

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



Prepared by:

Ocala Marion Transportation Planning Organization  
and Marion Transit Services

Updated: June 8, 2023



Website: [Ocalamariontpo.org](http://Ocalamariontpo.org)



## 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 8<sup>th</sup>, 2023.

6/8/23  
Date

Michelle Stone  
Commissioner Michelle Stone, TDLCB Board Chairperson

6/21/23  
Date

Robert Boh  
TPO Director

Approved by the Commission for the Transportation Disadvantaged:

\_\_\_\_\_  
Date

\_\_\_\_\_  
David Darm, Executive Director

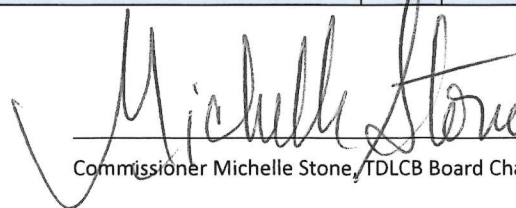
# TDLCB ROLL CALL VOTE

**TDSP Update**

**Approved Date: June 8, 2023**

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

6/8/23  
Date

  
 Commissioner Michelle Stone, TDLCB Board Chairperson



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***PUBLIC DISCLOSURE STATEMENT:***

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



## ***Introduction to this Plan***

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

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



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

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

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

## ***Section 1: Development Plan***

### ***Introduction to the Service Area***

#### ***1. Background of Transportation Disadvantaged Program***

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





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

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

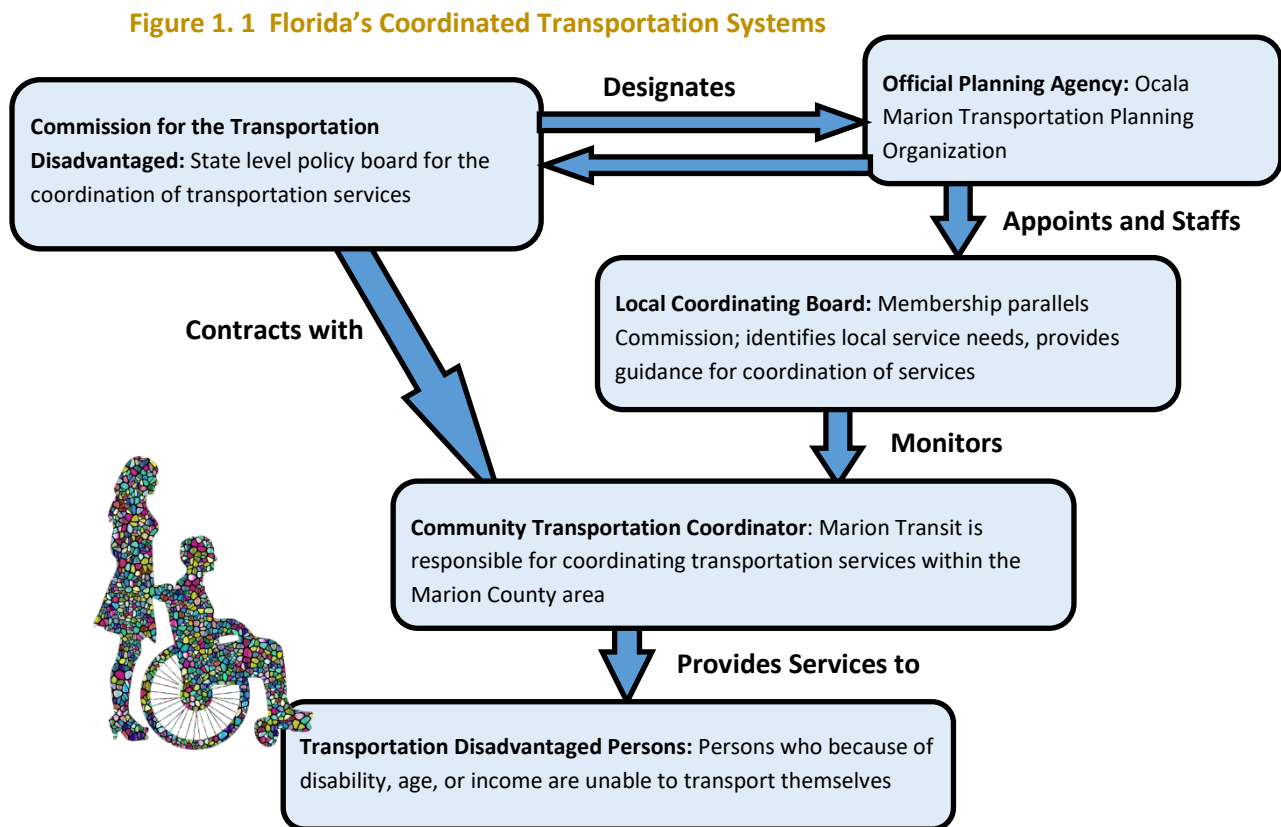
The purpose of the TD is to ensure the availability of efficient, cost-effective, and quality transportation services for the transportation disadvantaged population. Older adults who are lower income and/or have a disability are often considered transportation disadvantaged, are unable to drive due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

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



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

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



## 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

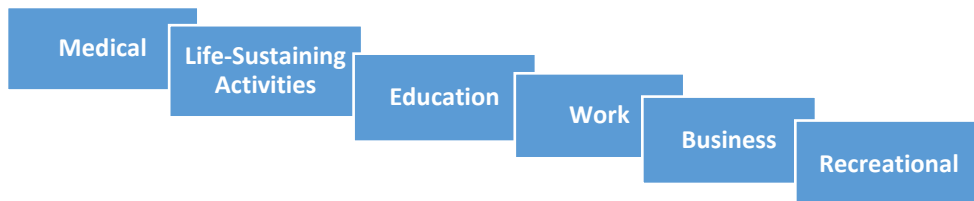
The Community Transportation Coordinator (CTC) is the agency responsible for providing coordinated transportation services for the transportation disadvantaged citizens in the county.

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 serve an area of more than 1,600 square miles. Trip priorities are established by a subcommittee of the TDLCB and the TPO.

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



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

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

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

#### **4. Summary of Other Plans and Documents**

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

#### **5. Public Participation**

Public participation is at the center of the transportation planning process, as transportation networks affect the public in many ways. Therefore, the voice of the public is essential in ensuring that the transportation decisions that are made, are efficient, and effective at serving the residents they impact. The transportation network affects economic vitality, personal and freight mobility, and local/regional priorities, it is critical for the voices of everyone to be heard and documented. The TPO is the Designated Official Planning Agency (DOPA) for the TDLCB. Public participation has always been an important priority of the TPO. The TPO works with area government entities, businesses and social groups to ensure that all plans encompass the requirements to improve county transportation systems. The TPO intends to utilize the TPO's Public Involvement Plan (PIP) in the development of any transit plans.

An ongoing opportunity for citizens to participate in the development of local transit plans and to address other transit concerns is provided at all TDLCB meetings, Committee meetings, and TPO



Board meetings. Prior to each meeting, workshop, or event, the TPO advertises in the local newspaper to allow the county citizens the opportunity to attend in person in order to participate, comment and express their concerns, approval or disapproval.

Surveys are utilized as a form of gathering information and insight from the public. The TDLCB surveys as needed 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

range from residential, multi-family, commercial, and industrial. Therefore, the relationship between land use and transportation are vitally important. TPO staff works diligently with planners and engineers at all of our local partners to ensure that the level of service on roadways are adequate to support the demand for whatever uses are adjacent to a particular corridor.

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

### 3. Population Composition

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

**Table 1. 2 Population by Race**

<i>Race</i>	<i>Population</i>	<i>Percent of Population</i>
White	274,241	71.1%
African American	46,465	12%
Two or more races	46,970	12.2%
Asian	6,708	1.7%
American Indian & Alaska Native	518	0.1%
Other race	11,013	2.9%
<b>Total</b>	<b>385,915</b>	<b>100.00%</b>
Hispanic/Latino of any race	59,704	15.5%

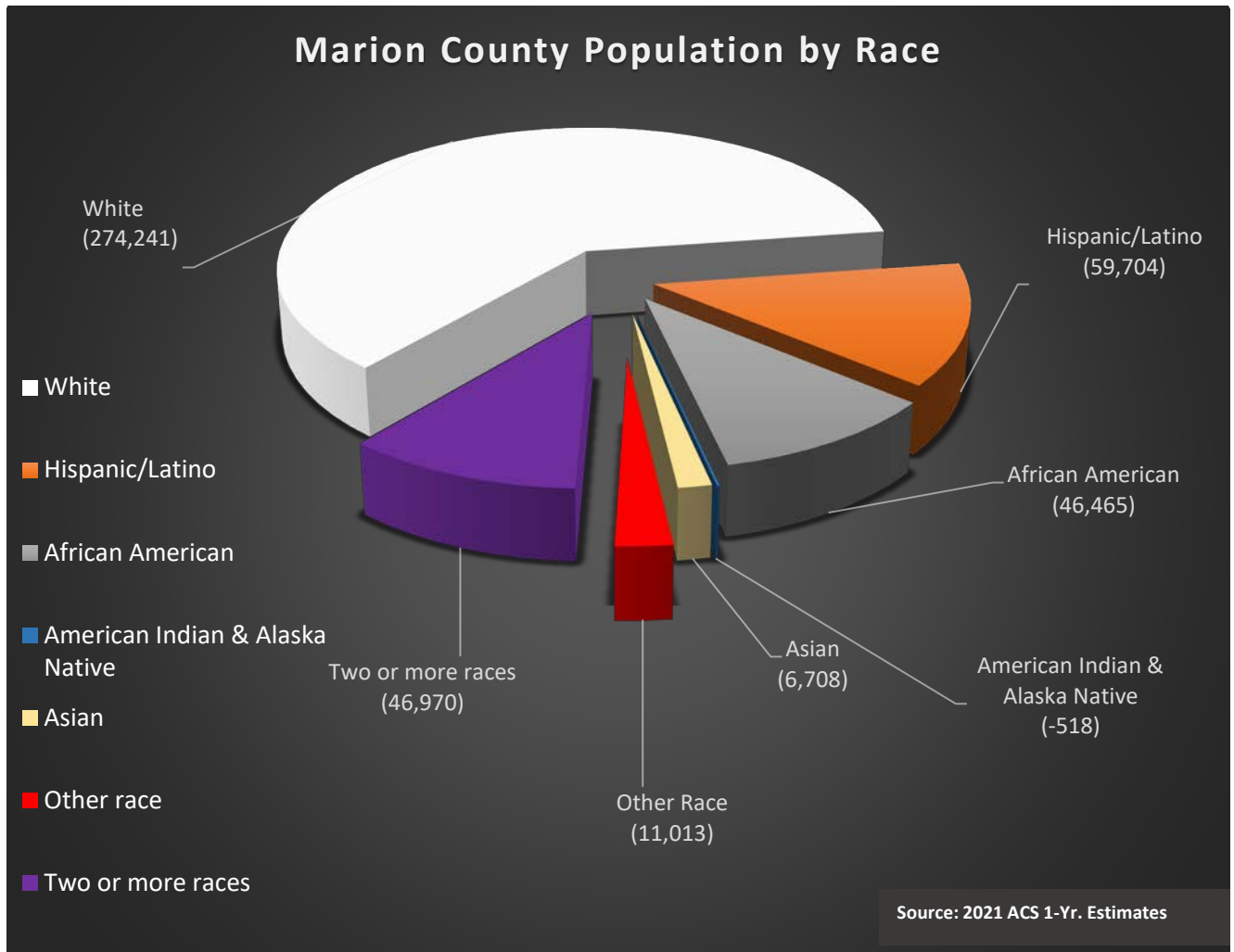
Source: ACS 2021- 1-year estimates. Items may not add to totals or compute to displayed percent due to rounding.

### 4. Cultural Descriptions

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



Figure 1.2 Population by Race



Marion County’s population increased from 375,908 persons in 2020 to 381,176 persons in 2021, an overall increase of 1.4%. It is estimated that the population will continue to increase according to the 2021 Population report by the Bureau of Economic and Business Research (BEBR) at the University of Florida. Using BEBR Florida population projections, the population of Marion County is expected to increase by 27% by 2050. **Table 1.3** provides an overview of the population projections for Marion County and Florida from 2021 to 2050. Marion County is experiencing high residential and business growth, which will require a higher demand for transit service in the future.

**Table 1.3 Marion County and Florida Population Projections**

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

Source: BEBR 2025 - 2050 Population Projections, October 2022

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

**Table 1.4 Marion County Municipalities**

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

Source: BEBR Florida Estimates of 2022Population by County and City, April 2022

### 5. Population Density

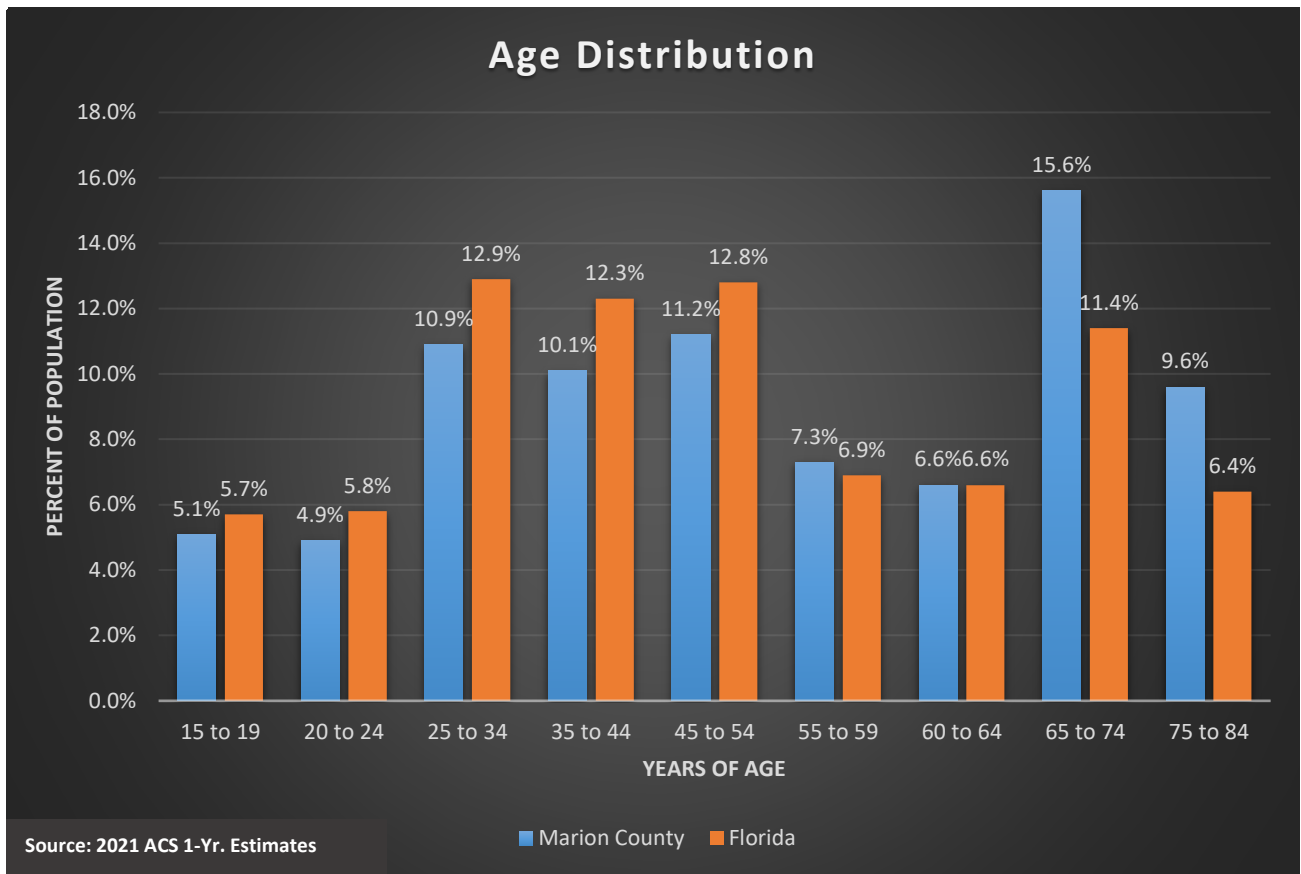
The densest areas are projected to be within the Ocala urbanized area, in southwest Marion County along SR-40 and SR-200, and in Dunnellon and Belleview. High population density also will be in The Villages and the sprawling On Top of the World development communities located off SW 99th Street Road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

