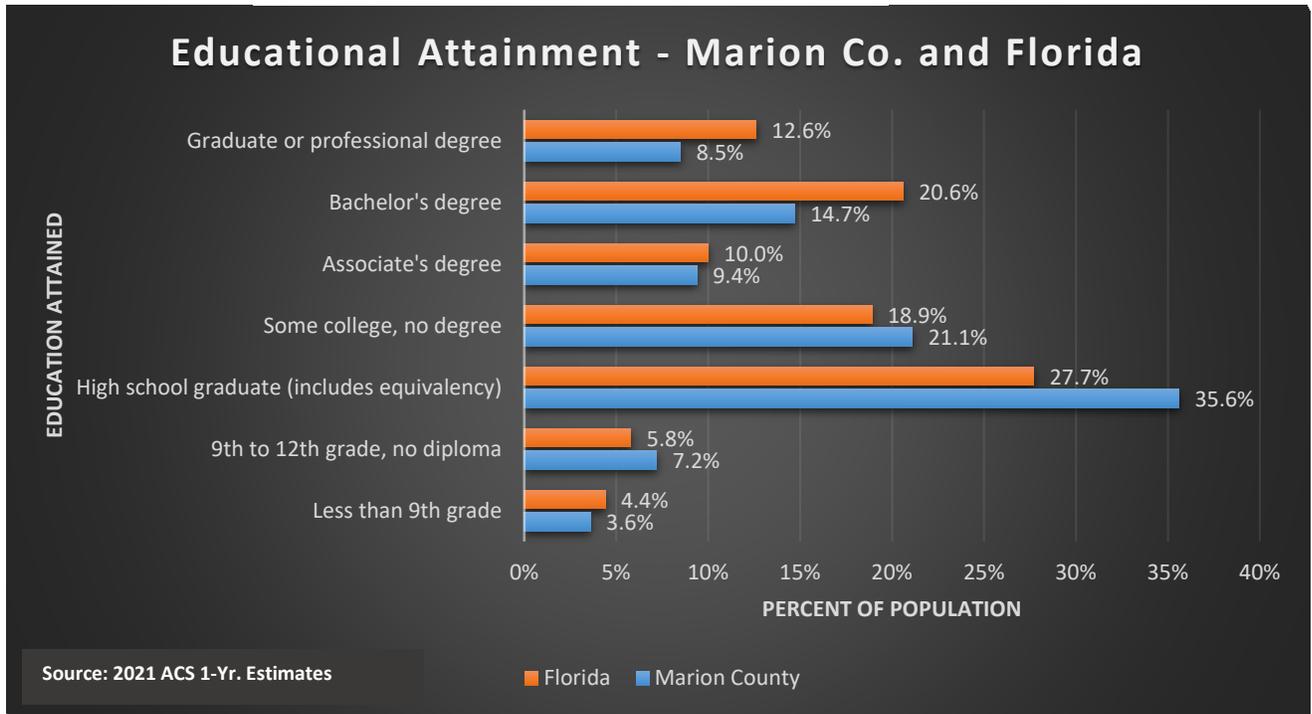
9. Employment

Table 1.5: Employment Characteristics-Marion County and Florida 2023 (Not Seasonally Adjusted)

Area	Civilian Labor Force	Number Employed	Number Unemployed	Unemployment Rate
Marion County	151,640	146,830	4,810	3.2%*
Florida	11,027 ,000	10,746,000	281,000	2.6%*
* All State of Florida estimates except unemployment rates are rounded to the nearest thousand. Items may not add to totals or compute to displayed percent due to rounding. Source: 2023 Florida Department of Economic Opportunity				

Table 1.5 includes the current labor force, employment, and unemployment data for Marion County and Florida. The data provided in the table presents a snapshot from the Florida Department of Economic Opportunity Labor Market Employment Statistics for March 2023. These figures show that Marion County has a slightly higher unemployment rate than the state as a whole, though the rates are not seasonally adjusted.

10. Employment Density

Like population density, employment density is concentrated throughout the central Ocala area. Beyond the urbanized Ocala area, pockets of high density are also found along SR 200 southwest of

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Ocala near the I-75 interchange, the Belleview area along US-301 southeast of Ocala, the Dunnellon area, and west of I-75 adjacent to the Ocala International Airport, where there is a cluster of transportation, distribution, and equine-focused companies. Employment density is more centralized than the general population density along the major arterials and, for the most part, employment is projected to continue growing in the TAZs where high growth is currently observed, with some growth observed just south of Reddick along I-75.

11. *Major Employers*

Major industries in Marion County, include government, education, healthcare, manufacturing, distribution, transportation, and leisure/hospitality. The largest employer is the Marion County School Board, which has more than twice as many employees as the next largest employer. Major employment centers also include healthcare centers such as Advent Health Ocala (formerly Munroe Regional Medical Center) and Ocala Health. Manufacturing companies such as Lockheed Martin,and Retail centers, including Winn-Dixie and Publix also employ a large number of workers in Marion County. **Table 1.6** shows the major public and private sector employers in Marion County.

Table 1.6: Major Employers
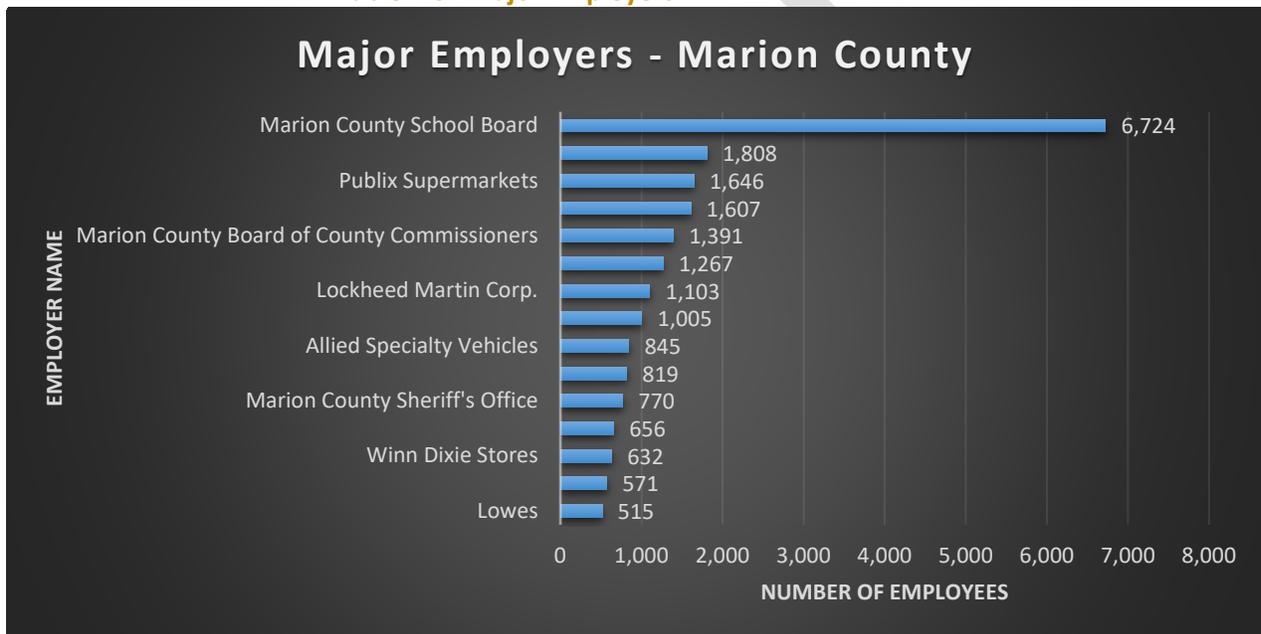
Major Employers - Marion County

Employer Name	Number of Employees
Marion County School Board	6,724
	1,808
Publix Supermarkets	1,646
	1,607
Marion County Board of County Commissioners	1,391
	1,267
Lockheed Martin Corp.	1,103
	1,005
Allied Specialty Vehicles	845
	819
Marion County Sheriff's Office	770
	656
Winn Dixie Stores	632
	571
Lowes	515

12. *Major Trip Generators*

Major trip generators in Marion County for paratransit trips are medical facilities (hospitals, healthcare clinics, and dialysis facilities), and local shopping centers. Trips to other locations such as parks, libraries, government/social services, religious activities, and restaurants are also requested.

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Below is a list of the major trip generators. TD services are provided county-wide, with service to any location in the county, and ADA service is provided within ¾ mile of SunTran fixed route service.

1	Davita-East Dialysis Center	2870 SE 1st Av	Ocala
2	Davita-Shores Dialysis Center	9310 Spring Rd	Ocala
3	Walmart- SW SR 200	9570 SW Hwy 200	Ocala
4	Wal-Mart-East Silver Springs Blvd.	4980 E. Silver Springs Blvd.	Ocala
5	Davita-North Dialysis Center	2620 W. Hwy 316	Citra
6	Davita-West Dialysis Center	8585SW State Rd. 200	Ocala
7	Transitions Life Center	3360 NW Gainesville Rd.	Ocala
8	Kenny's Place	7677 SE 41st Ct.	Ocala
9	Walmart -Easy Street	2600 SW 19th Ave. Rd.	Ocala
10	Fresenius Dialysis	2701 SW College Rd.	Ocala

Source: Marion Senior Services (April 2023)

13. Household Vehicle Availability

Marion County has 332,406 registered vehicles according to the latest report (2023) by the Florida Department of Highway Safety and Motor Vehicles. The majority of the registered vehicles belong to the ages between 21 and 59, with the 70-79 age group being the single largest age group. The chart and **Table 1.7** seen below demonstrate how the registered vehicles look by age group.

Table 1.7: Registered Vehicles by Age
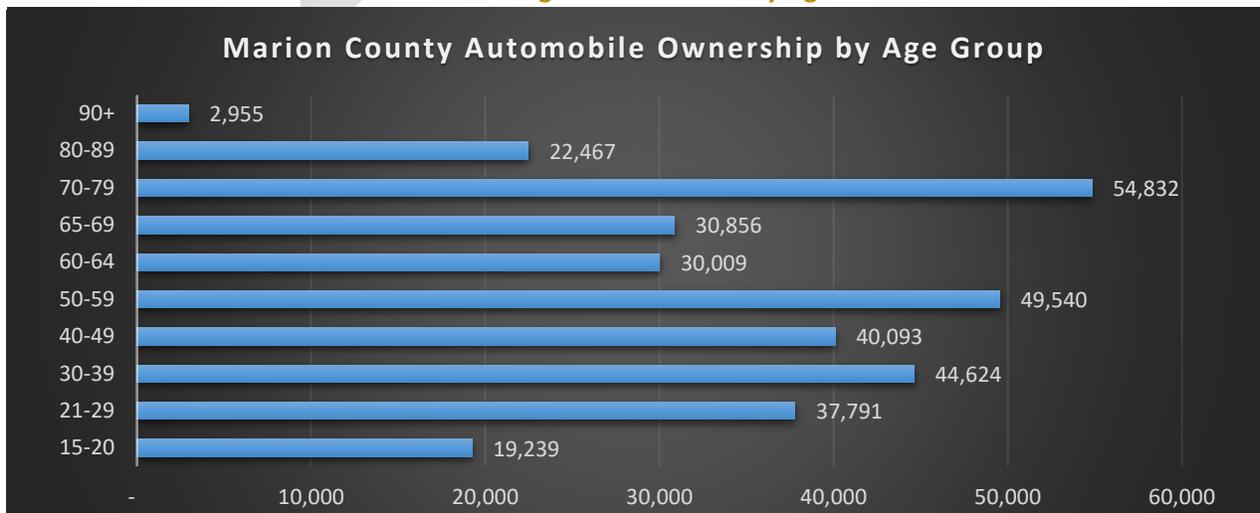
Age Group										
15-20	21-29	30-39	40-49	50-59	60-64	65-69	70-79	80-89	90+	Total
19,239	37,791	44,624	40,093	49,540	30,009	30,856	54,832	22,467	2,955	332,406
Source: Florida Department of Highway Safety and Motor Vehicles 2023 Report										

RED DENOTES UPDATES

Service Analysis

1. Transportation Disadvantaged Population

Table 1.8 shows a three year comparison of trips by trip purpose. MT strives to give older adults the ability to lead independent lives allowing them to age in their homes, among their peers, and in their communities. The ability to have an alternate means of transportation readily accessible gives those unable to drive and have no available family or friends, a stress free option. Medical trips are the highest in demand. A greater emphasis is given to medical riders with education, training, and nutrition following closely behind. The potential elderly population being greater in Marion County than the State of Florida makes for high demand on paratransit services.

Table 1.8 Passenger Trips by Trip Purpose

PURPOSE	2020	2021	2022
Medical	44,193	58,220	39,527
Employment	2,455	1,617	2,468
Ed/Train/DayCare	22,193	7,167	10,064
Nutritional	16,312	12,879	14,922
Life-Sustaining Other	3,459	2,972	3,777
TOTAL	88,612	82,855	70,758
Source: Annual Performance Reports from 2020-2022, FCTD			

MT is the designated CTC for Marion County and operates the paratransit services, providing public transportation to the TD population of Marion County.   Priority is given to those who have mobility issues, or do not own or drive their own vehicle and do not have family or friends to assist them in traveling to and from destination points.

RED DENOTES UPDATES

2. Forecasts of Transportation Disadvantaged Population

The TD population was estimated using the methodology developed by the CTD utilizing data from various sources to forecast demand. The travel demand forecasting methodology was updated 2015 to address some of the changes in policy and demographics that have occurred over the past years since the original methodology was established in 1993. The TD population and travel demand estimates for Marion County were calculated from a series of automated formulas from the work book using the 2022 CUTR, Paratransit Service Demand Estimation Tool and 2022 socio-economic data from BEBR. The pre-coded data included in the workbook's automated formulas is derived from the US Census Bureau's Survey of Income and Program Participation (SIPP).
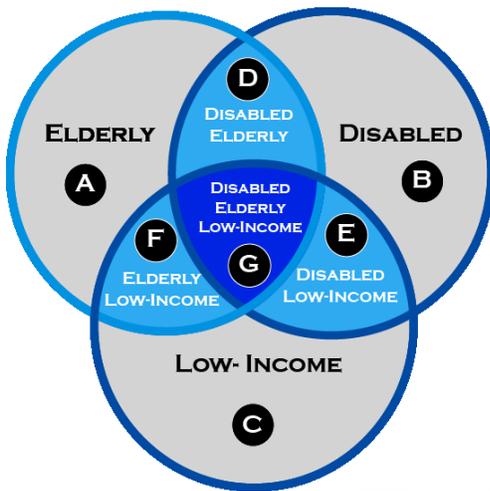
Figure 1.6: TD Population Groups

General TD Population	% of Total	
Non-Duplicated General TD Population Estimate	110,581	28.7%

County Pop. By Age	Total Pop by Age	% of Total Pop	Population Below Poverty Level by Age	% of Total Pop Below Poverty Level by Age	Total Population with a Disability by Age	% of Total Pop with a Disability by Age	Total Pop with Disability and Below Poverty Level by Age	% Total Pop with a Disability and Below Poverty Level by Age
<5	18,036	4.7%	17,880	4.6%	0	0.0%	17,880	4.10%
5-17	59,651	15.5%	53,293	13.8%	768	0.2%	54,061	14.01%
18-34	59,879	15.5%	62,840	16.3%	3,561	0.9%	66,401	17.21%
35-64	137,768	35.7%	135,208	35.0%	19,093	4.9%	154,301	39.98%
Total Non-Elderly	**275,334**	**71.3%**	**269,221**	**69.8%**	**23,422**	**6.1%**	**292,643**	**75.83%**
65-74	60,762	15.7%	109,578	28.4%	14,350	3.7%	123,928	32.11%
75+	49,819	12.9%	0	0.0%	19,733	5.1%	19,733	5.11%
Total Elderly	**110,581**	**28.7%**	**109,578**	**28.4%**	**34,083**	**8.8%**	**143,661**	**37.23%**
TOTAL	**385,915**	**100%**	**378,799**	**98.2%**	**57,505**	**14.9%**	**436,304**	**113.06%**
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 258 days annually.								

