



TPO Board Meeting

Marion County Commission Auditorium
601 SE 25th Avenue, Ocala, FL 34471

April 27, 2021

4:00 PM

AGENDA

- 1. CALL TO ORDER AND PLEDGE OF ALLEGIANCE**
- 2. ROLL CALL**
- 3. PROOF OF PUBLICATION**
- 4. CONSENT AGENDA**
 - A. Minutes – February 23, 2021**
- 5. ACTION ITEMS**
 - A. Fiscal Years (FY) 20/21 to 24/25 Transportation Improvement Program (TIP) Amendment 1**

Financial Management Numbers (FM#)
448816-1: 5310 Capital ARC Marion, Small Urban
448854-1: NE 40th Street at RR Crossing #627890
Staff is seeking review and approval of two additional projects to the TIP.
 - B. Fiscal Years (FY) 20/21 to 24/25 Transportation Improvement Program (TIP) Amendment 2**

Staff is seeking approval of the Transit Safety Performance Measure Targets developed for SunTran's Public Transportation Safety Action Plan (PTASP).
 - C. Fiscal Years (FY) 20/21 to 21/22 Unified Planning Work Program (UPWP) Amendment**

Staff is seeking approval of a request to amend the UPWP to include carryforward Federal Transit Administration grant funding.

D. Approval of Community Transportation Coordinator (CTC) Review and Evaluation

Staff is seeking approval of the TPO's review of the Community Transportation Coordinator annual evaluation performed on Marion Transit Services.

E. Approval of TPO Mission and Vision Statements

Staff is seeking approval of the TPO's proposed mission and vision statements based on a feedback process conducted with board and committee members.

6. DISCUSSION ITEMS

F. Office of Inspector General Audit Report of the TPO

Staff and Chair will share highlights from the audit report.

G. Congestion Management Plan Public Survey

Staff will share highlights from a recent public survey conducted to support the development of a revised congestion management process in 2021.

H. National Bike Month

May is National Bike Month. Staff will share plans for virtual engagement.

7. COMMENTS BY FDOT- April 2021 Construction Report

8. COMMENTS BY TPO STAFF

I. Florida MPOAC Legislative Activities

J. List of Priority Projects (LOPP) and Fiscal Years (FY) 21/22 to 25/26 TIP Schedule

9. COMMENTS BY TPO MEMBERS

11. PUBLIC COMMENT (Limited to 2 minutes)

12. ADJOURNMENT

All meetings are open to the public, the TPO does not discriminate on the basis of race, color, national origin, sex, age, religion, disability and family status. Anyone requiring special assistance under the Americans with Disabilities Act (ADA), or requiring language assistance (free of charge) should contact Liz Mitchell, Title VI/Nondiscrimination Coordinator at (352) 438-2634 or liz.mitchell@marioncountyfl.org forty-eight (48) hours in advance, so proper accommodations can be made.

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

The next regular meeting of the Ocala Marion Transportation Planning Organization will be held on May 25, 2021.



TPO Board Meeting

Marion County Commission Auditorium and via WebEx
601 SE 25th Avenue, Ocala, FL 34471
February 23, 2021
4:00 PM

MINUTES

Members Present:

Councilman Ire Bethea
Commissioner Kathy Bryant
Councilwoman Valerie Hanchar
Commissioner Ronald Livsey
Commissioner Craig Curry

Members Not Present:

Commissioner Jeff Gold
Councilman Justin Grabelle
Mayor Kent Guinn
Councilman Brent Malever
Councilman Jay Musleh
Commissioner Michelle Stone
Commissioner Carl Zalak

Others Present:

Rob Balmes, TPO
Shakayla Irby, TPO
Liz Mitchell, TPO
Anna Taylor, FDOT
Steven Neal, City of Ocala

Item 1. Call to Order and Pledge of Allegiance

Vice-Chairman Ire Bethea called the meeting to order at 4:02pm and led the board in the Pledge of Allegiance.

Item 2. Roll Call

Shakayla Irby, Administrative Assistant called the roll and a quorum was present.

Item 3. Proof of Publication

Shakayla Irby, Administrative Assistant stated the meeting was published online at the TPO website and the City of Ocala, Belleview and Dunnellon and Marion County meeting calendars on February 16, 2021. The meeting was also published to the TPO's Facebook and Twitter pages.

Item 4a. 2021 Safety Targets

Mr. Balmes presented and said that the Performance Management was a strategic approach to connect investment and policy decisions to help achieve performance goals. Performance measures were used to evaluate progress. Performance measure targets were the benchmarks against which collected data was gauged. The Moving Ahead for Progress in the 21st Century Act (MAP-21) required State DOTs and TPOs/MPOs to conduct performance-based planning by tracking performance measures and setting data-driven targets to improve the measures.

Every year, the Ocala Marion TPO was required to update its targets for the five Safety performance measures established under MAP-21. The TPO had to submit its Safety targets at the end of February 2021.

Safety Performance Measures Description

1. Fatalities- Total number of fatalities in a motor vehicle crash
2. Fatalities (Rate) - Total number of fatalities per 100 Million VMT (Vehicle Miles Traveled)*
3. Serious Injuries- Total number of serious injuries in a motor vehicle crash
4. Serious Injuries (Rate) - Total number of serious injuries per 100 Million VMT (Vehicle Miles Traveled)*
5. Non-Motorized Fatalities & Serious Injuries- Combined number of non-motorized fatalities and non-motorized serious injuries involving a motor vehicle.

