



Transportation Disadvantaged Local Coordinating Board (TDLCB) Meeting

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

June 16th, 2022

10:00 AM

AGENDA

- 1. CALL TO ORDER AND ROLL CALL**
- 2. PLEDGE OF ALLIGENCE**
- 3. PROOF OF PUBLICATION**
- 4. PRESENTATIONS**
 - A. New members
 - Introduction of new Board members
- 5. ACTION ITEMS**
 - A. [Transportation Disadvantaged Service Plan 2022 Update](#) - Page 3
 - B. [Rate Model Calculation Sheet](#) - Page 83
- 6. CONSENT AGENDA**
 - A. [Minutes March Meeting](#) - Page 93
- 7. DISCUSSION ITEMS**
- 8. COMMENTS BY TDLCB MEMBERS**
- 9. COMMENTS BY TPO STAFF**

Meeting: Date: June 16, 2022
 Time: 10:00 am
 Location: 2710 E. Silver Springs Blvd. - Training Room

- 10. COMMENTS BY TRANSPORTATION COORDINATOR (CTC)**
- 11. PUBLIC COMMENT (Limited to 2 minutes)**

12. ADJOURNMENT

All meetings are open to the public, the TPO does not discriminate on the basis of race, color, national origin, sex, age, religion, disability and family status. 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 forty-eight (48) hours in advance, so proper accommodations can be made.

Pursuant to Chapter 286.0105, Florida Statutes, please be advised that if any person wishes to appeal any decision made by the Board with respect to any matter considered at the above meeting, they will need a record of the proceedings, and that, for such purpose, they may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based.

The next regular meeting of the Ocala Marion Transportation Disadvantaged Local Coordinating Board will be held on
September 15, 2022.



TO: TDLCB Board Members

FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner

RE: Transportation Disadvantaged Service Plan – 2022 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

Attachment(s)

Updated TDSP Plan

Action Requested

TPO staff is requesting the TDLCB members 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



Website: Ocalamariontpo.org

Updated:
June 16, 2022

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 16, 2022.

Date

Commissioner Michelle Stone, TDLCB Board Chairperson

Approved by the Commission for the Transportation Disadvantaged:

Date

David Darm, Executive Director

TDLCB ROLL CALL VOTE

For Approval of Marion County's TDSP Update

Approved Date: June 16, 2022

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			
Tracey Alesiani	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			
Lauren Debick	Marion County School Board			

RED DENOTES – NEW MEMBERS

Date

Commissioner Michelle Stone, TDLBCB Board Chairperson

Cooperative and comprehensive planning for our transportation needs
 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

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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.

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.

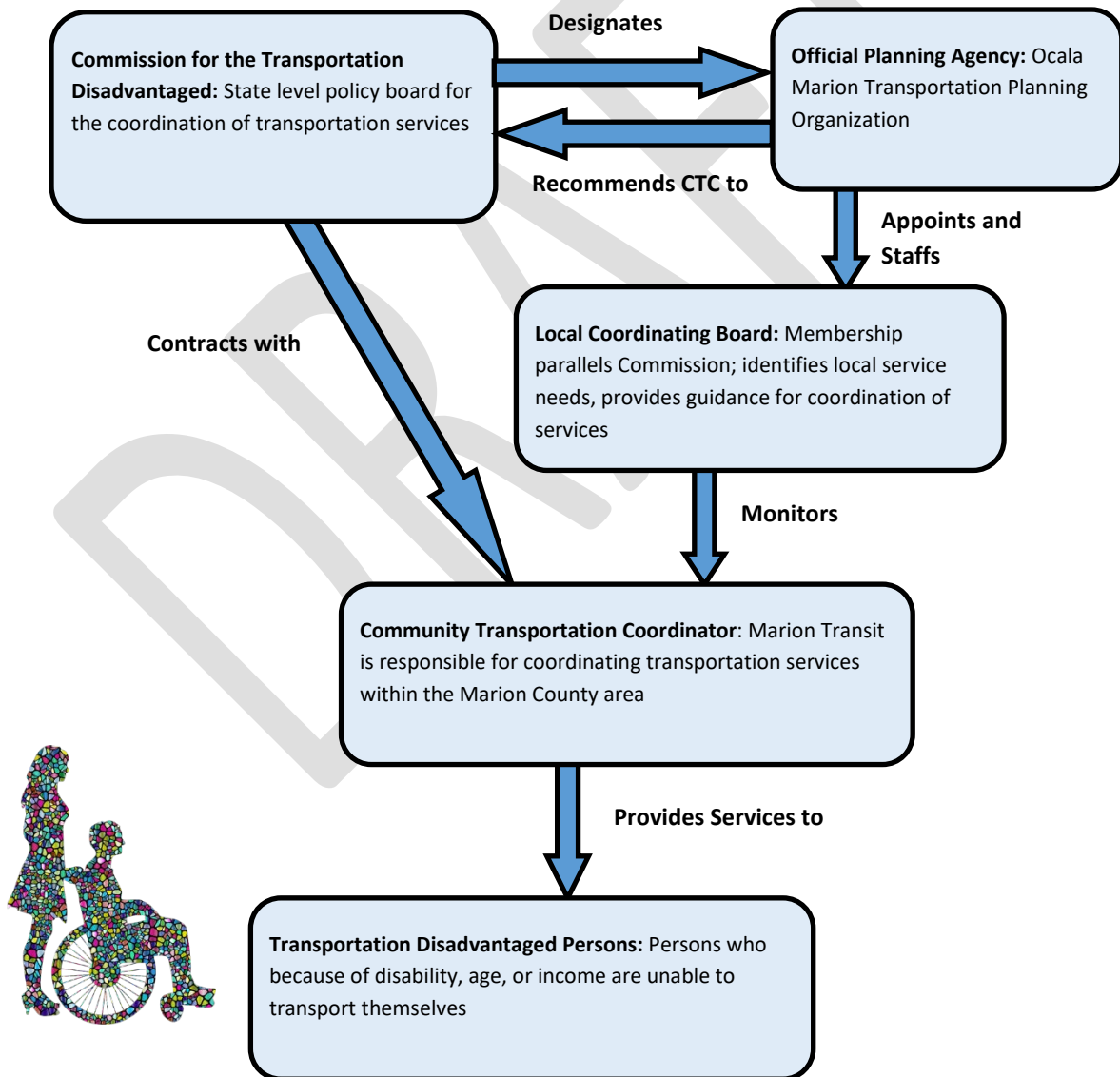
... those who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education,

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. 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*

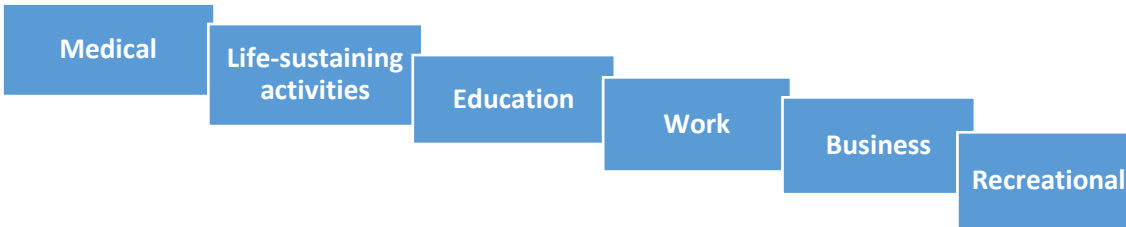
The Community Transportation Coordinator (CTC) is the agency responsible for providing coordinated transportation services for the transportation disadvantaged citizens in the county.

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 serves 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:



MT currently has coordination contracts with two entities that provide transportation services to their own residents: Advocacy Resource Center Marion, Inc. (ARC), 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 Official Planning Agency 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 once a year 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.

4. Cultural Descriptions

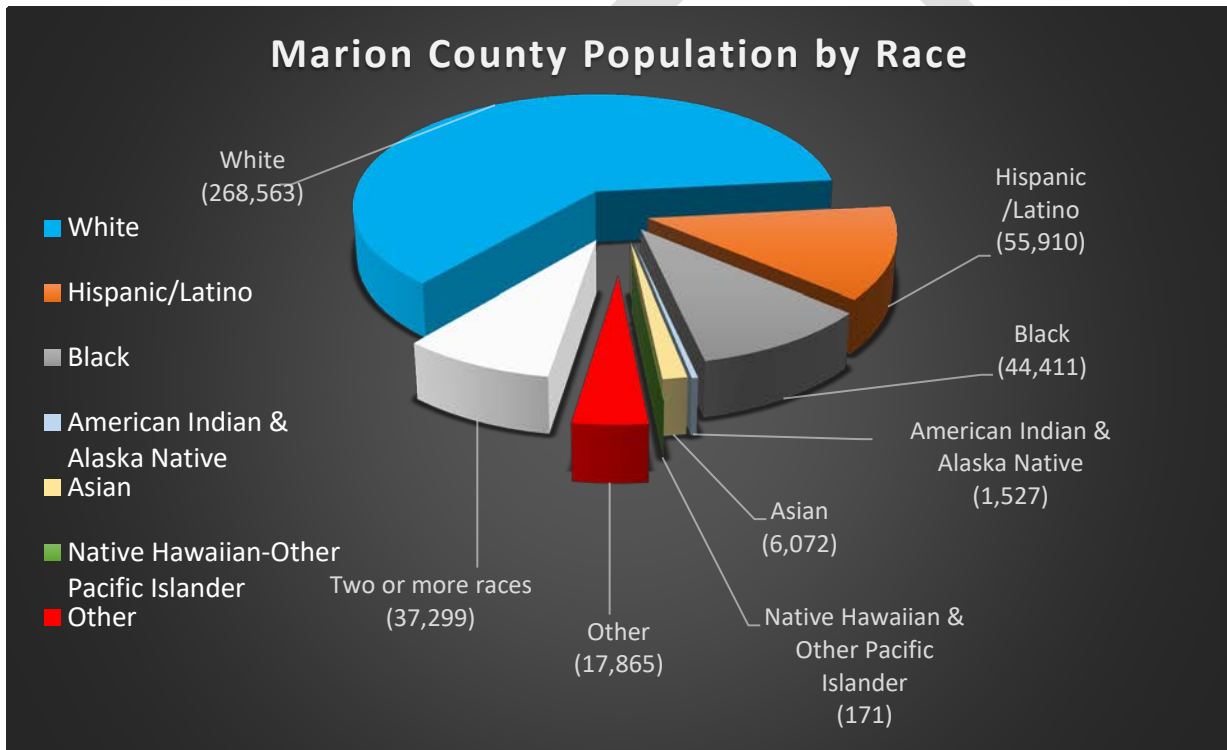
Marion County has a total population of **375,908** according to the American Community Survey's (ACS) 2020 five-year estimates. The chart and graph seen below **Table 1.2 and Figure 1.2** highlight the racial makeup of Marion County.