### 6. Age Distribution

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



Figure 1. 3 Population by Age



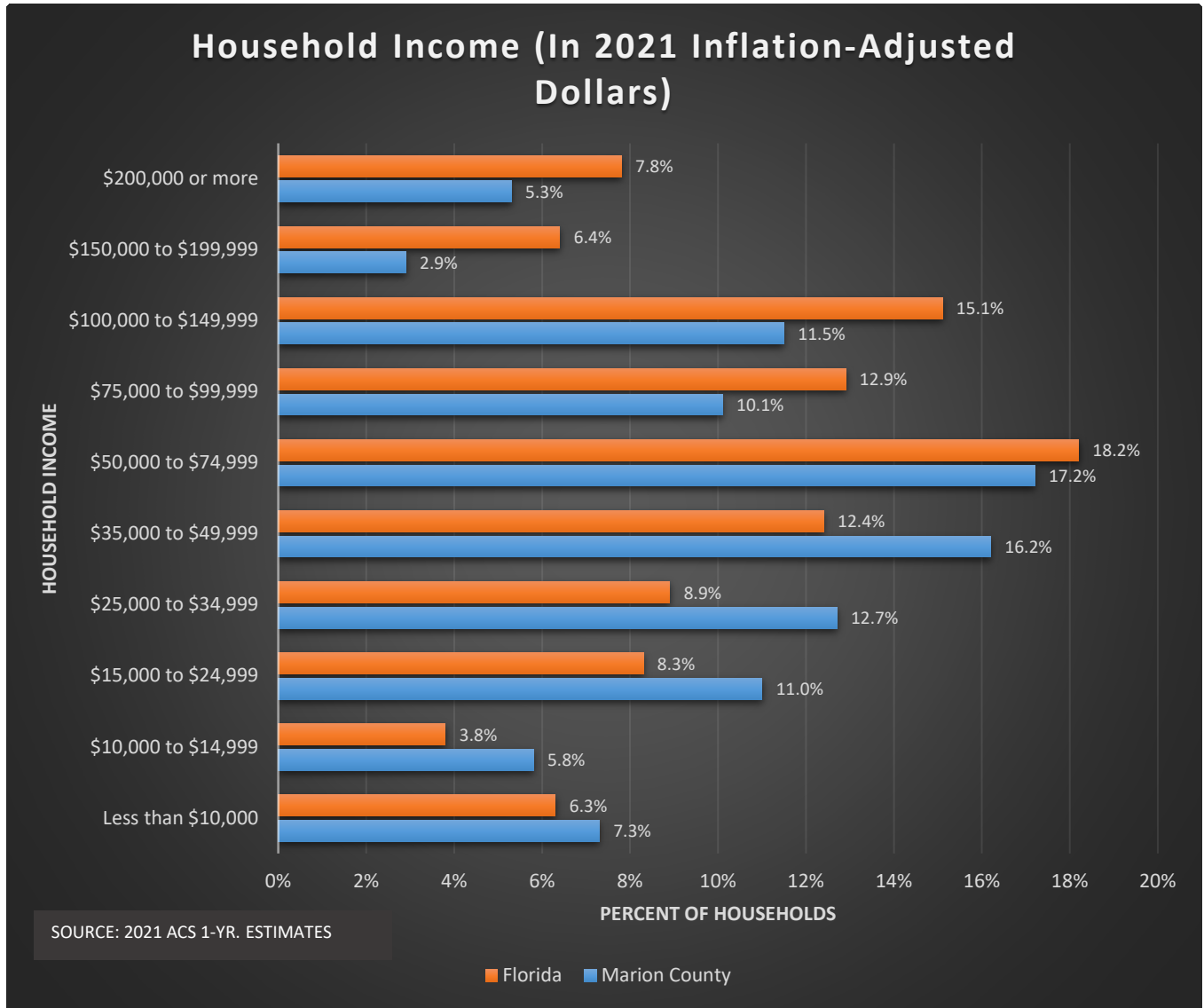
### 7. Housing and Household Income

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 2023, existing home sales increased 15.8 percent representing the largest monthly percentage increase since March 2022. The median property value in Marion County is \$274,914, and the homeownership rate is 78.5%. **Figure 1.4** compares the distribution of household income in Marion County and Florida. A larger share of Marion County residents earns an income within the five lowest income categories (below \$50,000). Additionally, a smaller share of Marion County residents earn an income slightly lower than the four highest income categories (above \$75,000) compared to the Florida state average. The Marion County median household income is approximately 26% lower than Florida, with Marion County’s median income at \$46,841 and Florida’s at \$63,062.





Figure 1.4 Household Income

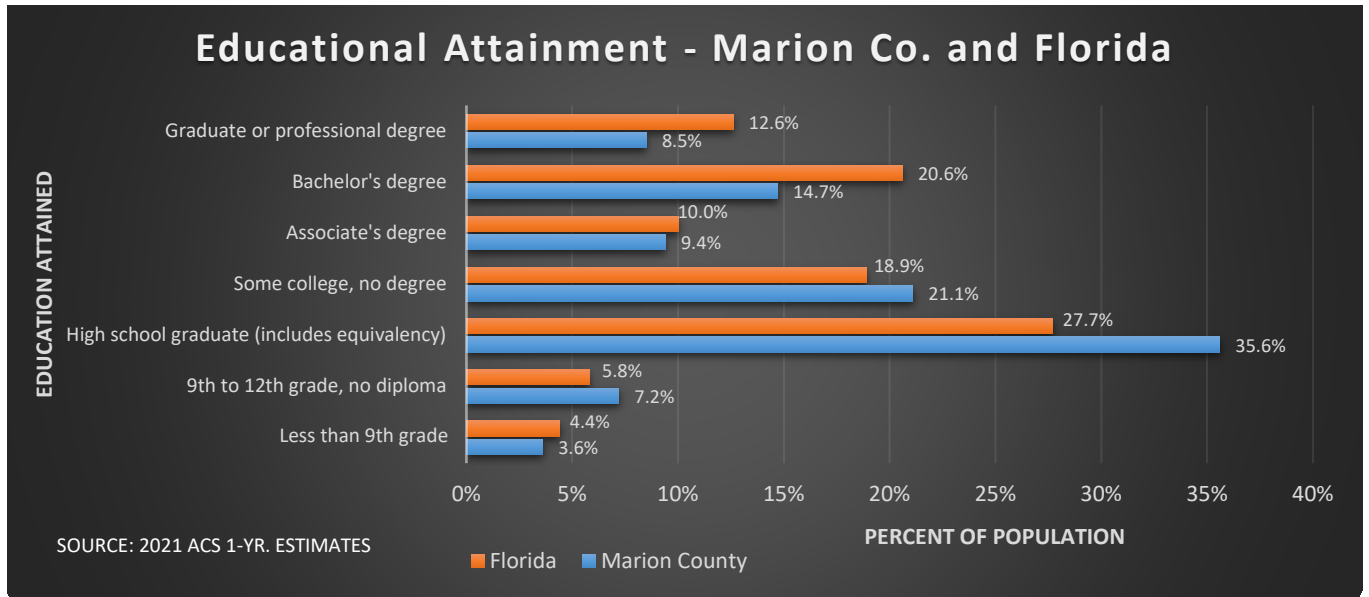


## 8. Education

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.% 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 (Not Seasonally Adjusted)

Area	Civilian Labor Force	Number Employed	Number Unemployed	Unemployment Rate
Marion County	151,640	146,830	4,810	3.2%*
Florida	11,027,000	10,746,000	281,000	2.6

\* All State of Florida estimates except unemployment rates are rounded to the nearest thousand. Items may not add to totals or compute to displayed percent due to rounding. Source: 2023 Florida Department of Economic Opportunity

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

## 10. Employment Density

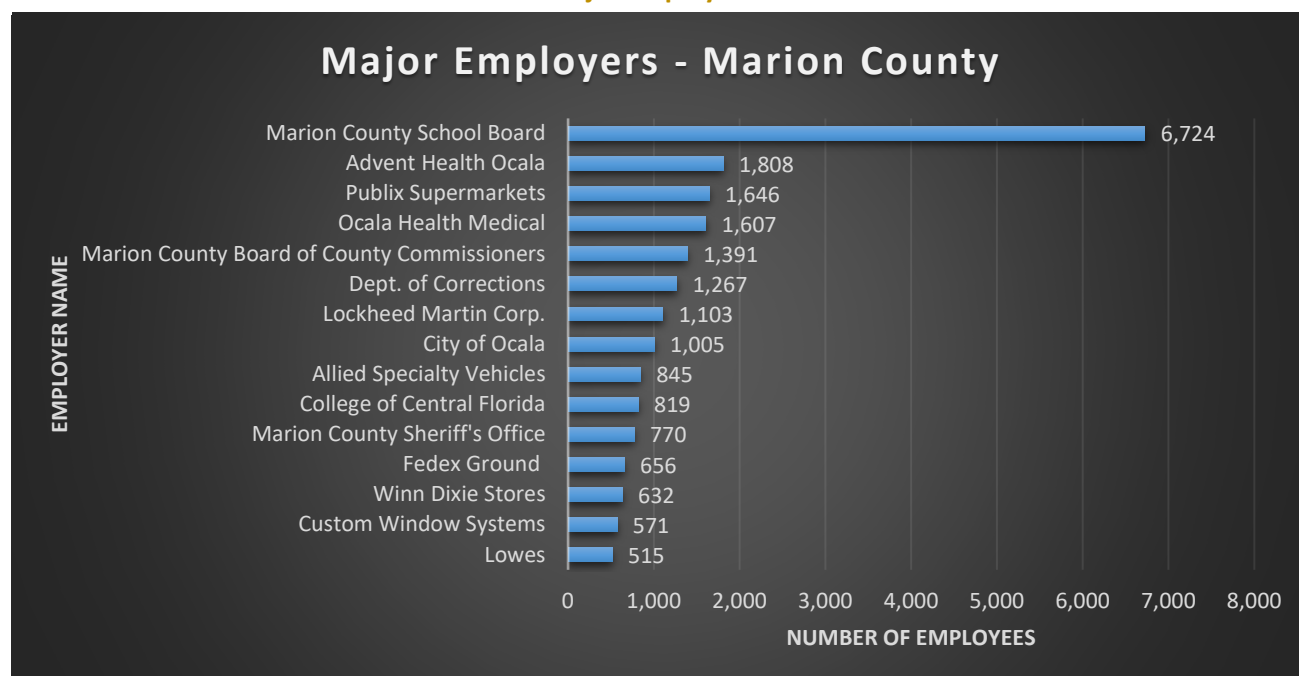
Like population density, employment density is concentrated throughout the central Ocala area. Beyond the urbanized Ocala area, pockets of high density are also found along SR 200 southwest of Ocala near the I-75 interchange, the Belleview area along US-301 southeast of Ocala, the Dunnellon area, and west of I-75 adjacent to the Ocala International Airport, where there is a cluster of transportation, distribution, and equine-focused companies. Employment density is more centralized than the general population density along the major arterials and, for the most part, employment is

projected to continue growing in the TAZs where high growth is currently observed, with some growth observed just south of Reddick along I-75.

### 11. Major Employers

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

**Table 1.6 Major Employers**



Prepared by: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.  
 Source: Employer Database 2021 Edition 2

### 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 ¾ mile of SunTran fixed route service.

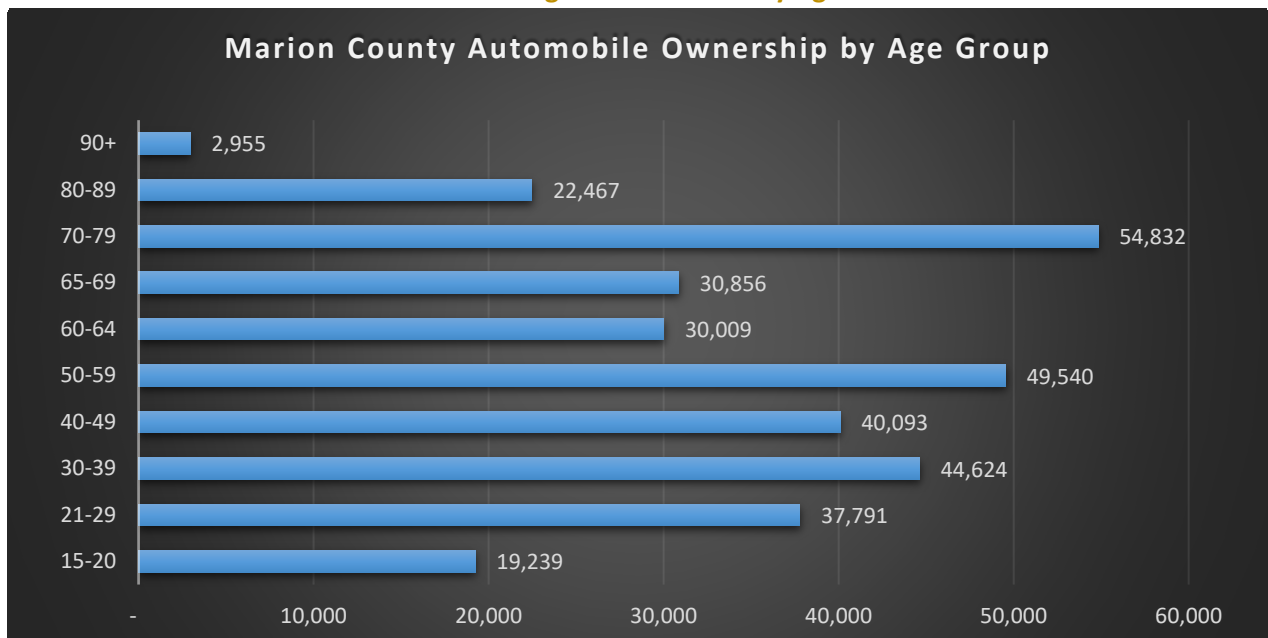


1.	Davita-East Dialysis Center	2870 SE 1st Av	Ocala
2.	Davita-Shores Dialysis Center	9310 Spring Rd	Ocala
3.	Walmart- SW SR 200	9570 SW Hwy 200	Ocala
4.	Wal-Mart-East Silver Springs Blvd.	4980 E. Silver Springs Blvd.	Ocala
5.	Davita-North Dialysis Center	2620 W. Hwy 316	Citra
6.	Davita-West Dialysis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

### 13. Household Vehicle Availability

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

**Table 1.7 Registered Vehicles by Age**



Age Group										
15-20	21-29	30-39	40-49	50-59	60-64	65-69	70-79	80-89	90+	Total
19,239	37,791	44,624	40,093	49,540	30,009	30,856	54,832	22,467	2,955	332,406

Source: Florida Department of Highway Safety and Motor Vehicles 2023 Report



## Service Analysis

### 1. Transportation Disadvantaged Population

**Table 1.8** shows a three year comparison of trips by trip purpose. MT strives to give older adults the ability to lead independent lives allowing them to age in their homes, among their peers, and in their communities. The ability to have an alternate means of transportation readily accessible gives those unable to drive and have no available family or friends, a stress free



option. Medical trips are the highest in demand. A greater emphasis is given to medical riders with education, training, and nutrition following closely behind. The potential elderly population being greater in Marion County than the State of Florida makes for high demand on paratransit services.

**Table 1. 8 Passenger Trips by Trip Purpose**

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

Source: Annual Performance Reports from 2020-2022, FCTD

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



## 2. Forecasts of Transportation Disadvantaged Population

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

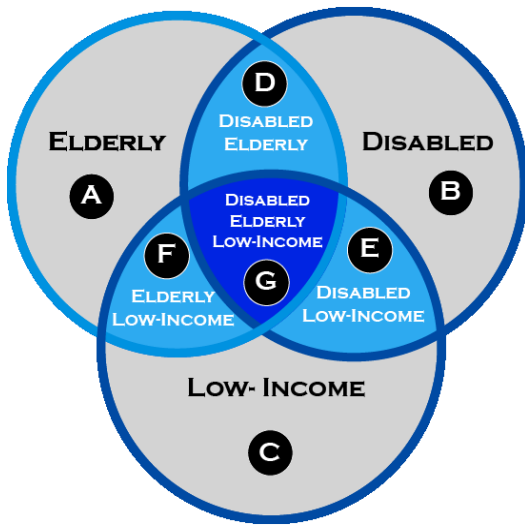


Figure 1.6 TD Population Groups

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

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

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

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

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

**Table 1.9 Forecast General TD Population**

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

**Table 1.10** presents the Critical Need TD population forecasts and includes individuals who, due to severe physical limitations or low income, are unable to transport themselves or purchase transportation and are dependent upon others to obtain access to health care, employment, education, shopping, social activities, and other life-sustaining activities. As shown, the Marion County’s 2022 Critical Need TD population is estimated to be 57,505, representing nearly 52% of the



general TD population. In 2022, the Critical Need TD population is expected to make 494 total annual trips as shown below in **Table 1.11**. The number of Critical Need trips needed is expected to increase 7.02% over the five year period.

**Table 1. 10 Critical Need Transportation Disadvantaged**

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

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

**Table 1. 11 Marion County Forecasted Annual Trip Demand, 2021-2026**

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

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

### 3. Needs Assessment

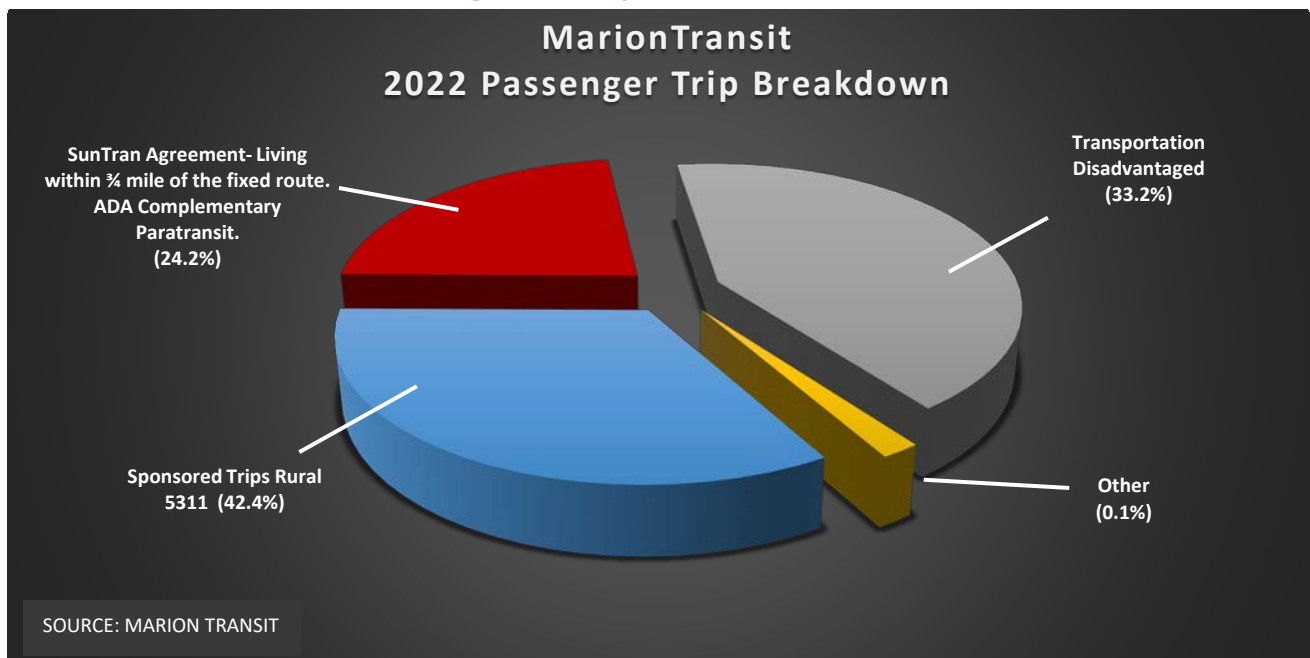
Assessment of existing and unmet needs for public transportation for low income older adults and persons with disabilities is essential. An inventory of existing transportation providers and identification of redundancies and gaps in service were used to identify unmet needs or duplications of public transportation services. It is assumed that there will be a growing need for public transit in

the higher-density areas in Marion County. Older persons may be more likely to use public transportation as the aging process begins to limit their ability or preference to drive. Marion County has a larger proportion of older adults compared to the statewide average. According to the ACS 2021 5-year estimates, more than 25% of Marion County’s population is 65 years of age or older compared to nearly 18% for Florida.