When updating its Safety targets, the Ocala Marion TPO was provided the option to either:

1. Adopt the targets established by FDOT, or,
2. Develop its own quantifiable safety performance targets.

In 2020, the TPO voted to develop its own quantifiable safety performance targets, which were based on previous 5-year rolling averages.

TPO staff recommended that the board approve the 2021 Safety Targets, as presented.

An explanation of the methodologies used to develop the 2021 Safety Targets, as well as the past 2019 Safety Targets and 2020 Safety Targets methodologies, had been provided to the board.

Ms. Hanchar made a motion to approve the 2021 Safety Targets. Mr. Curry seconded, and the motion passed unanimously.

Item 4b. SunTran Bus Route Planning

Mr. Steven Neal with the City of Ocala gave a presentation to the board. The presentation provided an overview of the current process underway to assess a re-design of current bus transit service.

The SunTran Service before 2018 had the following:

- 6 Routes
- 70-minute Headway
- Interlined “Figure 8” Routes
- 17 Hours a day
- Monday to Saturday Service

The Existing Transit Network had the following:

- 6 Routes to 7 Routes (Silver Route added)
- “Two-Way” Service to “One-Way” Service
- Loss of coverage for some heavy transit-dependent population area
- Service Extension beyond US 200 & I-75

Some of the challenges that came from the route changes in 2018 included:

- Decreasing Ridership
- Route Issues
- Declining Cost Efficiency
- Additional Locations
- Customer Complaints
- Longer riding time (50% increases from before)
- Loss coverage of needed destinations
- Longer walk to bus stops
- Schedule insufficient to cover after-work trip
- Limited Shelters and Benches

New Locations to service were:

NW Ocala- FedEx Ground, Chewy, AutoZone, Greyhound Stations

W Ocala- Florida Access, the Centers

SW Ocala- Market Street at Heath Brook, New VA Clinic Facility

The Existing Project Status

- 9 new bus vehicles as of August 2020
- Developed public involvement plan

Approved –

- On-board Survey (on bus and internet)
 - SunTran Operator Survey
 - Stakeholder Interview Questionnaire
- Coordinate with 3rd-party technical supporting platforms for the transition (Remix and Avail Technologies)

There were plans to implement the redesign system by the summer of 2021.

Ms. Bryant made a motion to approve the SunTran Bus Route Planning. Ms. Hanchar seconded, and the motion passed unanimously.

Walk-On Agenda Item: TPO Position

Ms. Hanchar made a motion to allow the Walk-On Agenda Item: TPO Position. Mr. Curry seconded, and the motion passed unanimously.

Mr. Balmes said that due to the departure of two staff members of the TPO he had worked closely with the Human Resources Department to post a Senior Transportation Planner position. The position would support a lot of key areas of the TPO such as the Transportation Improvement Program (TIP) with annual updates and amendments, managing the Technical and Citizens Advisory Committees, providing support with the Geographic Information System (GIS), and be involved with any future planning studies.

Mr. Bethea asked if the one position would replace both vacant positions at the TPO.

Mr. Balmes said that the TPO had went through some cuts in the 5305d grant and that the TPO faced a \$25,000 cut in funding and due to that the TPO would need to continue with a staff support of four members. The new position would combine some of the Planner position and a leadership role.

Ms. Bryant made a motion to approve the TPO Senior Transportation Planner position.

Ms. Hanchar seconded, and the motion passed unanimously.

Item 5a. Congestion Management Plan

Mr. Balmes presented and said that over the next nine months, the TPO staff had been planning to conduct a major update to the Congestion Management Process (CMP) documents. The last significant development of the CMP was in 2011, which had included CMP Policy and Procedures and State of the System reports. In 2021, the TPO planned to develop one revised comprehensive Congestion Management Plan (CMP).

Approved –

The CMP would outline a systematic approach for identifying and managing congestion on the major federal-aid roadway network within Marion County. That would include an assessment of current and projected traffic conditions, identification of congestion hot spots, recommended strategies and solutions to improve congestion, and planning level guidance for the top congested locations.

The process for developing the CMP would be a collaborative approach involving input and guidance from the technical staff members of the cities of Belleview, Dunnellon and Ocala, Marion County and the Florida Department of Transportation (FDOT). The TPO had planned for both the Technical and Citizens committees and TPO Board would be involved throughout the process to review information, draft documents and offer feedback.

The TPO would also be working with Kimley-Horn and Associates to support the completion of the CMP. Mr. Balmes provided a kick-off presentation to the board members outlining the timeline for completion by October 2021.

Item 5b. Pavement, Bridge and Reliability Targets

Mr. Balmes presented and said that every year, the Federal Highway Administration (FHWA) required the Florida Department of Transportation (FDOT) and all Metropolitan Planning Organizations in Florida to adopt Performance Measure (PM) targets.

Developed in 2016 as part of the Moving Ahead for Progress in the 21st Century Act, or MAP-21, the targets provided a way for the MPOs and the State to track performance measures and ultimately improved on these measures.

Mr. Schauerte reported on the performance measures and provided tables to outline the targets that had been set by the Florida Department of Transportation and adopted by the TPO.