Table 1.2: Population by Race

<i>Race</i>	<i>Population</i>	<i>Percent of Population</i>
White	268,563	71.4%
Black	44,411	11.8%
Two or more races	37,299	9.9%
Asian	6,072	1.6%
American Indian & Alaska Native	1,527	0.4%
Other race	17,865	4.8%
Native Hawaiian & Other Pacific Islander	171	0.0%
Total	375,908	100.00%
*Hispanic/Latino—Not Hispanic/Latino by race	55,910	14.9%

Source: ACS 2020 5-year estimates. Items may not add to totals or compute to displayed percent due to rounding.
 *Source: ACS 2020 Dec. Redistricting Data

Figure 1.2: Population by Race



Marion County’s population increased from 336,811 persons in 2015 to 375,908 persons in 2020, an overall increase of 9%. It is estimated that the population will continue to increase according to the 2020 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 28% by 2045. Table 1.3 provides an overview of the population projections for Marion County and Florida from 2020 to 2045. Marion County is experiencing high

residential and business growth, which will require a higher demand for transit service in the future.

Table 1.3: Marion County and Florida Population Growth Projections, 2020-2045

Area	Population Estimate	Population Projections						Population Growth
	2019	2020	2025	2030	2035	2040	2045	2019-2045
Marion County	360,421	365,900	392,100	414,800	432,800	447,900	460,800	28%
Florida	21,208,589	21,556,000	23,130,900	24,426,200	25,498,000	26,428,700	27,266,900	29%

Source: BEBR 2020 - 2045 Population Projections, April 2019

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 and excluding the reduction of residents in McIntosh.

Table 1.4: Marion County Municipalities

Geographic Area	2020	2021	2020 - 2021 Population Change
Marion County	375,908	381,176	5,268
Belleview	5,413	5,591	178
Dunnellon	1,928	1,934	6
McIntosh	463	462	-1
Ocala	63,591	64,243	652
Reddick	449	461	12
UNINCORPORATED	304,064	308,485	4,421

Source: BEBR Florida Estimates of 2021 Population, April 2020

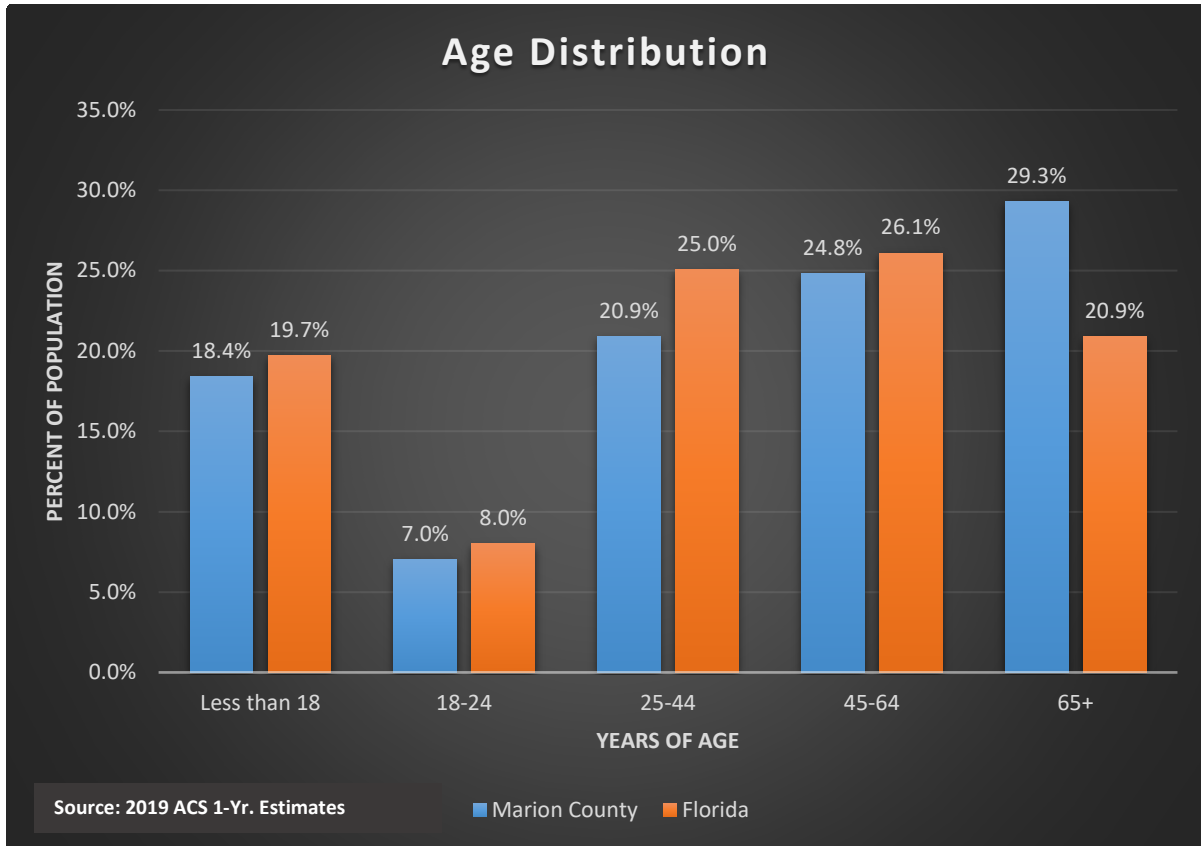
5. Population Density

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 **2019 ACS one-year estimates**, more than **29%** of Marion County’s population is 65 years of age or older compared to nearly **21%** for Florida. The 45-to-64 age group includes a high percentage of both the Marion County and Florida populations, indicating that the older age group will be increasing significantly in the future, which could lead to increased public transportation demand.

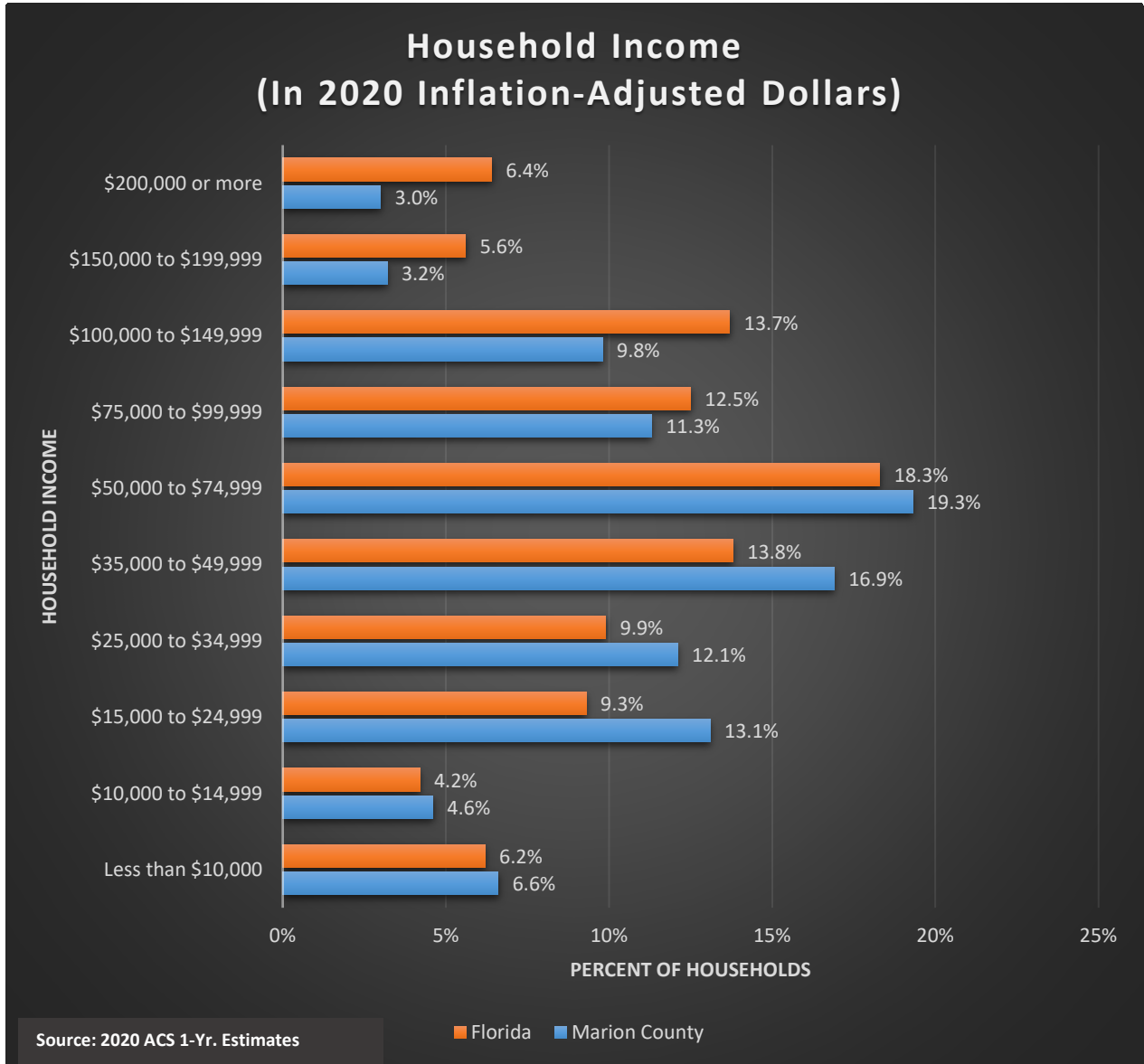
Figure 1.3: Population by Age



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 2019, existing home sales increased 180 homes, or 2 percent from the previous 12 months. The median property value in Marion County is \$161,100, and the homeownership rate is 71.5%. **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 three lowest income categories (below \$50,000). Additionally, a smaller share of Marion County residents earns an income within the four highest income categories (above \$75,000) compared to the Florida state average. The Marion County median household income is approximately 9% lower than Florida, with Marion County's median income at \$49,576 and Florida's at \$53,267.