Double Counts Calculations		
E - Estimate non-elderly/disabled/ low income	From Base Data (I9)	292,643
B - Estimate non-elderly/ disabled/not low income	Subtract I9 from G9	(269,221)
G - Estimate elderly/disabled/low income	From Base Data (I11)	143,661
D- Estimate elderly/ disabled/not low income	Subtract I11 from G11	(109,578)
F - Estimate elderly/non-disabled/low income	Subtract I11 from E11	(34,083)
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C11	110,581
C - Estimate low income/not elderly/not disabled	Subtract I9 from E9	(23,422)
Total - Non-Duplicated		**110,581**
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 258 days annually		

Table 1.9 shows the forecasts of the general TD population for Marion County and references the categories shown in **Figure 1.6**. As shown, the 2022 TD population in Marion County is estimated to be 111,320, representing approximately 28.84% of the total population. This population includes all persons with disabilities, older adults, low-income persons, and
children who are high-risk or at-risk and is expected to increase by approximately 3.38% over the five-year period.

Table 1.8: Forecast General TD Population

General TD Population Forecast	2021	2022	2023	2024	2025	2026	2027
Overlapping Circle Component							
E - Estimate non-elderly/disabled/ low income	292,643	294,598	296,565	298,546	300,540	302,548	304,568
B - Estimate non-elderly/ disabled/not low income	-269,221	-271,019	-272,829	-274,652	-276,486	-278,333	-280,192
G - Estimate elderly/disabled/low income	143,661	144,621	145,587	146,559	147,538	148,523	149,515
D- Estimate elderly/ disabled/not low income	-109,578	-110,310	-111,047	-111,788	-112,535	-113,287	-114,043
F - Estimate elderly/non-disabled/low income	-34,083	-34,311	-34,540	-34,771	-35,003	-35,237	-35,472
A - Estimate elderly/non-disabled/not low income	110,581	111,320	112,063	112,812	113,565	114,324	115,087
C - Estimate low income/not elderly/not disabled	-23,422	-23,578	-23,736	-23,894	-24,054	-24,215	-24,376
TOTAL GENERAL TD POPULATION	**110,581**	**111,320**	**112,063**	**112,812**	**113,565**	**114,324**	**115,087**
TOTAL POPULATION	**385,915**	**388,493**	**391,087**	**393,700**	**396,329**	**398,976**	**401,641**
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 258 days annually.							

Table 1.10 presents the Critical Need TD population forecasts and includes individuals who, due to severe physical limitations or low income, are unable to transport themselves or purchase transportation and are dependent upon others to obtain access to health care, employment, education, shopping, social activities, and other life-sustaining activities. As shown, the Marion

County's 2022 Critical Need TD population is estimated to be 57,505, representing nearly 52% of the general TD population. In 2022, the Critical Need TD population is expected to make 494 total annual trips as shown below in **Table 1.11**. The number of Critical Need trips needed is expected to increase 7.02% over the five year period.

Table 1.10: Critical Need Transportation Disadvantaged

County TD Population by Age	Total TD Population with Disability by Age	% with a Severe Disability by Age	Total Population with Severe Disability by Age	% of Total Pop with Severe Disability by Age	% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
<5	0	4.20%	-	-		
5-17	768	4.20%	32	0.05%		
18-34	3,561	6.30%	224	0.37%		
35-64	19,093	13.84%	2,642	1.92%		
Total Non-Elderly	23,422		2,899	1.05%	28.60%	829
65-74	14,350	27.12%	3,892	6.40%		
75+	19,733	46.55%	9,186	18.44%		
Total Elderly	34,083		13,077	11.83%	11.70%	1,530
Total	57,505		15,977	4.14%		2,359

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 258 days annually.

Table 1.11: Marion County Forecasted Annual Trip Demand, 2021-2026

Critical Need TD Population Forecast	2021	2022	2023	2024	2025	2026
Total Critical TD Population						
___Disabled	15,977	16,083	16,191	16,299	16,408	16,517
___Low Income Not Disabled No Auto/Transit	-156	-157	-159	-160	-161	-162
Total Critical Need TD Population	15,820	15,926	16,032	16,139	16,247	16,356
Daily Trips – Critical Need TD Population						
Severely Disabled	783	788	793	799	804	809
Low Income - Not Disabled - No Access	-297	-299	-301	-303	-305	-307
Total Daily Trips -Critical Need TD Population	486	494	502	511	520	529
Annual Trips	125,341	127,460	129,614	131,804	134,032	136,404

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 258 days annually.

3. Needs Assessment

Assessment of existing and unmet needs for public transportation for low income older adults and persons with disabilities is essential. An inventory of existing transportation providers and identification of redundancies and gaps in service were used to identify unmet needs or duplications of public transportation services. It is assumed that there will be a growing need for public transit in the higher-density areas in Marion County. Older persons may be more likely to use public

transportation as the aging process begins to limit their ability or preference to drive. Marion County has a larger proportion of older adults compared to the statewide average.

According to the ACS 2021 5-year estimates, more than 25% of Marion County's population is 65 years of age or older compared to nearly 18% for Florida.

MT receives funding from the Transportation Disadvantaged Trip and Equipment Grant which is formula based and divided among all the counties in Florida. Marion County has been traditionally known as a rural county relying on federal funding through the 5311 FDOT Grant to sponsor trips. In recent years the funding of non-sponsored trips through the Transportation Disadvantaged Trip and Equipment Grant has not kept up with rising cost and demand. As a result, MT has to, on occasion, prioritize trip offerings. This has resulted in TD Riders not being able to fully take advantage of the system. As illustrated in **Figure 1.7** the county's unincorporated areas encompass a large portion of MT's trips. Qualifying and providing service without more funding will result in a decreased quality in service.

Currently, there is an independent study to analyze areas throughout the county with a need for specialized door-to-door service for healthcare, employment and shopping. It is anticipated that the study will allow MT to expand service to areas of the County currently not being serviced with a need for TD transport.

Figure 1.7: Trip Breakdown
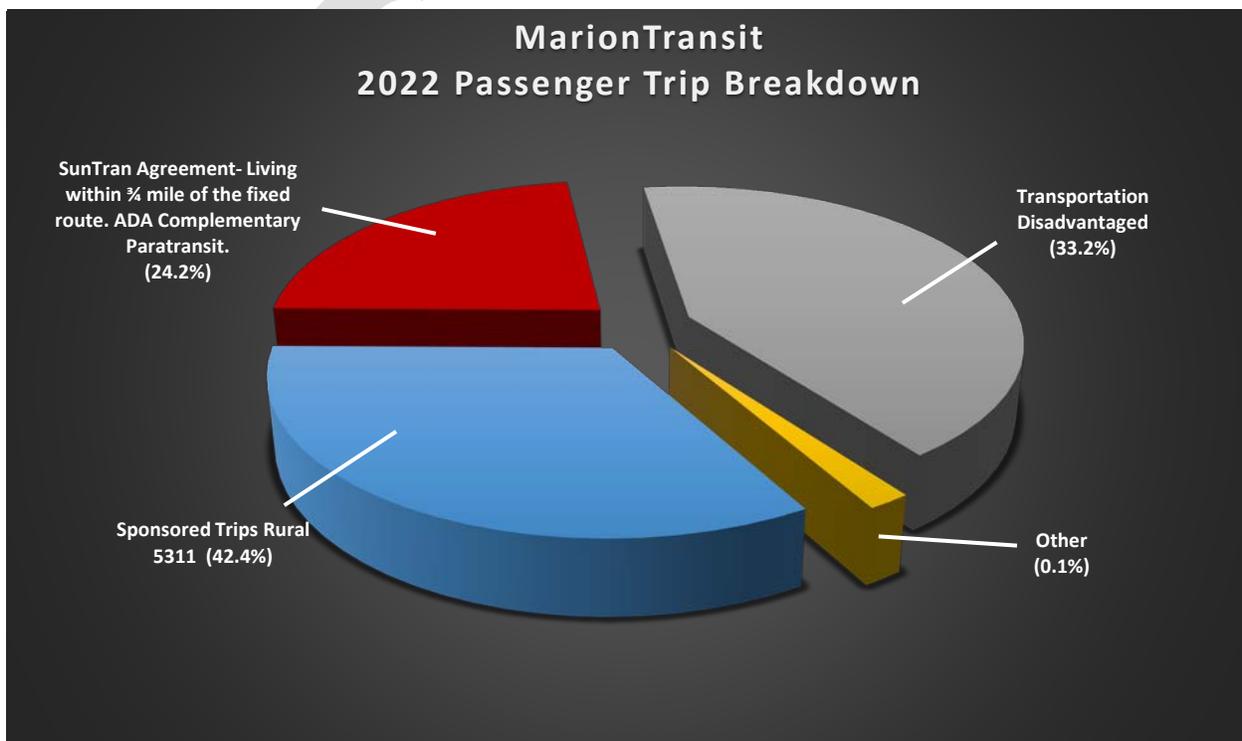
4. Barriers to Coordination

Having identified the statistics and demographics county-wide can be useful in attempting to provide riders with safe, reliable and cost-effective transportation services. However, identifying what prevents or hinders the path to those services will assist MT in making the decisions needed to move ahead. Funding is at the core, rising cost of fuel, insurance, and personnel, together with high demand due to an aging demographic is a large barrier. Another barrier is assuring that other agencies mandated to purchase transportation through the coordinated transportation systems are doing so. Below is a current list of barriers to coordination.

- High demand due to large percent of individuals who may not have access to a personal vehicle or are unable to drive themselves because of age, income status or disability.

- Providing service to the rural areas is difficult to keep costs low because of the geographic size of the service area.

- Other agencies are not allocating sufficient funds to secure transportation services for participation in their programs leaving the burden on TD funds.

- Insufficient funds to provide service for the non-sponsored trips as opposed to sponsored trips.

- Fixed route public transportation service is not available in many of the rural areas of the county, again leaving the burden on TD funds.

Goals, Objectives, and Strategies

Developing a vision for transit services is a fundamental component of the TDSP. Goals, objectives, and strategies are critical for implementation of the public transit's vision in the community. The vision identifies what the CTC is, who it serves, and how best to provide service. This section includes the long-range goals of MT, specific measurable objectives that identify actions that can be taken to achieve the goals, and strategies to achieve the objectives.

MT's vision and mission statements were developed with a focus for success toward providing the best possible transit experience for their riders.   MT's business values and goals are evident through their hard work and dedication.

Marion Transit Vision Statement

Is to provide public transportation that offers riders a high-quality safe, reliable, and efficient paratransit experience.

Marion Transit Mission Statement

Providing safe and efficient paratransit public transportation service in Marion County to the Transportation Disadvantaged and others who may not have access to basic life sustaining needs such as medical, education, work, business and recreational due to lack of transportation.

MT will focus the next five years to increase access to public transportation within the rural areas of Marion County utilizing route deviation in conjunction with demand response services and work towards reducing reservations closer to next day appointments. An analysis of MT's call-in, routing and appointment system is currently under way in an effort to move toward a decreased lead time. MT will improve current technology or acquire new technology to facilitate the effort in lead-time reduction. MT will continue to provide service that meets the needs of Marion County's transportation disadvantaged, combined with safety and integrated with other county modes of travel.

MT's goals, objectives and strategies are:

1. **To provide the best possible transportation service to those in the service area.**

   Objectives:

   a. Continue to monitor and assess riders to transition to fixed-route services. MT has retained a consultant to research the counties rural areas for the most advantageous locations to increase service and assist those needing transit the most.
   a.b.   Carefully match the best possible transit solution for every particular need.
   b.c. Make sure that the application and registration process is simplified but as effective as possible.

   Strategies:

   a. Annually assess the applications of current riders that are able to transition to fixed route system. Continually looking for options to move to fixed routes as has been done in the Dunnellon and Marion Oaks by reviewing concentration and consistency of riders.
   b. At the time the reservationist takes the call, monitor and adjust as needed the service standards for customer service to ensure consideration of their needs.
   c. Annually update the application and registration process to meet the needs of the customer. Registration has been streamlined in anticipation of reducing call hold time, pick-up window, and reservation time.

2. **Educate the riders and general public on services provided.**

   Objectives:

   a. Participate in community events to educate.
   b. Maintain a presence on the internet to improve public image.
   c. Respond to complaints immediately to improve public perception and identify problems.

   Strategies:

   a. MT will continue to make presentations and participate in speaking engagements in the community at a minimum one a month.
   b. Maintain website and social media platforms up-to-date for public image.
   c. Immediate notification of complaint to Grievance Committee for resolution and annually update grievance procedures.

3. **Remain flexible and open-minded in terms of routes and riders' needs.**

   Objectives:

   a. Ensure that requests received are communicated and considered as possible feasible changes and/or corrections.
   b. Best practices in terms of less call hold time, pick-up window, and reservation time.
   c. Continued assessment of the routes for more efficient service.

   Strategies:

   a. Maintain effective means of communication where customers can provide input through the TDLCB meetings, website and social media.
   b. Work with customers at the time they call in a reservation to attain their buy-in for no shows, and cancellations. Continues to be an ongoing issue. This will be alleviated with an analysis of the system paired with the implementation of new technology.
   c. Look at and update the routes at a minimum annually.

4. **Provide transportation services with safety at the forefront**

   Objectives:

   a. Adhere to the System Safety Program Plan and meet all requirements.
   b. All vehicles to receive regularly scheduled maintenance and daily inspections.
   c. Maintain a process for sanitizing and cleaning all vehicles every day.

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Strategies:

a. Continue background checks, drug tests and physical compliance for all drivers at the onset of employment and random testing regularly.
b. Ascertain qualified mechanics are utilized for repair of the buses and drivers sign off daily for inspections.
c. Establish procedures for cleaning of buses and continued awareness and education on sanitizing with daily logs.

5. **Maintain consistent coordination to provide effective service to public and private partners.**

Objectives:

a. Build a rapport with both public and private partners to better understand their needs.
b. Work to establish a mutual trust with partners.
c. Coordinate resources to better serve and maintain costs down with efficient service.

Strategies:

a. Arrange to meet on a quarterly basis in an effort to build rapport.
b. Share plans and routes with partners at the quarterly meeting in order to build mutual trust.
c. Maintain communication quarterly to close any gaps in service and look for ways to improve costs and efficiency.

6. Implementation Plan

Table 1.9: Implementation Plan

OBJECTIVE	STRATEGY	RES-PONSIBLE	MEASURE-STATUS	2023 STATUS UPDATE
GOAL 1- To provide the best possible transportation service to those in the service area.				
Continue to monitor riders to transition to fixed-route services	Annually assess the applications of current riders that are able to transition to fixed route system	CTC TDLCB	CTC reports to TDLCB Ongoing	Looking to incorporate more fixed routes where possible-Consultant has been retained to research areas with TD needs.
Carefully match the best possible transit solution for every particular need	When the reservationist takes the call, monitor/adjust as needed the service standards to ensure consideration of their needs	CTC	CTC to monitor -Daily,	Registration process has been streamlined and simplified - Ongoing
Make sure the application-registration	Annually update the application and registration process to meet the needs of the customer	CTC TDLCB	CTC to monitor minimum – Annually	Process has been streamlined and updated.

process is simplified but effective				
GOAL 2. Educate the riders and general public on services provided.				
Participate in community events to educate	Continue to make presentations and participate in speaking engagements in the community at minimum one a month	CTC	Number of presentations -	Ongoing – presentations have been made to TPO Board, and City of Dunnellon.
Maintain a presence on the internet to improve public image	Maintain website and social media platforms up-to-date for public image	CTC	Customer input	The website is updated regularly - Ongoing
Respond to complaints immediately to improve public perception and identify problems	Immediate notification of complaint to Grievance Committee for resolution and annually update grievance procedures	CTC TDLCB	CTC to report to TDLCB – Quarterly	Immediate attention is given and followed according to procedures- Ongoing
GOAL 3. Remain flexible and open-minded in terms of routes and riders' needs.				
Ensure that requests received are considered as feasible changes and/or corrections	Maintain effective means of communication where customers can provide input through the TDLCB meetings, website and social media	CTC TDLCB	Maintain comment cards on buses/website	Comment cards have been placed on buses and surveys are taken for input - Ongoing
Best practices in terms of less call hold time, pick-up window, and reservation time	Work with customers at the time they call in a reservation to attain their buy-in for no shows and cancellations	CTC	CTC to monitor – Daily-	Analysis in progress for new format and/or new technology - Ongoing
Continued assessment of routes for more efficient service	Look at and update the routes at a minimum annually	CTC	CTC to monitor cost efficiency -Annually	System is analyzed regularly in an effort to find new possible Deviated Routes. - Consultant's research will assist in identifying new deviated routes in the very near future.– Ongoing
GOAL 4. Provide the transportation services with safety at the forefront				
Adhere to the System Safety Program Plan and meet all requirements	Arrange to meet on a quarterly basis in an effort to build rapport	CTC	CTC to monitor documentation – Daily	Program is monitored and is strictly adhered to - Ongoing
All vehicles to receive regularly scheduled maintenance and daily inspections	Share plans and routes with partners quarterly at the meeting in order to build mutual trust	CTC	CTC to monitor documentation – Daily	Maintenance schedule is followed and strictly adhered to - Ongoing
Maintain a process for sanitizing and cleaning all vehicles every day	Maintain communication quarterly to close any gaps in service and ways to improve cost and efficiency	CTC	CTC to monitor customer input -Daily	All buses are sanitized between riders and at the end of the day - Ongoing
GOAL 5. Maintain consistent coordination to provide effective service to public and private partners				
Build a rapport with both public/private partners to better understand their needs	Arrange to meet on a quarterly basis in an effort to build rapport		CTC to monitor	Public outreach and presentations assist with a better rapport - Ongoing
Work to establish a mutual trust with partners	Share plans and routes with partners quarterly at the meeting in order to build mutual trust		CTC report to TDLCB-Qtrly	Ongoing
Coordinate resources to better serve and maintain costs down with efficient service	Maintain communication quarterly to close any gaps in service and ways to improve cost and efficiency		CTC to monitor	Continual monitoring and assessing new innovative ways to hold costs down - Ongoing

RED DENOTES UPDATES

Section 2: Service Plan

Operations Element

MT policies and procedures are described in this section and were modified to comply with the US Department of Transportation (USDOT) rules under the ADA and Section 504 of the Rehabilitation Act of 1973.