Item 6. Senate Bill 62 and Regional Planning Councils

Mr. Balmes informed the board of the Senate Bill 62 and Regional Planning Councils that stated “Regional Planning Councils; Revising a requirement for the Executive Office of the Governor to review and consider certain reports, data, and analyses relating to the revision of the state comprehensive plan; eliminating the advisory role of regional planning councils in state comprehensive plan preparation and revision; repealing provisions relating to the Florida Regional Planning Council Act; authorizing local governments to recommend areas of critical state concern to the state land planning agency, etc.”

Mr. Balmes provided the board with a list of 40th Anniversary items for the TPO.

Item 7. Consent Agenda

Ms. Bryant made a motion to approve the Consent Agenda. Ms. Hanchar seconded, and the motion passed unanimously.

Item 8. Comments by FDOT

Ms. Anna Taylor with FDOT provided the board with an updated construction report.

Item 9. Comments by TPO Staff

Mr. Balmes provided the board with a MPOAC Legislative Newsletter and highlighted some activities pertinent to the TPO.

- Pete Buttigieg was confirmed as the U.S. DOT Secretary of Transportation
- State Regular Legislative Session convenes March 2
- State Regular Legislative Last Day of Session April 30
- SB 62 – Elimination of advisory role of regional planning councils and shifting duties to state office. Bill now in Judiciary committee.
- SB 140 – Fees for Electric Vehicles. Creating additional fees for electric vehicles, license tax and fees for plug-in hybrids
- SB 1030/HB 763 – Repeal MCORES program and funding

Item 10. Comments by TPO Members

Mr. Curry informed the board that he had attended the MPOAC meeting and said that there had been discussions on SB 138- “Revising the Department of Transportation's goals relating to mobility; requiring the department to establish the Electric Vehicle Infrastructure Grant Program; providing for the distribution of grants to certain entities to install electric vehicle charging infrastructure; specifying that certain rules adopted by the Department of Agriculture and Consumer Services may not require specific methods of sale for electric vehicle charging equipment used in, and services provided in, this state, etc.”

There had also been discussion on ways to gain revenue to support the growing electric vehicle market instead of relying on a motor fuels gas tax. Also, ways that the MPOAC and partners could be proactive in the area and to work with the state to find other alternatives to the gas tax.

Item 10. Public Comment

Melba Smith, 1310 W Silver Springs Blvd., Ocala, FL 34475 addressed the board and spoke about the changes that took place with the SunTran bus routes in 2018.

Ms. Smith said that buses had been running late, only able to go down one side of the road and not the other side, long waits at the Health Department, and also inconveniencing changes to the Purple Route.

Ms. Smith was in favor of making the bus routes the way they were prior to the major changes in 2018.

Joseph Morah (no address was stated) addressed the board and said he would like to see Sunday Service added to the SunTran for those that work during the week and have time to do other

Approved –

activities on the weekend but have no way around.

Item 11. Adjournment

Vice-Chairman Bethea adjourned the meeting at 5:22pm.

Respectfully Submitted By:

Shakayla Irby, Administrative Assistant



TO: TPO Board Members

FROM: Rob Balmes, Director

RE: Amendment of FY 2020/21 to 2024/25 Transportation Improvement Program (TIP)

Per the request of the Florida Department of Transportation (FDOT), two projects are proposed to be amended to the Fiscal Years (FY) 2020/2021 to 2024/2025 Transportation Improvement Program (TIP). The projects may be found on the following attached pages of the TIP document.

FM# 448816-1: Capital ARC Marion – Small Urban

- New project that will be added to the FY 2020/21 to - 2024/25 TIP
- \$6,200 added to FY 2021
- New capital project awarded from Section 5310 grant
- Support for Advocacy Resource Center (ARC) transportation services – preventative maintenance for vehicles (Marion Transit)

FM# 448854-1: NE 40th Railroad Crossing (#627890)

- New project that will be added to the FY 2020/21 to - 2024/25 TIP
- \$3,588 added to FY 2021
- This project will include funding to replace incandescent bulbs and lenses with LED bulbs and lenses at the railroad crossing

On April 13, 2021 the Technical Advisory Committee (TAC) and Citizens Advisory Committee (CAC) recommended both projects to be amended to the TIP. TPO staff is requesting your review and approval. If you have any questions regarding the proposed TIP amendments, please contact me at 438-2631.



Florida Department of Transportation

RON DESANTIS
GOVERNOR

719 S. Woodland Boulevard
DeLand, Florida 32720-6834

KEVIN J. THIBAUT, P.E.
SECRETARY

February 18, 2021

Robert Balmes
TPO Director
Ocala Marion Transportation Planning Organization
2710 E. Silver Springs Blvd
Ocala, FL 34470

Dear Mr. Balmes:

Subject: REQUEST FOR TRANSPORTATION IMPROVEMENT PROGRAM CHANGES

The Florida Department of Transportation (FDOT) requests the following changes to be made to Ocala Marion Transportation Planning Organization's Adopted Fiscal Years 2020/2021 – 2024/2025 Transportation Improvement Program (TIP) in coordination with the corresponding changes to the Department's Adopted Work Program. Please make sure that you put the amendment date on your cover page of the amended TIP and the page of the TIP that the project is listed on.

MARION COUNTY

FM#448816-1 5310 CAPITAL ARC MARION - SMALL URBAN

Current TIP Status:

Project is not in current TIP for Fiscal Years 2020/2021 – 2024/2025.