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

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

**Figure 1.7 Trip Breakdown**



#### ***4. Barriers to Coordination***

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

- High demand due to large percent of individuals who may not have access to a personal vehicle or are unable to drive themselves because of age, income status or disability.
- Providing service to the rural areas is difficult to keep costs low because of the geographic size of the service area.
- Other agencies are not allocating sufficient funds to secure transportation services for participation in their programs leaving the burden on TD funds.
- Insufficient funds to provide service for the non-sponsored trips as opposed to sponsored trips.
- Fixed route public transportation service is not available in many of the rural areas of the county, again leaving the burden on TD funds.

#### ***Goals, Objectives, and Strategies***

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

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



## 5. Marion Transit Vision Statement

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

## 6. Marion Transit Mission Statement

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

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

MT's goals, objectives and strategies are:

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

#### Objectives:

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

#### Strategies:

- a. Annually assess the applications of current riders that are able to transition to fixed route system. Continually looking for options to move to fixed routes as has been done in the Dunnellon and Marion Oaks by reviewing concentration and consistency of riders.

- b. At the time the reservationist takes the call, monitor and adjust as needed the service standards for customer service to ensure consideration of their needs.
- c. Annually update the application and registration process to meet the needs of the customer. Registration has been streamlined in anticipation of reducing call hold time, pick-up window, and reservation time.

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

### Objectives:

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

### Strategies:

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

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

### Objectives:

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

### Strategies:

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

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

##### Objectives:

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

##### Strategies:

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

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

##### Objectives:

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

##### Strategies:

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

## Implementation Plan

**Table 1. 12 Implementation Plan**

OBJECTIVE	STRATEGY	PERSON	MEASURE-STATUS	2023 STATUS UPDATE
<b>GOAL 1- To provide the best possible transportation service to those in the service area.</b>				
Continue to monitor riders to transition to fixed-route services	Annually assess the applications of current riders that are able to transition to fixed route system	CTC TDLCB	CTC reports to TDLCB Ongoing	Looking to incorporate more fixed routes where possible- Consultant has been retained to research areas with TD needs.
Carefully match the best possible transit solution for every particular need	When the reservationist takes the call, monitor/adjust as needed the service standards to ensure consideration of their needs	CTC	CTC to monitor -Daily,	Registration process has been streamlined and simplified - Ongoing
Make sure the application-registration process is simplified but effective	Annually update the application and registration process to meet the needs of the customer	CTC TDLCB	CTC to monitor minimum – Annually	Process has been streamlined and updated.
<b>GOAL 2. Educate the riders and general public on services provided.</b>				
Participate in community events to educate	Continue to make presentations and participate in speaking engagements in the community at minimum	CTC	Number of presentations -	Ongoing – presentations have been made to TPO Board, and City of Dunnellon.
Maintain a presence on the internet to improve public image	Maintain website and social media platforms up-to-date for public image	CTC	Customer input	The website is updated regularly - Ongoing
Respond to complaints immediately to improve public perception and identify problems	Immediate notification of complaint to Grievance Committee for resolution and annually update grievance procedures	CTC TDLCB	CTC to report to TDLCB – Quarterly	Immediate attention is given and followed according to procedures-Ongoing
<b>GOAL 3. Remain flexible and open-minded in terms of routes and riders’ needs.</b>				
Ensure that requests received are considered as feasible changes and/or corrections	Maintain effective means of communication where customers can provide input through the TDLCB meetings, website and social media	CTC TDLCB	Maintain comment cards on buses/website	Comment cards have been placed on buses and surveys are taken for input - Ongoing

Best practices in terms of less call hold time, pick-up window, and reservation time	Work with customers at the time they call in a reservation to attain their buy-in for no shows and cancellations	CTC	CTC to monitor – Daily-	Analysis in progress for new format and/or new technology - Ongoing
Continued assessment of routes for more efficient service	Look at and update the routes at a minimum annually	CTC	CTC to monitor cost efficiency -Annually	System is analyzed regularly in an effort to find new possible Deviated Routes. Consultant’s research will assist in identifying new deviated routes in the very near future.– Ongoing
<b>GOAL 4. Provide the transportation services with safety at the forefront</b>				
Adhere to the System Safety Program Plan and meet all requirements	Arrange to meet on a quarterly basis in an effort to build rapport	CTC	CTC to monitor documentation – Daily	Program is monitored and is strictly adhered to - Ongoing
All vehicles to receive regularly scheduled maintenance and daily inspections	Share plans and routes with partners quarterly at the meeting in order to build mutual trust	CTC	CTC to monitor documentation – Daily	Maintenance schedule is followed and strictly adhered to - Ongoing
Maintain a process for sanitizing and cleaning all vehicles every day	Maintain communication quarterly to close any gaps in service and ways to improve cost and efficiency	CTC	CTC to monitor customer input -Daily	All buses are sanitized between riders and at the end of the day - Ongoing
<b>GOAL 5. Maintain consistent coordination to provide effective service to public and private partners</b>				
Build a rapport with both public/private partners to better understand their	Arrange to meet on a quarterly basis in an effort to build rapport		CTC to monitor	Public outreach and presentations assist with a better rapport - Ongoing
Work to establish a mutual trust with partners	Share plans and routes with partners quarterly at the meeting in order to build mutual trust		CTC report to TDLCB-Qtrly	Ongoing
Coordinate resources to better serve and maintain costs down with efficient service	Maintain communication quarterly to close any gaps in service and ways to improve cost and efficiency		CTC to monitor	Continual monitoring and assessing new innovative ways to hold costs down - Ongoing

## Section 2: Service Plan

### Operations Element

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

#### 1. Types, Hours and Days of Service

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

TD Trip requests are currently prioritized in the following order:

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

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

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





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

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

## **2. Accessing Service**

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

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

## **3. Trip Eligibility**

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

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

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

#### 4. Trip Prioritization

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

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

#### 5. Other Accessibility Processes/Procedures

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

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

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

Oxygen bottles are permitted as long as they are secured to the wheelchair or an oxygen tree on the bus. Additionally, since Marion County is very rural there are some roads and driveways that a bus cannot drive down due to overhanging tree branches, loose sandy unpaved roads or driveways and other obstacles; in those cases, the potential rider may be required to meet the bus at a predetermined pick-up location. Riders may bring items onboard the bus, but items must be placed on the rider's lap or under their seat. Drivers are not required to handle personal property and are

discouraged from doing so. Therefore, riders should be able to manage their own belongings. The exception to this policy is for shoppers. Riders are permitted up to three (3) grocery bags and drivers may assist them with proper and safe storage in the bus.

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

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

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

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

Bus drivers utilize their onboard tablet to document trips i.e. locations, pick-up times, fare collection, etc. This information is collected by the RouteMatch software system. Driver’s also use a paper manifest with duplicate information from their tablet where driver’s take notes and document unusual occurrences for review as needed for trip improvements.



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

### 6. *Transportation Operators and Coordination Contractors*

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

**Table 2.1 Coordination Contractors**

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

### 7. *Public Transit Utilization*

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

**Note:** All requests for MT transportation services with trip origins and destinations within the 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.

### 8. *School Bus Utilization*

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

## **9. Vehicle Inventory**

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

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

## **10. System Safety Program (SSPP) Certification**

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

## **11. Inter-County Services**

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

## **12. Emergency Preparedness and Response**

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

## **13. Marketing**

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

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

#### 14. Service Standards

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

**Table 2.2: CTC Service Standards**

Service Standard	Policy/Measure
Accidents	MT Preventable Accident Standards are <1 accident per 100,000 miles.
Advance Reservations	Trips must be scheduled a minimum of 72 hours prior to date of travel and at a maximum of two weeks in advance of date of travel, with exception of ADA Complementary Paratransit – by p.m. the day before travel.
Call Hold Time	MT goal – average inbound telephone hold time no longer than 2 minutes.
Child Restraint Devices	Children under the age of 5 or weighing less than 40 pounds must be in appropriate child seat. Child seat may be furnished by MT if requested during reservation or may be furnished by rider. Driver is responsible for properly securing the child seat and child.
Driver Criminal Background Screening	Criminal check is facilitated by Human Resources and must pass a Level B check, completed prior to hire.
Escorts	Passengers may have one escort for assistance, if medically necessary. Escorts must be at least 16 years of age. Dependent children may be transported if medical appointment if for the child. Escorts are also expected to pay the rider fare unless the rider has a fare waiver.
Fare Collection	All riders are expected to pay fare at time they receive transportation services. Riders must have exact change; drivers do not carry cash. Bus tickets are also available. Fare as of June 2020 is \$2.00. Note: Fare waivers are available for riders who certify limited income levels. Call MT for details.
Passenger No-Shows	Passengers who make reservations and are not available for pickup within 5 minutes after bus arrives are considered “no-show”. After two no-shows, transportation service may have sanctions up to suspension if there is a pattern and practice is determined after review.
Pick-Up Window	Riders must be ready for pickup 2 hours prior to appointment time. Note: Rural riders may be required a greater time due to distance.
On-Time Performance	MT On-Time Performance Standards are 95% or greater of trips to scheduled appointment time are on time.
Out-of-Service Area Trips	Out-of-service area trips provided when determined locally and approved by LCB, except when local ordinance prohibit such trips.
Oxygen Transport	Oxygen bottles may be taken if securely attached to wheelchair, tree on bus or in small bottle carried by rider.
Rider Personal Property	Riders may carry personal property on buses if it can be placed on lap or under seat. Drivers may not handle personal property. Exception is shopping trips; customer may carry no more than 3 grocery bags, and driver may assist to ensure bags are safely stowed on the bus.
Road calls	No more than one road call per 10,000 miles.
Service Animals	Service Animals are allowed to accompany riders in accordance with ADA; MT must be notified when reservation is made that you will have a service animal traveling with you.



Training	All transportation safety-sensitive employees required to complete 60 minutes of drug and alcohol training annually. All new drivers complete a minimum of 80 hours of Field Operator Training with a Field Training Operator who covers all the required training for new personnel before going solo. This training includes both book/video and hands on training with a trainer. All drivers complete mandatory training every three years at least once. Training includes; customer satisfaction, wheelchair restraints, loading/unloading, defensive driving, distracted driving and other necessary training. All training is either classroom, online, observing, or interaction with a trainer.
Wheelchair	Drivers cannot assist wheelchairs over more than 1 step or curb. The minimum clear width for single wheelchair passage shall be 32 inches (815 mm) at a point for a maximum length of 24 inches and 36 inches (915 mm) continuously. Lift capacity (chair & rider combined) may not exceed the lift maximum limits usually 800 or 1000 pounds depending on the bus.
Drug & Alcohol	MT requires each driver be drug screened prior to hiring. MT also has a zero-tolerance policy for drug abuse and follow the recommended Federal Transportation Authority (FTA) policy. This policy includes random drug and alcohol testing once on board.

**15. Local Complaint and Grievance Procedures/Processes**

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

**Section 3: Quality Assurance**

**CTC Monitoring and Evaluation Process for Operators and Coordination Contractors**

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



**1. CTC Evaluation**

In accordance with the FCTD CTC Evaluation Workbook, the TDLCB along with the TPO conducts an annual evaluation of Marion County’s CTC to evaluate the performance



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

## 2. Cost/Revenue Allocation and Rate Structure Justification

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

**Table 3.1: FCTD Calculated Rates**

FCTD Calculated Rates	
<i>Ambulatory (and Escort)</i>	Trip Charge: \$ 32.69
<i>Wheelchair</i>	Trip Charge: \$ 56.04
<i>Stretcher (Contracted)*</i>	* MT does not offer stretcher services

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

**Table 3.2: SunTran Fare Structure/MT Fare Structure**

FARE DESCRIPTION	SUNTRAN ONE-WAY FARE	SUNTRAN PASS FARE - MONTHLY
<b>Adult Regular Fare</b>	\$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	
<b>MT'S FARE DESCRIPTION</b>	<b>MT FARE AMOUNT</b>	
MT ONE-WAY FARES	\$2.00	



## Appendix A Summary Review of Other Plans

### Local Government Comprehensive Plans

#### City of Ocala

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

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

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

#### Marion County

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

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

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

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

## Regional Plans

### Ocala 2035 Vision

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

### Transit Development Plan'

#### SunTran

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

#### TDSP

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

## **Commission for Transportation Disadvantaged Plans**

### **Annual Performance Report (2022- 2023)**

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

### **Annual Operations Report for Marion Transit**

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

## **Ocala Marion County Transportation Planning Organization (TPO) Plans**

### **2045 Long-Range Transportation Plan (LRTP)**

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

### **Transportation Improvement Program (TIP) FY 2024 to 2028**

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





## Summary

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

Appendix B: MT's Vehicle Inventory

**MARION TRANSIT FLEET INVENTORY**

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

Revised 4/19/2023



**Inserted**

# GRIEVANCE PROCEDURES

## OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

### **Article 1: Preamble**

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

### **Article II: Name and Purpose**

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

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

### **Article III: Definitions**

1. Community Transportation Coordinator (CTC): An entity and or person appointed to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.
2. A Grievance is defined as any ongoing service problem that interferes with accessing a major life activity, such as work, healthcare, employment, education, shopping, social activities, or other life sustaining activities.
3. Service Complaint: Any routine incidents and/or dissatisfaction that occur, are reported to the driver, dispatcher, or other individuals involved with the daily operations, and are

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

- a. Late trips (late pickup, late drop off, and/or late returns)
  - b. No-show by Transportation Operator
  - c. No-show by client
  - d. Client Behavior
  - e. Driver Behavior
  - f. Passenger discomfort
  - g. Refusal of service to client for any reason
4. Formal Grievances: A written complaint to document any concerns or an unresolved service complaint regarding the operation or administration of TD services by the Transportation Operator, Community Transportation Coordinator, agencies, or Local Coordinating Board. Formal Grievances may include, but are not limited to:
- a. Chronic or unresolved service complaints
  - b. Violation of specific laws governing the provision of Transportation Disadvantaged Services (i.e., Chapter 427 of Florida Statutes, Chapter 41-2 of Florida Administrative Code and accompanying documents, Sunshine Law and/or ADA violations)
  - c. Contract disputes (Agencies/Operators)
  - d. Bidding disputes
  - e. Agency compliance
  - f. Conflicts of interest
  - g. Supplanting of funds
  - h. Billing and/or accounting procedure violation
  - i. Denials of applications for paratransit services

#### **Article IV: Membership**

1. Members of the Grievance Subcommittee shall serve on a voluntary basis and shall consist of at least five (5) voting members.
2. Each member of the Grievance Subcommittee shall serve at the discretion of the TDLCB.
3. The CTC shall not serve on the Grievance Subcommittee.
4. Grievance Subcommittee members will meet if a grievance is brought before the committee.

5. When a meeting of the Grievance Subcommittee is necessary, staff to the TPO shall schedule the meeting. Meetings shall be held at the time and place as the Grievance Subcommittee may determine.
6. The Members shall serve a term of one year, with allowances for multiple terms.
7. The Grievance Subcommittee shall elect a Chairperson and Vice-Chairperson.
8. A simple majority shall be present in any official action.
9. No voting member will have a vote on an issue that is deemed a conflict of interest.

#### **Article V: Filing Complaints and Grievances – STEP 1**

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

All written complaints can be sent to:

Marion Senior Services  
1101 SW 20<sup>th</sup> Court  
Ocala, Florida 34471

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

11. The CTC must post the contact person and telephone number for access to information regarding reporting service complaints or filing a formal grievance in each of their vehicles in plain view of riders.
12. The CTC will have ten (10) working days from the date of notification of the complaint to address or investigate the problem.



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**

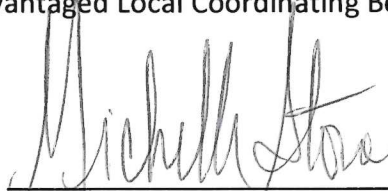
The Transportation Disadvantaged Local Coordinating Board Grievance Procedures may be amended by a two-thirds (2/3) vote of members present, if a quorum exists, and all Members have been notified of proposed changes at least seven (7) working days in advance of the meeting.

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 8<sup>th</sup> day of December 2022.