1. Types, Hours and Days of Service

MT provides public transportation services to eligible TD residents (non-sponsored) and sponsored program recipients in Marion County. Trip reasons may be prioritized due to funding reductions experienced by most sponsoring agencies, and the prioritization format has been approved by the TDLCB. However, while MT has reported 0 unmet trips in the past, the number has the potential to increase due to lack of funding for TD non-sponsored trips.

TD Trip requests are currently prioritized in the following order:

1. Medical Needs
2. Life-Sustaining Activities
3. Education
4. Work
5. Business
6. Recreational

MT operates Monday through Friday from 5:00 am – 7:00 pm or until all passengers have completed their scheduled return trip. However, service may be available on Saturdays with special arrangements. MT does not operate on Sunday. Special riding arrangements are made for frequent riders such as dialysis patients for early, late and Saturday appointments. Limited service is also offered for major holidays.

Office hours are 8:00 am – 5:00 pm Monday through Friday, excluding holidays. Passengers are requested to make appointments with pick-up times between 9:00 am and 2:00 pm so they can be picked up and delivered prior to their scheduled appointment time and returned home prior to the end of MT service hours. This may require they are ready up to 2 hours before their scheduled appointment time for pick up. Appointments for persons residing in outlying areas should be made between 10:00 am and 1:00 pm due to travel time needed to make appointments. Note: Those residents in outlying areas may need to be ready for pick up 3 hours in advance due to travel distances. Trips may be scheduled as early as 2 weeks in advance, but not later than *72 hours before their appointment time. Recurring trips, such as dialysis or therapy, scheduled on an ongoing basis

may be granted. Reservations will work with the rider to set this type of schedule up. *Approved ADA Complementary Paratransit riders are able to reserve trips by 5:00 pm the day before their appointment.

In total, 46 paratransit cutaway buses (100%) are all ADA equipped for ambulatory and wheelchair riders set up in various configurations. MT does not have the ability to accommodate stretchers.

2. *Accessing Service*

Riders may call MT's Reservations line at 352-620-3071 Monday through Friday from 8:00 am to 5:00 pm to schedule a trip. Reservations may not be made more than 2 weeks prior but not less than 72 hours before their appointment time. However, ADA Complementary paratransit eligible riders may call by 5:00 pm the day before their scheduled appointment. The reservationist will listen to every request, discuss the circumstances, and decide whether to accept or deny the reservation. If the reservation time is unavailable, an alternate day or time is offered.

All potential riders must request transportation through MT's Reservationist who determines the rider's eligibility, assigns the appropriate sponsor, and then assigns the trip in the software (RouteMatch) program. Next, MT's scheduler reviews the scheduled trips and proceeds to assign them to a manifest/bus for transportation on the designated date/time. The rider is then transported from origin to destination (door to door) as requested.

3. *Trip Eligibility*

MT provides Public Transportation to all eligible residents residing in Marion County. Visitors may also qualify for our services by calling Reservations who will assist with eligibility requirements.

Service for riders living within the small urban areas of Marion County who may be Transportation Disadvantaged may use our system when they meet certain eligibility requirements i.e. disabled, have no other means of transportation, over 60 years, under 16 years or income levels 150% below the federal poverty guideline.

Eligibility is accomplished by self-declaration of the potential rider; the rider must answer specific questions to help determine his/her eligibility. Once they are determined to be eligible, registration is completed by obtaining pertinent data or affidavits to affirm statements made which is entered into their respective rider file and electronic database (RouteMatch).

Once this process is completed the rider is eligible for transportation services with MT.

4. Trip Prioritization

The TDLCB, sets the prioritization guidelines when prioritization is needed. The following guidelines become effective as the need arises. Service for TD (non-sponsored) trips is provided in the following hierarchy:

- Medical = kidney dialysis, cancer treatment, doctor appointments, therapy & prescriptions
- Life-sustaining activities = food/food stamps, shopping
- Education = life skills training for persons with disabilities, day treatment programs for abused and/or neglected children
- Work
- Business = banking, Social Security, visits to hospital/nursing homes
- *Recreational trips = YMCA, gym, Too Your Health
- *Note: If prescribed by a Doctor then the trip would be considered medical.

5. Other Accessibility Processes/Procedures

MT service is origin to destination (door to door). It is MT policy that the driver will assist riders requiring assistance from the door at the rider's home and to the main entrance of the rider's destination. It is the driver's responsibility to also make themselves available to assist riders boarding and exiting the bus. This policy does not preclude others who have knowledge of the rider from helping.

Drivers will not assist a wheelchair rider down more than one step and, in many cases will not/cannot push a wheelchair through loose sand, gravel or mud.   The minimum clear width for single wheelchair passage shall be 32 inches (815 mm) at a point for a maximum length of 24 inches and 36 inches (915 mm) continuously. Lift capacity (chair & rider combined) may not exceed the lift maximum limits usually 800 or 1000 pounds depending on the bus.

> Note: Riders may be required to provide documentation they do not exceed the limits prior to riding AND must let reservations know if the weight exceeds 800 pounds so they are scheduled on a bus with a 1000-pound capacity lift.

Oxygen bottles are permitted as long as they are secured to the wheelchair or an oxygen tree on the bus. Additionally, since Marion County is very rural there are some roads and driveways that a bus cannot drive down due to overhanging tree branches, loose sandy unpaved roads or driveways and other obstacles; in those cases, the potential rider may be required to meet the bus at a predetermined pick-up location.

Riders may bring items onboard the bus, but items must be placed on the rider's lap or under their seat. Drivers are not required to handle personal property and are discouraged from doing so. Therefore, riders should be able to manage their own belongings. The exception to this policy is for shoppers. Riders are permitted up to three (3) grocery bags and drivers may assist them with proper and safe storage in the bus.

To cancel an appointment, riders must call the office and advise a reservationist of their name and date of travel as soon as they know the trip is no longer needed. After hours riders may leave a recorded message on the reservation line to notify us of their decision to cancel. MT also has an automated notification system that calls the riders the day before their scheduled trip to remind them. This system also allows for the rider to cancel by pressing a designated digit on their phone. Riders are encouraged to cancel as soon as possible so that others can ride. Last minute cancellations keep others from using the system. MT has a "no-show" policy in place. If a rider is not available for transportation within five minutes after the bus arrives, including no response at the door or refusal of service at the door, the rider is considered a no-show. In the event of a no-show, the driver radio's dispatch and every effort is made to contact the rider. If they cannot be contacted, the driver leaves a no-show notification notice on the doorknob. This notice reminds the rider that repeated no-shows may result in the rider being suspended from using MT.

> Note: Review of cancellations for a pattern or practice of late cancellations and/or no-shows by the rider will be clearly identified before sanctions are imposed. If any sanctions are imposed the rider may appeal them.

Escorts are limited to one per passenger, as deemed medically necessary. Escorts must be at least age 16. Dependent children may be transported if the medical appointment is for the child. Children under age 5 or weighing less than 40 pounds must be in an approved car seat either provided by the rider or pre-arranged with reservations. The driver is responsible for properly securing the child seat on the bus and ensuring the child is properly secured for the trip. The scheduler determines how many buses may be required to perform the trips scheduled as well as capacity and number of wheelchairs vs. ambulatory passengers onboard at one time while considering the most efficient use of vehicles for getting riders to their appointments.

Return trips are monitored by dispatch depending on when clients come ready by calling in to dispatch after their appointment is complete. Available bus is then dispatched to return the rider to their return destination location to complete the round trip.

Bus drivers utilize their onboard tablet to document trips i.e. locations, pick-up times, fare collection, etc. This information is collected by the RouteMatch software system. Driver's also use a paper

manifest with duplicate information from their tablet where driver's take notes and document unusual occurrences for review as needed for trip improvements.

A Billing Clerk then verifies trips using RouteMatch system and reviews paper manifest for notes to ensure accuracy and consistency. Trip rate is calculated per trip that includes billing eligibility being verified by the clerk and Trips Manager.

6. Transportation Operators and Coordination Contractors

Marion Transit currently does not subcontract with other providers to provide trips. However, there are coordination contracts with other not-for-profit agencies who assist the CTC by providing trips to their own clients.

Table 2.1: Agreements with Outside Transportation Agencies

NAME	CONTACT	ADDRESS	PHONE	AGREEMENT TYPE
Advocacy Resource Center Marion, Inc.	Sean McLaughlin, CEO	2800 SE Maricamp Rd., Ocala, FL	352-387-2210	Coordination Agreement
Florida Center for the Blind, Inc.	Anissa Pieriboni, CEO	1411 NE 22nd Avenue, Ocala, FL	352-873-4700	Coordination Agreement

7. Public Transit Utilization

The goal for MT is to provide 100% of all requested service for eligible riders. When a trip originates and terminates within the fixed-route (SunTran) service area, potential riders are directed to use the fixed-route system for trips unless they are certified as eligible for complementary ADA paratransit service.

Note: All requests for MT transportation services with trip origins and destinations within the ¾ mile from a SunTran fixed bus route are directed to use the fixed-route bus system. All SunTran vehicles are ADA accessible. To ensure that all citizens of Marion County are provided with equal access to public transportation, SunTran undergoes ADA certification; contracts with the Center for Independent Living of North Central Florida to assist with the rider certification/eligibility process.

8. School Bus Utilization

Marion Transit does not utilize school buses for transporting the transportation disadvantaged within the coordinated system. However, during county declared emergencies Marion Transit works closely with the School Board to provide needed transportation to shelters especially those considered special needs. This effort is coordinated through Marion County Emergency Management.

9. Vehicle Inventory

To properly operate TD services, MT maintains a fleet of approximately 46 cutaway buses in various seating configurations of less than 15 passengers each for ambulatory and wheelchair riders. All of MT's fleet is ADA accessible equipped some with wheelchair lifts having a capacity of up to 1,000 pounds. Several "spare" vehicles are included within this fleet for when vehicles are out of service for repairs or inspections. Each in-service bus is inspected following a mandatory pre and post-trip inspection by drivers. Safety issues found can immediately place a bus out-of-service until repaired.

Buses have a camera system capable of providing live feed and recording both outside and inside each bus. This live feed/recording camera system provides another level of passenger safety. They are also equipped with tablets to communicate with dispatch as well as tracking trips, passengers and any special needs. Drivers have two-way communications with dispatch with the capability of calling 911 for emergencies. Inventory of MT vehicles is provided in **Appendix B**.

10. System Safety Program (SSPP) Certification

Marion Transit is required to develop and implement a System Safety Program Plan (SSPP). MT has an approved SSPP that was developed in compliance with Chapter 14-90, F.A.C. and is reviewed and updated as necessary but at a minimum reviewed annually. A copy of this certificate has been provided in **Appendix D**.

11. Inter-County Services

Out of service area trips are provided as determined locally and may be approved by the Transportation Disadvantaged Local Coordinating Board (TDLCB), except in instances when local ordinances prohibit such trips.

12. Emergency Preparedness and Response

Transportation services provided by MT are an integral part of the Marion County Emergency Management plan. MT is designated as a back-up for special needs riders to the Marion County School Board. Transportation may be used to evacuate special needs citizens who are going to shelters or staging areas as designated by Emergency Management.

13. Marketing

Marketing is focused on getting public transportation to those who require the service that MT provides and it is done using brochures, local newspapers, presenting at community meetings and on MT's website (www.mariontransit.org). All of MT's buses are marked with MT's name and phone

number. MT's newer fleet include the words: "Call – Connect – Ride" and phone number 352-620-3071 in bold letters.

14. *Service Standards*

 MT Service Standards established to provide oversight of the coordinated system are shown in **Table 2.2**.

Table 2.2: CTC Service Standards

Service Standard	Policy/Measure
Accidents	MT Preventable Accident Standards are <1 accident per 100,000 miles.
Advance Reservations	Trips must be scheduled a minimum of 72 hours prior to date of travel and at a maximum of two weeks in advance of date of travel, with exception of ADA Complementary Paratransit – by p.m. the day before travel.
Call Hold Time	MT goal – average inbound telephone hold time no longer than 2 minutes.
Child Restraint Devices	Children under the age of 5 or weighing less than 40 pounds must be in appropriate child seat. Child seat may be furnished by MT if requested during reservation or may be furnished by rider. Driver is responsible for properly securing the child seat and child.
Driver Criminal Background Screening	Criminal check is facilitated by Human Resources and must pass a Level B check, completed prior to hire.
Escorts	Passengers may have one escort for assistance, if medically necessary. Escorts must be at least 16 years of age. Dependent children may be transported if medical appointment if for the child. Escorts are also expected to pay the rider fare unless the rider has a fare waiver.
Fare Collection	All riders are expected to pay fare at time they receive transportation services. Riders must have exact change; drivers do not carry cash. Bus tickets are also available. Fare as of June 2020 is $2.00. Note: Fare waivers are available for riders who certify limited income levels. Call MT for details.
Passenger No-Shows	Passengers who make reservations and are not available for pickup within 5 minutes after bus arrives are considered "no-show". After two no-shows, transportation service may have sanctions up to suspension if there is a pattern and practice is determined after review.
Pick-Up Window	Riders must be ready for pickup 2 hours prior to appointment time. Note: Rural riders may be required a greater time due to distance.
On-Time Performance	MT On-Time Performance Standards are 95% or greater of trips to scheduled appointment time are on time.
Out-of-Service Area Trips	Out-of-service area trips provided when determined locally and approved by LCB, except when local ordinance prohibit such trips.
Oxygen Transport	Oxygen bottles may be taken if securely attached to wheelchair, tree on bus or in small bottle carried by rider.
Rider Personal Property	Riders may carry personal property on buses if it can be placed on lap or under seat. Drivers may not handle personal property. Exception is shopping trips; customer may carry no more than 3 grocery bags, and driver may assist to ensure bags are safely stowed on the bus.
Road calls	No more than one road call per 10,000 miles.
Service Animals	Service Animals are allowed to accompany riders in accordance with ADA; MT must be notified when reservation is made that you will have a service animal traveling with you.
Training	All transportation safety-sensitive employees required to complete 60 minutes of drug and alcohol training annually. All new drivers complete a minimum of 80 hours of Field Operator Training with a Field Training Operator who covers all the required training for new personnel before going solo. This training includes both book/video and hands on training with a trainer. All drivers complete mandatory training every three years at least once. Training includes; customer satisfaction, wheelchair restraints, loading unloading, defensive driving, distracted driving and other necessary training. All training is either classroom, online, observing, or interaction with a trainer.
Wheelchair	Drivers cannot assist wheelchairs over more than 1 step or curb. The minimum clear width for single wheelchair passage shall be 32 inches (815 mm) at a point for a maximum length of 24 inches and 36 inches (915 mm) continuously. Lift capacity (chair & rider combined) may not exceed the lift maximum limits usually 800 or 1000 pounds depending on the bus.
Drug & Alcohol	MT requires each driver be drug screened prior to hiring. MT also has a zero-tolerance policy for drug abuse and follow the recommended Federal Transportation Authority (FTA) policy. This policy includes random drug and alcohol testing once on board.