Proposed Amendment:

Phase	Amended Funding Type	Amended Amount	Fiscal Year
Grants and Miscellaneous	DPTO	\$620	2021
Grants and Miscellaneous	DU	\$4,960	2021
Grants and Miscellaneous	LF	\$620	2021
TOTAL		\$6,200	

Difference: New Transit Project with Phase 94 (Capital Grant) funds added in Fiscal Year 2020/2021. TIP must be updated to reflect new project and added funding.

Explanation: This new capital project was awarded funding as a result of our Section 5310 grant application cycle. ARC Marion, located in Ocala, FL, provides transportation services to adults with developmental disabilities in Marion County. The preventative maintenance funds will be used on the vehicles that provide transportation services to their clients.

FM#448854-1 NE 40TH ST AT RR CROSSING #627890

Current TIP Status:

Project is not in current TIP for Fiscal Years 2020/2021 – 2024/2025.

Proposed Amendment:

Phase	Amended Funding Type	Amended Amount	Fiscal Year
Railroad and Utilities	RHP	\$3,588	2021
	TOTAL	\$3,588	

Difference: New Railroad and Utilities Project with Phase 57 (Railroad Construction) funds added in Fiscal Year 2020/2021. TIP must be updated to reflect new project and added funding.

Explanation: This project will replace the existing 12" incandescent bulbs and lenses with LED bulbs and lenses at CSX #627890X at Milepost# S-729.74 on NE 40th Street in Ocala; Marion County. No dirt will be disturbed, and all work will be completed in Railroad right of way.

Sincerely,



Anna Taylor, Government Liaison Administrator
FDOT District Five

cc: Kellie Smith, Planning & Environmental Management Administrator, FDOT
Rakinya Hinson, MPO Liaison, FDOT
Carlos Colon, Transit Liaison, FDOT

Project Description: 5310 Capital ARC Marion - Small Urban

Project Type: Capital Grant

FM Number: 4488161

Lead Agency: Marion Transit

Length: N/A

LRTP # (pg. #): Goal 1, Objectives 1,3,4 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$6,200

**Additional
Information:**

Preventative maintenance funds for vehicles that provide transportation services to Advocacy Resource Center (ARC) in Marion County.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	DPT0	\$620	\$0	\$0	\$0	\$0	\$620
CAP	DU	\$4,960	\$0	\$0	\$0	\$0	\$4,960
CAP	LF	\$620	\$0	\$0	\$0	\$0	\$620
Total		\$6,200	\$0	\$0	\$0	\$0	\$6,200

Project Description: NE 40th At Railroad Crossing #627890

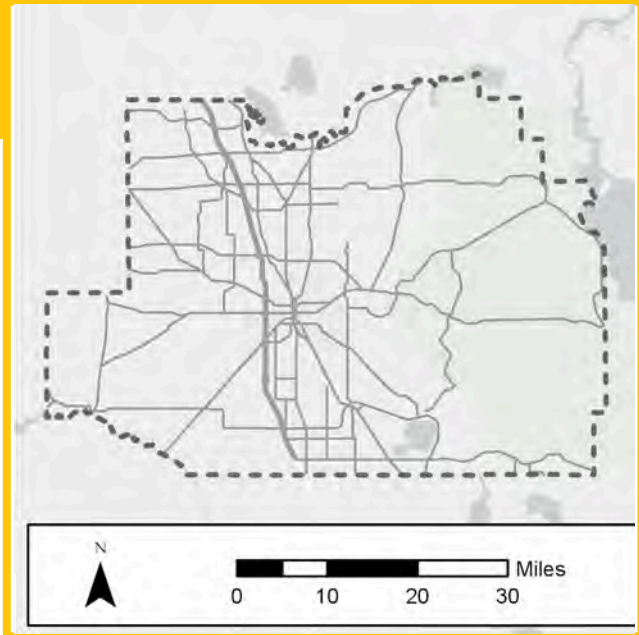
Project Type: Rail Safety Project

FM Number: 4488541

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 6: Objectives 2,3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$3,588

**Additional
Information:**

Replacement of existing incandescent bulbs and lenses with LED bulbs and lenses at CSX crossing #627890X on NE 40th in Ocala.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
RHP	RRU	\$3,588	\$0	\$0	\$0	\$0	\$3,588
Total		\$3,588	\$0	\$0	\$0	\$0	\$3,588