Commissioner Michelle Stone, TLDCB Chairperson



Robert Balmes, TPO Director

## COMPLAINT FORM

### OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

Complainant(s) Name:	Complainant(s) Address:
Complainant(s) Phone Number:	Complainant(s) Email:
Complainant(s) Representative's Name, Address, Phone Number and Relationship (e.g. friend, attorney, parent, etc.):	
Names of the Individual(s) Whom You Allege a Complaint Against (If Known):	
Name and Address of Agency, Institution, or Department Whom You Allege a Complaint Against:	

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

Please list the name(s) and phone number(s) of any person, if known, that can be contacted for additional information to support or clarify your allegation(s):
Please explain as clearly as possible HOW, WHY, WHEN and WHERE is your alleged complaint. Include as much information as possible. Additional pages may be attached if needed.
Please indicate what would be an acceptable resolution:

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

Please submit to: Address in the step process

Additional Pages are attached.

# TDLCB COMPLAINT TRACKING FORM

Name of Complainant: \_\_\_\_\_

**COMPLAINT TO THE CTC –STEP 1**

File Number \_\_\_\_\_

Date of 1<sup>st</sup>. Complaint: \_\_\_\_\_

Date of 1<sup>st</sup>. Resolution: \_\_\_\_\_

Action Taken (including date of letter): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**APPEAL = COMPLAINT TO THE TDLCB GRIEVANCE SUBCOMMITTEE – STEP 2**

Date of 2<sup>nd</sup> Complaint: \_\_\_\_\_

Date of 2<sup>nd</sup> Resolution: \_\_\_\_\_

Date of Subcommittee Hearing: \_\_\_\_\_

Action Taken (including date of letter): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**APPEAL = COMPLAINT TO THE TDLCB – STEP 3**

Date of 3<sup>rd</sup> Complaint: \_\_\_\_\_

Date of 3<sup>rd</sup> Resolution: \_\_\_\_\_

Date of TDLCB Hearing: \_\_\_\_\_

Action Taken (including date of letter): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

Date sent: \_\_\_\_\_



Appendix D: System Safety Program Plan Certification

**Inserted**



*Florida Department of Transportation*

RON DESANTIS  
GOVERNOR

420 W. Landstreet  
Orlando, Florida 32824

KEVIN J. THIBAUT, P.E.  
SECRETARY

May 14, 2021

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

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

Dear Mr. Wilder:

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

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

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

Sincerely,

DocuSigned by:  
  
1053F40140014E0...

Diane Poitras  
Transit Programs Administrator  
District Five

DP/bg

# MARION TRANSIT

A DIVISION OF



## BUS TRANSIT SYSTEM SAFETY PROGRAM PLAN (SSPP)



Adopted: July 2016

Latest Review / Update: September 21, 2022

## System Safety Program Plan (SSPP)

### SSPP Document Activity Log

Date	Activity (Review/Update/Addendum/ Adoption/Distribution)	Concerned Person (Signature)	Remarks
7/29/2016	Review/Update	Tom Wilder	Updated document
5/25/2017	Update & Annual Review	Tom Wilder	Updated document
10/12/2017	Review/Update	Tom Wilder	Added background check level. Added refresher course topic syllabus.
12/1/2017	Review/Update	Tom Wilder	Added to Accident/Incident reporting to FDOT within 24 hours.
5/30/2018	Routine REVIEW/ UPDATE	Tom Wilder	Added MT Policies to Appendix K
10/01/2019	Routine Review	Tom Wilder	No Changes
7/08/2020	Review/Update	Tom Wilder	New flow chart, duties updated, removed quarterly meeting (due to COVID 19) requirement. Changed MSS to Marion Transit.
3/10/2021	Review/Update	Tom Wilder	Updated accident procedures (Appendix K-1.0-5.0)
5/1/2022	Review/Update	Clayton Murch	New flow chart, duties updated, positions updated, updated director information, restored quarterly safety meetings (was suspended due to COVID 19)

## **SSPP Document Activity Log (Continued)**

<b>Date</b>	<b>Activity (Review/Update/Addendum/ Adoption/Distribution)</b>	<b>Concerned Person (Signature)</b>	<b>Remarks</b>
7/21/2022	Review/Update	Clayton Murch	Updated MRO information in the Substance Abuse Policy. Updated agency's contact information.
9/21/2022	Review/Update	Clayton Murch	Updated FDOT address. Updated Client intake process and forms to include 3-yr eligibility review

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**5.0 ORGANIZATION STRUCTURE AND SYSTEM SAFETY RESPONSIBILITIES** .....

    5.1 Your Community Transit Organization Chart.....

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**11.0 SAFETY DATA ACQUISITION & ANALYSIS**.....

**12.0 HAZARD IDENTIFICATION AND RESOLUTION** .....

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**18.0 CERTIFICATION** .....

**19.0 APPENDICES**.....

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- Appendix B: Substance Abuse Policy
- Appendix C: Maintenance Plan
- Appendix D: Preventative Maintenance Guidelines
- Appendix E: Medical Examination Form 725-030-011
- Appendix F: Radio Operating Procedures
- Appendix G: Internal Safety Audit Checklist
- Appendix H: Bus Transit System Annual Safety and Security Certification Form
- Appendix I: SSPP Addendums (placeholder for future updates)
- Appendix J: Text Formatting Palette
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  - a. Operations Staff Accident Procedures / Responsibilities
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  - q. Rider Disciplinary- Suspension Policy
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  - u. Bus Road Call & Wrecker Procedure
  - v. Disadvantaged Business Enterprise (DBE) Policy/Procedure
  - w. About our Clients
  - x. Bus Video Review Policy
  - y. Asset Management Plan
  - z. Client Injury Report
  - aa. Supervisor Incident Review



## **1.0 Management Safety Commitment and Policy Statement**

Marion Transit is committed to providing safe, secure, clean, reliable, and efficient transportation services to the patrons. This policy statement serves to express management's commitment to and involvement in providing and maintaining a safe and secure transit system.

The mission of Marion Transit *"Is to provide Public Transportation that offers riders a high-quality safe, reliable, and efficient paratransit experience"*.

Section 341.041, Florida Statutes (F.S.); Section 334.044(2), F.S.; and Section 341.061(2)(a), F.S., requires the establishment of minimum equipment and operational safety standards for all governmentally owned bus transit systems; privately owned or operated bus transit systems operating in this state which are financed wholly or partly by state funds; all bus transit systems created pursuant to Chapter 427, F.S.; and all privately owned or operated bus transit systems under contract with any of the aforementioned systems. Safety standards for bus transit systems are provided by Rule Chapter 14-90, Florida Administrative Code (F.A.C.), hereinafter referred to as Florida Administrative Code Rule 14-90. Bus transit systems are required to develop, adopt, and comply with a System Safety Program Plan (SSPP), which meets or exceeds, the established safety standards set forth in Florida Administrative Code Rule 14-90.

In the interest of safety and security, and in order to comply with the statutory requirements, Marion Transit has developed and adopted this System Safety Program Plan (SSPP) that complies with established safety standards set forth in Florida Administrative Code Rule 14-90. The SSPP is intended to document all policies, functions, responsibilities, etc. of the agency necessary to achieve a high degree of system safety and applies to all areas of the transportation system, including procurement, administration, operations, maintenance, etc.

Marion Transit management is responsible for maintaining a coordinated safety system in order to identify and prevent unsafe acts and conditions that present a potential danger or threat to public safety. Management has responsibility for maintaining and implementing the SSPP and complying with the policies, procedures, and standards included in this document. All departments, personnel, and contract service operators are charged with the responsibility of adhering to this SSPP. Any violation of safety and security practices is subject to appropriate administrative action. Management is ultimately responsible for enforcing the SSPP and maintaining a safe and secure system.

This plan was reviewed by the Marion Senior Services, Inc. Executive Board on 11/9/2022.

\_\_\_\_\_  
Jennifer Martinez, Executive Director  
Marion Senior Services, Inc.  
Date: 11/9/2022

Attest: \_\_\_\_\_  
Clayton Murch, Transportation Director  
Marion Transit

# 2.0 System Safety Goals and SSPP

Marion Transit has established the following goals for the system safety program:

- Achieve a high standard of system safety in all areas of the transportation system
- Develop and implement a comprehensive, systematic, and coordinated program to identify, assess, and control all safety hazards
- Develop and maintain a high level of safety awareness among all employees through pre-employment screening and systematic training and testing programs
- Establish safety standards for contract service operators and ensure compliance
- Ensure that system safety is integrated with daily operations through operational standards and procedures, vehicle maintenance, inspections, record keeping, audits, quality assurance and quality control
- Ensure that all vehicles and equipment operated by the agency meet established safety standards
- Maintain a formal process for event investigation, emergency preparedness and response, and handling security threats
- Ensure a drug free workplace
- Comply with all regulatory requirements.

In addition:

- High Passenger Satisfaction
- On-time performance
- Minimized Passenger Dwell (wait) time
- Passenger Safety
- Deliver Excellent Customer Service
- Safe driving

The purpose of this SSPP document is to:

- Establish and document system safety policies and procedures in compliance with Florida Administrative Code Rule 14-90
- Establish a coordinated and documented process to implement the SSPP during the operations of the system in order to achieve system safety goals
- Identify and delegate safety functions and responsibilities to units and personnel within the organization and contract service operators
- Facilitate internal and external safety audits to identify, track, and resolve safety program deficiencies.

## **System Safety Program Plan (SSPP)**

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In accordance with Florida Administrative Code Rule 14-90 (included in Appendix A), the SSPP addresses the following safety elements and requirements:

- Safety policies and responsibilities
- Vehicle and equipment standards and procurement criteria
- Operational standards and procedures
- Bus driver and employee selection
- Driving requirements
- Bus driver and employee training
- Vehicle maintenance
- Investigations of events
- Hazard identification and resolution
- Equipment for transporting wheelchairs
- Safety data acquisition and analysis
- Wireless communication plan and procedure
- Safety standards for private contract bus transit system(s) that provide(s) continuous or recurring transportation services for compensation as a result of a contractual agreement with Marion Transit.

### **2.1 SSPP Control and Update Procedures**

Marion Transit management will review the SSPP annually, update the document as necessary, and implement the changes within a timeframe that will allow the agency to timely submit the annual self-certification of compliance to the Florida Department of Transportation (FDOT). The annual review of the SSPP will be conducted as part of an internal audit beginning October 1st of each calendar year and ending prior to the end of the same calendar year. Necessary updates outside the annual update window will be handled as SSPP addendums which will be incorporated in the body of the SSPP during subsequent annual update.

All proposed changes will be documented by the management as proposed SSPP addendums and distributed to all affected parties including employees and contract service operators. All parties must comment within two weeks of the issuance of the proposed changes unless otherwise specified. Following the approval of any modifications to the SSPP by the Executive Director, management staff will distribute the SSPP addendum to all affected parties, with a cover memo highlighting the changes. All parties receiving the updates are required to sign for its receipt and acknowledge their responsibility in implementing the changes. Management will document and retain the proof of SSPP receipt by all employees during initial hire and subsequent updates. Agency's governing board will adopt the SSPP annually following the internal audit and a copy of the adopted SSPP will be distributed to all employees and contract service providers. A copy of the adopted SSPP will also be forwarded to the FDOT District Office. Document reviews of the SSPP by the local agency, any subsequent updates, addendums, adoption, and distribution activities will be documented in the SSPP Document Activity Log included in this document.

### 3.0 Hazard and Security Plan (HSP)

In accordance with Florida Administrative Code Rule 14-90, Marion Transit has adopted, and implemented a Hazard and Security Plan (HSP), often referred to as the Security Program Plan (SPP), which covers the hazard and security portion of the system safety program. The HSP contains information about prevention, mitigation, preparedness, response, recovery, and associated organizational responsibilities. The purpose of the HSP/SPP is to specify:

- Actions required of employees on a daily, weekly, monthly, and annual basis to prevent or reduce the likelihood of security and emergency events from occurring, and to mitigate the effects of those events that do occur
- Measures needed to prepare for incidents occurring within the transportation system and in the surrounding community
- Agency procedures that should be established to respond to security hazards and emergencies that affect the system and its customers
- Formal processes to recover from routine security events or major emergencies
- Roles, responsibilities, and interagency coordination required to respond to a disaster or security event.

The HSP/SPP addresses the following hazard and security elements and requirements:

- Security policies, goals, and objectives
- Organization, roles, and responsibilities
- Emergency management processes and procedures for mitigation, preparedness, response, and recovery
- Procedures for investigation of events described under subsection 14-90.004(5), F.A.C.
- Procedures for the establishment of interfaces with emergency response organizations
- Procedures for interagency coordination with local law enforcement jurisdictions
- Employee security and threat awareness training programs
- Security data acquisition and analysis
- Emergency preparedness drills and exercises
- Requirements for private contract transit providers that engage in continuous or recurring transportation services for compensation as a result of a contractual agreement with the bus transit system.
- Procedures for SPP maintenance and distribution.

## **System Safety Program Plan (SSPP)**

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The HSP/SPP has been adopted separately from the SSPP. Bus transit systems are prohibited by Section 119.071(3)(2), Florida Statutes, from publicly disclosing the SPP, as applicable under any circumstance. The document is maintained in a secure location by the management and access to the document is restricted to select agency personnel and appropriate FDOT personnel exercising oversight in this area. On-site access to the HSP/SPP is granted to regulatory authorities (FDOT, FTA, etc.) on as-needed basis. Select portions of the HSP/SPP may be shared with employees depending on their job responsibilities.

*Any additional text for Chapter 3.0 must be inserted above this point for formatting/page numbering purposes.*

## **4.0 System Description**

### **History:**

Service on Wheels, later to become Marion County Senior Services, came into being in August 1973, with an idea and a \$100.00 check from Blessed trinity Church. The idea was to provide hot noontime meals for some of Ocala's most needy.

The First Presbyterian Church had established a volunteer program called VISION-"Volunteers in Service in our Neighborhood". Since VISION recruited volunteers, and Service on Wheels needed volunteers to deliver meals, the two worked well together. Karen May, Director of Vision, supervised both programs and served as the first Service on wheels Board President. Diane Morthland was the part-time M.O.W. Director from 1973-1976. Karen May, Linda Foy and other volunteers wrote letters to local organizations for financial help, recruited some volunteers, found someone to prepare the meals (Julian's Marion Lunch), and they were off running. They delivered 13 meals the first day.

In the early days, church groups, clubs, organizations and fees from the participants kept the program going. The program grew to a point where additional funding was necessary to continue; therefore, Service on Wheels applied for and became a United Way Agency.

In mid1975, the S.O.W. Board decided to apply for a federal grant for a Nutrition Program for the Elderly, through Older Americans Act funds of 1964 which provided daily meals at congregate dining sites.

Nancy Picard, a volunteer who served as the director of the Nutrition Program for the first 6 months, wrote the first grant. Diane Morthland was hired to take her place in July 1976. The budget totaled \$90,145 and we served 100 meals daily (five days a week).

In October 1976, a new program funded through Older Americans Act funds was added to provide transportation and homemaker service. The first Director for this program was Eleanor Preston, wife of the Ft. King Presbyterian Church minister, Dr. Frank Preston. The office was located on the grounds of that church and started off with one leased van and 3 homemakers.

In January 1977, the Nutrition Program and the Homemaker/Transportation Program combined and moved to an office next door to our present office, with Diane Morthland as Executive Director for the combined programs.

In the beginning S.O.W. (Meals on Wheels) and the Marion County Nutrition Program operated separately but shared the same Board of Directors. The name was changed from Service on Wheels to Marion County Senior services, Inc. in April 1979 and in October of 1979 the two services combined to share staff and office space.

## **System Safety Program Plan (SSPP)**

---

We still maintain independent Meals on Wheels Program, which is funded as it was in the beginning, with local donations, United Way funding, and fees based on a sliding scale. Maintaining this separate program allows us to serve needy clients of any age. The federal programs are restricted to those 60 years of age and older. Local match funds (cash or in-kind) are required to secure grant funds.

In 1980, MCSS began participation in the state-funded Community Care for the Elderly Program. CCE is a continuum of care for functionally impaired, frail, elderly to live independently in their homes for as long as possible. Case managers plan both in-home support services as well as other community resources (such as food stamps, SSI, Medicaid, legal services, doctor appointments, etc.) while working with the clients until their problems are solved.

In 1982, the Metropolitan Planning Organization designated Marion County Senior Services as the Community Transportation Coordination Provider for the transportation disadvantaged in Marion County including coordinating all transportation trips using public funds such as Medicaid. Operating, administrative and capital funds were provided by the Florida Department of Transportation. Since 1991, the Transportation Disadvantaged Commission has also provided funds to pay for clients not sponsored by any agency or organization. Sponsored trips include Medicaid and elder programs. We currently operate 37 daily routes to transport elderly, disabled and transportation-disadvantaged persons throughout Marion County. In 1994 our transportation service was renamed Marion Transit Services to more accurately reflect the diverse ridership.

In 1989, three new state-funded programs were added: Community Care for Disabled Adults, Alzheimer's disease Initiative and Community Care for the Elderly Diversions Program.

These programs allowed us to provide services to severely disabled adults 18-59, to provide more frequent and intensive in-home services to clients at risk of nursing home placement and to provide much needed support, particularly respite, to Alzheimer's victims.

Additional programs/services added in 1993: Medicaid Waiver services for low-income clients who would otherwise be placed in nursing homes at a greater cost to the state (replacing the elderly Diversions Program) and Preventative/Health Promotion Services (Title III-F) funded through Older Americans Act.

Beginning January 1, 1996, we began administering the Home Care for the Elderly Programs, which offers case management and subsidy payments to caregivers as an alternative to institutionalization. II-F funds were discontinued. In May Diane Morthland retired after 23 years with our agency. Gail Cross became the new Executive Director.