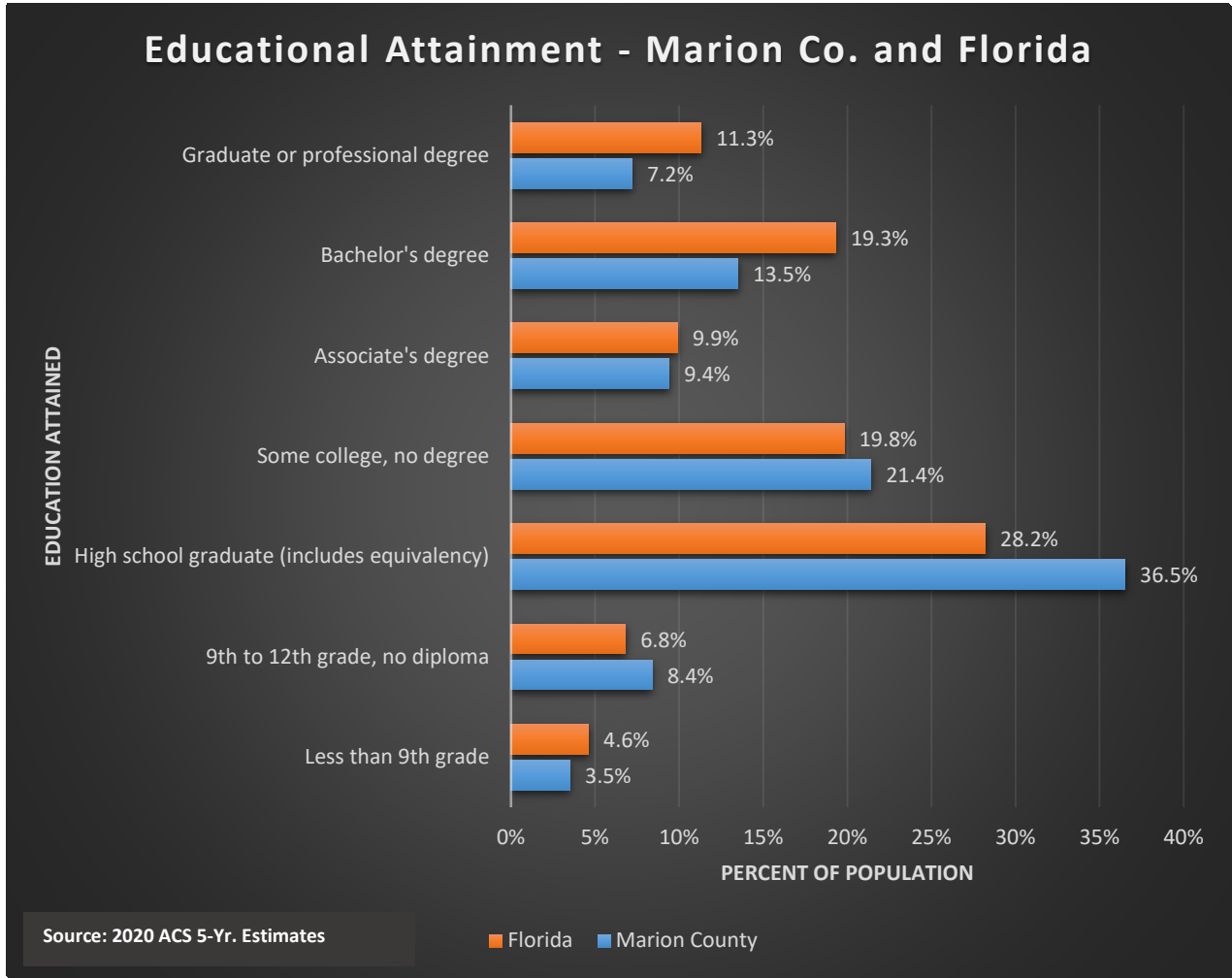
Figure 1.4: Household Income



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 **36.5%** 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.

Figure 1.5: Educational Attainment Distribution



9. Employment

Table 1.5: Employment Characteristics-Marion County and Florida 2022 (Not Seasonally Adjusted)

Area	Civilian Labor Force	Number Employed	Number Unemployed	Unemployment Rate
Marion County	142,460	138,014	4,446	3.1%*
Florida	10,544,000	10,260,000	284,000	2.7%*

* 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: 2022 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 Statistics for **April 2022 data**. 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.

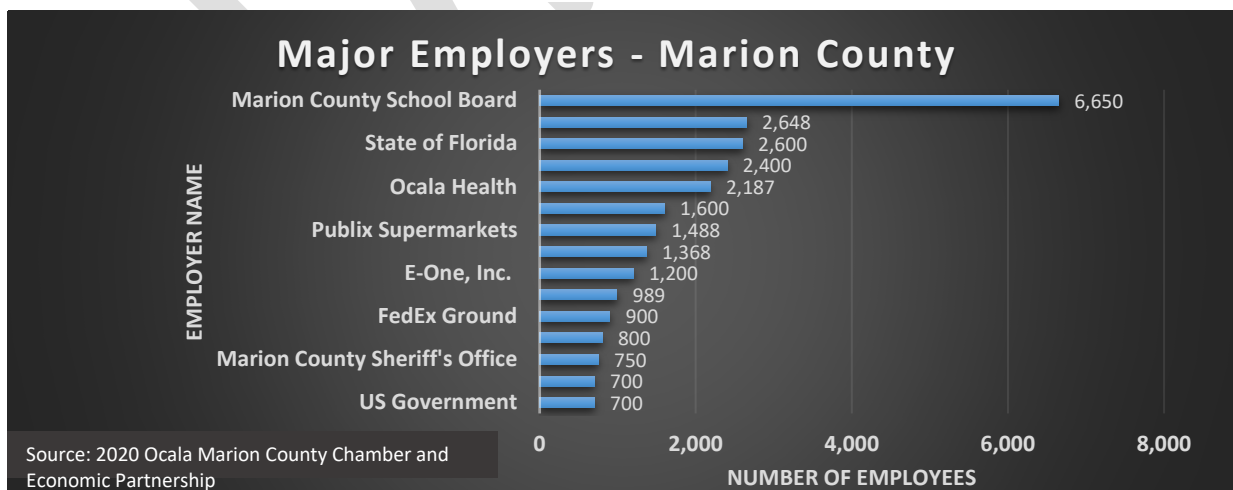
10. Employment Density

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 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 E-One, Inc. Retail centers, including Walmart 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



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. 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 ¼ mile of SunTran fixed route service.

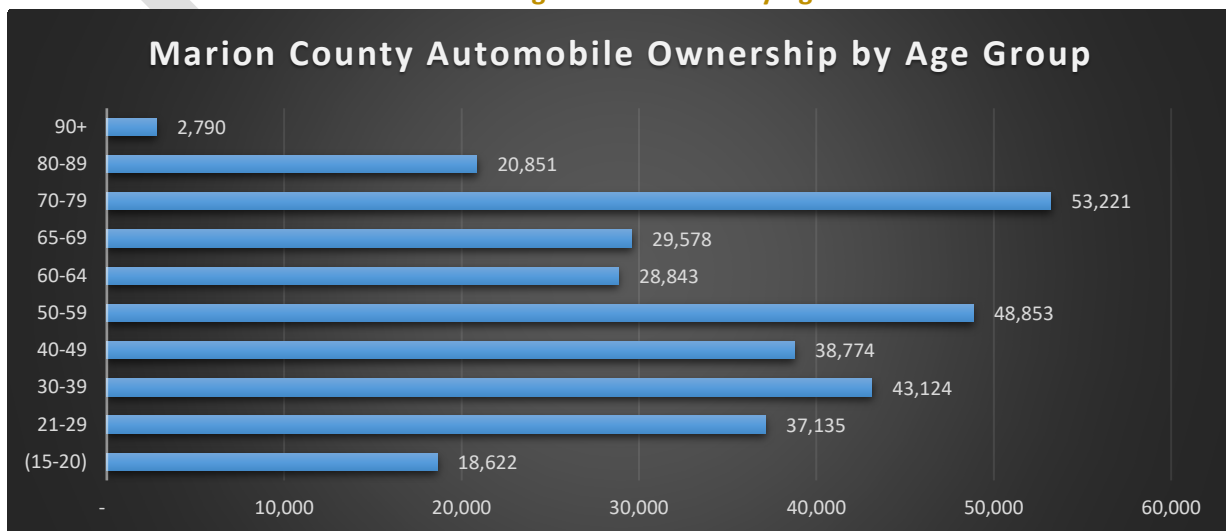
1	Davita-East Dialysis Center	2870 SE 1st Av	Ocala
2	Davita-Shores Dialysis Center	9310 Spring Rd	Ocala
3	Davita-West Dialysis Center	8585 SW Hwy 200	Ocala
4	Wal-Mart	2600 SW 19th Av Rd	Ocala
5	Davita-South Dialysis Center	13940 US Hwy 441	Lady Lake
6	Davita-North Dialysis Center	2620 W Hwy 316	Citra
7	Wal-Mart	9570 SW Hwy 200	Ocala
8	Quad County Clinic	216 NE 1st Av	Ocala
9	Publix	8075 SW Hwy 200	Ocala
10	Wal-Mart	17961 S US Hwy 441	Summerfield

Source: Marion Senior Services (August 2020)

13. Household Vehicle Availability

Marion County has just over 300,000 registered vehicles according to the latest report (2020) 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 50-59 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
18,622	37,135	43,124	38,774	48,853	28,843	29,578	53,221	20,851	2,790	321,791

Source: Florida Department of Highway Safety and Motor Vehicles 2022 Report

Service Analysis

1. Transportation Disadvantaged Population

Table 1.8 shows the trend in the TD population and TD passengers between 2019 and 2021 in Marion County. The potential TD population has risen by nearly 3.98%, from 177,922 in 2019 to 185,006 in 2021. The number of TD passengers served also decreased by 55%, from 3,280 in 2019 to 1,470 in 2021 due to the significant impacts of the global pandemic.