Transportation Improvement Program FY 2020/21 – FY 2024/25

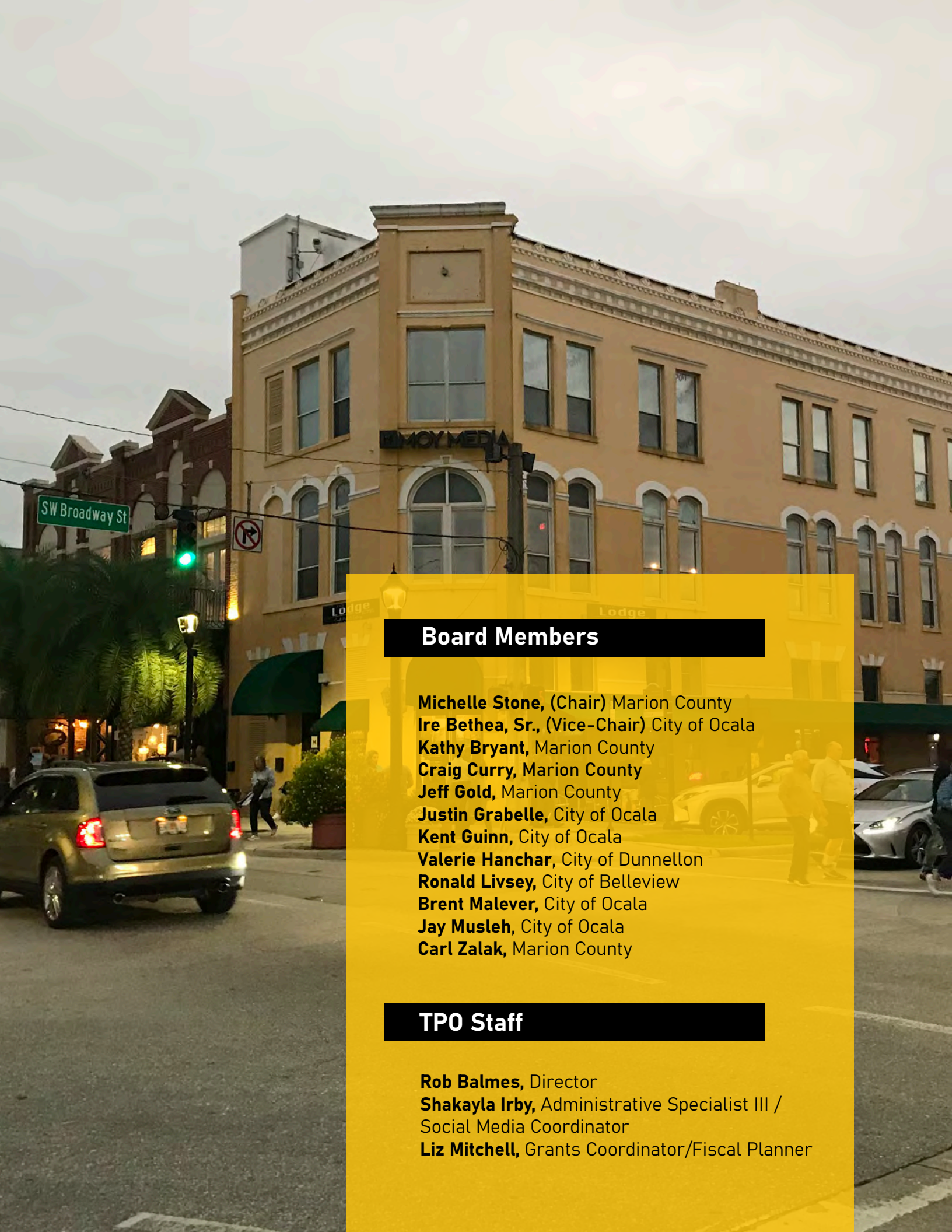
Adopted:

- July 6, 2020

Amended:

- September 22, 2020**
- January 26, 2021**
- April 27, 2021**

[Resolution Placeholder]



Board Members

Michelle Stone, (Chair) Marion County
Ire Bethea, Sr., (Vice-Chair) City of Ocala
Kathy Bryant, Marion County
Craig Curry, Marion County
Jeff Gold, Marion County
Justin Grabelle, City of Ocala
Kent Guinn, City of Ocala
Valerie Hanchar, City of Dunnellon
Ronald Livsey, City of Belleview
Brent Malever, City of Ocala
Jay Musleh, City of Ocala
Carl Zalak, Marion County

TPO Staff

Rob Balmes, Director
Shakayla Irby, Administrative Specialist III /
Social Media Coordinator
Liz Mitchell, Grants Coordinator/Fiscal Planner

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INTRODUCTION

PURPOSE

The Ocala Marion Transportation Planning Organization (TPO) is the federally designated Metropolitan Planning Organization (MPO) for Marion County, Florida and is responsible for developing the Transportation Improvement Program (TIP). The TIP is a five-year schedule of transportation projects proposed by government agencies and other stakeholders within the TPO's Metropolitan Planning Area (MPA), which includes all of Marion County. The TIP documents the anticipated timing and cost of transportation improvements funded by federal, state and local sources and is updated on an annual basis. The types of projects in the TIP include all modes of transportation, such as roadway construction, operations, and reconstruction; bicycle and pedestrian; transit and aviation. Other projects that are regionally significant, regardless of funding source, are also incorporated into this document.

As stated in the Federal Highway and Transit Acts of 1962 and 1964, each urbanized area over 50,000 people must have a continuing, cooperative and comprehensive transportation process. This process, also known as the 3-C planning process, is carried out by the TIP, in conjunction with the Long-Range Transportation Plan (LRTP). The LRTP, which is also developed by the TPO, documents the community's transportation vision and goals 20 years into the future. The TIP outlines the short-term "action steps" necessary for achieving Marion County's long-term transportation vision by indicating specific improvements. In short, the TIP acts as the budget for carrying out the LRTP. The purpose of the TIP

is also to coordinate transportation projects between local, state, and federal agencies, thereby ensuring the efficient use of limited transportation funds.

All transportation projects contained in the TIP are financially feasible, located within the designated metropolitan planning area and funded by 23 United States Code (U.S.C.) and 49 U.S.C. Chapter 53 funds. For a project to be considered financially feasible, the anticipated cost must not exceed the anticipated revenue.