In order to expand needed services; in 1977 we implemented an intensive volunteer recruitment program for in-home services with a special grant from the



## **System Safety Program Plan (SSPP)**

---

Department of Elder Affairs. State funded programs began requiring a co-pay based on income from all clients.

From small volunteer-based program in the 70's and then a recipient of program grants, Marion County Senior Services has evolved into two primary contractor roles for our community. We serve as the "lead agency" and service provider for state and federally funded contracts to provide services to elderly and disabled through specific "contracts" for service with our regional Area Agency on Aging. And we are the designated Community Transportation Coordinator providing public Paratransit service to elderly, disabled, and underprivileged people throughout Marion County the Commission for Transportation Disadvantaged, Florida Department of Transportation, and SunTran (for Complementary ADA trips).

In January 2011, Marion County Senior Services' name changed to Marion Senior Services, Inc. The primary purpose for changing the name was to remove the connotation that the Agency was part of Marion County government.

Marion Transit is a division of Marion Senior Services, Inc.

### **Marion Transit System Profile (As of 09/21/2022):**

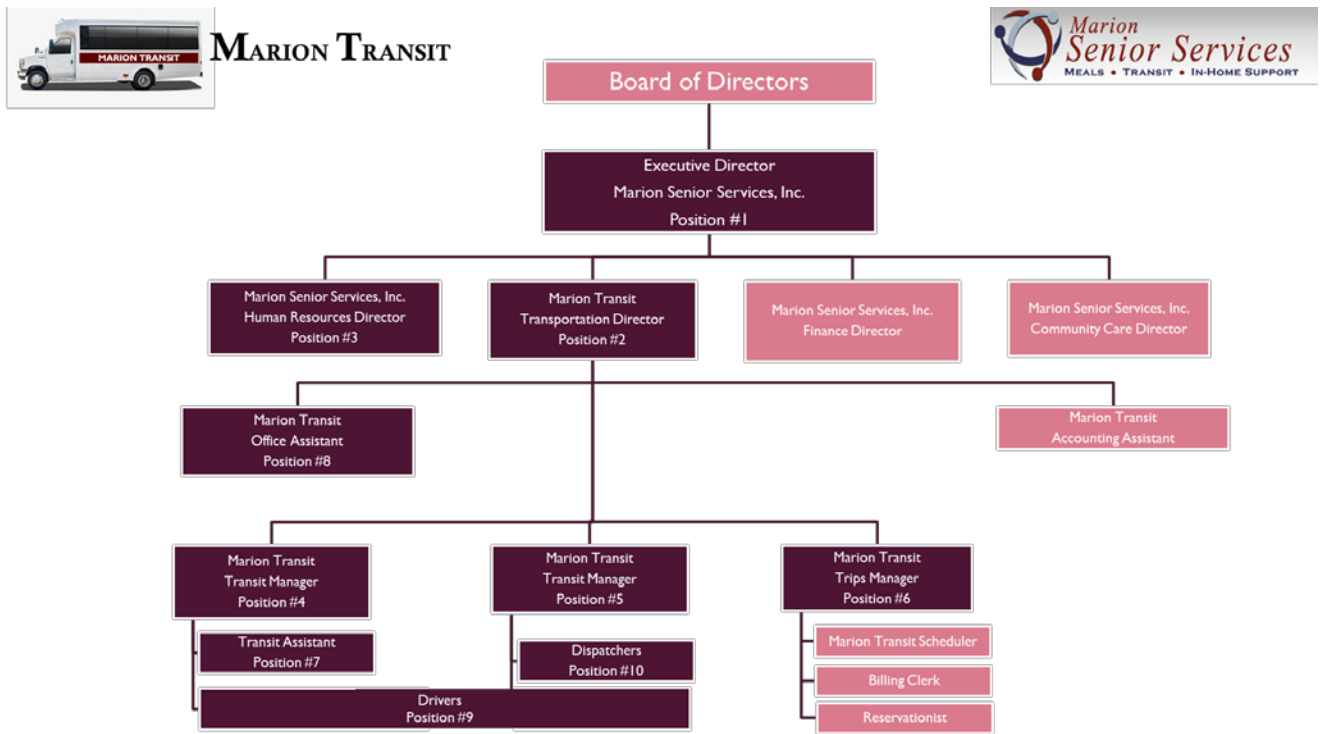
- Total Number of drivers: 37
- Full-time: 31 Part-time: 6 Volunteers: 0 in transportation
- Number of operational buses: 46
- Buses W/C accessible: 46
- Number of Type I buses (>22' length) 40 Type II buses (<22' length)
- Dispatch Location(s): 1101 SW 20<sup>th</sup> Court, Ocala, FL – Marion Transit
- Maintenance Locations:
  - Advance Tire & Service, 2199 NW 10<sup>th</sup> Street, Ocala, FL 34475
  - Fishers Auto Care – 2021 SW 27<sup>th</sup> Avenue, Ocala, FL 34471
  - Don's Garage – 218 SW 10<sup>th</sup> Street, Ocala, FL 34471
  - Advanced Vehicle Modifications (Lift) 2520 NW 6<sup>th</sup> Street, Ocala, FL
- Community Transportation Coordinator (CTC): Yes
- CTC Operator: Yes
- CTC Name: Marion Senior Services, Inc. D/B/A Marion Transit
- Contracted passenger service operations: None at this time.
- Contract operator has own adopted SSPP and SPP approved by transit system or CTC: N/A
- Contract operator adopts and implements the Transit System's CTC's SSPP: N/A

*Any additional text for Chapter 4.0 must be inserted above this point for formatting/page numbering purposes.*

## 5.0 Organization Structure and System Safety Responsibilities

Management has the overall responsibility of safe and secure operations of Marion Transit and any contract service operators (N/A at this time). Each employee is required to carry out specific system safety responsibilities, depending on his/her position, in compliance with the SSPP. The organization information provided below describes each position and the reporting structure; the table in the following page shows system safety responsibilities of each position.

### 5.1 Marion Transit Organizational Chart



## System Safety Program Plan (SSPP)

### 5.2 Marion Transit Transit System Safety Responsibilities by Position

System Safety Task	Frequency	Management Responsibilities by Position						Staff Responsibilities by Position			
		Position 1	Position 2	Position 3	Position 4	Position 5	Position 6	Position 7	Position 8	Position 9	Position 10
Oversee and assure SSPP and HSP/SPP compliance	Daily	X	X		X	X					
Random inspections of Departments for safety compliance (pre-trip inspections, driver files, maintenance records, etc.)	Quarterly/ As needed		X		X	X		X			
SSPP and HSP/SPP review and distribution	Annual/ As needed	X	X		X	X			X		
Intra-agency coordination and safety briefings	Monthly		X		X	X			X		
Inter-agency coordination (FDOT, law enforcement, emergency response organizations, etc.)	As needed	X	X		X	X	X				
Facility inspection / generator	Monthly		X		X	X		X			
Employee safety training and testing and record keeping	Initial hire/ quarterly & ongoing		X	X	X	X			X		
Drug free workplace (policy maintenance, employee training and testing, etc.)	Initial hire/ Quarterly + Randoms		X	X	X	X					
Driver license validity check and record maintenance	Initial hire/ Monthly		X	X	X	X			X		
Administrative/Human Resource safety actions	As needed			X							
Safety and security data acquisition and analysis	On an ongoing basis		X		X	X					
Medical examination of drivers and record keeping	Initial hire/ biennium			X							
Vehicle and equipment procurement	As needed		X		X	X					
Pre-trip inspections and record keeping	Daily				X	X		X		X	

## System Safety Program Plan (SSPP)

System Safety Task	Frequency	P-1	P-2	P-3	P-4	P-5	P-6	P-7	P-8	P-9	P-10
Vehicle maintenance and record keeping	Daily				X	X		X			
Annual safety inspections and record keeping	Annual		X		X	X	X	X	X		
Event investigation and record keeping	As needed		X		X	X			X		
Investigate safety complaints	As needed		X	X	X	X	X	X			
Pre-employment screening	Initial hire			X							
Employee time recording and maintenance	Daily		X		X	X	X				
Internal safety audits	Annual/As needed		X		X	X					
Records maintenance, retention, and distribution	Daily/As needed		X	X	X	X	X		X		
Vendor safety and security compliance oversight	Daily/As needed		X		X	X		X			
Hazard identification and resolution	Daily		X	X	X	X	X	X	X	X	X
Compliance with SSPP	Daily	X	X	X	X	X	X	X	X	X	X
Self-certification of safety compliance	Annual		X		X	X	X				

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### **5.3 System Safety Responsibilities of Contract Service Operator(s)**

Marion Transit requires all contract service operators to fully comply with the established safety standards set forth in Florida Administrative Code Florida Administrative Code Rule 14-90. Contract operators have the option to either adopt and implement the SSPP and HSP/SPP of Marion Transit, or develop, adopt, and implement their own program plans, but must ensure compliance with Florida Administrative Code Florida Administrative Code Rule 14-90. If the contract service operator opts to develop their own SSPP and HSP/SPP, the program plans must be reviewed and approved by Marion Transit management prior to initiation of service. In addition, each contractor/subcontractor shall submit a safety and security certification to Marion Transit no later than January 15th, annually for the prior calendar year period.

The certification shall attest to the following:

- The adoption of an SSPP and an HSP/SPP in accordance with established standards set forth in Florida Administrative Code Florida Administrative Code Rule 14-90.
- Compliance with its adopted SSPP and HSP/SPP.
- Performance of safety inspections on all buses operated by the system in accordance with Florida Administrative Code Rule 14-90.
- Reviews of the SSPP and HSP/SPP have been conducted to ensure they are up to date.

The certification shall include:

- The name and address of the contractor/subcontractor, and the name and address of the entity(ies) who performed bus safety inspections and security assessments during the prior calendar year, if different from that of the contractor/subcontractor.
- A statement signed by an officer or person directly responsible for management of the contractor/subcontractor attesting to compliance with Florida Administrative Code Florida Administrative Code Rule 14-90.

Contractors/subcontractors are subject to audits and inspections on an announced or unannounced basis at the discretion of Marion Transit management. Marion Transit, or its contractor, will conduct safety and security reviews of contract operators, at least once every three years, to ascertain compliance with the provisions of Florida Administrative Code Florida Administrative Code Rule 14-90. Marion Transit will prepare and submit a report of the audit to the affected contract operator within 30 business days of completion of the review containing the following:

- Identification of the findings, including a detailed description of any deficiency.
- Required corrective action and a schedule for implementation of the corrective action to be taken for each deficiency.
- Any required suspension of bus transit system service should Marion Transit determine of the continued operation of the service, or a portion thereof, poses an immediate danger to public safety.

If the contract operator fails to correct specific deficiency(ies) in accordance with Florida Administrative Code Florida Administrative Code Rule 14-90 and the established implementation

## **System Safety Program Plan (SSPP)**

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schedule, Marion Transit will notify the FDOT District Office and initiate actions to dismiss the contract.

*Any additional text for Chapter 5.0 must be inserted above this point for formatting/page numbering purposes.*

### 6.0 Qualification and Selection of Drivers

Marion Transit management is responsible for ensuring that the following minimum standards are met when hiring new drivers.

- Must possess a valid Florida driving license of appropriate class.
- Level 2 background screening pursuant to FSS chapter 435.
- Criminal background check (with local law enforcement and the Florida Department of Law Enforcement) and driving records check including, but not limited to, the following items:
  - Driving records
  - Instant Social Security Number validations
  - Instant identification of applicant's county of residence for the past seven years
  - County felony criminal history checks for up to three counties per applicant and other criminal records checks
  - Education verification
  - Employment reference checks
  - Personal reference check
  - Workers' Compensation claims
- Complete employment application.
- Successful completion of pre-employment physical including an eye examination and drug screening test.
- Signed acknowledgement of receipt and agreement to comply with drug-free workplace policy.
- Signed acknowledgment of receipt and agreement to comply with SSPP.
- Successful completion of required orientation, training and testing to demonstrate and ensure adequate skills and capabilities to safely operate each type of bus or bus combination before driving on a street or highway unsupervised.
- Signed acknowledgment of receipt and compliance with the following written operational and safety procedures before driving on a street or highway unsupervised.
  - Communication and handling of unsafe conditions, security threats, and emergencies.
  - Familiarization and operation of safety and emergency equipment, wheelchair lift equipment, and restraining devices.
  - Application and compliance with all applicable federal and state laws, rules and regulations.
- Drivers are required to write and submit a daily bus inspection report pursuant to Florida Administrative Code Florida Administrative Code Rule 14-90.006, F.A.C.
- Personnel licensed and authorized by the bus transit system to drive, move, or road test a bus in order to perform repairs or maintenance services when it has been determined that such temporary operation does not create unsafe operating conditions or create a hazard to public safety are not bound to the following two provisions:
  - Training and testing to demonstrate and ensure adequate skills and capabilities to safely operate each type of bus or bus combination before driving on a street or highway unsupervised.



## **System Safety Program Plan (SSPP)**

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- Bus transit systems shall provide written operational and safety procedures to all bus drivers before driving on streets or highways unsupervised.

Noncompliance with any regulatory or agency specific requirement may result in an employee administrative action up to and including suspension or termination of employment. It is the policy of Marion Transit to screen applicants to eliminate those that pose a safety or security threat to the agency or who would not be capable of carrying out agency safety and security policies.

### **Essential Requirements**

- High School diploma or equivalent.
- Must be able to pass the DOT Physical Requirements.
- 2 years' verifiable experience in transporting passengers or other commercial driving experience.
- Ability to use a portable radio and/or phone
- Clean driving record that meets company's insurance standards
- Understand and to carry out detailed but uninvolved written or oral instructions.
- Basic math skills including addition, subtraction, division and multiplication of numbers and currency.
- Excellent Customer Service skills and experience interacting with the public
- Good people skills to include good communication, and the ability to deal with and manage large groups and communicate clear instructions.
- Be familiar with the Marion County Address System and able to locate addresses using maps and/or GPS.

*Any additional text for Chapter 6.0 must be inserted above this point for formatting/page numbering purposes.*

# 7.0 Driver Safety Training and Testing

All employees and drivers of Marion Transit and all contract service providers are required to complete all training and testing requirements to demonstrate and ensure adequate skills and capabilities to safely operate each type of bus or bus combination before driving on a street or highway unsupervised. The Transit Manager is responsible for conducting and documenting all training and testing activities utilizing a certification process. Noncompliance with any regulatory or agency specific guideline or requirement may result in suspension or termination of employment. This section of the SSPP discusses the training and testing programs to be administered by the Transit Manager.

## 7.1 Initial Driver Training and Testing

Upon hire and prior to being placed into road service, all drivers are required to complete a total of 80 hours of training and testing in the following areas:

1. Bus transit system safety and operational policies and procedures.
2. Operational bus and equipment inspections.
3. Bus equipment familiarization.
4. Basic operations and maneuvering.
5. Boarding and alighting passengers.
6. Operation of wheelchair lift and other special equipment.
7. Defensive driving.
8. Distracted driving.
9. Passenger assistance and securement.
10. Handling of emergencies and security threats.
11. Security and threat awareness.
12. Driving conditions.
13. 60 minutes of drug awareness and 60 minutes of the effects of alcohol abuse.

As part of the driver training program, specific procedures have been incorporated to instruct the driver on how to safely approach and depart from a transit bus stop to avoid contact with pedestrians and other hazards.

In addition, new drivers are required to successfully undergo a road test with an experienced driver. A new-hire check-off list must be completed to ensure the employee has received all required 14-90 training and information before being authorized for over-the-road service.

After successful completion of each training and testing module, the agency is required to document and record the satisfactory completion of the employee's training and submit to the Transportation Director. Certificates of completion will be maintained in the driver files for a minimum of 5 years.

## **System Safety Program Plan (SSPP)**

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All newly hired employees are also provided instructional training by the HR Director and Transit Manager per agency's HSP/SPP. Drivers are given instruction in Marion Transit rules and standard operating procedures in the following areas :

- General rules: General rules of the agency including employee conduct codes.
- Personal appearance and conduct: Cover uniforms, grooming, and employee conduct.
- Customer service: Covers expectations of employees when dealing with the public; includes instruction on how and to whom to report security incidents, and types of individuals or situations to be aware of and report.
- Traffic laws: Covers applicable traffic-related laws and regulations, drug and alcohol testing, and drug and alcohol use restrictions.
- Fare handling: Covers fare collection procedures and provides instruction in dealing with fare disputes, conflict resolution, and notification of security personnel.
- Americans with Disabilities Act requirements: Provides instruction in complying with ADA requirements and providing service to disabled patrons.
- Radio procedures: Provides instruction on radio procedure for both routine and emergency radio traffic. Includes instruction on reporting crimes, suspicious acts, and potentially hazardous situations.
- Report writing: Provides instruction on report writing, and reporting requirements.
- Substance abuse policy: Provides information on the drug and alcohol testing program.
- Occupational Safety and Health Administration (OSHA) standards: Covers blood borne pathogens and other occupational exposure to health hazards.

The HR Director and Transportation Director will develop and maintain a Training Manual for new hire training and testing of employees as part of the Safety Training Program. The manual will contain training course content, curriculum, lesson plans, testing requirements, etc. All training and testing activities will also be adequately documented by the Transit Manager.

### **7.2 On-Going/Refresher Training and Testing**

The HR Director and Transportation Director will develop and maintain a Training Manual for on-going and refresher training and testing of employees. The manual will contain training course content, curriculum, lesson plans, testing requirements, etc. On-going/refresher training and testing sessions will be conducted as necessary to remain compliant with Florida Administrative Code Florida Administrative Code Rule 14-90. The drivers are required to attend training and testing in all areas specified by Florida Administrative Code Florida Administrative Code Rule 14-90 at least once every three years.