Table 1.8: TD Population

Year	Potential TD Population	TD Passengers Served
2019	177,922	3,280
2020	181,430	2,194
2021	185,006	1,470
% Change (2019-2021)	3.98%	-55%

Source: Annual Performance Reports from 2019-2021, 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 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.

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 2020 American Community Survey (ACS) data and 2020 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).

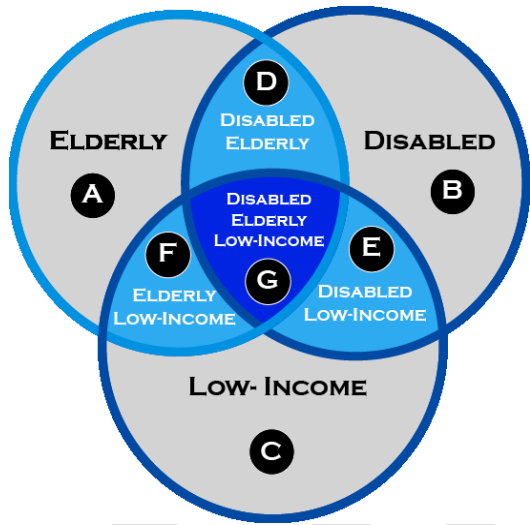


Figure 1.6: TD Population Groups

General TD Population	% of Total	
Non-Duplicated General TD Population Estimate	348,925	95.4%

County TD Pop. By Age	Total TD Pop by Age	% of Total TD Pop (136,400)	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
<18	67,252	18.4%	64,859	17.7 %	4,102	6.1 %	1,547	2.30 %
18-64	191,377	52.3%	151,787	41.5 %	29,089	15.2 %	6,315	3.30 %
Total Non-Elderly	258,629	70.7 %	216,646	59.3 %	33,192	12.8 %	7,862	3.04 %
65+	106,950	29.3 %	102,604	28.1 %	51,657	48.3 %	7,700	7.20 %
Total Elderly	106,950	29.3 %	102,604	28.1 %	51,657	46.3 %	7,700	7.20 %
Total	365,579	100 %	319,250	87.3 %	84,849	23.2 %	15,563	4.26 %

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 277 days annually, accounting for some Saturdays.

Double Counts Calculations		
E - Estimate non-elderly/disabled/ low income	From Base Data (I9)	7,862
B - Estimate non-elderly/ disabled/not low income	Subtract I9 from G9	25,329
G - Estimate elderly/disabled/low income	From Base Data (I11)	7,700
D- Estimate elderly/ disabled/not low income	Subtract I11 from G11	,956
F - Estimate elderly/non-disabled/low income	Subtract I11 from E11	94,904
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C11	(39,610)
C - Estimate low income/not elderly/not disabled	Subtract I9 from E9	208,784
Total - Non-Duplicated		348,925

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 277 days annually, accounting for some Saturdays

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 **2020** TD population in Marion County is estimated to be **348,925**, representing approximately **95.4%** 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 9% over the five-year period of 2020-2025.

Table 1.9: Forecast General TD Population

General TD Population Forecast	2020	2021	2022	2023	2024	2025
<i>Overlapping Circle Component</i>						
E - Estimate non-elderly/disabled/ low income	7,862	7,950	8,038	8,127	8,218	8,309
B - Estimate non-elderly/ disabled/not low income	25,329	25,611	25,896	26,183	26,474	26,769
G - Estimate elderly/disabled/low income	7,700	7,786	7,873	7,960	8,048	8,138
D- Estimate elderly/ disabled/not low income	43,956	44,445	44,939	45,438	45,943	46,454
F - Estimate elderly/non-disabled/low income	94,904	95,958	97,025	98,103	99,194	100,296
A - Estimate elderly/non-disabled/not low income	-39,610	-40,051	-40,496	-40,946	-41,401	-41,861
C - Estimate low income/not elderly/not disabled	208,784	211,104	213,451	215,823	218,222	220,647
TOTAL GENERAL TD POPULATION	348,925	352,804	356,725	360,690	364,698	368,752
TOTAL POPULATION	365,579	369,642	373,751	377,905	382,105	386,352

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 277 days annually, accounting for some Saturdays.

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 **2020** Critical Need TD population is estimated to be **84,849**, representing nearly **24.3%** of the general TD population. In **2022**, the Critical Need TD population is expected to make **218,432** total annual trips as shown below in **Table 1.11**. The number of Critical Need trips needed is expected to increase **9.2%** over the five-year period.

Table 1.10: Critical Need Transportation Disadvantaged

County TD Population by Age	Total 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
<18	4,102	6.10%	1,547	2.30%		
18-64	29,089	15.20%	6,315	3.30%		
Total Non-Elderly	33,192	12.83%	7,862	3.04%	28.60%	2,249
65+	51,657	48.30%	7,700	7.20%		
Total Elderly	51,657	48.30%	7,700	7.20%	11.70%	901
Total	84,849	23.21%	15,563	4.26%		3,150

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 277 days annually, accounting for some Saturdays.

Table 1.10: Marion County Forecasted Annual Trip Demand, 2020-2025

Critical Need TD Population Forecast	2020	2021	2022	2023	2024	2025
Total Critical TD Population						
<i>Disabled</i>	15,563	15,736	15,911	16,087	16,266	16,447
<i>Low Income Not Disabled No Auto/Transit</i>	788	800	811	823	835	847
Total Critical Need TD Population	16,351	16,536	16,722	16,910	17,101	17,294
Daily Trips – Critical Need TD Population						
<i>Severely Disabled</i>	763	771	780	788	797	806
<i>Low Income - Not Disabled - No Access</i>	1497	1518	1540	1563	1585	1608
Total Daily Trips Critical Need TD Population	2260	2289	2320	2351	2382	2414
Annual Trips	211,232	214,801	218,432	222,123	225,877	229,875

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 277 days annually, accounting for some Saturdays.

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 2019 one-year estimates**, more than **29%** of Marion County's population is 65 years of age or older compared to nearly **21%** for Florida.

MT has found that the Transportation Disadvantaged Trip and Equipment Grant is formula based throughout 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. However, in recent years the non-sponsored trips paid out of the Transportation Disadvantaged Trip and Equipment Grant has not kept up with these trips and MT must prioritize these trips. 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 **and with the 2020 Census redistricting pending**, many of these areas of Marion County will no longer be considered rural areas resulting in more demand for non-sponsored trips. Marion Oaks is one example of such an area with approximately 15,000 residents needing service to healthcare, employment and shopping. Qualifying and providing service in this area without more funding will result in a decreased quality in service.

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:

1. Continue to monitor and assess riders to transition to fixed-route services.
2. Carefully match the best possible transit solution for every particular need.
3. 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:

1. Participate in community events to educate.
2. Maintain a presence on the internet to improve public image.
3. 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:

1. Ensure that requests received are communicated and considered as possible feasible changes and/or corrections.
2. Best practices in terms of less call hold time, pick-up window, and reservation time.
3. 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:

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

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:

- 1. Build a rapport with both public and private partners to better understand their needs.
- 2. Work to establish a mutual trust with partners.
- 3. 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 1.11: Implementation Plan

OBJECTIVE	STRATEGY	RES- PONSIBLE	MEASURE- STATUS	2022 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
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 - Ongoing
Make sure the application-registration process is simplified but as effective as possible	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

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
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	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 are being 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
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 - 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 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	Schedule is followed per plan - 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 busses 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	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	Ongoing

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, 47 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 away from. 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.

7. **Table 2.1: Agreements with Outside Transportation Agencies**

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

8. 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 ¼ 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.

9. 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.

10. Vehicle Inventory

To properly operate TD services, MT maintains a fleet of approximately 47 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**.

11. 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**.

12. Inter-County Services

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

13. 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.

14. 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.

15. 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 is 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.

16. 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, TDLCB conducts an annual evaluation of Marion County's CTC to evaluate the performance over 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 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 MONTHLY PASS FARE
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 two 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 approved in 2017. Currently, the TDP is in process of being updated scheduled to be completed in the Fall of 2022. The plan mentions several opportunities for further expansion and the funding that would be required to obtain such expansion. In addition, 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 2022. 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 (2020 - 2021)

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 and submitted to the Governor and the Commission for final approval. This report was analyzed by staff to complete the Development section of this plan update.

Annual Operations Report for Marion County

Marion County 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.

Transportation Improvement Program (TIP) FY 2023 to 2027

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 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