TPO PLANNING AREA

The Ocala Marion TPO is a federally-mandated public agency responsible for the planning and

implementation of several modes of transportation, including highway, transit, freight, bicycle, pedestrian and paratransit. The TPO serves the cities of Belleview, Dunnellon, Ocala and Marion County. The TPO was established in 1981 after the 1980 Census determined the urbanized area of Ocala exceeded a threshold of 50,000 people. Due to rapid population growth in the 1980s, the planning boundaries of the entire county were added. Figure 1 illustrates the 2010 Census designated Urbanized Areas (UZA) and Urban Cluster areas of Marion County, which are all served by the TPO. This also includes portions of Lady Lake-the Villages and the Homosassa Springs-Beverly Hills-Citrus areas within the Ocala Metropolitan Statistical Area (MSA), Marion Oaks, Rainbow Lakes and Ocala Estates-Lake Bryant.

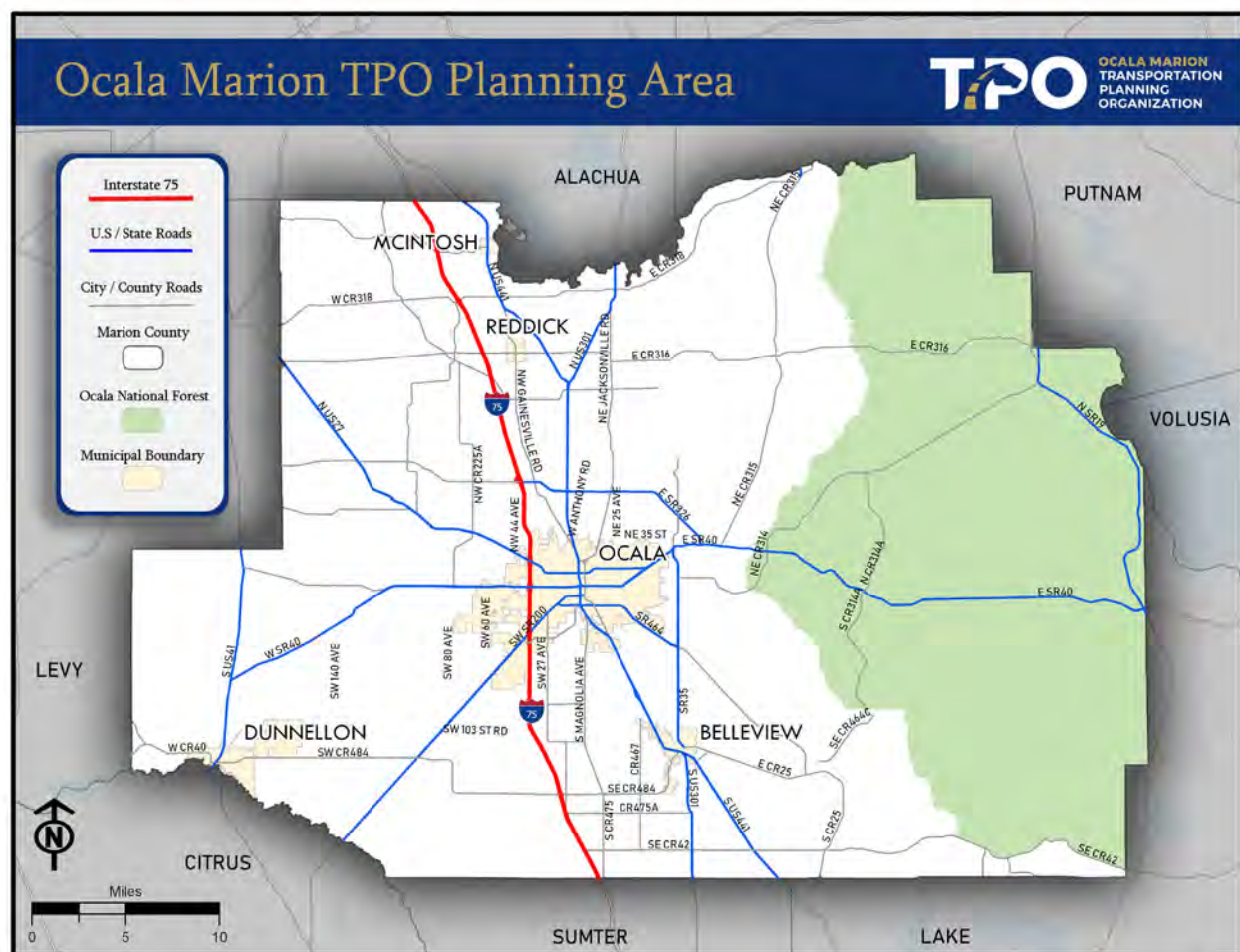


Figure 1: Map of TPO Planning Area

DEVELOPMENT OF THE TIP

Public and local government involvement for the development of the TIP is accomplished through regularly scheduled meetings of the TPO's Technical Advisory Committee (TAC) and Citizens Advisory Committee (CAC) and the TPO Board. The TPO also strives to engage both citizens and stakeholders to assist in the development of the TIP. The TPO seeks public input for thirty (30) days once the TIP DRAFT is publicly noticed, in accordance with 23 Code of Federal Regulation (C.F.R.) 450.316 and 23 C.F.R. 450.326(b). A Glossary of Terms and Acronyms used in the TIP and other TPO documents can be found in Appendix G.