RED DENOTES UPDATES

15. Local Complaint and Grievance Procedures/Processes

MT, in conjunction with the Ocala/Marion County Transportation Disadvantaged Local Coordinating Board (TDLCB) has developed and implemented a policy for resolving complaints. A copy of this procedure has been provided in **Appendix C**.

Section 3: Quality Assurance

CTC Monitoring and Evaluation Process for Operators and Coordination Contractors

As part of the operator and coordination contractor monitoring process, MT uses criteria similar to the FDOT monitoring process. Monitoring is completed on an annual basis. Following the monitoring process, a written report is issued to the operators and coordination contractors. If an unfavorable report is issued, corrective actions must be taken within the assigned amount of time, and MT will conduct a follow-up visit to ensure the corrective actions have been completed.

1. CTC Evaluation

In accordance with the FCTD CTC Evaluation Workbook, the TDLCB along with the TPO conducts an annual evaluation of Marion County's CTC to evaluate the performance accomplished the previous year. This evaluation entails looking at each facet of the operation to ensure that the rules and regulations of the FCTD are in place and being adhered to. In addition, the FCTD conducts triennial Quality Assurance and Program Evaluation (QAPE) reviews as part of its monitoring process. The QAPE review is conducted by an independent auditor on behalf of the FCTD and in compliance with the detailed tasks listed in the FCTD's monitoring tool. Using a series of interviews and system record inspections, the QAPE auditor evaluates the system based on FCTD standards, local standards and ADA requirements. The CTC annual evaluation results are presented in **Appendix E.**

2. Cost/Revenue Allocation and Rate Structure Justification

The rate structure is the same for all TD trips within Marion County. The TD rates presented in **Table 3.1** were determined using FCTD standardized rate model spreadsheets, which consider past and projected costs and revenues associated with MT transportation services. The rate model is updated annually by MT to reflect changes in revenues and expenditures. The rates calculated using the FCTD model were approved by the TDLCB and the FCTD. The TDLCB will continue to monitor the rates on an ongoing basis to determine when/if these rates need to be modified due to changes in the cost of delivery of trips.

Table 3.1: FCTD Calculated Rates

FCTD Calculated Rates	
Ambulatory (and Escort)	Trip Charge: $ 33.76
Wheelchair	Trip Charge: $ 57.88
Stretcher (Contracted)*	*** MT does not offer stretcher services**

The rate model worksheets are presented in **Appendix F,** and the existing MT fare structure is shown in **Table 3.2** below.

Table 3.2: SunTran Fare Structure/MT Fare Structure

FARE DESCRIPTION	SUNTRAN ONE-WAY FARE	SUNTRAN PASS FARE - MONTHLY
Adult Regular Fare	$1.50	$45.00
Youth/Student Fare	$1.10	$34.00
Older Adult/Person with Disability Fare	$0.75	$23.00
Medicare Card Holder Fare	$0.75	
Veteran Fare	$0.75	
Children under Age 5 (when accompanied by paying adult)	FREE	
MT'S FARE DESCRIPTION	**MT FARE AMOUNT**	
MT ONE-WAY FARES	$2.00	

Appendix A: Summary Review of Other Plans

Local Government Comprehensive Plans

City of Ocala

The City of Ocala's Comprehensive Plan has three (3) main goals regarding their transportation vision for the future; they are as follows:

- Goal #1 – To create and maintain a safe, efficient, and aesthetic transportation system that encourages multi-modal transportation and promotes the mobility strategies of the Ocala 2035 Vision.
- Goal #2 – Promote walking and biking as safe and viable modes of transportation by providing connections to residential, business, and community areas.
- Goal #3 – Provide an efficient and safe public transit system that is accessible to all citizens.

Staff at the City of Ocala works hand in hand with TPO staff to ensure that all projects that are proposed are both compatible to their vision and land use. TPO and City of Ocala staff work together on project proposals, traffic methodology, and any proposed amendments that could possibly affect the availability of multimodal facilities within the planning area.

Marion County

Marion County's Comprehensive Plan has seven (7) main goals with respect to their transportation element; they are as follows:

- Goal #1 – To develop a comprehensive and performance driven approach to support transportation demands over the life of the comprehensive plan by improving economic efficiency and accessibility while protecting the unique assets, character, and quality of life in Marion County through the implementation of policies that address the following:
    1. Functionality of the Transportation System
    2. Land Use and Transportation
    3. Provision of Infrastructure
    4. Freight
    5. Transit
    6. Aviation

- Goal #2 – To coordinate land use decisions, access locations and configurations in order to maintain and improve the efficiency and safety of the transportation system and to ensure transportation infrastructure supports the effective movement of automobiles, freight, cyclist, pedestrians and transit throughout Marion County
- Goal #3 – To recognize the inter-relationship of land use patterns and the need to coordinate those with the County's transportation planning efforts to ensure the appropriate transportation network is in place within the Urban Growth Boundary (UGB) to address land use/transportation interactions.
- Goal #4 – Marion County shall develop a cost-effective transportation system based on market principals which maximize economic efficiency and provide accessibility for residents and industry consistent with the Future Land Use Map.
- Goal #5 – Marion County shall enhance the freight transportation network (aviation, highways, and rail), which supports existing industry and enhances future economic development opportunities.
- Goal #6 – Marion County shall coordinate with the TPO to undertake action to serve transportation disadvantaged persons with an efficient transit system; provide for the development of a rational and integrated multi-modal transportation system; provide management support to coordinate all components of the Transit service system and relevant comprehensive plan elements; and preserve options to promote the development of long-range transit alternatives.
- Goal #7 – Marion County shall support the development of general aviation facilities, both public and private, to better serve the needs of the citizens of Marion County and surrounding areas by providing for aviation-compatible land uses for airports licensed for public use, by limiting or restricting incompatible land uses and activities.

Marion County has implanted several objectives, statements, and policies to help aide them in carrying out the goals mentioned above. The Marion County staff is committed to seeing transit distributed equally throughout the community. They have taken several approaches to ensure that land use is compatible with proposed developments and their vision for seeing transit expanded. The staff at Marion County work diligently with the staff at the TPO to ensure the appropriate planning efforts are taken and that funding is sought to increase both the availability and efficiency of the overall transit network within Marion County

Regional Plans

Ocala 2035 Vision

As mentioned in the Local Government Comprehensive Plan section, the City of Ocala has invested a great deal of time, energy, and effort into ensuring that their transportation system is safe, efficient, and accessible to all users. The 2035 Vision is another way the city highlights and demonstrates their commitment to this effort. The Mobility and Community Connectivity section of this document discusses utilizing to main tools to promote a better-connected transportation system. The two tools are utilizing the complete streets program and road diets. In addition, increasing the accessibility of public transit was also recommended to either reduce congestion, connect neighborhoods that are not currently connected and to provide additional transportation choices to citizens.

Transit Development Plans

SunTran

The City of Ocala operates and manages the day to day operations and financial matters for the fixed route public transit provider in Marion County. The latest approved Transit Development Plan (TDP) for SunTran was adopted in 2022. SunTran has initiated a 10-Year Transit Development Plan (TDP) to cover the 10-year horizon plan from FY 2023 to FY 2027. The Plan supports the development of an effective multimodal transportation system in the City of Ocala and Marion County and is the basis for defining public transit needs.   The SunTran TDP provides a roadmap for how to improve and build upon Marion County's transit system over the next 10 years. The plan provides for transit and mobility needs, cost and revenue projections, and community transit goals, objectives, and policies. TPO staff has worked with SunTran and City of Ocala staff to ensure that transit efficiency and availability increases where uses are necessary and applicable.

TDSP

TPO Staff in conjunction with the Transportation Disadvantaged Local Coordinating Board (TDLCB) and the Community Transportation Coordinator (CTC) approved the latest TDSP annual update for 2023. The current plan highlights existing goals, objectives, and strategies to help improve the efficiency of the transit system for the disadvantaged community here in Marion County. The TDSP looks at current demographics, land use, and automobile ownership to better predict where new customers and users could be potentially gained. This helps staff at the local municipalities and the TPO, better plan for the transportation needs of its citizens.

Commission for Transportation Disadvantaged Plans

Annual Performance Report (2022- 2023)

The Commission for Transportation Disadvantaged publishes an Annual Performance Report (APR) each year. The APR summarizes each county's transportation disadvantaged services, and statistics. These statistics are extremely valuable to the planning process for TPO staff, the Transportation Disadvantaged Local Coordinating Board (TDLCB), and the Community Transportation Coordinator (CTC). This report is completed on an annual basis by the Commission and submitted to the Governor for final approval. This report was analyzed by staff to complete the Development section of this plan update.

Annual Operations Report for Marion Transit

Marion Transit submits an Annual Operations Report (AOR) each fiscal year to the Commission. This report is used by the Commission to complete their Annual Performance Report, cited above. The AOR includes information such as number of trips, type of trips, users, and various other information that is related to the services provided by Marion Transit. This report was analyzed by staff to complete the Development section of this plan update.

Ocala Marion County Transportation Planning Organization (TPO) Plans

2045 Long-Range Transportation Plan (LRTP)

The Ocala Marion County TPO is the federal designated metropolitan planning agency for Marion County. The TPO is required by federal statute to update the LRTP every five years. The LRTP is a blueprint used to guide the transportation system throughout Marion County over the next twenty plus years. The 2045 LRTP discusses service improvements including new route expansions and increased frequency. However, due to funding constraints the expansions and increased frequency were both determined to not be cost feasible. The LRTP was reviewed for consistency with this plan update. The TPO will begin updating the new 2050 LRTP in late fall of 2023.

Transportation Improvement Program (TIP) FY 2026 to 2028

The TIP is another document required by both federal and state statutes to be updated on an annual basis. The TIP demonstrates the financial commitments which will be utilized on projects with Marion County over the next five years. The TIP lists out individual projects, phases of projects, and funding sources for the commitments. Therefore, the TIP provides great insight into what investments are being made in the area, which further highlights the essential priorities in the area. The draft TIP was reviewed for consistency with this plan update.

Summary

The review of transit and transportation planning documents was conducted to enhance the understanding of existing plans and programs that are relevant to public transportation in Marion County. This review helped identify relevant information which was utilized to enhance the planning process for this TDSP update. The Comprehensive Plans from both Marion County and the City of Ocala provided great insight into the relationship between land use and transportation. Both the city and the county, have implemented various policies to help work towards being a more multimodal and transit friendly environment. They have implemented processes into their reviews of proposed development to ensure that the proposed use doesn't detract from any approved transit plans throughout the area. In addition, plans from the Commission for Transportation Disadvantaged, SunTran, and Marion Transit were analyzed to ensure consistency with this major plan update to the TDSP.

Appendix B: MT's Vehicle Inventory

MARION TRANSIT FLEET INVENTORY							
Agency's Bus Number	Year / Make	Vehicle Length (Feet)	Ambulatory Seats	Wheelchair Spaces	ADA Accessory (Lift, Ramp, etc)	Current Use	Current Condition
1205 (50)	2012/Dodge	12	6	1	Ramp	Spare	Good
1305 (31)	2013/Chevy	23	10	3	Lift	Daily Use	Good
1401 (08)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1404 (18)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1405 (29)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1406 (34)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1407 (37)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1501 (15)	2015/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1502 (40)	2015/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1601 (05)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1602 (09)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1603 (11)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1604 (20)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1605 (21)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1701	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1702	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1703	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1704	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1705	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1801	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1802	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1803	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1804	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1805	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1900	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1901	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1902	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1903	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1904	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2001	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2002	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2003	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2004	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2005	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2101	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2102	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2103	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2104	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2105	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2106	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2107	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2108	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2109	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2110	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2111	2021/Ford E-450	25	14	2	Lift	Daily Use	Excellent
2112	2021/Ford E-450	25	14	2	Lift	Daily Use	Excellent
Revised 4/19/2023							

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Appendix C: Marion Transit Grievance Procedures

Inserted

GRIEVANCE PROCEDURES
OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

Article 1: Preamble

The following will set forth the grievance procedures which shall serve to guide the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board (TDLCB). The Community Transportation Coordinator (CTC) will receive and attempt to satisfy any concerns by any person(s). If for any reason the complainant is not satisfied with the resolution determined by the CTC then the procedures herein will assist in acquiring a satisfactory resolution. This will provide procedures and policies for fulfilling the requirements of chapter 427, Florida Statutes, Rule 41-2 of the Florida Administrative Code (FAC), and subsequent laws setting forth requirements for the establishment of grievance procedures.

Article II: Name and Purpose

Name: The Grievance Committee is a Subcommittee of the Transportation Disadvantaged Local Coordinating Board, but will hereinafter be referred to as the Grievance Subcommittee.

Purpose: The primary purpose of the Grievance Subcommittee is to process, investigate and make recommendations to any and all unresolved grievances and/or complaints. To provide a formal grievance process by the TDLCB to address concerns by any person or agency including but not limited to, users, potential users, agencies, and other interested parties. The Grievance Subcommittee will provide a mechanism for issues to be brought before the committee which shall meet as often as necessary to address unresolved complaints in a timely manner.

Article III: Definitions

1. Community Transportation Coordinator (CTC): An entity and or person appointed to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.

2. A Grievance is defined as any ongoing service problem that interferes with accessing a major life activity, such as work, healthcare, employment, education, shopping, social activities, or other life sustaining activities.

3. Service Complaint: Any routine incidents and/or dissatisfaction that occur, are reported to the driver, dispatcher, or other individuals involved with the daily operations, and are

resolved within the course of a reasonable time period suitable to the complainant. Service complaints may include but are not limited to:

   a. Late trips (late pickup, late drop off, and/or late returns)
   b. No-show by Transportation Operator
   c. No-show by client
   d. Client Behavior
   e. Driver Behavior
   f. Passenger discomfort
   g. Refusal of service to client for any reason

4. Formal Grievances: A written complaint to document any concerns or an unresolved service complaint regarding the operation or administration of TD services by the Transportation Operator, Community Transportation Coordinator, agencies, or Local Coordinating Board. Formal Grievances may include, but are not limited to:

   a. Chronic or unresolved service complaints
   b. Violation of specific laws governing the provision of Transportation Disadvantaged Services (i.e., Chapter 427 of Florida Statutes, Chapter 41-2 of Florida Administrative Code and accompanying documents, Sunshine Law and/or ADA violations)
   c. Contract disputes (Agencies/Operators)
   d. Bidding disputes
   e. Agency compliance
   f. Conflicts of interest
   g. Supplanting of funds
   h. Billing and/or accounting procedure violation
   i. Denials of applications for paratransit services

Article IV: Membership

1. Members of the Grievance Subcommittee shall serve on a voluntary basis and shall consist of at least five (5) voting members.

2. Each member of the Grievance Subcommittee shall serve at the discretion of the TDLCB.

3. The CTC shall not serve on the Grievance Subcommittee.

4. Grievance Subcommittee members will meet if a grievance is brought before the committee.

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5. When a meeting of the Grievance Subcommittee is necessary, staff to the TPO shall schedule the meeting. Meetings shall be held at the time and place as the Grievance Subcommittee may determine.

6. The Members shall serve a term of one year, with allowances for multiple terms.

7. The Grievance Subcommittee shall elect a Chairperson and Vice-Chairperson.

8. A simple majority shall be present in any official action.

9. No voting member will have a vote on an issue that is deemed a conflict of interest.

Article V: Filing Complaints and Grievances – STEP 1

10. All formal grievances must contain the following:

    a. Must submit in writing
    b. Name and address of complainant
    - A clear and concise statement of the grounds for the grievance and supplemented by supporting documentation
    - Exact date and time of incident
    - Exact location of incident
    - Any witnesses to incident (including name and address)
    - Vehicle unit number, license number, color and type
    - Any other information affiliated with the complaint
    c. An explanation by the complainant of the improvements needed to address the complaint

    All written complaints can be sent to:

    Marion Senior Services
    1101 SW 20th Court
    Ocala, Florida 34471

    A complaint form has been created (see page 8) indicating all of the above-mentioned items.

11. The CTC must post the contact person and telephone number for access to information regarding reporting service complaints or filing a formal grievance in each of their vehicles in plain view of riders.