Ongoing and refresher training will be conducted but is not limited to the following topics:

- Bus transit system safety and operational policies and procedures.
- Operational bus and equipment inspections.
- Bus equipment re-familiarization.
- Operation of wheelchair lift and other special equipment.

## **System Safety Program Plan (SSPP)**

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- Defensive driving.
- Distracted driving.
- Passenger assistance and securement.
- Handling of emergencies and security threats.
- Security and threat awareness.
- Drug awareness and the effects of alcohol abuse.

Marion Senior Services also requires quarterly mandatory safety meetings. Any training during these meetings will be documented.

All training and testing activities are to be recorded and retained in files for a minimum of five years.

### **7.3 Remedial Training and Testing**

Marion Transit will employ remedial training for drivers who have been involved in a serious collision or have developed unsafe driving behaviour or other driving problems. Other causes for remedial training may include persistent customer complaints, supervisor recommendations, or a result of ongoing evaluations. Depending on the circumstances, the Transportation Director will determine the appropriate remedial training and testing, the results of which will also be documented and retained in files.

### **7.4 NIMS Training**

The National Incident Management System (NIMS) provides a consistent nationwide template to enable all government, private-sector, and nongovernmental organizations to work together during domestic incidents (<http://www.fema.gov/emergency/nims/>). The NIMS system requires that transit agencies comply with a number of specific activities to ensure personnel who will be conducting activities in response to emergencies use the standard Incident Command System (ICS).

Marion Transit HSP/SPP requires that management staff take available NIMS training to understand this requirement and to coordinate regularly with outside organizations to prepare for coordinated responses to incidents. In addition, all employees will be provided security training and drills every six months to ensure they are familiar with emergency policies. All training and testing activities will also be recorded and retained in files.

*Any additional text for Chapter 7.0 must be inserted above this point for formatting/page numbering purposes.*

# 8.0 Records Management

The Transportation Director is responsible for implementing a record management program that includes maintenance, retention, distribution, and safe disposal of all safety and security records of the agency in compliance with state and federal regulations.

All safety and security documents of the agency (SSPP, HSP/SPP, etc.) will be periodically revised, as needed, to ensure that they are up to date. Revisions and updates will be communicated with employees, contractors, and regulatory agencies as they occur or as deemed necessary by the management, depending on the nature of the revision or update. The HSP/SPP is considered a confidential document and will be retained in a secure location by management.

Marion Transit will maintain and retain the following records for at least five years:

- Records of bus driver background checks and qualifications
- Detailed descriptions of training administered and completed by each bus driver
- A record of each bus driver's duty status which will include total days worked, on-duty hours, driving hours, and time of reporting on and off duty each day
- Event investigation reports, corrective action plans, and related supporting documentation
- Records of preventive maintenance, regular maintenance, inspections, lubrication, and repairs performed for each bus
- Records of annual safety inspections and documentation of any required corrective actions
- Completed and signed medical examination reports for each bus driver

In addition, Marion Transit will retain records of daily bus inspections and any corrective action documentation for a minimum of two weeks.

An organized paper and electronic filing system will be maintained by the agency, adequately backed up to prevent potential loss of information. All sensitive personnel records will be protected from public access. When ready for disposal, both paper and electronic data will be disposed of in a secure manner ensuring that critical information is protected.

*Any additional text for Chapter 8.0 must be inserted above this point for formatting/page numbering purposes.*

## **9.0 Drug and Alcohol Program**

Marion Transit has established a Zero Tolerance Substance Abuse Policy Statement in accordance with 49 C.F.R. Part 32 and a substance abuse management and testing program in accordance with 49 C.F.R. Parts 40 and 655, October 1, 2009, a copy of which is included in Appendix B. The Substance Abuse Program Manager is responsible for ensuring the implementation of a drug and alcohol testing program for all safety-sensitive employees as identified and described within the subject policy.

The intent of the policy is to:

- Assure that employees are not impaired in their ability to perform assigned duties in a safe, productive, and healthy manner;
- Create a workplace environment free from the adverse effects of drug and alcohol abuse or misuse;
- Prohibit the unlawful manufacture, distribution, dispensing, possession, or use of controlled substances; and
- Encourage employees to seek professional assistance when substance abuse adversely affects their ability to perform their assigned duties.

Violation of this substance abuse policy is subject to disciplinary actions.

*Any additional text for Chapter 9.0 must be inserted above this point for formatting/page numbering purposes.*

## **10.0 Vehicle Maintenance Program**

The function of the maintenance plan is to provide a consistent systematic program to properly maintain and service vehicles to meet or exceed the manufacturer's recommended maintenance schedule. Marion Transit vehicle maintenance program will ensure that all buses operated, and all parts and accessories on such buses, including those specified in Florida Administrative Code Florida Administrative Code Rule 14-90.007, F.A.C., and any additional parts and accessories which may affect safety of operation, including frame and frame assemblies, suspension systems, axles and attaching parts, wheels and rims, and steering systems, are regularly and systematically inspected, maintained, and lubricated to standards that meet or exceed the bus manufacturer's recommendations and requirements. The Transportation Director is responsible for ensuring that a Maintenance Plan consistent with 14-90 has been developed and implemented by the agency and that all vehicles operated are regularly and systematically inspected, maintained, and lubricated according to the agency's Maintenance Plan and Preventative Maintenance Guidelines (included in Appendix C and Appendix D, respectively).

### **10.1 Daily Vehicle Inspections (DVI)**

Drivers are required to perform daily vehicle inspections prior to operating the assigned vehicle, during routes, and after all route schedules are completed. The pre-trip inspection includes an inspection of the following parts and devices to ascertain that they are in safe condition and in good working order:

- Service brakes
- Parking brakes
- Tires and wheels
- Steering
- Horn
- Lighting devices
- Windshield wipers
- Rear vision mirrors
- Passenger doors
- Exhaust system
- Equipment for transporting wheelchairs
- Safety, security, and emergency equipment

During the scheduled trips and at the end of the day, the operator will note any additional findings and submit the daily vehicle inspection forms. The process and form/s to be utilized for daily vehicle inspections is included in agency's preventative maintenance guidelines. The daily vehicle inspection forms must be complete with the operator's signature and a check in each box to document that the items are "OK" or a defect is noted in the comments section. If the driver finds any mechanical or other problems that could compromise the safety of the vehicle at any point, the drivers will immediately inform the Transit Manager and the vehicle will not be scheduled for service until repaired. Failure to report deficiencies by drivers may result in an administrative action taken against the employee.

The Transit Manager & Transit Assistant will review the daily inspections and document the corrective actions taken as a result of any deficiencies identified by the operator. Daily inspection records will be retained for a minimum of two weeks. ***The Transit Manager and Transit***

## **System Safety Program Plan (SSPP)**

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***Assistant will periodically conduct vehicle inspections behind the drivers who have completed the vehicle inspections to ensure that the daily vehicle inspections are adequately performed.*** Once defects are noted they will be prioritized and sorted into categories for repairs. Once a defect is noted on the inspection form and repaired, the documentation will be attached to the work/repair order and filed in the maintenance files.

### **10.2 Preventive Maintenance**

A preventative maintenance schedule is implemented to inspect for safety hazards and to maintain vehicles in a manner conforming to safety regulations. Marion Transit will perform scheduled preventive maintenance and safety inspections on all vehicles at every 6,000-mile interval according to the agency's maintenance plan (comply with FDOT PM Edition 4.1). As preventative maintenance inspections are scheduled by projected mileage, the agency will allow 10%-mile deviations in mileage interval, so long as the actual mileage interval meets the manufacturer's recommended maintenance schedule. When a vehicle is due for an inspection, it will be taken out of service until the inspection is completed. This allows a series of repairs to be carried out while minimizing costs and optimizing the number of operational vehicles. If a vehicle is "down" for an extended period of time due to unavoidable circumstances, preventative maintenance will be temporarily suspended until the vehicle can be returned to service. However, the annual inspection will be conducted on all vehicles regardless of "up/down" status and/or mileage accrued.

The Transit Manager and Transportation Director will regularly perform Quality Control (QC)/Quality Assurance (QA) checks to ensure that the inspections and repairs, both in-house and contracted, are completed and documented properly. Each vehicle will have a written record documenting preventive maintenance, regular maintenance, inspections, lubrication and repairs performed. Such records will be maintained for at least five years and include, at a minimum, the following information:

- Identification of the bus, the make, model, and license number or other means of positive identification and ownership
- Date, mileage, description, and each type of inspection, maintenance, lubrication, or repair performed
- If not owned by Marion Transit, the name of any person furnishing a bus
- The name and address of any entity or contractor performing an inspection, maintenance, lubrication, or repair

For tracking purposes, a maintenance log will be kept containing vehicle ID, make and type of vehicle, year, model, special equipment, inspections, maintenance and lubrication intervals, and date or mileage when services are due.

### **10.3 Bus Safety Inspections**

Safety inspections are part of the maintenance inspections and are performed every 6,000 miles on all buses operated by Marion Transit. The Transit Manager is responsible for ensuring that each individual performing a bus safety inspection is qualified as follows:

- Understands the requirements set forth in Florida Administrative Code Florida Administrative Code Rule 14-90 and can identify defective components.



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- Is knowledgeable of and has mastered the methods, procedures, tools, and equipment used when performing an inspection.
- Is ASE certified with at least one year of training and/or experience as a mechanic or inspector in a vehicle maintenance program and has sufficient general knowledge of buses owned and operated by the bus transit system to recognize deficiencies or mechanical defects.

Each bus receiving a safety inspection shall be checked for compliance with the requirements for safety devices and equipment as referenced or specified by Florida Administrative Code Florida Administrative Code Rule 14-90. Specific operable equipment and devices as required by Florida Administrative Code Florida Administrative Code Rule 14-90 include the following as applicable to Type I and II buses:

- Horn
- Windshield wipers
- Mirrors
- Wiring and batteries
- Service and parking brakes
- Warning devices
- Directional signals
- Hazard warning signals
- Lighting systems and signaling devices
- Handrails and stanchions
- Standee line and warning
- Doors and brake interlock devices
- Step wells and flooring
- Emergency exits
- Tires and wheels
- Suspension system
- Steering system
- Exhaust system
- Seat belts
- Safety equipment
- Equipment for transporting wheelchairs
- Working speedometer

A safety inspection report will be prepared by the individual(s) performing the inspection and will include the following:

- Identification of the individual(s) performing the inspection
- Identification of the bus transit system operating the bus
- The date of the inspection
- Identification of the bus inspected
- Identification of the equipment and devices inspected including the identification of equipment and devices found deficient or defective

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- Identification of corrective action(s) for any deficient or defective items found and date(s) of completion of corrective action(s)

**Records of annual safety inspections and documentation of any required corrective actions will be retained for a minimum of four years for compliance review.**

*Any additional text for Chapter 10.0 must be inserted above this point for formatting/page numbering purposes.*

# 11.0 Safety Data Acquisition & Analysis

Understanding safety data is an important step towards allocating important and scarce resources to implement safety program elements. Safety data relative to transit provider operations can be used to determine safety trends in system operation. The following data will be collected and retained by Marion Transit on an ongoing basis:

- Accident and incident data
- Maintenance data including daily vehicle inspection forms
- Passenger claims and complaints
- Records of crimes and rule violations occurring in and around the transit agency

The data will be analyzed by Marion Transit management both qualitatively and quantitatively for safety hazard identification, resolution and risk management purposes. The analysis results will be useful for identifying necessary actions to minimize safety risks. Analysis of safety data will also help improve system performance, not only in respect to safety, but also in overall delivery of service to the public. In addition, trend analyses of safety data can help determine the effectiveness of safety initiatives that have been implemented. The results of such analysis will be shared with agency staff and law enforcement agencies on, at minimum, an annual basis for awareness and support.

*Any additional text for Chapter 11.0 must be inserted above this point for formatting/page numbering purposes.*

## **12.0 Hazard Identification and Resolution**

Hazard management is a mechanism by which hazards are identified, analyzed for potential impact on the operating system, and resolved in a manner acceptable to the management and regulatory agencies. Marion Transit hazard management consists of three primary components – hazard identification, hazard categorization, and hazard resolution.

### **12.1 Hazard Identification**

By means of safety data acquisition and analysis and coordination with the Transit Manager, the Transportation Director will identify system hazards on an ongoing basis.

### **12.2 Hazard Categorization**

Once the key system hazards have been identified, the Transportation Director will categorize the hazards based on severity and probability of occurrence.

Hazard severity is a subjective measure of hazard, supported by factual data, and will be categorized as follows –

- Catastrophic – Death or system loss
- Critical – Severe injury, severe occupational illness, or major system damage
- Marginal – Minor injury, minor occupational illness, or minor system damage
- Negligible – less than minor injury, occupational illness, or system damage

Hazard probability is a subjective measure of likelihood that a specific hazard will occur and will be categorized as follows –

- Frequent – Likely to occur frequently
- Probable – Likely to occur several times
- Occasional – Likely to occur sometime
- Remote – Unlikely but possible to occur
- Improbable – So unlikely that it can be rejected from consideration

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### 12.3 Hazard Resolution

Once the hazards are identified and categorized, subsequent analysis will be undertaken to resolve the issue and minimize risk associated with the identified hazard. A hazard resolution matrix will be developed combining hazard severity and hazard frequency, as shown in the matrix on the following page, to identify the level of acceptance for a specific hazard/risk.

<b>Hazard Resolution Matrix</b>	<b>Catastrophic</b>	<b>Critical</b>	<b>Marginal</b>	<b>Negligible</b>
<b>Frequent</b>	Unacceptable	Unacceptable	Unacceptable	Acceptable with reservation
<b>Probable</b>	Unacceptable	Unacceptable	Undesirable	Acceptable with reservation
<b>Occasional</b>	Unacceptable	Undesirable	Undesirable	Acceptable
<b>Remote</b>	Undesirable	Undesirable	Acceptable with reservation	Acceptable
<b>Improbable</b>	Acceptable with reservation	Acceptable with reservation	Acceptable with reservation	Acceptable

The results of the analysis will be shared by the Transportation Director with the Executive Director on an ongoing basis to identify appropriate actions. All “unacceptable” hazards must be eliminated, and measures will be taken for the remaining risk acceptance categories to minimize risk. The results of such analysis will be shared with agency staff and law enforcement agencies on a quarterly basis for awareness and support.

*Any additional text for Chapter 12.0 must be inserted above this point for formatting/page numbering purposes.*

### 13.0 Event Investigation

For the purpose of this SSPP, events are considered accidents or incidents that involve a transit vehicle or take place on Marion Transit controlled property. An “accident” is an event that causes damage to a vehicle, individual, or property while the vehicle is in motion. It may involve a single vehicle or multiple vehicles. An “incident” is defined as an event that causes damage to a vehicle, individual, or property, which is not an accident.

Any event involving a bus or taking place on property controlled by a transit system and resulting in a fatality, injury, or property damage will be investigated by Marion Transit. All events included but not limited to the following, will be investigated:

- A fatality, where an individual is confirmed dead within 30 days of a bus transit system related event, excluding suicides and deaths from illnesses.
- Injuries requiring immediate medical attention away from the scene for two or more individuals.
- Property damage to bus transit system buses, non-bus transit system vehicles, other bus system property or facilities, or any other property. Marion Transit will have the discretion to investigate events resulting in property damage less than \$1,000.
- Evacuation of a bus due to a life safety event where there is imminent danger to passengers on the bus, excluding evacuations due to operational issues.

In case of all events, drivers are required to contact the local law enforcement, dispatcher, and emergency medical services (as required) immediately. Supervisors will be sent to the scene depending on the severity of the event at the discretion of the Transportation Director and/or Transit Manager. Each investigation will be documented in a final report that includes a description of the investigation activities, identified causal factors, and any identified corrective action plan. Each corrective action plan will identify the action to be taken by the bus transit system and the schedule for its implementation. The Transportation Director will monitor and track the implementation of each corrective action plan. Investigation reports, corrective action plans, and related supporting documentation will be maintained by the Transportation Director for a minimum of five years from the date of completion of the investigation.

**Marion Transit will notify FDOT within 24 hours of any accident or casualty involving project vehicles/equipment and submit related reports as required by FDOT. This notification will be accomplished by emailing the respective District 5 project coordinator for Marion Transit.**

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### **FTA Post-Accident Thresholds**

Must perform a DOT post-accident test when there is an occurrence associated with the operation of a mass transit vehicle, if as a result:

#### **FATAL ACCIDENT**

1. An Individual *dies* (Must Test); or
- 

#### **NON-FATAL ACCIDENT**

Unless the Marion Transit driver's performance can be ***completely discounted*** as a contributing factor to the accident

2. An individual suffers bodily injury and immediately ***receives medical treatment*** away from the scene of the accident; or

(‘Individual’ refers to a transit employee, pedestrian, passenger on the mass transit vehicle

or person in the other vehicle(s))

3. A vehicle (including non-transit vehicle) incurs disabling damage as the result of the occurrence and a vehicle is ***transported away from the scene by a tow truck or other vehicle;***  
or

(in which the mass transit vehicle involved is a bus, electric bus, van or automobile)

4. The mass transit vehicle is ***removed from operation.***

(in which the mass transit vehicle involved is a rail car, trolley car, trolley bus, or vessel)

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#### **Who to Test**

1. Covered employee operating the mass transit vehicle, unless the transit employee's performance can be ***completely discounted*** as a contributing factor to the accident.
2. Other covered employee who could have contributed to the accident.

#### **Time Limitations for Post-Accident Testing**

- ✓ Employee must remain readily available for testing
- ✓ Alcohol & Drug testing must begin as soon as practicable following the accident

*Any additional text for Chapter 13.0 must be inserted above this point for formatting/page numbering purposes.*

# 14.0 Medical Exams for Bus Transit System Drivers

This section of the SSPP establishes Marion Transit medical examination requirements for all applicants for driver positions and for existing drivers.