TPO Boards and Committees

The TPO submits its draft TIP for review and feedback to the TPO's Technical Advisory Committee (TAC) and Citizens Advisory Committee (CAC). These boards/committees are composed of members who represent a variety of government organizations and stakeholders, which include the Cities of Belleview, Dunnellon, and Ocala; the Marion County School Board; the Marion County Engineering, Planning, and Tourism Departments; SunTran; the Florida Greenways and Trails Association; and citizens of Marion County, including persons who are considered transportation disadvantaged.

The TPO also submits its draft TIP to the TPO Board for review and to receive additional feedback. The TPO then addresses the recommendations provided by the Board and Committees, in addition to public input, in developing the final version of the TIP. The final version of the TIP is presented to the TPO Board for adoption in May or June of each year. TPO staff presented the draft TIP to the TAC and CAC on May 12th and June 9th, the TPO Board on May 26th and June 23rd, the Dunnellon City Council on June 8th and the Belleview City Commission on June 16th.

Public Involvement

In addition to meeting federal regulations, the TIP was developed in accordance with the TPO's [Public Involvement Plan \(PIP\)](#). The public was provided the opportunity to comment on the draft TIP at the aforementioned TAC, CAC, TPO Board, Dunnellon City Council and Belleview City Commission meetings. The TAC and CAC meetings were held virtually and therefore were accessible to those with internet access. The TPO Board, Dunnellon and Belleview meetings were held in-person, with the added capability to participate virtually. The TPO sought input from the public and other stakeholders by posting on its website, social media pages (Facebook, Twitter, LinkedIn) and sending e-blast notifications. Beginning on May 19th, a legal notice of the draft version of the TIP was placed in the Ocala Star Banner for 30 days. The public comment period for the TIP began on May 19th and concluded on June 23rd. A copy of the notice can be found in Appendix E and a list of public comments, including the TPO's response to each comment, can be found in Appendix F. On May 19th, the TPO sent the Draft TIP for review and comment to the following agencies: Federal Transit Administration, Federal Highway Administration, U.S. Forest Service, Florida Department of Transportation, Department of Economic Opportunity, Florida Commission for the Transportation Disadvantaged and the St. Johns River Water Management District.

CERTIFICATION

The most recent certification review of the Ocala Marion TPO was conducted by FDOT in February 2020. FDOT certified the transportation planning process for Fiscal Year 2020/2021. The next certification review will occur in February 2021.

CONSISTENCY WITH OTHER PLANS

The projects and project phases listed in the 2020/21-2024/25 TIP are consistent, to the maximum extent possible, with public transit development plans, aviation, and the approved local government comprehensive plans for governments within the TPO's MPA [s.339.175(8)(c)(7), F.S.]. The TIP is consistent with the Ocala Marion TPO's 2040 Long Range Transportation Plan (LRTP), Florida Transportation Plan (FTP), Strategic Intermodal System (SIS) Policy Plan, Freight Mobility and Trade Plan (FMTP), Transportation Asset Management Plan (TAMP), Congestion Management Plan (CMP) and the Transportation Development Plan (TDP).

2040 Long Range Transportation Plan (LRTP)

In addition to documenting Marion County's long-term vision and goals for transportation, the LRTP includes a Needs Assessment and a Cost Feasible Plan. These two sections detail the specific projects to fulfill the County's long-term vision and goals. In order to remain current with the changing needs of Marion County, the Ocala Marion TPO updates the LRTP every five years. The 2040 Long Range Transportation Plan is the current LRTP for Marion County and development of the 2045 LRTP is currently in progress. The 2045 is scheduled for adoption in November 2020. A list of TIP projects referenced in the 2040 LRTP can be found in Appendix I.

Florida Transportation Plan (FTP)

The Florida Transportation Plan (FTP) serves as the state's long-range transportation vision and policy plan. The FTP focuses on ways to improve safety,

provide a more efficient transportation system, meet the needs of a changing population, create a more competitive economy, enhance the overall quality of life and environment, increase access to transit and address emerging technologies.

Strategic Intermodal System (SIS) Policy Plan

The Strategic Intermodal System (SIS) Policy Plan establishes the policy framework for planning and managing Florida's Strategic Intermodal System, a network of transportation facilities that serves as the state's highest priority for transportation capacity investments. The Governor and Legislature established the SIS in 2003 to focus state resources on facilities most significant for promoting the state's economic competitiveness, including interregional, interstate and international travel. The SIS is the primary tool for implementing the Florida Transportation Plan (FTP). A map of the SIS can be found in Appendix D.

Freight Mobility and Trade Plan (FMTP)

FDOT's Freight Mobility and Trade Plan (FMTP) defines policies and investments that will enhance Florida's economic development efforts into the future. The FMTP's Investment Element is specifically intended to identify freight needs, identify criteria for state investments in freight, and prioritize freight investments across modes. In February 2018, FHWA approved the FMTP as FDOT's State Freight Plan.

Transportation Asset Management Plan (TAMP)

The Transportation Asset Management Plan (TAMP) outlines the process for effectively operating, maintaining, and improving physical transportation assets within Florida. The plan also provides detailed

information, such as the department's assets, asset management strategies, and long-term expenditure forecasts, in order to help inform decision-making at both the State and Local levels.