MTS#	Agency's Bus Number	Year/Make	Vehicle Size (Feet)	Ambulatory Seats	Wheelchair Spaces	ADA Accessory (Lift/Ramp, etc.)	Current Use
1	1202 (32)	2012/Chevy	23	12	3	Lift	Spare
2	1204 (41)	2012/Chevy	23	12	3	Lift	Spare
3	1205 (50)	2012/Dodge	12	6	1	Ramp	Spare
4	1305 (31)	2013/Chevy	23	10	3	Lift	Daily Use
5	1401 (08)	2014/Chevy	23	10	3	Lift	Daily Use
6	1402 (10)	2014/Chevy	23	10	3	Lift	Daily Use
7	1403 (17)	2014/Chevy	23	10	3	Lift	Daily Use
8	1404 (18)	2014/Chevy	23	10	3	Lift	Daily Use
9	1405 (29)	2014/Chevy	23	10	3	Lift	Daily Use
10	1406 (34)	2014/Chevy	23	10	3	Lift	Daily Use
11	1407 (37)	2014/Chevy	23	10	3	Lift	Daily Use
12	1501 (15)	2015/Ford E-450	23	10	3	Lift	Daily Use
13	1502 (40)	2015/Ford E-450	23	10	3	Lift	Daily Use
14	1601 (05)	2016/Ford E-450	23	10	3	Lift	Daily Use
15	1602 (09)	2016/Ford E-450	23	10	3	Lift	Daily Use
16	1603 (11)	2016/Ford E-450	23	10	3	Lift	Daily Use
17	1604 (20)	2016/Ford E-450	23	10	3	Lift	Daily Use
18	1605 (21)	2016/Ford E-450	23	10	3	Lift	Daily Use
19	1701	2017/Ford/Tran	22	9	3	Lift	Daily Use
20	1702	2017/Ford/Tran	22	9	3	Lift	Daily Use
21	1703	2017/Ford/Tran	22	9	3	Lift	Daily Use
22	1704	2017/Ford/Tran	22	9	3	Lift	Daily Use
23	1705	2017/Ford/Tran	22	9	3	Lift	Daily Use
24	1801	2018/Chev	24	11	3	Lift	Daily Use
25	1802	2018/Chev	24	11	3	Lift	Daily Use
26	1803	2018/Chev	24	11	3	Lift	Daily Use
27	1804	2018/Chev	24	11	3	Lift	Daily Use
28	1805	2018/Chev	24	11	3	Lift	Daily Use
29	1900	2019/Ford E-450	23	12	3	Lift	Daily Use
30	1901	2019/Ford E-450	23	12	3	Lift	Daily Use
31	1902	2019/Ford E-450	23	12	3	Lift	Daily Use
32	1903	2019/Ford E-450	23	12	3	Lift	Daily Use
33	1904	2019/Ford E-450	23	12	3	Lift	Daily Use
34	2001	2020/Ford E-450	23	12	3	Lift	Daily Use
35	2002	2020/Ford E-450	23	12	3	Lift	Daily Use
36	2003	2020/Ford E-450	23	12	3	Lift	Daily Use
37	2004	2020/Ford E-450	23	12	3	Lift	Daily Use
38	2005	2020/Ford E-450	23	12	3	Lift	Daily Use
39	2101	2021/Ford E-450	23	12	3	Lift	Daily Use
40	2102	2021/Ford E-450	23	12	3	Lift	Daily Use
41	2103	2021/Ford E-450	23	12	3	Lift	Daily Use
42	2104	2021/Ford E-450	23	12	3	Lift	Daily Use
43	2105	2021/Ford E-450	23	12	3	Lift	Daily Use
44	2106	2021/Ford E-450	23	12	3	Lift	Daily Use
45	2107	2021/Ford E-450	23	12	3	Lift	Daily Use
46	2108	2021/Ford E-450	23	12	3	Lift	Daily Use
47	2109	2021/Ford E-450	23	12	3	Lift	Daily Use
48	2110	2021/Ford E-450	23	12	3	Lift	Daily Use
49	2111	2021/Ford E-450	25	14	2	Lift	Daily Use
50	2112	2021/Ford E-450	25	14	2	Lift	Daily Use

Revised 3/4/2022

Red font denotes-to be retired in 2022



Appendix C: Marion Transit Grievance Procedures

Inserted

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**OCALA MARION
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD
GRIEVANCE PROCEDURES**

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 Local Coordinating Board (LCB) 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.
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
 - c. 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
 - d. 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 7) 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.

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.
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.

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 15th day of October 2020.

Commissioner Michelle Stone, TDLCB Chairperson

**OCALA MARION
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD
COMPLAINT FORM**

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.

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): _____

APPEAL = TO THE COMMISSION FOR THE TRANSPORTATION DISADVANTAGED – STEP 4

Date sent: _____



OCALA MARION

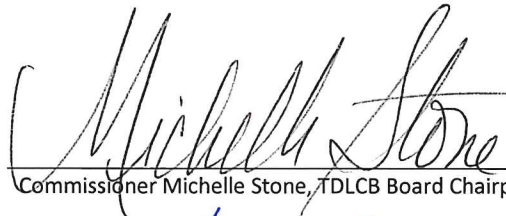
TRANSPORTATION DISADVANTAGED

LOCAL COORDINATING BOARD

GRIEVANCE PROCEDURES

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 as adopted by the Ocala Marion Transportation Disadvantaged Local Coordinating Board on the 9th day of December 2021.



Commissioner Michelle Stone, TDLCB Board Chairperson



Robert Balms, TPO Director

Appendix D: System Safety Program Plan Certification

Inserted

DRAFT

**BUS TRANSIT SYSTEM
ANNUAL SAFETY CERTIFICATION**

DATE: February 5, 2022
BUS TRANSIT SYSTEM: Marion Senior Services, Inc. d/b/a Marion Transit
ADDRESS: 1101 S.W. 20th Court
Ocala, Florida 34471

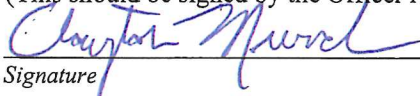
IN ACCORDANCE WITH FLORIDA STATUTE 341.061

THE BUS TRANSIT SYSTEM NAMED ABOVE HEREBY CERTIFIES TO THE FOLLOWING:

1. The adoption of a System Safety Program Plan (SSPP) and the Security Program Plan (SPP) pursuant to Florida Department of Transportation safety standards set for in Rule Chapter 14-90, Florida Administrative Code (F.A.C.).
Current date of Adopted SSPP: July 29, 2016
Current date of Adopted SPP: August 1, 2016

2. Compliance with adopted safety standards in the SSPP and the SPP.

3. Performance of annual safety inspections on all operational buses in accordance with Rule 14-90.009, F.A.C. (This should be signed by the Officer responsible for management of the bus transit system to certify compliance.)



Signature

Clayton Murch

Name (Printed or Typed):

Transportation Director

Title

4. Name and address of entity(ies) which has (have) performed safety inspections:

Advanced Tire & Service

Name

2199 NW 10th Street

Address (Street Number)

Ocala, FL 34475

Address (City, State, Zip Code)

January – December 2021.

Date(s) of Inspection

Advanced Vehicle Modifications (Wheelchair Lifts)

Name

7265 SW 62nd Avenue, Unit #1

Address (Street Number)

Ocala, FL 34476

Address (City, State, Zip Code)

January – December 2021

Date(s) of Inspection

Continued: Name and address of entity(ies) which has (have) performed safety inspections:

AAMCO

Name

661 S.W. 17th Loop

Address (Street Number)

Ocala, FL 34471

Address (City, State, Zip Code)

January – December 2021.

Date(s) of Inspection

Fisher's Auto Care

Name

2021 SW 27th Ave

Address (Street Number)

Ocala, FL 34471

Address (City, State, Zip Code)

January – December 2021

Date(s) of Inspection

5. Names and contact information for all **contract** bus transit systems subject to the provisions of Rule 14-90, F.A.C. N/A

Appendix E: Quality Assurance Program Evaluation (QAPE), Corrective Action Plan, and CTC Evaluation

Inserted

DRAFT



Florida Department of Transportation

RON DESANTIS
GOVERNOR

420 W. Landstreet Rd.
Orlando, FL 32824

KEVIN J. THIBAUT, P.E.
SECRETARY

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,

DocuSigned by:

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

FDOT Triennial Review - Section 5311 Sub-Recipient Finding Summary

Review Category	Review Area/Finding Level	Details
Charter Bus/School Bus	No Findings	Not Applicable
Civil Rights: Americans with Disabilities Act (ADA)	No Findings	Not Applicable
Civil Rights: Disadvantaged Business Enterprise	No Findings	Not Applicable
Civil Rights: Equal Employment Opportunity	No Findings	Not Applicable
Civil Rights: Title VI Program	Plan and Support Documents / Area of Concern	Agency's Title VI Plan does not identify the racial breakdown of the Transportation Disadvantaged Local Coordinating Board (TDLCB) in the region.
Civil Rights: Title VI Program	Plan and Support Documents / Area of Concern	Agency's Title VI Plan did not conclude include the American Community Survey maps and tables provided by FDOT.
Coordinated Plans	Coordinated Public Transportation/Human Services / Area of Concern	"Section 5310 CFR 9070.1G Coordinated Public Transit-Human Services Transportation Plan. On December 4, 2015, Congress enacted the Fixing America's Surface Transportation (FAST) Act, which provides funding for highway and transit programs. The FAST Act has been extended through fiscal year 2021 in September of 2020. The law includes transportation planning requirements. Among these, FAST requires that local communities have a coordinated human services transportation plan. Projects funded by the Federal Transit Administration's (FTA) Section 5310 (Enhanced Mobility for Seniors and Individuals with Disabilities) Program, "must be derived from a locally developed, coordinated public transit-human services transportation plan." In addition to promoting local transportation coordination, this

FDOT Triennial Review - Section 5311 Sub-Recipient Finding Summary

Review Category	Review Area/Finding Level	Details
		<p>requirement is intended to improve transportation services for persons with disabilities, older adults and individuals with lower incomes. FTA defines a coordinated plan as a unified, comprehensive strategy for public transportation service delivery that defines the transportation needs of individuals with disabilities, seniors, and individuals with limited incomes, lays out strategies for meeting these needs and prioritizes services.</p> <ul style="list-style-type: none"> • Requires public participation for the planning process, the TDLCB meetings are part of the coordinated system but not a part of the planning process. • Agency should work with Ocala/Marion TPO on this process to update this plan. • MSS is required to develop a Coordinated Public Transit-Human Services Transportation Plan which can also be used to meet the Commission for Transportation Disadvantaged requirements for the TDSP.
Drug & Alcohol Testing	Drug and Alcohol Policy / Area of Concern	Agency may be including employees in the federal testing program that are not performing safety-sensitive functions (as defined by FTA rule, 49 CFR Part 655.4). Federal testing of employees who are not covered by the rule is prohibited.
Drug & Alcohol Testing	Pre-Employment- Testing and Background Checks / Deficiency	USDOT rule, 49 CFR Part 40.25 requires all transportation employers to perform drug and alcohol background checks when an applicant or transferee is being placed into a safety-sensitive position and has previously held a DOT-covered position within the 2 years prior to date of application. Agency was not able to provide documentation that DOT-previous employer drug and alcohol background checks (inquiries) are being performed.