12. The CTC will have ten (10) working days from the date of notification of the complaint to address or investigate the problem.

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13. The CTC will investigate the problem and respond in writing, within ten (10) working days of notification to the complainant as to what action was taken. Such action will contain an explanation of the facts that lead to the CTC's decision and provide a method or ways to bring about a resolution.

14. The Grievance Subcommittee and TDLCB Board will receive a copy of all grievances and responses.

Article VI: Appeal Process – STEP 2

1. If the complainant is dissatisfied with the CTC's response and/or recommendation they may file an appeal with the Grievance Subcommittee.

2. The complainant may only file after they have sought satisfaction directly from the CTC and received a response. Complainant must demonstrate that they have unsuccessfully attempted to resolve the issue with the CTC. Every effort will be made by the CTC to resolve service problems. However, if unable to resolve the problem and/or the complainant wishes to take further action, then the CTC will provide the complainant with assistance in following the Grievance Procedures.

3. The appeal must be filed within ten (10) days from the date of notification of final decision from the CTC.

   The appeal must be in writing and addressed to:

   Ocala Marion Transportation Planning Organization
   ATTN: TDLCB Grievance Subcommittee
   2710 E. Silver Springs Blvd.
   Ocala, Florida 34470

4. Once an appeal has been received, the Grievance Subcommittee shall meet and render its recommendation within thirty (30) working days of the date the appeal was filed.

5. The complainant shall be notified in writing of the mutually agreed upon date, time and place where the appeal shall be heard. This written notice shall be mailed at least ten (10) working days in advance of the meeting.

6. A written recommendation will be rendered to all parties involved within ten (10) working days from the date of the recommendation and will include the following, in writing:

    a. Statement that a meeting was held and the involved parties were given an opportunity to present their position(s).
    b. The issues discussed and clearly defined
    c. Reason(s) for the recommendation based on the information provided

7. Grievance Subcommittee must report all grievances and recommendations to the full Transportation Disadvantaged Local Coordinating Board.

Article VII: Appeal to the Transportation Disadvantaged Local Coordinating Board – STEP 3

1. If the complainant is dissatisfied with the recommendation of the Grievance Subcommittee he/she may continue the appeal process with the TDLCB as follows.

2. The appeal must be in writing and filed within ten (10) working days from the date of final recommendation from the Grievance Subcommittee.

3. Appeal to the TDLCB can only be filed after the complainant has sought satisfaction directly from the Grievance Subcommittee.

4. The appeal should demonstrate a clear violation of a specific law, regulation, contractual agreement, or circumstance.

    Address all appeals to:

    Ocala Marion Transportation Planning Organization
    ATTN: TDLCB
    2710 E. Silver Springs Blvd.
    Ocala, Florida 34470

5. Once an appeal has been received, the TDLCB shall meet and render its recommendation within sixty (60) working days of the date the appeal was filed.

6. The complainant shall be notified in writing of the mutually agreed upon date, time and place where the appeal shall be heard. This written notice shall be mailed at least ten (10) working days in advance of the meeting.

RED DENOTES UPDATES

7. A written recommendation will be rendered to all parties involved within ten (10) working days from the date of the recommendation and will include the following, in writing:

   a. Statement that a meeting was held and the involved parties were given an opportunity to present their position(s).
   b. The issues discussed and clearly defined
   c. Reason(s) for the recommendation based on the information provided

Article VIII: Appeal to the Commission for the Transportation Disadvantaged – STEP 4

If the complainant is dissatisfied with the recommendation of the TDLCB, he/she may continue the process with the TD Ombudsman Program by calling the following number(s): 1-800-983-2435. For hearing and speech impaired customers call, 711 (Florida Only) Florida Relay System or (850) 410-5708 for TTY via written correspondence to:

Florida Commission for the Transportation Disadvantaged
Attn: Ombudsman Program
605 Suwannee Street, MS-49
Tallahassee, FL 32399-0450

Article IX: General

The Transportation Disadvantaged Local Coordinating Board Grievance Procedures may be amended by a two-thirds (2/3) vote of members present, if a quorum exists, and all Members have been notified of proposed changes at least seven (7) working days in advance of the meeting.

The implementation of these rules and procedures will ensure quality control and the ability to provide an impartial body to hear complaints and submit recommendations regarding the grievance as indicated.

Apart from this grievance/appeal process, aggrieved parties with proper standing may also have recourse through Chapter 120, Florida Statutes Administrative Hearing Process, or the judicial court system.

RED DENOTES UPDATES

CERTIFICATION

The undersigned hereby certifies that he/she is the Chairperson of the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board and that the foregoing is a full, true and correct copy of the Grievance Procedures of this Local Coordinating Board as adopted by the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board on the 8t^h day of December 2022.
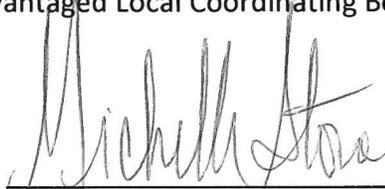
Commissioner Michelle Stone, TDLCB Chairperson

Robert Balmes, TPO Director

RED DENOTES UPDATES

COMPLAINT FORM
OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

Complainant(s) Name:	Complainant(s) Address:
Complainant(s) Phone Number:	Complainant(s) Email:

Complainant(s) Representative's Name, Address, Phone Number and Relationship (e.g. friend, attorney, parent, etc.):

Names of the Individual(s) Whom You Allege a Complaint Against (If Known):

Name and Address of Agency, Institution, or Department Whom You Allege a Complaint Against:

Date of incident:	Vehicle Unit/License No.-Color-Type	Time of Incident:	

Please list the name(s) and phone number(s) of any person, if known, that can be contacted for additional information to support or clarify your allegation(s):

Please explain as clearly as possible HOW, WHY, WHEN and WHERE is your alleged complaint. Include as much information as possible. Additional pages may be attached if needed.

Please indicate what would be an acceptable resolution:

Complainant(s) or Complainant(s) Representatives Signature:	Date of Signature:

Please submit to: Address in the step process   ☐ **Additional Pages are attached.**

RED DENOTES UPDATES

TDLCB COMPLAINT TRACKING FORM

Name of Complainant: _____

COMPLAINT TO THE CTC –STEP 1   File Number _____

Date of 1st. Complaint: _____   Date of 1st. Resolution: _____

Action Taken (including date of letter):_____
_____
_____
_____
_____
_____

APPEAL = COMPLAINT TO THE TDLCB GRIEVANCE SUBCOMMITTEE – STEP 2

Date of 2nd Complaint: _____   Date of 2nd Resolution: _____
Date of Subcommittee Hearing: _____

Action Taken (including date of letter):_____
_____
_____
_____
_____
_____

APPEAL = COMPLAINT TO THE TDLCB – STEP 3

Date of 3rd Complaint: _____   Date of 3rd Resolution: _____
Date of TDLCB Hearing: _____

Action Taken (including date of letter):_____
_____
_____
_____
_____
_____

RED DENOTES UPDATES

<u>APPEAL = TO THE COMMISSION FOR THE TRANSPORTATION DISADVANTAGED – STEP 4</u>

Date sent: _____

Appendix D: System Safety Program Plan Certification

Inserted

May 14, 2021

Tom Wilder
Transportation Director
Marion Senior Services
1101 Southwest 20th Court
Ocala, Florida 34471

Re: Marion Senior Services System Safety Program Plan Letter of Concurrence (2021)

Dear Mr. Wilder:

The Department has completed a review of the System Safety Program Plan (SSPP) during Marion Senior Services' 2021 Triennial Review. We find the SSPP to comply with the 2019 FDOT State Management Plan, FDOT Procedural Topic No. 725-030-009-j, and Florida Administrative Code (F.A.C.) Rule Chapter 14-90. Therefore, the Department is in concurrence with the Marion Senior Services SSPP.

We appreciate the opportunity to review the document and ensure compliance with state requirements. Please include a copy of this letter as an appendix to your agency's SSPP. The Department also recommends proper documentation of the receipt of concurrence letter in the plan's activity log.

If you have any questions, please contact me at (321) 319-8174 or e-mail diane.poitras@dot.state.fl.us.

Sincerely,

DocuSigned by:
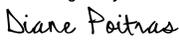
Diane Poitras

1053F40140014E0...

Diane Poitras
Transit Programs Administrator
District Five

DP/bg

RED DENOTES UPDATES

Inserted

May 3, 2021

Tom Wilder
Transportation Director
Marion Senior Services
1101 Southwest 20th Court
Ocala, Florida 34471

Re: Marion Senior Services – 2021 Florida Department of Transportation (FDOT) Triennial Review Compliance Notice

Dear Mr. Wilder:

This letter is to confirm that the 2021 Marion Senior Services' FDOT Triennial Review conducted on January 26 and 27, 2021, is now closed. Following the Triennial Review Report originally transmitted on March 17, 2021, the Department has found Marion Senior Services in compliance with the FDOT regulations for providing public transportation services and for receiving federal funding programs 49 U.S.C. §5310, §5311, and §5339. A summary of review findings is provided in Attachment A of this notice. Thank you for cooperating with the FDOT review team to work towards compliance in various areas of Marion Senior Services' public transportation program.

Your cooperation during the process was greatly appreciated. The Department looks forward to continuing its valued partnership with Marion Senior Services to provide safe and efficient public transportation for the residents of Marion County.

Should you have any questions or require additional information, please do not hesitate to contact me directly at (321) 319-8174 or e-mail diane.poitras@dot.state.fl.us.

Sincerely,

Diane Poitras
—1053F40140014E0...
Diane Poitras
Transit Programs Administrator
FDOT District Five

c:
Carlos Colon, Transit Project Coordinator - FDOT, District Five
Sophia Villavicencio-Ortiz, In-House Consultant – VHB
Jennifer Martinez, Executive Director – Marion Senior Services
Herman Schulz, Transit Manager – Marion Senior Services
Ken McKelvy, Transit Manager – Marion Senior Services

Attachment A – Findings Summary

RED DENOTES UPDATES

February 27, 2023

Mr. Clayton Murch
Marion Transit Services
1101 SW 20th Ct.
Ocala, FL 34471

RE: 2023 CTC Performance Evaluation

Dear Mr. Murch:

The analysis of all relevant elements within the operations of Marion Transit Services and your role as the Community Transportation Coordinator has concluded.

The TDLCB looked at:

- Safety Standards
- Performance Standards
- Equipment
- Driver Certification, and Training
- Vehicle Operations & Maintenance
- Grievance and Complaint Procedures
- Contracts, Contract Management and Compliance
- Policies and Procedures
- Quality Assurance
- Customer Service/Rider Satisfaction

In summary, the TPO found that all of the required items listed above were in place, being adhered to and functioning well. Our evaluation found that the system is well ran, the riders are happy with the overall system and service they are being provided.

The TPO has provided a few recommendations as well as commendations as a result of our evaluation.

A transportation system that supports growth, mobility, and safety through leadership and planning

Marion County   •   City of Belleview   •   City of Dunnellon   •   City of Ocala

2710 E. Silver Springs Blvd. • Ocala, Florida 34470
Telephone: (352) 438 - 2630   •   www.ocalamariontpo.org
RED DENOTES UPDATES

Recommendations:

The pertinent phone numbers on each bus continue to be too small. Due to the fact that service is geared for the disadvantaged, many are unable to get up close to view the Ombudsman and complaint phone numbers. These numbers need to be larger and centralized so that those seated on opposite sides of the isle are still able to see the numbers. Also, for distance viewing from the back of the bus, and the wheelchair riders that are secured in the very back.

Commendations:

Marion Transit continues to make the changes required to maintain happy riders. Last year the TPO recommended a sealed drop box for comments so that riders could provide input on an ongoing basis. This led to an additional day being added to the Blue line in Dunnellon. The comments were unanimous that the riders wanted Friday added to the Blue Line. We commend MT for readily and eagerly making the necessary changes requested by their riders.

We wish continued success to Marion Transit, their drivers and staff.

Sincerely,

Robert Balmes
TPO Director

RED DENOTES UPDATES

Via Email -

March 2, 2023

Commission for the Transportation Disadvantaged
Attn: Kyle Mills – CTD Project Manager
605 Suwannee Street, MS-49
Tallahassee, FL 32399-0450

Re: CTC ANNUAL EVALUATION – MARION TRANSIT

To whom it may concern:

Marion Transit, as the current Community Transportation Coordinator (CTC), recently completed a review conducted by the Ocala Marion Transportation Planning Organization (TPO). See attached memorandum.

We appreciate all the hard work put into this review by the TPO staff, especially Ms. Liz Mitchell. This review had no substantial findings requiring a Corrective Action Plan (CAP).

The review team did offer several suggestions that our staff will review and implement if possible or practicable.

Thank you,

Sincerely,

Clayton Murch, Transportation Director & CTC

Attachment

Appendix F: FCTD Rate Model Calculation Spreadsheets

Inserted

CTC Organization Name:	Marion Senior Services, Inc.
Address:	1101 SW 20 CT
City:	Ocala
State:	FL
Zip Code:	34471
Organization Type:	Private Non Profit
Network Type:	Partial Brokerage
Operating Environment:	Rural
Transportation Operators:	No
Number of Transportation Operators:	0
Coordination Contractors:	Yes
Number of Coordination Contractors:	2
Provide Out of County Trips:	No
Local Coordinating Board (LCB) Chairperson:	Commissioner Michele Stone
CTC Contact:	Clayton Murch
CTC Contact Title:	Transportation Director
CTC Contact Email:	cmurch@marionseniorservices.org
Phone:	(352) 620-3519

CTC Certification

I, Clayton Murch, as the authorized Community Transportation Coordinator (CTC) Representative, hereby certify, under the penalties of perjury as stated in Chapter 837.06, F.S., that the information contained in this report is true, accurate, and in accordance with the accompanying instructions.

CTC Representative (signature): _____

LCB Certification

I, Commissioner Michele Stone, as the Local Coordinating Board Chairperson, hereby, certify in accordance with Rule 41-2.007(6), F.A.C. that the Local Coordinating Board has reviewed this report and the Planning Agency has received a copy.

LCB Chairperson (signature): _____

Coordination Contractor Name:	Florida Center for the Blind, Inc.
Address:	1411 NE 22nd Avenue
City:	Ocala
State:	FL
Zip Code:	34470
Organization Type:	Private Non Profit
Operating Environment:	Rural
Provide Out of County Trips:	Yes
Who Do You Serve:	Individuals who are blind and visually impaired
Contact Person:	Anissa M. Pieriboni
Contact Title:	President/CEO
Contact Email:	apieriboni@flblind.org
Phone:	(352) 873-4700

Coordination Contractor Certification

By submission of this form, I, Anissa M. Pieriboni, as the authorized representative of Florida Center for the Blind, Inc. , hereby certify, under the penalties of perjury as stated in Chapter 837.06, F.S., that the information contained in this report is true, accurate, and in accordance with the accompanying instructions.

CTC Representative (signature): _____

County: Marion **CTC Status**: Submitted **CTC Organization**: Marion Senior Services, Inc.
Fiscal Year: 7/1/2021 - 6/30/2022 **Upload Date**: 8/26/2022

Coordination Contractor Name:	ARC Marion, Inc.
Address:	2800 SE Maricamp Rd
City:	Ocala
State:	FL
Zip Code:	34471
Organization Type:	Private Non Profit
Operating Environment:	Rural
Provide Out of County Trips:	No
Who Do You Serve:	Persons with Disabilities
Contact Person:	Sean McLaughlin
Contact Title:	CEO
Contact Email:	mclaughlin.sean@mcarc.com
Phone:	(352) 387-2210

Coordination Contractor Certification

By submission of this form, I, Sean McLaughlin, as the authorized representative of ARC Marion, Inc. , hereby certify, under the penalties of perjury as stated in Chapter 837.06, F.S., that the information contained in this report is true, accurate, and in accordance with the accompanying instructions.

CTC Representative (signature): _____

CTC Trips

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

CTD Status: Under Review

CTC Organization: Marion Senior Services, Inc.