- Medical examination requirements include a pre-employment examination for applicants, an examination at least once every two years for existing drivers, and a return to duty examination for any driver prior to returning to duty after having been off duty for 30 or more days due to an illness, medical condition, or injury.
- Medical examinations will be performed and recorded according to FDOT Form Number 725-030-11, *or equivalent*, Medical Examination Report for Bus Transit System Driver, Rev. 05/09, included in Appendix E.
- Medical examinations will be performed by a Doctor of Medicine or Osteopathy, Physician Assistant, or Advanced Registered Nurse Practitioner licensed or certified by the State of Florida. If medical examinations are performed by a Physician Assistant or Advanced Registered Nurse Practitioner, they must be performed under the supervision or review of a Doctor of Medicine or Osteopathy.
- An ophthalmologist or optometrist licensed by the State of Florida may perform as much of the medical examination as it pertains to visual acuity, field of vision, and color recognition.
- Upon completion of the medical examination, the examiner shall complete, sign, and date the medical examination form and maintain the original at his or her office.
- Upon completion of the medical examination, the examiner shall complete, sign, and date the medical examination certificate and provide a copy to Marion Transit.
- Upon completion of the medical examination the driver shall provide their driver license number, signature, and date on the medical examination certificate.
- Completed and signed medical examination certificate for each bus driver, dated within the past 24 months, will be maintained on file for a minimum of five years from the date of the examination.
- Marion Transit will not allow a driver to operate a transit bus without having on file a completed medical examination certificate dated within the past 24 months.

*Any additional text for Chapter 14.0 must be inserted above this point for formatting/page numbering purposes.*



# 15.0 Operating and Driving Requirements

The Transportation Director and Transit Manager are responsible for overall compliance with all operating and driving requirements of the SSPP.

It is the responsibility of every Marion Transit employee who performs driving and/or operational duties to strictly adhere to the following requirements:

- Under no circumstances is a driver allowed to operate a vehicle without having the appropriate and valid driver's license in his or her possession.
- Drivers are not permitted to drive a bus when his or her driver license has been suspended, cancelled, or revoked. A driver who receives a notice that his or her license to operate a motor vehicle has been suspended, cancelled, or revoked is required to notify his or her supervisor of the contents of the notice immediately, if possible, otherwise no later than the end of the business day following the day he or she received the notice. Violation of this policy may result in disciplinary actions including suspension or termination of employment.
- Marion Transit management will annually check Motor Vehicle Records (MVR) for all drivers for investigating information on license suspensions, revocations, accidents, traffic violations, unpaid summons, etc. Marion Transit management will also check driver license status of each driver utilizing the Florida Department of Highway Safety and Motor Vehicles website - <https://www6.hsmv.state.fl.us/DLCheck/main.jsp>.
- Buses must be operated at all times in compliance with applicable traffic regulations, ordinances, and laws of the jurisdiction in which they are being operated.
- Florida Administrative Code Florida Administrative Code Rule 14-90 defines "On Duty" and "Off Duty" status of drivers as follows -
  - "On Duty" means the status of the driver from the time he or she begins work, or is required to be in readiness to work, until the time the driver is relieved from work and all responsibility for performing work. "On Duty" includes all time spent by the driver as follows:
    - (a) Waiting to be dispatched at bus transit system terminals, facilities, or other private or public property, unless the driver has been completely relieved from duty by the bus transit system.
    - (b) Inspecting, servicing, or conditioning any vehicle.
    - (c) Driving.
    - (d) Remaining in readiness to operate a vehicle (stand-by).
    - (e) Repairing, obtaining assistance, or remaining in attendance in or about a disabled vehicle.
  - **NOTE:** The amount of on-duty hours is monitored by Supervisors to ensure compliance by reviewing daily schedules (they are not scheduled for more than 11 hours) and electronic time-clocks.
  - "Off-Duty" means any time the driver is not on duty, required to be in readiness to work, or under any responsibility to perform work. Such time shall not be counted towards the maximum allowed on-duty hours within a 24-hour period.

## System Safety Program Plan (SSPP)

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- Drivers are not permitted to drive more than 12 hours in a 24-hour period, or drive after having been on duty for 16 hours in a 24-hour period. A driver is not permitted to drive until the requirement of a minimum eight consecutive hours of off-duty time has been fulfilled. A driver's work period begins from the time he or she first reports for duty to his or her employer. A driver is permitted to exceed his or her regulated hours in order to reach a regularly established relief or dispatch point, provided the additional driving time does not exceed one hour.
- Drivers are not permitted to be on duty more than 72 hours in any period of seven consecutive days; however, any 24 consecutive hours of off duty time shall constitute the end of any such period of seven consecutive days. A driver who has reached the maximum 72 hours of on duty time during the seven consecutive days is required to have a minimum of 24 consecutive hours of off duty time prior to returning to on duty status.
- A driver is permitted to drive for more than the regulated hours for the safety and protection of the public when conditions such as adverse weather, disaster, security threat, a road or traffic condition, medical emergency, or an accident occur.
- Drivers are not permitted to drive a bus when his or her ability is impaired, or likely to be impaired, by fatigue, illness, or other causes, likely to create an unsafe condition.
- Drivers will not report for duty or operate any vehicle while under the influence of alcohol or any other substance, legal or illegal, that may impair driving ability. All employees are required to comply with agency's Substance Abuse Policy.
- Drivers are required to conduct daily vehicle inspections and reporting of all defects and deficiencies likely to affect safe operation or cause mechanical malfunctions.
- Drivers are required to immediately report any defect or deficiency that may affect safe operations or cause mechanical malfunctions. Any defect or deficiency found shall be properly documented on a Daily Vehicle Inspection (DVI) form and should be submitted to the Transit Manager.
- The Transit Manager will review daily inspection reports and document corrective actions taken as a result of any deficiencies identified by daily inspections.
- A bus with any passenger doors in the open position will not be operated with passengers aboard. The doors will not be opened until the bus is stopped. A bus with any inoperable passenger door will not be operated with passengers aboard, except to move a bus to a safe location.
- Drivers will ensure that during darkness, interior lighting and lighting in stepwells on buses shall be sufficient for passengers to enter and exit safely. Adherence to pre-trip inspection requirements help insure the ability of this requirement to be met.
- Passengers will not be permitted in the stepwells of any bus while the bus is in motion, or to occupy an area forward of the standee line.
- Passengers will not be permitted to stand on buses not designed and constructed for that purpose.
- Buses will not be refueled in a closed building. The fueling of buses when passengers are being carried will be reduced to the minimum number of times necessary during such transportation.
- Drivers are required to be properly secured to the driver's seat with a restraining belt at all times while the bus is in motion.

## **System Safety Program Plan (SSPP)**

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- Buses will not be left unattended with passengers aboard for longer than 15 minutes. The parking or holding brake device will be properly set at any time the bus is left unattended.
- Buses will not be left unattended in an unsafe condition with passengers aboard at any time.
- Drivers are prohibited from leaving keys in the vehicle for any reason at any time the bus is left unattended.
- Transit vehicles will not be used at any time for uses other than those that are authorized and permitted according to state and federal program requirements.

Noncompliance with these requirements may result in disciplinary actions including suspension or termination of employment.

### **15.1 Wireless Communication**

“Wireless communication device” means an electronic or electrical device capable of remote communication. Examples include cell phones, personal digital assistants (PDAs) and portable computers (commonly called laptop computers). “Personal wireless communications device” means an electronic or electrical device that was not provided by the bus transit system for business purposes. “Use of a wireless communication device” means use of a mobile telephone or other electronic or electrical device, hands-on or hands-free, to conduct an oral communication; to place or receive a telephone call; to send or read electronic mail or a text message; to play a game; to navigate the Internet; to play, view, or listen to a video; to play, view, or listen to a television broadcast; to play or listen to music; to execute a computational function, or to perform any other function that is not necessary for the health or safety of the person and that entails the risk of distracting the employee from a safety-critical task. Use of an electronic or electrical device that enhances the individual’s physical ability to perform, such as a hearing aid, is not included in this definition.

Marion Transit requires all drivers to fully comply with the following wireless communication policies –

Policies on the use of a personal wireless communication device:

- The use of a personal wireless communication device is prohibited while the transit vehicle is in motion.
- All personal wireless communication devices must be turned off with any earpieces removed from the operator’s ear while occupying the driver’s seat.
- In an emergency, if a driver is unable to use the radio (e.g., driver is separated from the vehicle due to a need to evacuate, or the radio is inoperable because it is beyond the radio coverage area or other malfunction), a personal cellular phone may be used to contact the agency. In such situation the driver must park the vehicle in a safe place off the road and call the direct line to the dispatcher.
- Drivers are not permitted to use any wireless communication device issued by the bus transit system while the transit vehicle is in motion except brief radio communications with the dispatcher. If the driver must use the radio for a long duration, he/she must stop the vehicle in a safe place off the road.

## **System Safety Program Plan (SSPP)**

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- The use of a wireless communication device is prohibited while loading or unloading a wheelchair patron or while conducting any other safety related duty that require the driver's undivided attention. If wireless communication is necessary, the driver will use a company issued wireless communication device before or upon completion of the safety related task.
- Employees are permitted to use wireless communication devices issued by the bus transit system in the following situations -
  - A driver needing to communicate with the dispatcher and vise-versa.
  - A driver requesting medical or emergency assistance.
  - A driver reporting an illegal activity, a traffic accident, a road hazard, or a safety or security threat.

Marion Transit requires all employees to follow the radio operating procedures included in Appendix F. .

## **16.0 Vehicle Equipment Standards & Procurement Criteria**

Marion Transit will procure vehicles utilizing the Transit Research-Inspection-Procurement Services (TRIPS) program, formerly known as the Florida Vehicle Procurement Program (FVPP), and other State Programs strictly adhering to the vehicle equipment standards and procurement criteria specified in 14-90.007.

- All buses procured and operated must meet the following minimum standards, as applicable:
  - a. The capability and strength to carry the maximum allowed load and not exceed the manufacturer's gross vehicle weight rating (GVWR), gross axle weighting, or tire rating.
  - b. Structural integrity that mitigates or minimizes the adverse effects of collisions.
  - c. Federal Motor Vehicle Safety Standards (FMVSS), 49 C.F.R. Part 571, Sections 102, 103, 104, 105, 108, 207, 209, 210, 217, 302, 403, and 404, October 1, 2008, hereby incorporated by reference.
- Proof of strength and structural integrity tests on new buses procured will be submitted by manufacturers or bus transit systems to the Department.
- In addition, every bus operated by the agency will be equipped as follows:
  - Mirrors. There shall be two exterior rear vision mirrors, one at each side. The mirrors shall be firmly attached to the outside of the bus and so located as to reflect to the driver a view of the highway to the rear along both sides of the vehicle. Each exterior rear vision mirror, on Type I buses shall have a minimum reflective surface of 50 square inches. Neither the mirror nor the mounting shall protrude farther than the widest part of the vehicle body except to the extent necessary to produce a field of view meeting or exceeding the requirements of this section. All Type I buses shall, in addition to the above requirements, be equipped with an inside rear vision mirror capable of giving the driver a clear view of seated and standing passengers. Buses having a passenger exit door that is located inconveniently for the driver's visual control shall be equipped with additional interior mirrors to enable the driver to view the passenger exit door. In lieu of interior mirrors, trailer buses and articulated buses may be equipped with closed circuit video systems or adult monitors in voice control with the driver.
  - Wiring and Batteries. Electrical wiring shall be maintained so as not to come in contact with moving parts, heated surfaces, or be subject to chafing or abrasion which may cause insulation to become worn. Every Type I bus manufactured on or after February 7, 1988, shall be equipped with a storage battery electrical power main disconnect switch. The disconnect switch shall be practicably located in an accessible location adjacent to or near to the battery and be legibly and permanently marked for identification. Every storage battery on a public-sector bus shall be mounted with proper retainment devices in a compartment which provides adequate ventilation and drainage.
  - Brake Interlock Systems. All Type I buses having a rear exit door shall be equipped with a rear exit door/brake interlock that automatically applies the brake upon driver activation of the rear exit door to the open position. Brake interlock application shall

## System Safety Program Plan (SSPP)

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remain activated until deactivated by the driver and the rear exit door returns to the closed position. The rear exit door brake interlock on such buses shall be equipped with an identified override switch enabling emergency release of the brake interlock function. The override switch shall not be located within reach of the seated driver. Air pressure application to the brake during brake interlock operation, on buses equipped with rear exit door/brake interlock, shall be regulated at the equipment's original manufacturer's specifications.

- Standee Line and Warning. Every bus designed and constructed to allow standees shall be plainly marked with a line of contrasting color at least two inches wide, or be equipped with some other means to indicate that all passengers are prohibited from occupying a space forward of a perpendicular plane drawn through the rear of the driver's seat and perpendicular to the longitudinal axis of the bus. A sign shall be posted at or near the front of the bus stating that it is a violation for a bus to be operated with passengers occupying an area forward of the line.
- Handrails and Stanchions. Every bus designed and constructed to allow standees shall be equipped with overhead handrails for standee passengers. Overhead handrails shall be continuous, except for a gap at the rear exit door, and terminate into vertical stanchions or turn up into a ceiling fastener. Every Type I and Type II bus designed for carrying more than 16 passengers shall be equipped with handrails, stanchions, or bars at least 10 inches long and installed to permit safe on-board circulation, seating and standing assistance, and boarding and alighting by elderly and handicapped persons. Type I buses shall be equipped with a safety bar and panel directly behind each entry and exit stepwell.
- Flooring, Steps, and Thresholds. Flooring, steps, and thresholds on all buses shall have slip resistant surfaces without protruding or sharp edges, lips, or overhangs, in order to prevent tripping hazards. All step edges and thresholds shall have a band of color(s) running the full width of the step or edge which contrasts with the step tread and riser, either light-on-dark or dark-on-light.
- Doors. Power activated doors on all buses shall be equipped with a manual device designed to release door closing pressure.
- Emergency Exits. All buses shall have an emergency exit door, or in lieu thereof, shall be provided with emergency escape push-out windows. Each emergency escape window shall be in the form of a parallelogram with dimensions not less than 18" by 24", and each shall contain an area of not less than 432 square inches. There shall be a sufficient number of push-out or kick-out windows in each vehicle to provide a total escape area equivalent to 67 square inches per seat, including the driver's seat. No less than 40% of the total escape area shall be on one side of the vehicle. Emergency escape kick-out or push-out windows and emergency exit doors shall be conspicuously marked with a sign or light and shall always be kept in good working order so that they may be readily opened in an emergency. All such windows and doors shall not be obstructed either inside or outside so as to hinder escape. Buses equipped with an auxiliary door for emergency exit shall be equipped with an audible alarm and light indicating to the driver when a door is ajar or opened while the engine is running. Supplemental security locks operable by a key are prohibited on emergency exit doors unless these security locks are equipped and connected with an ignition interlock system or an audio visual alarm located in the driver's compartment. Any supplemental security lock system used on emergency exits shall be kept unlocked whenever a bus is in operation.

## System Safety Program Plan (SSPP)

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- Tires and Wheels. Tires shall be properly inflated in accordance with manufacturer's recommendations.
  - i. No bus shall be operated with a tread groove pattern depth:
    - 1. Less than  $\frac{4}{32}$  ( $\frac{1}{8}$ ) of an inch, measured at any point on a major tread groove for tires on the steering axle of all buses. The measurements shall not be made where tie bars, humps, or fillets are located.
    - 2. Less than  $\frac{2}{32}$  ( $\frac{1}{16}$ ) of an inch, measured at any point on a major tread groove for all other tires of all buses. The measurements shall not be made where tie bars, humps, or fillets are located.
  - ii. No bus shall be operated with recapped, regrooved, or retreaded tires on the steering axle.
  - iii. Wheels shall be visibly free from cracks and distortions and shall not have missing, cracked, or broken mounting lugs.
- Suspension. The suspension system of all buses, including springs, air bags, and all other suspension parts, shall be free from cracks, leaks, or any other defect which may cause its impairment or failure to function properly.
- Steering and Front Axle. The steering system of all buses shall have no indication of leaks which would or may cause its impairment to function properly, and shall be free from cracks and excessive wear of components that may cause excessive free play or loose motion in the steering system or above normal effort in steering control.
- Seat Belts. Every bus shall be equipped with an adjustable driver's restraining belt in compliance with the requirements of FMVSS 209, "Seat Belt Assemblies" 49 C.F.R. 571.209—October 1, 2008, and FMVSS 210, "Seat Belt Assembly Anchorages" 49 C. F. R. 571.210 October 1,2008, hereby incorporated by reference.
- Safety Equipment. Every bus shall be equipped with one fully charged dry chemical or carbon dioxide fire extinguisher, having at least a 1A:BC rating and bearing the label of Underwriter's Laboratory, Inc. The fire extinguishers shall be maintained as follows:
  - i. Each fire extinguisher shall be securely mounted on the bus in a conspicuous place or a clearly marked compartment and be readily accessible.
  - ii. Each fire extinguisher shall be maintained in efficient operating condition and equipped with some means of determining if it is fully charged.
  - iii. Every Type I bus shall be equipped with portable red reflector warning devices in compliance with Section 316.300, Florida Statutes.
- Persons with Disabilities. Buses used for the purpose of transporting individuals with disabilities shall meet the requirements set forth in 49 C.F.R. Part 38, October 1, 2008, hereby incorporated by reference, as well as the following:
  - i. Installation of a wheelchair lift or ramp shall not cause the manufacturer's GVWR, gross axle weight rating, or tire rating to be exceeded.
  - ii. Except in locations within 3 1/2 inches of the bus floor, all readily accessible exposed edges or other hazardous protrusions of parts of wheelchair lift assemblies or ramps that are located in the passenger compartment shall be padded with energy absorbing material to mitigate injury in normal use and in

## System Safety Program Plan (SSPP)

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case of a collision. This requirement shall also apply to parts of the bus associated with the operation of the lift or ramp.