FDOT Triennial Review - Section 5311 Sub-Recipient Finding Summary

Review Category	Review Area/Finding Level	Details
Project Management/Financial Information	Procurement / Area of Concern	Agency's procurement policy does not include language explaining the graduated purchasing authority that is followed and language explaining the agency's appeal and protest procedures.
Project Management/Financial Information	Procurement / Area of Concern	Agency should update the addendum concerning SAM.gov check to make it clear that any proposed vendor that will be paid with federal funds must not be excluded or disqualified through the Excluded Parties List System (EPLS) by completing a verification search on the following link: Sam.gov/SAM/
Project Management/Financial Information	Procurement / Area of Concern	FDOT address on DBE plan is outdated.
Project Management/Financial Information	Procurement / Area of Concern	Agency's procurement policy did not include reference that procurements utilizing federal funds will be in accordance to 2 CFR 200.317 – 200.326.
Safety and Security	Driver Qualifications / Observation	The CUTR team reviewed a random selection of driver records to ensure that all licenses, medical examinations, and training requirements were in compliance with Chapter 14-90, FAC and the agency's SSPP. Marion Senior Services is doing a good job ensuring they are in compliance with these requirements.
Safety and Security	Rules and SOPs / Deficiency	Marion Senior Services operators observed during the virtual ride-along did not operate the bus in accordance with the agency's rules and regulations and in observance of local, state, and federal laws.
Safety and Security	Accidents / Deficiency	<p>Marion Senior Services does not address the following requirements for Event Investigation as outlined in Rule 14-90 FAC.:</p> <ul style="list-style-type: none"> Events are investigated and documented in a final report that includes a description of the investigation activities, identified causal factors, and any identified corrective actions - Documentation not consistent with agency's SSPP

FDOT Triennial Review - Section 5311 Sub-Recipient Finding Summary

Review Category	Review Area/Finding Level	Details
		<ul style="list-style-type: none"> Corrective action plans are developed by the bus transit system that will identify planned actions and schedule for implementation - Documentation not consistent with agency's SSPP Does the agency monitor and tracks the implementation and completion of each corrective action - Documentation not consistent with the agency's SSPP Does the agency have a follow-up procedure in place to ensure that the corrective action is working - Documentation not consistent with the agency's SSPP Does the agency conduct annual/periodic safety and hazard analysis of data – agency stated that this requirement is under implementation
Safety and Security	Accidents / Deficiency	Marion Senior Services does not address the requirement of notification and investigation reports, findings, causal factors, corrective action plans, supporting documents as outlined in Rule 14-90 FAC. – Several files are incomplete missing CAP implementation documentation along with CAP monitoring documentation.
Safety and Security	Hazards / Deficiency	Marion Senior Services does not conduct a hazard analysis to assess the level of risk the seating capacity and configuration could pose if a vehicle needed to be evacuated in an emergency situation for vehicles with more than three (3) wheelchair positions as outlined in FDOT guidelines.
Safety and Security	Emergency Management and Security / Deficiency	<p>Marion Senior Services does not address the following requirements for the development and adoption of a Security Program Plan as outlined in Rule 14-90 FAC.</p> <ul style="list-style-type: none"> Approved Security Program Plan (SPP) – The document is not signed. Certification requirements SPP requirements for contractors

FDOT Triennial Review - Section 5311 Sub-Recipient Finding Summary

Review Category	Review Area/Finding Level	Details
		<ul style="list-style-type: none"> • Procedures for oversight and monitoring of contractors compliance with security requirements • Review threat and vulnerability assessment • Procedures for SPP maintenance and distribution: includes disclosure prohibition per Section 119.071(3)(a), F.S. – disclosure prohibition is not included.
Equipment Management	No Findings	Not Applicable
Facility Maintenance	No Findings	Not Applicable
National Transit Database (NTD)	No Findings	Not Applicable
Vehicle Maintenance	Vehicle Files / Observation	Marion Senior Services has an excellent PM program. The program is well documented and maintenance practices are consistent with the agency's written policies. Performance measures also indicated the program is efficient.
Vehicle Maintenance	Vehicle Files / Vehicle Files	A safety-sensitive defect was identified during the on-site vehicle inspection. The critical nature of the defect resulted in the vehicle being removed from service by the FDOT District 5 Representative.
Vehicle Maintenance	Maintenance Plan / Maintenance Plan	The fleet roster does not include all of the vehicles currently operated by Marion Senior Services to provide passenger transportation.
Vehicle Maintenance	Pre and Post-Trip Inspections / Pre and Post Trip Inspections	Although the drivers checked the wheelchair lift and interlock during their pre-trip inspection observation, they did not seem completely familiar with all of their safety functions.



March 23, 2022

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

RE: 2022 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:

- Performance Standards
- Safety Standards
- Quality Assurance
- Driver Certification & Training
- Vehicle Operations & Maintenance
- Budget
- Grievance/Complaint Procedures
- Contracts and Contract Management
- Policies and Procedures

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 speak highly of the overall system and feel that they are being provided a quality service.

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

Recommendations:

1. Provide readily available comment cards on each bus for input from the riders with a sealed drop box. This will allow for input from the riders on an ongoing basis.

A transportation system that supports growth, mobility, and safety through leadership and planning
Marion County • City of Belleview • City of Dunnellon • City of Ocala

2. While there has been improvement on the waiting period for returning riders home from their appointments we are still receiving comments on the pickup window being too long 2 to 3 hours wait prior to pick up.
3. Standardize the location of the pertinent phone numbers on each bus. 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 in various locations i.e. on the upper side isles for easier viewing from the riders sitting on the sides with an emphasis on the size of the numbers (larger for distance viewing from the back of the bus).

Commendations:

1. Riders are pleased and speak highly of the overall system and the staff.
2. Marion Transit monitors and continues to make the changes required to provide the coverage necessary to maintain happy riders.
3. Marion Transit was several months without a Director however the system overall did not diminish in quality due to well outlined policies and procedures, well trained staff and teamwork.

We congratulate you on your continued commitment to excellence!

Sincerely,



Robert Balmes
TPO Director

/em



MARION TRANSIT

A Division of Marion Senior Services
1101 S.W. 20th Court, Ocala, FL 34471
Telephone (352) 620-3519 Fax (352) 620-3504

Via Email -

March 24, 2022

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:

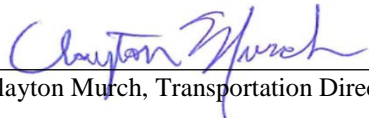
Marion Transit, as the current Community Transportation Coordinator (CTC), recently completed a review conducted by the Ocala Marion Transportation Planning Organization (TPO). See attached memorandum.

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

DRAFT

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/Patricia Yoder
Phone #	352.620.3519 / 352.620.3501

Check Applicable Characteristic:

ORGANIZATIONAL TYPE:	NETWORK TYPE:
<input type="radio"/> Governmental	<input type="radio"/> Fully Brokered
<input checked="" type="radio"/> Private Non-Profit	<input type="radio"/> Partially Brokered
<input type="radio"/> Private For Profit	<input checked="" type="radio"/> Sole Source

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

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 2020 to June 30th of 2021	Current Year's APPROVED Budget, as amended from July 1st of 2021 to June 30th of 2022	Upcoming Year's PROPOSED Budget from July 1st of 2022 to June 30th of 2023	% 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	\$ 63,748	\$ 87,393	\$ 90,000	37.1%	3.0%	
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other						
Bus Pass Program Revenue						

Local Government

District School Board	\$ 13,342	\$ 31,000	\$ 31,000	132.3%	0.0%	County Cash is inconsistent due to supplemental Federal funding.
Compl. ADA Services	\$ 278,302	\$ 340,000	\$ 340,000	22.2%	0.0%	
County Cash	\$ 151,086	\$ 969,909	\$ 665,842	542.0%	-31.4%	
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						

CTD

Non-Spons. Trip Program	\$ 796,483	\$ 778,311	\$ 813,021	-2.3%	4.5%	
Non-Spons. Capital Equipment						
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						

USDOT & FDOT

49 USC 5307						Increase in 5310 due to increased pricing for buses. 5311 is general operating revenue. ARP & CRRSAA funding listed in the "Other DOT" category - federal funding causes a resulting decrease in the need to draw from normal 5311 operating funding
49 USC 5310	\$ 374,000	\$ 353,758	\$ 442,198	-5.4%	25.0%	
49 USC 5311 (Operating)	\$ 742,170	\$ 847,858	\$ 520,234	14.2%	-38.6%	
49 USC 5311(Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)	\$ 1,183,721	\$ 44,220	\$ 1,495,533	-96.3%	3282.0%	
Bus Pass Program Revenue						

AHCA

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

DCF

Alcohol, 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)	\$ 711			-100.0%		
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

	Prior Year's ACTUALS from July 1st of 2020 to June 30th of 2021	Current Year's APPROVED Budget, as amended from July 1st of 2021 to June 30th of 2022	Upcoming Year's PROPOSED Budget from July 1st of 2022 to June 30th of 2023	% 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

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						
xxx						
xxx						
xxx						
Bus Pass Program Revenue						
Other Revenues						
Interest Earnings						
Sales of Vehicles	\$ -	\$ -	\$ -			
Loss reimbursement	\$ -	\$ -	\$ -			
Bus Pass Program Revenue						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue is Short By =		None				
Total Revenues =	\$3,603,563	\$3,452,449	\$4,397,828	-4.2%	27.4%	

EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors!)							
Operating Expenditures							
Labor	\$ 1,487,801	\$ 1,647,546	\$ 2,075,905	10.7%	26.0%	LABOR - wage increase of \$2.00 / hr for drivers & staff; FRINGE - 45% increase in benefit cost; misc includes depreciation expense. Service vendors 31% increase in labor rates. Fuel expense has increase by more than 25% YOY.	
Fringe Benefits	\$ 410,673	\$ 469,898	\$ 656,742	14.4%	39.8%		
Services	\$ 594,737	\$ 389,763	\$ 563,797	-34.5%	44.7%		
Materials and Supplies	\$ 41,238	\$ 308,890	\$ 317,047	649.0%	2.6%		
Utilities	\$ 32,053	\$ 42,757	\$ 47,488	33.4%	11.1%		
Casualty and Liability	\$ 135,647	\$ 146,711	\$ 162,000	8.2%	10.4%		
Taxes	\$ 1,217	\$ 142	\$ 1,100	-88.3%	673.4%		
Purchased Transportation:							
Purchased Bus Pass Expenses							
School Bus Utilization Expenses							
Contracted Transportation Services							
Other							
Miscellaneous	\$ 14,007	\$ 3,722	\$ 20,000	-73.4%	437.3%		
Operating Debt Service - Principal & Interest							
Leases and Rentals	\$ 1,550	\$ 820	\$ 1,000	-47.1%	21.9%		
Contrib. to Capital Equip. Replacement Fund	\$ 349,000			-100.0%			
In-Kind, Contributed Services	\$ -	\$ -	\$ -				
Allocated Indirect							
Capital Expenditures							
Equip. Purchases with Grant Funds	\$ 415,556	\$ 397,978	\$ 497,473	-4.2%	25.0%		
Equip. Purchases with Local Revenue	\$ 41,556	\$ 44,220	\$ 55,275	6.4%	25.0%		
Equip. Purchases with Rate Generated Rev.							
Capital Debt Service - Principal & Interest							
ACTUAL YEAR GAIN	\$78,528						
Total Expenditures =	\$3,525,035	\$3,452,449	\$4,397,828	-2.1%	27.4%		
See NOTES Below.							