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Service Type - One Way						
Fixed Route/Fixed Schedule						
Daily Pass Trips	0	N/A	0	0	N/A	0
Weekly Pass Trips	0	N/A	0	0	N/A	0
Monthly Pass Trips	0	N/A	0	0	N/A	0
Deviated Fixed Route Service	4,620	N/A	4,620	2,756	N/A	2,756
Complementary ADA Service	14,925	N/A	14,925	13,619	N/A	13,619
Paratransit						
Ambulatory	27,091	7,095	34,186	38,778	4,676	43,454
Non-Ambulatory	16,619	408	17,027	23,026	0	23,026
Stretcher	0	0	0	0	0	0
Transportation Network Companies	0	N/A	0	0	N/A	0
Taxi	0	N/A	0	0	N/A	0
School Board (School Bus)	0	N/A	0	0	N/A	0
Volunteers	0	N/A	0	0	N/A	0
Total - Service Type	**63,255**	**7,503**	**70,758**	**78,179**	**4,676**	**82,855**
Contracted Transportation Operator						
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC	0	N/A	0	0	N/A	0
Total - Contracted Transportation Operator Trips	**0**	**0**	**0**	**0**	**0**	**0**
Revenue Source - One Way						
Agency for Health Care Administration (AHCA)	0	0	0	0	0	0
Agency for Persons with Disabilities (APD)	0	3,557	3,557	18,516	4,561	23,077
Comm for the Transportation Disadvantaged (CTD)	21,327	N/A	21,327	23,716	N/A	23,716
Dept of Economic Opportunity (DEO)	0	0	0	0	0	0
Dept of Children and Families (DCF)	0	0	0	0	0	0
Dept of Education (DOE)	0	0	0	0	0	0
Dept of Elder Affairs (DOEA)	0	0	0	0	0	0
Dept of Health (DOH)	0	0	0	0	0	0
Dept of Juvenile Justice (DJJ)	0	0	0	0	0	0
Dept of Transportation (DOT)	26,894	3,751	30,645	21,737	55	21,792
Local Government	78	0	78	13,807	0	13,807
Local Non-Government	14,925	195	15,120	403	60	463
Other Federal & State Programs	31	0	31	0	0	0
Total - Revenue Source	**63,255**	**7,503**	**70,758**	**78,179**	**4,676**	**82,855**

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

CTD Status: Under Review

CTC Organization: Marion Senior Services, Inc.

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Passenger Type - One Way						
Older Adults	5,773	0	5,773	5,824	0	5,824
Children At Risk	30	0	30	63	0	63
Persons With Disabilities	51,355	7,503	58,858	67,039	4,676	71,715
Low Income	6,080	0	6,080	5,214	0	5,214
Other	17	0	17	39	0	39
Total - Passenger Type	**63,255**	**7,503**	**70,758**	**78,179**	**4,676**	**82,855**
Trip Purpose - One Way						
Medical	39,527	0	39,527	58,220	0	58,220
Employment	2,362	106	2,468	1,572	45	1,617
Education/Training/Daycare	2,667	7,397	10,064	2,536	4,631	7,167
Nutritional	14,922	0	14,922	12,879	0	12,879
Life-Sustaining/Other	3,777	0	3,777	2,972	0	2,972
Total - Trip Purpose	**63,255**	**7,503**	**70,758**	**78,179**	**4,676**	**82,855**
Unduplicated Passenger Head Count (UDPHC)						
UDPHC	1,428	122	1,550	1,400	70	1,470
Total - UDPHC	**1,428**	**122**	**1,550**	**1,400**	**70**	**1,470**
Unmet & No Shows						
Unmet Trip Requests	0	N/A	0	0	N/A	0
No Shows	2,262	N/A	2,262	1,682	N/A	1,682
Customer Feedback						
Complaints	10	N/A	10	23	N/A	23
Commendations	24	N/A	24	43	N/A	43

Coordination Contractor Trips

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022

Upload Date: 9/1/2022

Coordination Contractor: Florida Center for the Blind, Inc.

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Service Type - One Way		
Fixed Route/Fixed Schedule		
Daily Pass Trips	N/A	N/A
Weekly Pass Trips	N/A	N/A
Monthly Pass Trips	N/A	N/A
Deviated Fixed Route Service	N/A	N/A
Complementary ADA Service	N/A	N/A
Paratransit		
Ambulatory	389	154
Non-Ambulatory	0	0
Stretcher	0	0
Transportation Network Companies	N/A	N/A
Taxi	N/A	N/A
School Board (School Bus)	N/A	N/A
Volunteers	N/A	N/A
Total - Service Type	**389**	**154**
Contracted Transportation Operator		
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC	N/A	N/A
Total - Contracted Transportation Operator Trips	**0**	**0**
Revenue Source - One Way		
Agency for Health Care Administration (AHCA)	0	0
Agency for Persons with Disabilities (APD)	0	139
Comm for the Transportation Disadvantaged (CTD)	N/A	N/A
Dept of Economic Opportunity (DEO)	0	0
Dept of Children and Families (DCF)	0	0
Dept of Education (DOE)	0	0
Dept of Elder Affairs (DOEA)	0	0
Dept of Health (DOH)	0	0
Dept of Juvenile Justice (DJJ)	0	0
Dept of Transportation (DOT)	194	5
Local Government	0	0
Local Non-Government	195	10
Other Federal & State Programs	0	0
Total - Revenue Source	**389**	**154**

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

Upload Date: 9/1/2022

CTC Organization: Marion Senior Services, Inc.

Coordination Contractor: Florida Center for the Blind, Inc.

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Passenger Type - One Way		
Older Adults	0	0
Children At Risk	0	0
Persons With Disabilities	389	154
Low Income	0	0
Other	0	0
Total - Passenger Type	**389**	**154**
Trip Purpose - One Way		
Medical	0	0
Employment	106	45
Education/Training/Daycare	283	109
Nutritional	0	0
Life-Sustaining/Other	0	0
Total - Trip Purpose	**389**	**154**
Unduplicated Passenger Head Count (UDPHC)		
UDPHC	98	22
Total - UDPHC	**98**	**22**
Unmet & No Shows		
Unmet Trip Requests	N/A	N/A
No Shows	N/A	N/A
Customer Feedback		
Complaints	N/A	N/A
Commendations	N/A	N/A

Coordination Contractor Trips

County: Marion **CTC Status:** Submitted **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022 **Upload Date:** 8/26/2022 **Coordination Contractor:** ARC Marion, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Service Type - One Way		
Fixed Route/Fixed Schedule		
Daily Pass Trips	N/A	N/A
Weekly Pass Trips	N/A	N/A
Monthly Pass Trips	N/A	N/A
Deviated Fixed Route Service	N/A	N/A
Complementary ADA Service	N/A	N/A
Paratransit		
Ambulatory	6,706	4,522
Non-Ambulatory	408	0
Stretcher	0	0
Transportation Network Companies	N/A	N/A
Taxi	N/A	N/A
School Board (School Bus)	N/A	N/A
Volunteers	N/A	N/A
Total - Service Type	**7,114**	**4,522**
Contracted Transportation Operator		
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC	N/A	N/A
Total - Contracted Transportation Operator Trips	**0**	**0**
Revenue Source - One Way		
Agency for Health Care Administration (AHCA)	0	0
Agency for Persons with Disabilities (APD)	3,557	4,422
Comm for the Transportation Disadvantaged (CTD)	N/A	N/A
Dept of Economic Opportunity (DEO)	0	0
Dept of Children and Families (DCF)	0	0
Dept of Education (DOE)	0	0
Dept of Elder Affairs (DOEA)	0	0
Dept of Health (DOH)	0	0
Dept of Juvenile Justice (DJJ)	0	0
Dept of Transportation (DOT)	3,557	50
Local Government	0	0
Local Non-Government	0	50
Other Federal & State Programs	0	0
Total - Revenue Source	**7,114**	**4,522**

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

Upload Date: 8/26/2022

CTC Organization: Marion Senior Services, Inc.

Coordination Contractor: ARC Marion, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Passenger Type - One Way		
Older Adults	0	0
Children At Risk	0	0
Persons With Disabilities	7,114	4,522
Low Income	0	0
Other	0	0
Total - Passenger Type	**7,114**	**4,522**
Trip Purpose - One Way		
Medical	0	0
Employment	0	0
Education/Training/Daycare	7,114	4,522
Nutritional	0	0
Life-Sustaining/Other	0	0
Total - Trip Purpose	**7,114**	**4,522**
Unduplicated Passenger Head Count (UDPHC)		
UDPHC	24	48
Total - UDPHC	**24**	**48**
Unmet & No Shows		
Unmet Trip Requests	N/A	N/A
No Shows	N/A	N/A
Customer Feedback		
Complaints	N/A	N/A
Commendations	N/A	N/A

CTC Vehicles & Drivers

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

CTD Status: Under Review

CTC Organization: Marion Senior Services, Inc.

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Vehicle Miles						
Deviated Fixed Route Miles	55,819	N/A	55,819	39,915	N/A	39,915
Complementary ADA Service Miles	126,395	N/A	126,395	120,141	N/A	120,141
Paratransit Miles	644,527	80,592	725,119	844,566	62,361	906,927
Transportation Network Companies (TNC) Miles	0	N/A	0	0	N/A	0
Taxi Miles	0	N/A	0	0	N/A	0
School Board (School Bus) Miles	0	N/A	0	0	N/A	0
Volunteers Miles	0	N/A	0	0	N/A	0
Total - Vehicle Miles	**826,741**	**80,592**	**907,333**	**1,004,622**	**62,361**	**1,066,983**
Roadcalls & Accidents						
Roadcalls	6	0	6	8	0	8
Chargeable Accidents	3	0	3	2	0	2
Vehicle Inventory						
Total Number of Vehicles	46	19	65	50	19	69
Number of Wheelchair Accessible Vehicles	46	5	51	50	5	55
Drivers						
Number of Full Time & Part Time Drivers	33	26	59	37	27	64
Number of Volunteer Drivers	0	0	0	0	0	0

Coordination Contractor Vehicles & Drivers

County: Marion   **CTC Status:** Submitted   **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022   **Upload Date:** 9/1/2022   **Coordination Contractor:** Florida Center for the Blind, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Vehicle Miles		
Deviated Fixed Route Miles	N/A	N/A
Complementary ADA Service Miles	N/A	N/A
Paratransit Miles	14,953	2,155
Transportation Network Companies (TNC) Miles	N/A	N/A
Taxi Miles	N/A	N/A
School Board (School Bus) Miles	N/A	N/A
Volunteers Miles	N/A	N/A
Total - Vehicle Miles	**14,953**	**2,155**
Roadcalls & Accidents		
Roadcalls	0	0
Chargeable Accidents	0	0
Vehicle Inventory		
Total Number of Vehicles	6	6
Number of Wheelchair Accessible Vehicles	1	1
Drivers		
Number of Full Time & Part Time Drivers	6	7
Number of Volunteer Drivers	0	0

Coordination Contractor Vehicles & Drivers

County: Marion   **CTC Status:** Submitted   **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022   **Upload Date:** 8/26/2022   **Coordination Contractor:** ARC Marion, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Vehicle Miles		
Deviated Fixed Route Miles	N/A	N/A
Complementary ADA Service Miles	N/A	N/A
Paratransit Miles	65,639	60,206
Transportation Network Companies (TNC) Miles	N/A	N/A
Taxi Miles	N/A	N/A
School Board (School Bus) Miles	N/A	N/A
Volunteers Miles	N/A	N/A
Total - Vehicle Miles	**65,639**	**60,206**
Roadcalls & Accidents		
Roadcalls	0	0
Chargeable Accidents	0	0
Vehicle Inventory		
Total Number of Vehicles	13	13
Number of Wheelchair Accessible Vehicles	4	4
Drivers		
Number of Full Time & Part Time Drivers	20	20
Number of Volunteer Drivers	0	0

CTC Revenue Sources

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

CTD Status: Under Review

CTC Organization: Marion Senior Services, Inc.

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Revenue Sources						
Agency for Health Care Administration (AHCA)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Agency for Persons with Disabilities (APD)	$ 0	$ 64,442	$ 64,442	$ 455,675	$ 25,083	$ 480,758
Dept of Economic Opportunity (DEO)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Dept of Children and Families (DCF)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Dept of Education (DOE)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Dept of Elder Affairs (DOEA)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Dept of Health (DOH)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Dept of Juvenile Justice (DJJ)	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Commission for the Transportation Disadvantaged (CTD)						
Non-Sponsored Trip Program	$ 748,094	N/A	$ 748,094	$ 796,483	N/A	$ 796,483
Non-Sponsored Capital Equipment	$ 0	N/A	$ 0	$ 0	N/A	$ 0
Rural Capital Equipment	$ 0	N/A	$ 0	$ 0	N/A	$ 0
TD Other	$ 0	N/A	$ 0	$ 0	N/A	$ 0
Department of Transportation (DOT)						
49 USC 5307	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
49 USC 5310	$ 278,827	$ 28,500	$ 307,327	$ 192,597	$ 23,356	$ 215,953
49 USC 5311	$ 865,484	$ 0	$ 865,484	$ 50,208	$ 0	$ 50,208
49 USC 5311 (f)	$ 0	$ 0	$ 0	$ 1,183,721	$ 0	$ 1,183,721
Block Grant	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Service Development	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Commuter Assistance Program	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Other DOT	$ 0	$ 56,442	$ 56,442	$ 44,341	$ 0	$ 44,341
Local Government						
School Board (School Bus)	$ 0	N/A	$ 0	$ 0	N/A	$ 0
County Cash	$ 915,127	$ 0	$ 915,127	$ 351,001	$ 0	$ 351,001
County In-Kind	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
City Cash	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
City In-Kind	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Other Cash	$ 305,849	$ 0	$ 305,849	$ 47,966	$ 0	$ 47,966
Other In-Kind	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Local Non-Government						
Farebox	$ 58,684	$ 0	$ 58,684	$ 51,516	$ 3,165	$ 54,681
Donations/Contributions	$ 5,156	$ 18,700	$ 23,856	$ 1,888	$ 0	$ 1,888
In-Kind Services	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Other Non-Government	$ 0	$ 10,000	$ 10,000	$ 13,343	$ 17,480	$ 30,823
Other Federal & State Programs						
Other Federal Programs	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Other State Programs	$ 31,902	$ 0	$ 31,902	$ 0	$ 0	$ 0
Total - Revenue Sources	**$ 3,209,123**	**$ 178,084**	**$ 3,387,207**	**$ 3,188,739**	**$ 69,084**	**$ 3,257,823**

Coordination Contractor Revenue Sources

County: Marion **CTC Status:** Submitted **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022 **Upload Date:** 9/1/2022 **Coordination Contractor:** Florida Center for the Blind, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Revenue Sources		
Agency for Health Care Administration (AHCA)	$ 0	$ 0
Agency for Persons with Disabilities (APD)	$ 0	$ 875
Dept of Economic Opportunity (DEO)	$ 0	$ 0
Dept of Children and Families (DCF)	$ 0	$ 0
Dept of Education (DOE)	$ 0	$ 0
Dept of Elder Affairs (DOEA)	$ 0	$ 0
Dept of Health (DOH)	$ 0	$ 0
Dept of Juvenile Justice (DJJ)	$ 0	$ 0
Commission for the Transportation Disadvantaged (CTD)		
Non-Sponsored Trip Program	N/A	N/A
Non-Sponsored Capital Equipment	N/A	N/A
Rural Capital Equipment	N/A	N/A
TD Other	N/A	N/A
Department of Transportation (DOT)		
49 USC 5307	$ 0	$ 0
49 USC 5310	$ 28,500	$ 1,378
49 USC 5311	$ 0	$ 0
49 USC 5311 (f)	$ 0	$ 0
Block Grant	$ 0	$ 0
Service Development	$ 0	$ 0
Commuter Assistance Program	$ 0	$ 0
Other DOT	$ 0	$ 0
Local Government		
School Board (School Bus)	N/A	N/A
County Cash	$ 0	$ 0
County In-Kind	$ 0	$ 0
City Cash	$ 0	$ 0
City In-Kind	$ 0	$ 0
Other Cash	$ 0	$ 0
Other In-Kind	$ 0	$ 0
Local Non-Government		
Farebox	$ 0	$ 0
Donations/Contributions	$ 18,700	$ 0
In-Kind Services	$ 0	$ 0
Other Non-Government	$ 10,000	$ 11,894
Other Federal & State Programs		
Other Federal Programs	$ 0	$ 0
Other State Programs	$ 0	$ 0
Total - Revenue Sources	**$ 57,200**	**$ 14,147**

Coordination Contractor Revenue Sources

County: Marion   **CTC Status:** Submitted   **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022   **Upload Date:** 8/26/2022   **Coordination Contractor:** ARC Marion, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Revenue Sources		
Agency for Health Care Administration (AHCA)	$ 0	$ 0
Agency for Persons with Disabilities (APD)	$ 64,442	$ 24,208
Dept of Economic Opportunity (DEO)	$ 0	$ 0
Dept of Children and Families (DCF)	$ 0	$ 0
Dept of Education (DOE)	$ 0	$ 0
Dept of Elder Affairs (DOEA)	$ 0	$ 0
Dept of Health (DOH)	$ 0	$ 0
Dept of Juvenile Justice (DJJ)	$ 0	$ 0
Commission for the Transportation Disadvantaged (CTD)		
Non-Sponsored Trip Program	N/A	N/A
Non-Sponsored Capital Equipment	N/A	N/A
Rural Capital Equipment	N/A	N/A
TD Other	N/A	N/A
Department of Transportation (DOT)		
49 USC 5307	$ 0	$ 0
49 USC 5310	$ 0	$ 21,978
49 USC 5311	$ 0	$ 0
49 USC 5311 (f)	$ 0	$ 0
Block Grant	$ 0	$ 0
Service Development	$ 0	$ 0
Commuter Assistance Program	$ 0	$ 0
Other DOT	$ 56,442	$ 0
Local Government		
School Board (School Bus)	N/A	N/A
County Cash	$ 0	$ 0
County In-Kind	$ 0	$ 0
City Cash	$ 0	$ 0
City In-Kind	$ 0	$ 0
Other Cash	$ 0	$ 0
Other In-Kind	$ 0	$ 0
Local Non-Government		
Farebox	$ 0	$ 3,165
Donations/Contributions	$ 0	$ 0
In-Kind Services	$ 0	$ 0
Other Non-Government	$ 0	$ 5,586
Other Federal & State Programs		
Other Federal Programs	$ 0	$ 0
Other State Programs	$ 0	$ 0
Total - Revenue Sources	**$ 120,884**	**$ 54,937**

CTC Expense Sources

County: Marion

Fiscal Year: 07/01/2021 - 06/30/2022

CTC Status: Submitted

CTD Status: Under Review

CTC Organization: Marion Senior Services, Inc.