- iii. The controls for operating the lift shall be at a location where the bus driver or lift attendant has a full view, unobstructed by passengers, of the lift platform, its entrance and exit, and the wheelchair passenger, either directly or with partial assistance of mirrors. Lifts located entirely to the rear of the driver's seat shall not be operable from the driver's seat, but shall have an override control at the driver's position that can be activated to prevent the lift from being operated by the other controls (except for emergency manual operation upon power failure).
- iv. The installation of the wheelchair lift or ramp and its controls and the method of attachment in the bus body or chassis shall not diminish the structural integrity of the bus nor cause a hazardous imbalance of the bus. No part of the assembly, when installed and stowed, shall extend laterally beyond the normal side contour of the bus or vertically beyond the lowest part of the rim of the wheel closest to the lift.
- v. Each wheelchair lift or ramp assembly shall be legibly and permanently marked by the manufacturer or installer with the following information:
  - 1. The manufacturer's name and address.
  - 2. The month and year of manufacture.
  - 3. A certificate that the wheelchair lift or ramp securement devices, and their installation, conform to State of Florida requirements applicable to accessible buses.
- o Wheelchairs. Wheelchair lifts, ramps, securement devices, and restraints shall be inspected and maintained as required by this rule chapter. Instructions for normal and emergency operation of the lift or ramp shall be carried or displayed in every bus.

*Any additional text for Chapter 16.0 must be inserted above this point for formatting/page numbering purposes.*



## **17.0 Internal and External Safety Audits**

The Transportation Director is responsible for conducting announced and unannounced internal safety audits of Marion Transit units and contract operators. Annual internal safety audits will be conducted starting October 1st of each calendar year and ending prior to the end of the same calendar year utilizing the internal audit checklist included in Appendix G. The annual audit results will be documented by the Transportation Director in a report containing the following:

- Identification of the findings, including a detailed description of any deficiency.
- Required corrective action and a schedule for implementation of the corrective action to be taken for each deficiency.
- Any required suspension of bus transit system service should Your Community Transit determine the continued operation of the service, or a portion thereof, poses an immediate danger to public safety.

In addition, announced and unannounced periodic internal audits will be conducted by the Transportation Director or designee(s) to ensure compliance with all the objectives and requirements of SSPP and Florida Administrative Code Rule 14-90. Safety audits (sampling) of vehicles and records will be conducted on random basis, but at least annually. Pre-Post Trip Inspections will also be utilized to monitor safety concerns/issues on a daily basis. Facility inspection will be conducted once every week to identify and resolve potential safety and security hazards. The HR Director will regularly perform Quality Control (QC)/Quality Assurance (QA) checks to ensure that safety compliance, both in-house and contracted, is achieved at all times. Contractors/subcontractors are subject to audits and inspections on an announced or unannounced basis at the discretion of Marion Transit management. Marion Transit, or its contractor, will conduct safety and security reviews of contract service operators, at least once every three years, to ascertain compliance with the provisions of Florida Administrative Code Rule 14-90.

Marion Transit management will work closely with regulatory agencies (FDOT, FTA, etc.) when external audit notifications are received and allocate resources, as necessary, to facilitate the audits.

*Any additional text for Chapter 17.0 must be inserted above this point for formatting/page numbering purposes.*

### 18.0 Certification

The Transportation Director will submit an annual safety and security certification to the FDOT utilizing the self-certification form included in Appendix H. **The certification will be submitted no later than February 15, for the prior calendar year period unless otherwise required by FDOT.** The certification will attest to the following:

- The adoption of an SSPP and an SPP in accordance with established standards set forth in Florida Administrative Code Rule 14-90.
- Compliance with the adopted SSPP and SPP.
- Performance of safety inspections on all buses operated by the system in accordance with Florida Administrative Code Rule 14-90.
- Reviews of the SSPP and SPP have been conducted to ensure they are up to date.

The certification will also include:

- The name and address of Marion Transit, and the name and address of the entity(ies) who performed bus safety inspections and security assessments during the prior calendar year, if different from Marion Transit.
- A statement signed by the Chief Executive Officer/signatory authority responsible for the management of Marion Transit attesting to compliance with Florida Administrative Code Rule 14-90.

*Any additional text for Chapter 18.0 must be inserted above this point for formatting/page numbering purposes.*

# 19.0 Appendices

- Appendix A: Rule Chapter 14-90, F.A.C.
- Appendix B: Substance Abuse Policy
- Appendix C: Maintenance Plan
- Appendix D: Preventative Maintenance Guidelines
- Appendix E: Medical Examination Form 725-030-011
- Appendix F: Radio Operating Procedures
- Appendix G: Internal Safety Audit Checklist
- Appendix H: Bus Transit System Annual Safety and Security Certification Form
- Appendix I: SSPP Addendums (placeholder for future updates)
- Appendix J: Text Formatting Palette
- Appendix K: Marion Transit Procedures
  - a. Operations Staff Accident Procedures / Responsibilities
  - b. Pre-Trip / Post-Trip Daily Inspections
  - c. Biohazard Clean Up Procedure
  - d. Bus Evacuation Procedure/Plan
  - e. Transportation for Life Sustaining Activities
  - f. Lift & Wheelchair Procedure/Policy
  - g. Closing Procedure for Dispatch
  - h. Railroad Crossings Procedure
  - i. Proper Use of Two-Way Radios
  - j. Reasonable Modification Policy
  - k. Employee Incident & Injury Report Procedure
  - l. Vehicle Inspections
  - m. Complaint & Compliments Procedure
  - n. Alternative Internet Access
  - o. Customer Rights & Responsibilities
  - p. Scope of Work for Community Transportation Coordinators
  - q. Rider Disciplinary- Suspension Policy
  - r. Marion Transit STAR of the Month
  - s. Client Intake Procedure / Form
  - t. Trip Rate Procedure
  - u. Bus Road Call & Wrecker Procedure
  - v. Disadvantaged Business Enterprise (DBE) Policy/Procedure
  - w. About our Clients
  - x. Bus Video Review Policy
  - y. Asset Management Plan
  - z. Client Injury Report
  - aa. Supervisor Incident Review

**Appendix A**  
**Rule Chapter 14-90, F.A.C.**

# **Appendix B**

## **Substance Abuse Policy**

# **Appendix C**

## **Maintenance Plan**

# **Appendix D**

## **Preventative Maintenance Guidelines**

**Appendix E**  
**Medical Examination Form 725-030-011**



# Appendix F

## Radio Operating Procedures

# **Appendix G**

## **Internal Safety Audit Checklist**

**Appendix H**  
**Bus Transit System**  
**Annual Safety and Security Certification**  
**Form**

**Appendix I**  
**SSPP Addendums**  
**(placeholder for future updates)**

# Appendix J

## Text Formatting Palette

### Formatting/Styles

Report margins:

Top margin = 1"  
Bottom margin = 1"  
Left margin = 1.25"  
Right margin = .75"

Heading levels:

### Heading One

Arial 18 pt bold; centered; paragraph spacing = 20 pt after

### Heading 2

Arial 12 pt bold; left-aligned; line spacing-single; paragraph spacing = 6 pt before, 14 pt after

Body Text: Arial 11, single spaced, one blank line between paragraphs.

- Bulleted List: Arial 11 pt; line spacing-single; paragraph spacing = 6 pt before

### General Instructions

How to Update Table of Contents:

Right click on table of contents and choose **update field**—you will then have the option of updating the entire table of contents or just the page numbers.

How to Add New Section:

Under **Page Layout Menu**, choose **Breaks**, then **Section Break**, then **Next Page**.  
Heading numbers should update automatically in new section.

## **Appendix K**

### **Marion Transit Procedures**

- a. Operations Staff Accident Procedures / Responsibilities
- b. Pre-Trip / Post-Trip Daily Inspections
- c. Biohazard Clean Up Procedure
- d. Bus Evacuation Procedure/Plan
- e. Transportation for Life Sustaining Activities
- f. Lift & Wheelchair Procedure/Policy
- g. Closing Procedure for Dispatch
- h. Railroad Crossings Procedure
- i. Proper Use of Two-Way Radios
- j. Reasonable Modification Policy
- k. Employee Incident & Injury Report Procedure
- l. Vehicle Inspections
- m. Complaint & Compliments Procedure
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- y. Asset Management Plan
- z. Client Injury Report
- aa. Supervisor Incident Review



**Diane Poitras**

District Transit Programs Administrator  
FDOT District Five Modal Development Office  
420 W Landstreet Road, MS 594  
Orlando, FL 32824  
Phone: 407-482-7860  
Email: [diane.poitras@dot.state.fl.us](mailto:diane.poitras@dot.state.fl.us)

**Inserted**





*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 20<sup>th</sup> 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](mailto: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



February 27, 2023

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

RE: 2023 CTC Performance Evaluation

Dear Mr. Murch:

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

The TDLCB looked at:

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

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

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

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

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2710 E. Silver Springs Blvd. • Ocala, Florida 34470  
Telephone: (352) 438 - 2630 • [www.ocalamariontpo.org](http://www.ocalamariontpo.org)

**Recommendations:**

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

**Commendations:**

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

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

Sincerely,



Robert Balmes  
TPO Director



# MARION TRANSIT

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

**Via Email -**

March 2, 2023

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

Re: CTC ANNUAL EVALUATION – MARION TRANSIT

To whom it may concern:

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

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

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

Thank you,

Sincerely,

  
\_\_\_\_\_  
Clayton Murch, Transportation Director & CTC

Attachment

Appendix F: FCTD Rate Model Calculation Spreadsheets

Inserted

# Preliminary Information Worksheet

Version 1.4

<b>CTC Name:</b>	Marion Senior Services, Inc. d/b/a Marion Transit
<b>County (Service Area):</b>	Marion
<b>Contact Person:</b>	Clayton Murch/Tamara Grant-Powell
<b>Phone #</b>	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 2021 to June 30th of 2022	Current Year's APPROVED Budget, as amended from July 1st of 2022 to June 30th of 2023	Upcoming Year's PROPOSED Budget from July 1st of 2023 to June 30th of 2024	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

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

### Local Non-Govt

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

### Local Government

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

### CTD

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

### USDOT & FDOT

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

### AHCA

Medicaid						
Other AHCA (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

### DCF

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

### DOH

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

### DOE (state)

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

### AWI

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

### DOEA

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

### DCA

Community Services						
Other DCA (specify in explanation)						
<b>Bus Pass Admin. Revenue</b>						

# Comprehensive Budget Worksheet

Version 1.4

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

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

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

### APD

Office of Disability Determination						
Developmental Services						
Other APD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

### DJJ

(specify in explanation)						
<b>Bus Pass Program Revenue</b>						

### Other Fed or State

FL GAS TAX REFUND	\$ 31,902			-100.0%		
xxx						
xxx						
<b>Bus Pass Program Revenue</b>						

### Other Revenues

Interest Earnings						
EMPLOYEE CONTRIBUTIONS/DONATION	\$ 3,594	\$ 850		-76.4%	-100.0%	
INS LOSS REIMB REVENUE	\$ 807			-100.0%		
<b>Bus Pass Program Revenue</b>						

### Balancing Revenue to Prevent Deficit

Actual or Planned Use of Cash Reserve						
---------------------------------------	--	--	--	--	--	--

Balancing Revenue is Short By =	\$ 260,686					
<b>Total Revenues =</b>	<b>\$3,277,143</b>	<b>\$4,375,310</b>	<b>\$5,527,377</b>	<b>33.5%</b>	<b>26.3%</b>	

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

#### Operating Expenditures

Labor	\$ 1,630,444	\$ 1,917,245	\$ 2,014,932	17.6%	5.1%	
Fringe Benefits	\$ 467,730	\$ 497,328	\$ 596,565	6.3%	20.0%	
Services	\$ 539,372	\$ 506,283	\$ 376,295	-6.1%	-25.7%	
Materials and Supplies	\$ 426,247	\$ 535,809	\$ 551,883	25.7%	3.0%	
Utilities	\$ 33,855	\$ 30,670	\$ 31,590	-9.4%	3.0%	
Casualty and Liability	\$ 363,817	\$ 369,548	\$ 411,217	1.6%	11.3%	
Taxes	\$ 976	\$ 355	\$ 366	-63.6%	3.0%	
Purchased Transportation:						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services						
Other						
Miscellaneous	\$ 83,093	\$ 42,761	\$ 44,044	-48.5%	3.0%	
Operating Debt Service - Principal & Interest						
Leases and Rentals	\$ 472	\$ 472	\$ 486	0.0%	3.0%	
Contrib. to Capital Equip. Replacement Fund						
In-Kind, Contributed Services	\$ 74,709	\$ -	\$ -	-100.0%		
Allocated Indirect						

#### Capital Expenditures

Equip. Purchases with Grant Funds	\$ 264,474	\$ 735,527	\$ 1,200,000	178.1%	63.1%	
Equip. Purchases with Local Revenue			\$ 150,000			
Equip. Purchases with Rate Generated Rev.			\$ 150,000			
Capital Debt Service - Principal & Interest						

<b>ACTUAL YEAR LOSS</b>	<b>(\$608,046)</b>	<b>\$260,686</b>				
<b>Total Expenditures =</b>	<b>\$3,885,189</b>	<b>\$4,635,996</b>	<b>\$5,527,377</b>	<b>19.3%</b>	<b>19.2%</b>	

See NOTES Below.

Error: Revenues  
< Expenditures

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

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



**Budgeted Rate Base Worksheet**

Version 1.4

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

County: Marion

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

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

**REVENUES (CTC/Operators ONLY)**

**Local Non-Govt**

Farebox	\$ 85,000
Medicaid Co-Pay Received	\$ -
Donations/ Contributions	\$ -
In-Kind, Contributed Services	\$ -
Other	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**Local Government**

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

**CTD**

Non-Spons. Trip Program	\$ 771,834
Non-Spons. Capital Equipment	\$ 150,000
Rural Capital Equipment	\$ -
Other TD	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**USDOT & FDOT**

49 USC 5307	\$ -
49 USC 5310	\$ 1,200,000
49 USC 5311 (Operating)	\$ 1,876,570
49 USC 5311(Capital)	\$ -
Block Grant	\$ -
Service Development	\$ -
Commuter Assistance	\$ -
Other DOT	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**AHCA**

Medicaid	\$ -
Other AHCA	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**DCF**

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

**DOH**

Children Medical Services	\$ -
County Public Health	\$ -
Other DOH	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**DOE (state)**

Carl Perkins	\$ -
Div of Blind Services	\$ -
Vocational Rehabilitation	\$ -
Day Care Programs	\$ -
Other DOE	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**AWI**

WAGES/Workforce Board	\$ -
AWI	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**DOEA**

Older Americans Act	\$ -
Community Care for Elderly	\$ -
Other DOEA	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

**DCA**

Community Services	\$ -
Other DCA	\$ -
<b>Bus Pass Program Revenue</b>	<b>\$ -</b>

\$ 42,500	\$ 42,500	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

\$ 35,000	\$ -	
\$ -	\$ 336,000	
\$ 250,000	\$ 672,973	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ 150,000	
\$ -	\$ -	
\$ -	\$ -	

\$ 771,834	\$ -	\$ -
\$ -	\$ 150,000	\$ 150,000
\$ -	\$ -	\$ -
\$ -	\$ -	\$ -
\$ -	\$ -	\$ -

local match req.  
\$ 85,759  
\$ 16,667  
\$ -

\$ -	\$ -	\$ -
\$ -	\$ 1,200,000	\$ 1,200,000
\$ 1,876,570	\$ 0	\$ -
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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.



# 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 =	900,000
<b>Rate Per Passenger Mile = \$</b>	<b>3.31</b>
Total <u>Projected</u> Passenger Trips =	72,000
<b>Rate Per Passenger Trip = \$</b>	<b>41.33</b>

Fiscal Year

2023 - 2024

<b>Avg. Passenger Trip Length =</b>	<b>12.5 Miles</b>
-------------------------------------	-------------------

Rates If No Revenue Funds Were Identified As Subsidy Funds	
<b>Rate Per Passenger Mile = \$</b>	<b>6.14</b>
<b>Rate Per Passenger Trip = \$</b>	<b>76.77</b>

**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 Services** 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 checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input 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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Effective Rate for **Contracted Services:**  
 per **Passenger Mile** =  
 per **Passenger Trip** =

Ambulatory	Wheelchair	Stretcher	Group
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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 Services** 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: 2023 - 2024			
		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	900,000	= 567,900	+ 332,100	+ Leave Blank	+ Leave Blank
Rate per Passenger Mile =		\$2.62	\$4.49	\$0.00	\$0.00
				per passenger	per group

		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	72,000	= 45,360	+ 26,640	+ Leave Blank	+ Leave Blank
Rate per Passenger Trip =		\$32.69	\$56.04	\$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 =		\$2.62	\$4.49	\$0.00	\$0.00
				per passenger	per group

		Rates If No Revenue Funds Were Identified As Subsidy Funds			
		Ambul	Wheel Chair	Stretcher	Group
Rate per Passenger Mile =		\$4.86	\$8.33	\$0.00	\$0.00
				per passenger	per group
Rate per Passenger Trip =		\$60.72	\$104.09	\$0.00	\$0.00
				per passenger	per group

### Worksheet for Multiple Service Rates

CTC: Marion Senior Set 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

Program These Rates Into Your Medicaid Encounter Data