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

ACTUAL year GAIN (program revenue) MUST be reinvested as a trip or system subsidy. Adjustments must be identified and explained in a following year, or applied as a Rate Base Adjustment to proposed year's rates on the next sheet.

Budgeted Rate Base Worksheet

Version 1.4

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

County: Marion

- Complete applicable **GREEN** cells in column 3; **YELLOW** and **BLUE** cells are automatically completed in column 3
- Complete applicable **GOLD** cells in column and 5

	Upcoming Year's BUDGETED Revenues
	from
	July 1st of
	2022
	to
	June 30th of
	2023
1	2

	Budgeted Rate Subsidy Revenue Excluded from the Rate Base	
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?		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?
3	4	5

REVENUES (CTC/Operators ONLY)

Local Non-Govt

Farebox	\$	90,000
Medicaid Co-Pay Received	\$	-
Donations/ Contributions	\$	-
In-Kind, Contributed Services	\$	-
Other	\$	-
Bus Pass Program Revenue	\$	-

Local Government

District School Board	\$	31,000
Compl. ADA Services	\$	340,000
County Cash	\$	665,842
County In-Kind, Contributed Services	\$	-
City Cash	\$	-
City In-Kind, Contributed Services	\$	-
Other Cash	\$	-
Other In-Kind, Contributed Services	\$	-
Bus Pass Program Revenue	\$	-

CTD

Non-Spons. Trip Program	\$	813,021
Non-Spons. Capital Equipment	\$	-
Rural Capital Equipment	\$	-
Other TD	\$	-
Bus Pass Program Revenue	\$	-

USDOT & FDOT

49 USC 5307	\$	-
49 USC 5310	\$	442,198
49 USC 5311 (Operating)	\$	520,234
49 USC 5311 (Capital)	\$	-
Block Grant	\$	-
Service Development	\$	-
Commuter Assistance	\$	-
Other DOT	\$	1,495,533
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	\$	-

\$	45,000	\$	45,000
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

\$	31,000	\$	-
\$	-	\$	340,000
\$	100,000	\$	565,842
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

\$	813,021	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

\$	-	\$	-
\$	-	\$	442,198
\$	520,234	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	1,495,533	\$	-
\$	-	\$	-

\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
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\$	-	\$	-

\$	-	\$	-
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\$	-	\$	-
\$	-	\$	-

\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

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.

local match req.
\$ 90,336
\$ -
\$ -
\$ -
\$ 49,133
\$ -

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 <u>Projected</u> Passenger Miles =	875,000
Rate Per Passenger Mile = \$	3.43
Total <u>Projected</u> Passenger Trips =	70,000
Rate Per Passenger Trip = \$	42.93

Fiscal Year

2022 - 2023

Avg. Passenger Trip Length =	12.5 Miles
-------------------------------------	-------------------

Rates If No Revenue Funds Were Identified As Subsidy Funds	
Rate Per Passenger Mile = \$	5.03
Rate Per Passenger Trip = \$	62.83

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.

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

SECTION I: Services Provided

1. Will the CTC be providing any of these Services to transportation disadvantaged passengers in the upcoming budget year?.....

Ambulatory	Wheelchair	Stretcher	Group
<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No	<input checked="" type="radio"/> No	<input checked="" type="radio"/> 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

1. Will the CTC be contracting out any of these Services TOTALLY in the upcoming budget year?....

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No	<input checked="" type="radio"/> No	<input checked="" type="radio"/> 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?.....

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No	<input checked="" type="radio"/> No	<input checked="" type="radio"/> No
Leave Blank	Leave Blank	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

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

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

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 **Leave Blank**
 Pass. Mile
per passenger mile?.....
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

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)..... **Do NOT Complete Section IV**
- And what is the projected total number of Group Vehicle Revenue Miles? **Loading Rate 0.00 to 1.00**

SECTION V: Rate Calculations for Multiple 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: 2022 - 2023			
		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	875,000	542,500	332,500	Leave Blank	0
Rate per Passenger Mile =		\$2.70	\$4.63	\$0.00	\$0.00
		<small>per passenger per group</small>			

		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	70,000	43,400	26,600	Leave Blank	Leave Blank
Rate per Passenger Trip =		\$33.76	\$57.88	\$0.00	\$0.00
		<small>per passenger per group</small>			

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	Group
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =				Leave Blank	Leave Blank
Rate per Passenger Mile for Balance =		\$2.70	\$4.63	\$0.00	\$0.00
		<small>per passenger per group</small>			

		Rates If No Revenue Funds Were Identified As Subsidy Funds			
		Ambul	Wheel Chair	Stretcher	Group
Rate per Passenger Mile =		\$3.95	\$6.78	\$0.00	\$0.00
		<small>per passenger per group</small>			
Rate per Passenger Trip =		\$49.41	\$84.71	\$0.00	\$0.00
		<small>per passenger per group</small>			

Program These Rates Into Your Medicaid Encounter Data



TO: TDLCB Board Members

FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner

RE: Rate Calculation Model Spreadsheet

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.

Attachment(s)

Rate Calculation Model Spreadsheets

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/Patricia Yoder
Phone #	352.620.3519 / 352.620.3501

Check Applicable Characteristic:

ORGANIZATIONAL TYPE:	NETWORK TYPE:
<input type="radio"/> Governmental	<input type="radio"/> Fully Brokered
<input checked="" type="radio"/> Private Non-Profit	<input type="radio"/> Partially Brokered
<input type="radio"/> Private For Profit	<input checked="" type="radio"/> Sole Source

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

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 2020 to June 30th of 2021	Current Year's APPROVED Budget, as amended from July 1st of 2021 to June 30th of 2022	Upcoming Year's PROPOSED Budget from July 1st of 2022 to June 30th of 2023	% 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	\$ 63,748	\$ 87,393	\$ 90,000	37.1%	3.0%	
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other						
Bus Pass Program Revenue						

Local Government

District School Board	\$ 13,342	\$ 31,000	\$ 31,000	132.3%	0.0%	County Cash is inconsistent due to supplemental Federal funding.
Compl. ADA Services	\$ 278,302	\$ 340,000	\$ 340,000	22.2%	0.0%	
County Cash	\$ 151,086	\$ 969,909	\$ 665,842	542.0%	-31.4%	
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						

CTD

Non-Spons. Trip Program	\$ 796,483	\$ 778,311	\$ 813,021	-2.3%	4.5%	
Non-Spons. Capital Equipment						
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						

USDOT & FDOT

49 USC 5307						Increase in 5310 due to increased pricing for buses. 5311 is general operating revenue. ARP & CRRSAA funding listed in the "Other DOT" category - federal funding causes a resulting decrease in the need to draw from normal 5311 operating funding
49 USC 5310	\$ 374,000	\$ 353,758	\$ 442,198	-5.4%	25.0%	
49 USC 5311 (Operating)	\$ 742,170	\$ 847,858	\$ 520,234	14.2%	-38.6%	
49 USC 5311(Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)	\$ 1,183,721	\$ 44,220	\$ 1,495,533	-96.3%	3282.0%	
Bus Pass Program Revenue						

AHCA

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

DCF

Alcohol, 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)	\$ 711			-100.0%		
Bus Pass Program Revenue						

DCA

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

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

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	2	3	4	5	6	7
	Prior Year's ACTUALS from July 1st of 2020 to June 30th of 2021	Current Year's APPROVED Budget, as amended from July 1st of 2021 to June 30th of 2022	Upcoming Year's PROPOSED Budget from July 1st of 2022 to June 30th of 2023	% 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

xxx						
xxx						
xxx						
Bus Pass Program Revenue						
Other Revenues						
Interest Earnings						
Sales of Vehicles	\$ -	\$ -	\$ -			
Loss reimbursement	\$ -	\$ -	\$ -			
Bus Pass Program Revenue						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue is Short By = None						
Total Revenues =	\$3,603,563	\$3,452,449	\$4,397,828	-4.2%	27.4%	

EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors)							
Operating Expenditures							
Labor	\$ 1,487,801	\$ 1,647,546	\$ 2,075,905	10.7%	26.0%	LABOR - wage increase of \$2.00 / hr for drivers & staff; FRINGE - 45% increase in benefit cost; misc includes depreciation expense. Service vendors 31% increase in labor rates. Fuel expense has increase by more than 25% YOY.	
Fringe Benefits	\$ 410,673	\$ 469,898	\$ 656,742	14.4%	39.8%		
Services	\$ 594,737	\$ 389,763	\$ 563,797	-34.5%	44.7%		
Materials and Supplies	\$ 41,238	\$ 308,890	\$ 317,047	649.0%	2.6%		
Utilities	\$ 32,053	\$ 42,757	\$ 47,488	33.4%	11.1%		
Casualty and Liability	\$ 135,647	\$ 146,711	\$ 162,000	8.2%	10.4%		
Taxes	\$ 1,217	\$ 142	\$ 1,100	-88.3%	673.4%		
Purchased Transportation:							
Purchased Bus Pass Expenses							
School Bus Utilization Expenses							
Contracted Transportation Services							
Other							
Miscellaneous	\$ 14,007	\$ 3,722	\$ 20,000	-73.4%	437.3%		
Operating Debt Service - Principal & Interest							
Leases and Rentals	\$ 1,550	\$ 820	\$ 1,000	-47.1%	21.9%		
Contrib. to Capital Equip. Replacement Fund	\$ 349,000			-100.0%			
In-Kind, Contributed Services	\$ -	\$ -	\$ -				
Allocated Indirect							
Capital Expenditures							
Equip. Purchases with Grant Funds	\$ 415,556	\$ 397,978	\$ 497,473	-4.2%	25.0%		
Equip. Purchases with Local Revenue	\$ 41,556	\$ 44,220	\$ 55,275	6.4%	25.0%		
Equip. Purchases with Rate Generated Rev.							
Capital Debt Service - Principal & Interest							
ACTUAL YEAR GAIN	\$78,528						
Total Expenditures =	\$3,525,035	\$3,452,449	\$4,397,828	-2.1%	27.4%		
See NOTES Below.							