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Expense Sources						
Labor	$ 1,749,995	$ 109,695	$ 1,859,690	$ 1,538,313	$ 147,128	$ 1,685,441
Fringe Benefits	$ 182,054	$ 7,551	$ 189,605	$ 492,476	$ 30,577	$ 523,053
Services	$ 406,172	$ 0	$ 406,172	$ 9,645	$ 0	$ 9,645
Materials & Supplies Consumed	$ 384,003	$ 25,137	$ 409,140	$ 508,720	$ 23,240	$ 531,960
Utilities	$ 33,850	$ 9,549	$ 43,399	$ 14,699	$ 8,753	$ 23,452
Casualty & Liability	$ 323,897	$ 62,069	$ 385,966	$ 6,578	$ 34,674	$ 41,252
Taxes	$ 24,085	$ 5,957	$ 30,042	$ 388,201	$ 0	$ 388,201
Miscellaneous	$ 71,098	$ 32,269	$ 103,367	$ 827	$ 0	$ 827
Interest	$ 717	$ 0	$ 717	$ 0	$ 0	$ 0
Leases & Rentals	$ 7,057	$ 0	$ 7,057	$ 236	$ 0	$ 236
Capital Purchases	$ 529,768	$ 0	$ 529,768	$ 0	$ 65,516	$ 65,516
Contributed Services	$ 0	$ 0	$ 0	$ 0	$ 0	$ 0
Allocated Indirect Expenses	$ 16,375	$ 0	$ 16,375	$ 0	$ 0	$ 0
Purchased Transportation Services						
Bus Pass	$ 0	N/A	$ 0	$ 0	N/A	$ 0
School Board (School Bus)	$ 0	N/A	$ 0	$ 0	N/A	$ 0
Transportation Network Companies (TNC)	$ 0	N/A	$ 0	$ 0	N/A	$ 0
Taxi	$ 0	N/A	$ 0	$ 0	N/A	$ 0
Contracted Operator	$ 0	N/A	$ 0	$ 0	N/A	$ 0
Total - Expense Sources	**$ 3,729,071**	**$ 252,227**	**$ 3,981,298**	**$ 2,959,695**	**$ 309,888**	**$ 3,269,583**

Coordination Contractor Expense Sources

County: Marion   **CTC Status:** Submitted   **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022   **Upload Date:** 9/1/2022   **Coordination Contractor:** Florida Center for the Blind, Inc.

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Expense Sources		
Labor	$ 31,440	$ 1,902
Fringe Benefits	$ 0	$ 0
Services	$ 0	$ 0
Materials & Supplies Consumed	$ 7,271	$ 287
Utilities	$ 0	$ 0
Casualty & Liability	$ 18,489	$ 567
Taxes	$ 0	$ 0
Miscellaneous	$ 0	$ 0
Interest	$ 0	$ 0
Leases & Rentals	$ 0	$ 0
Capital Purchases	$ 0	$ 10,516
Contributed Services	$ 0	$ 0
Allocated Indirect Expenses	$ 0	$ 0
Purchased Transportation Services		
Bus Pass	N/A	N/A
School Board (School Bus)	N/A	N/A
Transportation Network Companies (TNC)	N/A	N/A
Taxi	N/A	N/A
Contracted Operator	N/A	N/A
Total - Expense Sources	**$ 57,200**	**$ 13,272**

Coordination Contractor Expense Sources

County: Marion   **CTC Status:** Submitted   **CTC Organization:** Marion Senior Services, Inc.

Fiscal Year: 07/01/2021 - 06/30/2022   **Upload Date:** 8/26/2022   **Coordination Contractor:** ARC Marion, Inc.

	Selected Reporting Period Coordination Contractors	Previous Reporting Period Coordination Contractors
Expense Sources		
Labor	$ 78,255	$ 145,226
Fringe Benefits	$ 7,551	$ 30,577
Services	$ 0	$ 0
Materials & Supplies Consumed	$ 17,866	$ 22,953
Utilities	$ 9,549	$ 8,753
Casualty & Liability	$ 43,580	$ 34,107
Taxes	$ 5,957	$ 0
Miscellaneous	$ 32,269	$ 0
Interest	$ 0	$ 0
Leases & Rentals	$ 0	$ 0
Capital Purchases	$ 0	$ 55,000
Contributed Services	$ 0	$ 0
Allocated Indirect Expenses	$ 0	$ 0
Purchased Transportation Services		
Bus Pass	N/A	N/A
School Board (School Bus)	N/A	N/A
Transportation Network Companies (TNC)	N/A	N/A
Taxi	N/A	N/A
Contracted Operator	N/A	N/A
Total - Expense Sources	**$ 195,027**	**$ 296,616**

County:	Marion
CTC:	Marion Senior Services, Inc.
Contact:	Clayton Murch
	1101 SW 20 CT
	Ocala, FL 34471
	352-620-3519
Email:	cmurch@marionseniorservices.org

Demographics	Number
Total County Population	0
Unduplicated Head Count	1,550

Florida Commission for the
CTD
Transportation Disadvantaged

Trips By Type of Service	2020	2021	2022
Fixed Route (FR)	0	0	0
Deviated FR	2,039	2,756	4,620
Complementary ADA	16,595	13,619	14,925
Paratransit	69,978	66,480	51,213
TNC	0	0	0
Taxi	0	0	0
School Board (School Bus)	0	0	0
Volunteers	0	0	0
TOTAL TRIPS	**88,612**	**82,855**	**70,758**

Passenger Trips By Trip Purpose			
Medical	44,193	58,220	39,527
Employment	2,455	1,617	2,468
Ed/Train/DayCare	22,193	7,167	10,064
Nutritional	16,312	12,879	14,922
Life-Sustaining/Other	3,459	2,972	3,777
TOTAL TRIPS	**88,612**	**82,855**	**70,758**

Passenger Trips By Revenue Source			
CTD	30,240	23,716	21,327
AHCA	233	0	0
APD	1,477	23,077	3,557
DOEA	0	0	0
DOE	0	0	0
Other	56,662	36,062	45,874
TOTAL TRIPS	**88,612**	**82,855**	**70,758**

Trips by Provider Type			
CTC	72,007	78,179	63,255
Transportation Operator	0	0	0
Coordination Contractor	16,605	4,676	7,503
TOTAL TRIPS	**88,612**	**82,855**	**70,758**

Vehicle Data	2020	2021	2022
Vehicle Miles	1,003,678	1,066,983	907,333
Roadcalls	21	8	6
Accidents	5	2	3
Vehicles	61	69	65
Drivers	70	64	59

Financial and General Data			
Expenses	$3,634,073	$3,269,583	$3,981,298
Revenues	$3,601,705	$3,257,823	$3,387,207
Commendations	35	43	24
Complaints	11	23	10
Passenger No-Shows	3,989	1,682	2,262
Unmet Trip Requests	5	0	0

Performance Measures			
Accidents per 100,000 Miles	0.50	0.19	0.33
Miles between Roadcalls	47,794	133,373	151,222
Avg. Trips per Passenger	40.39	56.36	45.65
Cost per Trip	$41.01	$39.46	$56.27
Cost per Paratransit Trip	$41.01	$39.46	$56.27
Cost per Total Mile	$3.62	$3.06	$4.39
Cost per Paratransit Mile	$3.62	$3.06	$4.39

OCALA MARION
TRANSPORTATION
PLANNING
ORGANIZATION

TO: **TDLCB Board Members**

FROM: **Liz Mitchell, Grants Coordinator/Fiscal Planner**

RE: **Marion Transit 2023-24 Trip Rate Model**

Summary

Each year, the TDLCB is required to approve Marion Transit's (MT) proposed trip rates. MT, as required, utilizes the Commission for Transportation Disadvantaged (CTD) Trip Rate Calculation process. The Trip Rate Calculation process considers numerous costs items including labor, fringe benefits, and insurance as well as, program income to determine the trip rates. This year, MT is proposing a slight decrease in the charge for ambulatory and wheelchair patients.

TPO staff has reviewed the Trip Rate Calculation and concurs with the results. The proposed rates are as follows:

	Current Rate	Proposed Rate
Ambulatory	$ 33.76	$ 32.69
Wheelchair	$ 57.88	$ 56.04

Attachment(s)

Trip Rate Calculation Sheets

Action Requested

TPO staff is requesting approval of the rates as proposed.

Any additional comments and/or suggestions please contact Liz Mitchell, liz.mitchell@marionfl.org.

Preliminary Information Worksheet Version 1.4

CTC Name:	Marion Senior Services, Inc. d/b/a Marion Transit
County (Service Area):	Marion
Contact Person:	Clayton Murch/Tamara Grant-Powell
Phone #	352.620.3519 / 352.620.3501

Check Applicable Characteristic:

ORGANIZATIONAL TYPE:

- ○ Governmental
- ● Private Non-Profit
- ○ Private For Profit

NETWORK TYPE:

- ○ Fully Brokered
- ○ Partially Brokered
- ● Sole Source

Once completed, proceed to the Worksheet entitled "Comprehensive Budget"

2023-24 Marion County Rate Model Approved: Preliminary Information

Comprehensive Budget Worksheet

Version 1.4

CTC: Marion Senior Services, Inc. d/b/a Marion Transit
County: Marion

1. Complete applicable **GREEN** cells in columns 2, 3, 4, and 7

	Prior Year's **ACTUALS** from July 1st of **2021** to June 30th of **2022**	Current Year's **APPROVED** Budget, **as amended** from July 1st of **2022** to June 30th of **2023**	Upcoming Year's **PROPOSED** Budget from July 1st of **2023** to June 30th of **2024**	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± $50,000
1	**2**	**3**	**4**	**5**	**6**	**7**

REVENUES   (CTC/Operators ONLY / Do **NOT** include coordination contractors!)

Local Non-Govt

Farebox	$ 69,510	$ 75,000	$ 85,000	7.9%	13.3%	
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services	$ 74,709			-100.0%		
Other						
Bus Pass Program Revenue						

Local Government

District School Board	$ 880	$ 20,000	$ 35,000	2173.7%	75.0%	Other cash reflects the 10% local match for 5310.
Compl. ADA Services	$ 267,574	$ 288,000	$ 336,000	7.6%	16.7%	
County Cash	$ 908,813	$ 938,194	$ 922,973	3.2%	-1.6%	
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash	$ 34,792		$ 150,000	-100.0%		
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						

CTD

Non-Spons. Trip Program	$ 754,604	$ 813,021	$ 771,834	7.7%	-5.1%	Cap Equip dollars reflects the 10% State Match required for 5310.
Non-Spons. Capital Equipment			$ 150,000			
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						

USDOT & FDOT

49 USC 5307						Other DOT reflects ARP-$693595 & CRRSA-$811124 Funds.
49 USC 5310	$ -		$ 1,200,000			
49 USC 5311 (Operating)	$ 865,484	$ -	$ 1,876,570	-100.0%		
49 USC 5311(Capital)	$ 264,474	$ 735,527		178.1%	-100.0%	
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)		$ 1,504,719			-100.0%	
Bus Pass Program Revenue						

AHCA

Medicaid						
Other AHCA (specify in explanation)						
Bus Pass Program Revenue						

DCF

Alcoh, Drug & Mental Health						
Family Safety & Preservation						
Comm. Care Dis./Aging & Adult Serv.						
Other DCF (specify in explanation)						
Bus Pass Program Revenue						

DOH

Children Medical Services						
County Public Health						
Other DOH (specify in explanation)						
Bus Pass Program Revenue						

DOE (state)

Carl Perkins						
Div of Blind Services						
Vocational Rehabilitation						
Day Care Programs						
Other DOE (specify in explanation)						
Bus Pass Program Revenue						

AWI

WAGES/Workforce Board						
Other AWI (specify in explanation)						
Bus Pass Program Revenue						

DOEA

Older Americans Act						
Community Care for Elderly						
Other DOEA (specify in explanation)						
Bus Pass Program Revenue						

DCA

Community Services						
Other DCA (specify in explanation)						
Bus Pass Admin. Revenue						

Comprehensive Budget Worksheet

Version 1.4

CTC: Marion Senior Services, Inc. d/b/a Marion Transit
County: Marion

1. Complete applicable **GREEN** cells in columns 2, 3, 4, and 7

1	Prior Year's ACTUALS from July 1st of 2021 to June 30th of 2022 — **2**	Current Year's APPROVED Budget, **as amended** from July 1st of 2022 to June 30th of 2023 — **3**	Upcoming Year's PROPOSED Budget from July 1st of 2023 to June 30th of 2024 — **4**	% Change from Prior Year to Current Year — **5**	Proposed % Change from Current Year to Upcoming Year — **6**	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± $50,000 — **7**
APD						
Office of Disability Determination						
Developmental Services						
Other APD (specify in explanation)						
Bus Pass Program Revenue						
DJJ						
(specify in explanation)						
Bus Pass Program Revenue						
Other Fed or State						
FL GAS TAX REFUND	$ 31,902			-100.0%		
xxx						
xxx						
Bus Pass Program Revenue						
Other Revenues						
Interest Earnings						
EMPLOYEE CONTRIBUTIONS/DONATION	$ 3,594	$ 850		-76.4%	-100.0%	
INS LOSS REIMB REVENUE	$ 807			-100.0%		
Bus Pass Program Revenue						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue is Short By =		$ 260,686				
Total Revenues =	$3,277,143	$4,375,310	$5,527,377	33.5%	26.3%	

EXPENDITURES (CTC/Operators ONLY / Do **NOT** include Coordination Contractors!)

Operating Expenditures						
Labor	$ 1,630,444	$ 1,917,245	$ 2,014,932	17.6%	5.1%	
Fringe Benefits	$ 467,730	$ 497,328	$ 596,565	6.3%	20.0%	
Services	$ 539,372	$ 506,283	$ 376,295	-6.1%	-25.7%	
Materials and Supplies	$ 426,247	$ 535,809	$ 551,883	25.7%	3.0%	
Utilities	$ 33,855	$ 30,670	$ 31,590	-9.4%	3.0%	
Casualty and Liability	$ 363,817	$ 369,548	$ 411,217	1.6%	11.3%	
Taxes	$ 976	$ 355	$ 366	-63.6%	3.0%	
Purchased Transportation:						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services						
Other						
Miscellaneous	$ 83,093	$ 42,761	$ 44,044	-48.5%	3.0%	
Operating Debt Service - Principal & Interest						
Leases and Rentals	$ 472	$ 472	$ 486	0.0%	3.0%	
Contrib. to Capital Equip. Replacement Fund						
In-Kind, Contributed Services	$ 74,709	$ -	$ -	-100.0%		
Allocated Indirect						
Capital Expenditures						
Equip. Purchases with Grant Funds	$ 264,474	$ 735,527	$ 1,200,000	178.1%	63.1%	
Equip. Purchases with Local Revenue			$ 150,000			
Equip. Purchases with Rate Generated Rev.			$ 150,000			
Capital Debt Service - Principal & Interest						
ACTUAL YEAR LOSS	($608,046)	$260,686				
Total Expenditures =	$3,885,189	$4,635,996	$5,527,377	19.3%	19.2%	
See NOTES Below.		**Error: Revenues < Expenditures**				

Once completed, proceed to the Worksheet entitled "Budgeted Rate Base"

Actual year LOSSES are shown as Balancing Revenue or Local Non-Government revenue.

Budgeted Rate Base Worksheet

Version 1.4

CTC: Marion Senior Services, Inc. d/b/a Marion Transit
County: Marion

1. Complete applicable **GREEN** cells in column 3; **YELLOW** and **BLUE** cells are automatically completed in column 3

2. Complete applicable **GOLD** cells in column and 5

	Upcoming Year's **BUDGETED** Revenues from July 1st of **2023** to June 30th of **2024**	What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue **EX**cluded from the Rate Base	What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?	
1	2	3	4	5	

REVENUES (CTC/Operators ONLY)

Local Non-Govt

	Col 2	Col 3	Col 4	Col 5	
Farebox	$ 85,000	$ 42,500	$ 42,500		
Medicaid Co-Pay Received	$ -		$ -		
Donations/ Contributions	$ -		$ -		
In-Kind, Contributed Services	$ -	$ -	$ -		
Other	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		

Local Government

District School Board	$ 35,000	$ 35,000	$ -		
Compl. ADA Services	$ 336,000	$ -	$ 336,000		
County Cash	$ 922,973	$ 250,000	$ 672,973		
County In-Kind, Contributed Services	$ -	$ -	$ -		
City Cash	$ -		$ -		
City In-kind, Contributed Services	$ -	$ -	$ -		
Other Cash	$ 150,000		$ 150,000		
Other In-Kind, Contributed Services	$ -	$ -	$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		

CTD

						local match req.
Non-Spons. Trip Program	$ 771,834	$ 771,834	$ -	$ -	$ 85,759
Non-Spons. Capital Equipment	$ 150,000	$ -	$ 150,000	$ 150,000	$ 16,667
Rural Capital Equipment	$ -	$ -	$ -	$ -	
Other TD	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		

USDOT & FDOT

49 USC 5307	$ -	$ -	$ -		
49 USC 5310	$ 1,200,000	$ -	$ 1,200,000	$ 1,200,000	$ 133,333
49 USC 5311 (Operating)	$ 1,876,570	$ 1,876,570	$ 0		
49 USC 5311(Capital)	$ -	$ -	$ -	$ -	$ -
Block Grant	$ -	$ -	$ -		
Service Development	$ -	$ -	$ -		
Commuter Assistance	$ -	$ -	$ -		
Other DOT	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		

AHCA

Medicaid	$ -	$ -	$ -		
Other AHCA	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		

DCF

Alcoh, Drug & Mental Health	$ -	$ -	$ -	
Family Safety & Preservation	$ -	$ -	$ -	
Comm. Care Dis./Aging & Adult Serv.	$ -	$ -	$ -	
Other DCF	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	

DOH

Children Medical Services	$ -	$ -	$ -	
County Public Health	$ -	$ -	$ -	
Other DOH	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	

DOE (state)

Carl Perkins	$ -	$ -	$ -	
Div of Blind Services	$ -	$ -	$ -	
Vocational Rehabilitation	$ -	$ -	$ -	
Day Care Programs	$ -	$ -	$ -	
Other DOE	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	

AWI

WAGES/Workforce Board	$ -	$ -	$ -	
AWI	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	

DOEA

Older Americans Act	$ -	$ -	$ -	
Community Care for Elderly	$ -	$ -	$ -	
Other DOEA	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	

DCA

Community Services	$ -	$ -	$ -	
Other DCA	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	

YELLOW cells
are **NEVER** Generated by Applying Authorized Rates

BLUE cells
Should be funds generated by rates in this spreadsheet

GREEN cells
MAY BE Revenue Generated by Applying Authorized Rate per Mile/Trip Charges

Fill in that portion of budgeted revenue in Column 2 that will be **GENERATED** through the application of authorized per mile, per trip, or combination per trip plus per mile rates. Also, include the amount of funds that are Earmarked as local match for Transportation Services and **NOT** Capital Equipment purchases.

If the Farebox Revenues are used as a source of Local Match Dollars, then identify the appropriate amount of Farebox Revenue that represents the portion of Local Match required on any state or federal grants. This does not mean that Farebox is the only source for Local Match.

Please review all Grant Applications and Agreements containing State and/or Federal funds for the proper Match Requirement levels and allowed sources.

GOLD cells

Fill in that portion of Budgeted Rate Subsidy Revenue in Column 4 that will come from Funds Earmarked by the Funding Source for Purchasing Capital Equipment. Also include the portion of Local Funds earmarked as Match related to the Purchase of Capital Equipment if a match amount is required by the Funding Source.

Budgeted Rate Base Worksheet

Version 1.4

CTC: Marion Senior Services, Inc. d/b/a Marion Transit

County: Marion

*1. Complete applicable **GREEN** cells in column 3; **YELLOW** and **BLUE** cells are automatically completed in column 3*

*2. Complete applicable **GOLD** cells in column and 5*

	Upcoming Year's **BUDGETED** Revenues from July 1st of **2023** to June 30th of **2024**	What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue **EX**cluded from the Rate Base	What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?
	1 **2**	**3**	**4**	**5**
APD				
Office of Disability Determination	$ -	$ -	$ -	
Developmental Services	$ -	$ -	$ -	
Other APD	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	
DJJ				
DJJ	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	
Other Fed or State				
FL GAS TAX REFUND	$ -		$ -	
xxx	$ -		$ -	
xxx	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	
Other Revenues				
Interest Earnings	$ -	$ -	$ -	
EMPLOYEE CONTRIBUTIONS/DONATION	$ -		$ -	
INS LOSS REIMB REVENUE	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	
Balancing Revenue to Prevent Deficit				
Actual or Planned Use of Cash Reserve	$ -	$ -	$ -	
Total Revenues =	$ 5,527,377	$ 2,975,904	$ 2,551,474	$ 1,350,000

EXPENDITURES (CTC/Operators ONLY)

$ 1,201,474

Amount of Budgeted Operating Rate Subsidy Revenue

Operating Expenditures

Labor	$ 2,014,932
Fringe Benefits	$ 596,565
Services	$ 376,295
Materials and Supplies	$ 551,883
Utilities	$ 31,590
Casualty and Liability	$ 411,217
Taxes	$ 366
Purchased Transportation:	
Purchased Bus Pass Expenses	$ -
School Bus Utilization Expenses	$ -
Contracted Transportation Services	$ -
Other	$ -
Miscellaneous	$ 44,044
Operating Debt Service - Principal & Interest	$ -
Leases and Rentals	$ 486
Contrib. to Capital Equip. Replacement Fund	$ -
In-Kind, Contributed Services	$ -
Allocated Indirect	$ -

Capital Expenditures

Equip. Purchases with Grant Funds	$ 1,200,000
Equip. Purchases with Local Revenue	$ 150,000
Equip. Purchases with Rate Generated Rev.	$ 150,000
Capital Debt Service - Principal & Interest	$ -
	$ -

Total Expenditures =	$ 5,527,377
minus **EXCLUDED** Subsidy Revenue =	$ 2,551,474
Budgeted Total Expenditures **INCLUDED** in Rate Base =	$ 2,975,904
Rate Base Adjustment[1] =	
Adjusted Expenditures Included in Rate Base =	$ 2,975,904

> **[1] Rate Base Adjustment Cell**
>
> **If necessary and justified, this cell is where you could optionally adjust proposed service rates up or down to adjust for program revenue (or unapproved profit), or losses from the Actual period shown at the bottom of the Comprehensive Budget Sheet. This is not the only acceptable location or method of reconciling for excess gains or losses. If allowed by the respective funding sources, excess gains may also be adjusted by providing system subsidy revenue or by the purchase of additional trips in a period following the Actual period. If such an adjustment has been made, provide notation in the respective exlanation area of the Comprehensive Budget tab.**

[1] The Difference between Expenses and Revenues for Fiscal Year: **2021 - 2022**

Once Completed, Proceed to the Worksheet entitled "Program-wide Rates"

Worksheet for Program-wide Rates

CTC: **Marion Senior Serv** Version 1.4
County: **Marion**

1. Complete Total Projected Passenger Miles and ONE-WAY Passenger Trips (GREEN cells) below

Do **NOT** include trips or miles related to Coordination Contractors!

Do **NOT** include School Board trips or miles UNLESS….........

INCLUDE all ONE-WAY passenger trips and passenger miles related to services you purchased from your transportation operators!

Do **NOT** include trips or miles for services provided to the general public/private pay UNLESS..

Do **NOT** include escort activity as passenger trips or passenger miles unless charged the full rate for service!

Do **NOT** include fixed route bus program trips or passenger miles!

PROGRAM-WIDE RATES

Total Projected **Passenger** Miles =	900,000
Rate Per Passenger Mile =	**$ 3.31**
Total Projected **Passenger** Trips =	72,000
Rate Per Passenger Trip =	**$ 41.33**

Fiscal Year

2023 - 2024

Avg. Passenger Trip Length = 12.5 Miles

Rates If No Revenue Funds Were Identified As Subsidy Funds

Rate Per Passenger Mile =	**$ 6.14**
Rate Per Passenger Trip =	**$ 76.77**

Once Completed, Proceed to the Worksheet entitled "Multiple Service Rates"

Vehicle Miles
The miles that a vehicle is scheduled to or actually travels from the time it pulls out from its garage to go into revenue service to the time it pulls in from revenue service.

Vehicle Revenue Miles (VRM)
The miles that vehicles are scheduled to or actually travel while in revenue service. Vehicle revenue miles exclude:

Deadhead
Operator training, and
Vehicle maintenance testing, as well as
School bus and charter services.

Passenger Miles (PM)
The cumulative sum of the distances ridden by each passenger.

2023-24 Marion County Rate Model Approved: Program-wide Rates

Worksheet for Multiple Service Rates

CTC: Marion Senior S Version 1.4
County: Marion

1. Answer the questions by completing the GREEN cells starting in Section I for all services
2. Follow the DARK RED prompts directing you to skip or go to certain questions and sections based on previous answers

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SECTION I: Services Provided

	Ambulatory	Wheelchair	Stretcher	Group
1. Will the CTC be providing any of these Services to transportation disadvantaged passengers in the upcoming budget year?..	● Yes ○ No	● Yes ○ No	○ Yes ● No	○ Yes ● No
	Go to Section II for Ambulatory Service	Go to Section II for Wheelchair Service	STOP! Do NOT Complete Sections II - V for Stretcher Service	STOP! Do NOT Complete Sections II - V for Group Service

---

SECTION II: Contracted Services

	Ambulatory	Wheelchair	Stretcher	Group
1. Will the CTC be contracting out any of these Services TOTALLY in the upcoming budget year?....	○ Yes ● No	○ Yes ● No	○ Yes ● No	○ Yes ● No
	Skip # 2, 3 & 4 and Go to Section III for Ambulatory Service	Skip # 2, 3 & 4 and Go to Section III for Wheelchair Service	Do Not Complete Section II for Stretcher Service	Do Not Complete Section II for Group Service
2. If you answered YES to #1 above, do you want to arrive at the billing rate by simply dividing the proposed contract amount by the projected Passenger Miles / passenger trips?.....	○ Yes ● No	○ Yes ● No	○ Yes ● No	○ Yes ● No
			Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

3. If you answered YES to #1 & #2 above, how much is the proposed contract amount for the service?
   How many of the total projected Passenger Miles relate to the contracted service?
   How many of the total projected passenger trips relate to the contracted service?

	Ambulatory	Wheelchair	Stretcher	Group
	Leave Blank	Leave Blank		

Effective Rate for Contracted Services:

	Ambulatory	Wheelchair	Stretcher	Group
per **Passenger Mile** =				
per **Passenger Trip** =				
	Go to Section III for Ambulatory Service	Go to Section III for Wheelchair Service	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

4. If you answered # 3 & want a Combined Rate per Trip PLUS a per Mile add-on for 1 or more
   services, INPUT the Desired per Trip Rate (but must be less than per trip rate in #3 above) =
   Rate per Passenger Mile for Balance =

Combination Trip and Mile Rate			
Leave Blank and Go to Section III for Ambulatory Service	Leave Blank and Go to Section III for Wheelchair Service	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

Worksheet for Multiple Service Rates

1. Answer the questions by completing the GREEN cells starting in Section I for all services
2. Follow the DARK RED prompts directing you to skip or go to certain questions and sections based on previous answers

CTC: **Marion Senior S** Version 1.4
County: **Marion**

SECTION III: Escort Service

1. Do you want to charge all escorts a fee?...

○ Yes
● No

**Skip #2 - 4 and
Section IV and
Go to Section V**

2. If you answered Yes to #1, do you want to charge the fee per passenger trip OR ....

● Pass. Trip
○ Pass. Mile

per passenger mile?........................

Leave Blank

3. If you answered Yes to # 1 and completed # 2, for how many of the projected
Passenger Trips / Passenger Miles will a passenger be accompanied by an escort?   [   ] Leave Blank

4. How much will you charge each escort?... [   ] Leave Blank

---

SECTION IV: Group Service Loading

**Do NOT
Complete
Section IV**

1. If the message "You Must Complete This Section" appears to the right, what is the projected total
number of Group Service Passenger Miles? (otherwise leave blank)............................ [   ]

Loading Rate

.... And what is the projected total number of Group Vehicle Revenue Miles?   [   ]   **0.00**   to 1.00

SECTION V: Rate Calculations for Mulitple Services:

1. Input Projected Passenger Miles and Passenger Trips for each Service in the GREEN cells and the Rates for each Service will be calculated automatically
   * Miles and Trips you input must sum to the total for all Services entered on the "Program-wide Rates" Worksheet, MINUS miles
     and trips for contracted services IF the rates were calculated in the Section II above
   * Be sure to leave the service BLANK if you answered NO in Section I or YES to question #2 in Section II

	RATES FOR FY:	2023 - 2024			
	Ambul	**Wheel Chair**	**Stretcher** Leave Blank	**Group** Leave Blank	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) = 900,000 =	567,900 +	332,100 +	[ ] +	0	
Rate per Passenger Mile =	**$2.62**	**$4.49**	**$0.00**	**$0.00**	**$0.00**
				per passenger	per group

	Ambul	**Wheel Chair**	**Stretcher** Leave Blank	**Group** Leave Blank	
Projected Passenger Trips (excluding totally contracted services addressed in Section II) = 72,000 =	45,360 +	26,640 +	[ ] +	[ ]	
Rate per Passenger Trip =	**$32.69**	**$56.04**	**$0.00**	**$0.00**	**$0.00**
				per passenger	per group

2 If you answered # 1 above and want a COMBINED Rate per Trip PLUS a per Mile add-on for 1 or more services,…

	Combination Trip and Mile Rate				
	Ambul	**Wheel Chair**	**Stretcher** Leave Blank	**Group** Leave Blank	
…INPUT the Desired Rate per Trip (but must be less than per trip rate above) =	[ ]	[ ]	[ ]	[ ]	$0.00
Rate per Passenger Mile for Balance =	**$2.62**	**$4.49**	**$0.00**	**$0.00**	**$0.00**
				per passenger	per group

Rates If No Revenue Funds Were Identified As Subsidy Funds				
Ambul	**Wheel Chair**	**Stretcher**	**Group**	
Rate per Passenger Mile =				
$4.86	$8.33	$0.00	$0.00	$0.00
			per passenger	per group

Ambul	**Wheel Chair**	**Stretcher**	**Group**	
Rate per Passenger Trip =				
$60.72	$104.09	$0.00	$0.00	$0.00
			per passenger	per group

Program These Rates Into Your Medicaid Encounter Data