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

ACTUAL year GAIN (program revenue) MUST be reinvested as a trip or system subsidy. Adjustments must be Identified and explained in a following year, or applied as a Rate Base Adjustment to proposed year's rates on the next sheet.

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 <u>Projected</u> Passenger Miles =	875,000
Rate Per Passenger Mile = \$ 3.43	
Total <u>Projected</u> Passenger Trips =	70,000
Rate Per Passenger Trip = \$ 42.93	

Fiscal Year
 2022 - 2023

Avg. Passenger Trip Length =	12.5 Miles
-------------------------------------	-------------------

Rates If No Revenue Funds Were Identified As Subsidy Funds	
Rate Per Passenger Mile = \$ 5.03	
Rate Per Passenger Trip = \$ 62.83	

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.

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

SECTION I: Services Provided

1. Will the CTC be providing any of these Services to transportation disadvantaged passengers in the upcoming budget year?.....

Ambulatory	Wheelchair	Stretcher	Group
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> 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

1. Will the CTC be contracting out any of these Services TOTALLY in the upcoming budget year?....

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> 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?.....

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Leave Blank	Leave Blank	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

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

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

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
 per passenger mile?.....
 Pass. Trip **Leave Blank**
 Pass. Mile
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

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).....
 Do NOT Complete Section IV
- And what is the projected total number of Group Vehicle Revenue Miles? Loading Rate
 0.00 to 1.00

SECTION V: Rate Calculations for Multiple 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: 2022 - 2023			
		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	875,000	= 542,500	+ 332,500	+ Leave Blank	+ Leave Blank
Rate per Passenger Mile =		\$2.70	\$4.63	\$0.00	\$0.00
				per passenger	per group

		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	70,000	= 43,400	+ 26,600	+ Leave Blank	+ Leave Blank
Rate per Passenger Trip =		\$33.76	\$57.88	\$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	Group
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =		<input type="text"/>	<input type="text"/>	Leave Blank	Leave Blank
Rate per Passenger Mile for Balance =		\$2.70	\$4.63	\$0.00	\$0.00
				per passenger	per group

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

Rate per Passenger Mile =

Rate per Passenger Trip =

Rates If No Revenue Funds Were Identified As Subsidy Funds

Ambul	Wheel Chair	Stretcher	Group	
\$3.95	\$6.78	\$0.00	\$0.00	\$0.00
			per passenger	per group
Ambul	Wheel Chair	Stretcher	Group	
\$49.41	\$84.71	\$0.00	\$0.00	\$0.00
			per passenger	per group

Program These Rates Into Your Medicaid Encounter Data



Transportation Disadvantaged Local Coordinating Board (TDLCB) Meeting

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

March 17, 2022

10:00 AM

MINUTES

Members Present:

Michelle Stone

Jeffrey Askew (*arrived at 10:04am*)

Lauren Debick

Andrea Melvin

Susan Hanley (*Mark Mulligan, alternate attended on behalf of Susan Hanley*)

Anissa Pieriboni (*arrived at 10:05am*)

Steven Neal (*arrived at 10:09am*)

Keith Fair

Members Not Present:

Ivonne Perez

Tracey Sapp

Carlos Colon

Iris Pozzo

Tracey Alesiani

Carressa Hutchinson

Jeff Aboumrad

Ronald Graham

Others Present:

Rob Balmes, TPO
Shakayla Irby, TPO
Elizabeth Mitchell, TPO
Jennifer Martinez, Marion Senior Services
Clayton Murch, Marion Senior Services
Ken McKelvy, Marion Senior Services
Karen Williams, Marion Senior Services
Herman Schulz, Marion Senior Services

Item 1. Call to Order and Roll Call

Chairwoman Stone called the meeting to order at 10:02am. Secretary Shakayla Irby called the roll and a quorum was present with a special quorum of five member's present in-person.

Ms. Melvin made a motion to proceed with the special quorum. Mr. Fair seconded, and the motion passed unanimously.

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 10, 2022 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 10, 2022 edition of the Ocala Star Banner.

Item 4A. Introduction of new Board members

Chairwoman Stone gave a welcome to the new board members.

New board members included:

- Keith Fair- Housing Finance Authority of Marion County
- Lauren Debick- Marion County School Board
- Carressa Hutchinson (unable to attend the meeting)- Florida Community Action Association
- Ronald Graham (unable to attend the meeting)- Department of Children and Families
- Sheri Peterson- (unable to attend the meeting)- Alternate member for Ronald Graham
- Stephanie Seawright- (unable to attend the meeting)- Alternate member for Caressa Hutchinson

TDLCB members went around the room and introduced themselves to the new members and stated the agencies they worked for.

Item 5A. Annual CTC Evaluation

Ms. Liz Mitchell gave a presentation on the CTC Evaluation and shared with the board 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.

You are considered "transportation disadvantaged" due to age, income, or a disability, you cannot drive, and do not have access to other transportation options. Access would be provided to medical appointments, employment, educational and other life sustaining services, including, groceries, shopping, meals, and social events, to those who were eligible and have no other means of transportation.

In accordance with Florida Statutes, Chapter 427, and the Florida Commission for the Transportation Disadvantaged the Marion County Community Transportation Coordinator (CTC) evaluation was conducted annually by members of the Transportation Disadvantaged Local Coordinating Board (TDLCB) with assistance from the Ocala Marion Transportation Planning Organization (TPO) staff. The TDLCB evaluates the CTC in order to ensure quality of service was being provided in the most cost effective and efficient manner. This was accomplished through an audit, a series of interviews, quality checks, rider surveys, and ride-along for observation.

The evaluation encompasses 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.

In summary, the TPO found that all of 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 was a zero tolerance substance abuse policy enforced complete with pre-employment drug and alcohol background check, and random testing. The riders spoke highly of the overall system and feel that they are being provided a quality service.

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

Recommendations

1. Provide readily available comment cards on each bus for input from the riders with a sealed drop box. This will allow for input from the riders on an ongoing basis.
2. While there has been improvement on the waiting period for returning riders home from their appointments we are still receiving comments on the pickup window being too long 2 to 3 hours wait prior to pick up.

3. Standardize the location of the pertinent phone numbers on each bus. 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 in various locations i.e. on the upper side isles for easier viewing from the riders sitting on the sides with an emphasis on the size of the numbers (larger for distance viewing from the back of the bus).

Commendations

1. Riders are pleased and speak highly of the overall system and the staff.
2. Marion Transit monitors and continues to make the changes required to provide the coverage necessary to maintain happy riders.
3. Marion Transit was several months without a Community Transportation Coordinator however the system overall did not diminish in quality due to well outlined policies and procedures, well trained staff and teamwork.

Chairwoman Stone asked if Marion Transit would be able to accommodate the recommendations of the TPO.

Ms. Martinez said that it would be no problem to fulfill the recommendations of the TPO.

The board gave praises to Marion Transit and the great quality of service that they continued to provide to the community.

Item 6A. Election of new Grievance sub-committee members

Members of the Grievance Subcommittee would serve on a voluntary basis and would consist of at least five (5) voting members. Each member of the Grievance Subcommittee would serve at the discretion of the TDLCB.

Grievance Subcommittee members would meet if a grievance was brought before the committee. When a meeting of the Grievance Subcommittee was necessary, the TPO staff would schedule the meeting. Meetings would be held at the time and place as the Grievance Subcommittee may determine.

Ms. Liz said that five members were suggested but not required. The board decided to move forward with four (4) voting members.

Board volunteers included:

- **Steven Neal**
- **Jeffrey Askew**
- **Keith Fair**
- **Anissa Pieriboni**

Mr. Fair made a motion to approve the four volunteer voting members for the Grievance Committee. Ms. Pieriboni seconded and the motion passed unanimously.

Item 7. Consent Agenda

Mr. Neal made a motion to approve the Consent Agenda. Ms. Melvin seconded, and the motion passed unanimously.

Item 8. Upcoming Workshop Highlights

Mr. Balmes told the board that on January 12, 2022, the TPO kicked-off **Commitment to Zero: An Action Plan for Safer Streets in Ocala Marion**. The public could participate at any time by visiting the Commitment to Zero project page at: <https://ocalamariontpo.org/safety-plan>.

The project page contained up to date documents and meeting information, including “How to Get Involved”. This section provides an opportunity for the public to complete an online survey and place comments on an online interactive map.

Mr. Balmes asked if the board would share the project page and opportunities for public comment. The TPO and consultant team would be hosting a **Community Workshop on April 14, 2022** at the **College of Central Florida Klein Center** and a flier highlighting the event was provided to the board members. The workshop would be open to all members of the community and further details would be forthcoming. An introduction was expected to be included followed by a brief presentation with an open-house style format.

On **June 16, 2022**, the TPO had plans to conduct a specific **TDLCB Workshop** at the annually scheduled workshop meeting. The consultant team would facilitate a 45 to 60 minute session with TDLCB members to gain insights and feedback to improve transportation safety for our community.

Item 8. Comments by TDLCB Members

Mr. Neal and Mr. Askew gave praises to Marion Senior Service staff for the great service they continued to provide during staffing changes.

Mr. Neal informed the board of the Parade of Senior Services taking place at the College of Central Florida Klein Center March 18, 2022 from 10am to 2pm.

Chairwoman Stone invited the board to attend Marion County Day on March 26, 2022 from 10am to 2pm at the McPherson Governmental Campus. She also invited the board to take part in the String Project that symbolized the good deeds in the community.

Ms. Melvin informed the board of the 5th Annual Emergency Preparedness Expo for People with Disabilities to take place March 30, 2022 from 8:45am to 1pm at the Ed Croskey Recreation Center.

Mr. Askew informed the board and secretary that Ms. Daisy Diaz would be his appointed alternate.

Item 9. Comments by TPO Staff

Ms. Mitchell informed the board the meetings for the TDLCB would take place at the Marion County Growth Services Training Room for the remainder of the year.

Item 10. Comments by CTC

New Transit Director and CTC, Mr. Clayton Much introduced himself and shared with the board a brief bio.

Item 11. Public Comment

There was no public comment.

Item 12. Adjournment

Chairwoman Stone adjourned the meeting at 11:05am.

Respectfully Submitted By:

Shakayla Irby, TPO Administrative Assistant