Congestion Management Plan (CMP)

Maintenance of a Congestion Management Process (CMP) is required for all TPOs under Florida Statute 339.175 (6)(c)1. Guidance from the Final Rule on the CMP states the intent of the process is to, "address congestion management through a process that provides for safe and effective integrated management and operation of the multimodal transportation system.

The Ocala Marion TPO has developed the CMP to improve traffic operations and safety through the use of either strategies that reduce travel demand or the implementation of operational improvements. Recommendations in the CMP often support improved travel conditions through the implementation of low cost improvements or strategies that can be implemented in a relatively short time frame (5-10 years) compared to traditional capacity improvements, such as adding travel lanes, which can be more time-consuming and expensive.

The TPO anticipates beginning the update of the CMP in 2020 and expects to complete the update in 2021. This plan serves two purposes; to meet state statute and to meet federal requirements for when the TPO becomes a Transportation Management Area (TMA). A TPO is considered a TMA when their urbanized area population exceeds 200,000. This is expected when the results of the 2020 census are finalized. Therefore, completing an update to the CMP will keep the TPO in compliance with both state statute and federal statutes.

Transit Development Plan (TDP)

The Transit Development Plan (TDP) represents

the community's vision for public transportation in the Ocala Marion TPO planning area for a 10-year span. Updated every five years to ensure transit services offered meet the mobility needs of the local communities, the TDP provides a comprehensive assessment of transit services in Marion County. Specifically, the TDP details SunTran's transit and mobility needs, cost and revenue projections, and community transit goals, objectives, and policies.

TIP REVISIONS

When the TIP and the FDOT Work Program became adopted in July 2020, there were cases in which some projects were not yet authorized. These projects, in addition to funding changes within other projects, "roll forward" automatically into the Work Program. These changes have been listed in Appendix J.

Revisions to the TIP may be required following approval of the document by the TPO Board and State and Federal agencies. Revisions to the TIP are required when projects are changed, added, or deleted. There are three types of revisions to the TIP; a major amendment, a minor amendment, and an administrative modification. Major amendments require adoption by the TPO Board and public comment, while a minor amendment and administrative modification do not. [23 C.F.R. 450.104].

Administrative Modifications

An administrative modification include minor changes to project/project phase costs, funding sources of previously included projects, and project/project phase initiation dates. is needed if there are changes in project timing within the five years of the program, changes in non-discretionary funding sources, and changes that cost less than \$200,000. An administrative modification does not require public comment.

Minor Amendments

A minor amendment is required to the TIP if a project is added or deleted that is either less than \$3 million in construction costs or a non-capacity expansion project. Changes to a project that cost up to \$3 million also require a minor amendment. Minor amendments do not require a formal public comment period.

Major Amendments

Major amendments to the TIP are required if a project that is over \$3 million in construction costs is added or deleted, if a capacity expansion project is added or deleted, or there is a significant change in cost (\$3 million or more).

TRANSPORTATION DISADVANTAGED

The Transportation Disadvantage (TD) program is a statewide program that provides vital transportation to medical appointments, employment, educational

and other life sustaining services. Persons eligible for TD services include those with a mental or physical disability, income level at or below 150% of the Federal Poverty Guideline or age 60+ or <16 years old.

In Marion County, TD transportation services are provided by Marion Transit. As a result of the overlap between the TD service area and the TPO service area, TD projects and funding are included in the TIP. The TIP was developed in conjunction with Marion Transit, which also serves as the Community Transportation Coordinator (CTC) for Marion County.

EFFICIENT TRANSPORTATION DECISION MAKING

Efficient Transportation Decision Making (ETDM) is a process used by FDOT to incorporate environmental, physical, cultural and community resource considerations into transportation planning to inform project delivery. FDOT screens some of the projects in this TIP through the ETDM process.

Grant	Grant Dates	Local	State	Federal	Total
5311 (Operating)	10/1/2020-9/30/2021	\$670,000		\$670,000	\$1,340,000
5310 (Capital)	10/1/2020-9/30/2021	\$42,114	\$42,114	\$336,911	\$421,139
TD Trip & Equipment Grant	07/01/2020-06/30/2021	\$94,899	\$854,091		\$948,990
Board of County Commissioners Transit and Match Funding	10/01/2020-09/30/2021				\$879,121
Grand Total		\$807,013	\$896,205	\$1,006,911	\$3,589,339

Figure 2: Transportation Disadvantaged Funding

PERFORMANCE MANAGEMENT

PERFORMANCE-BASED PLANNING

In order to develop a standardized process for monitoring the effectiveness of transportation investments across the country, the Federal government passed the Moving Ahead for Progress in the 21st Century Act (MAP-21). MAP-21 was enacted in 2012 by Congress to establish a framework to link performance management and decision-making for federally-funded transportation investments. MAP-21, which was supplemented by the Fixing America's Surface Transportation (FAST) Act in 2015, required the State Department of Transportation (DOTs) and TPOs/MPOs to conduct performance-based planning. The objective of performance-based planning is to invest resources in projects that help achieve the following seven national goals (23 CFR 490 or [23 USC 150(b)]):

#1- Safety

To achieve a significant reduction in traffic fatalities and serious injuries on all public roads

#2- Infrastructure Condition

To maintain the highway infrastructure asset system in a state of good repair

#3- Congestion Reduction

To achieve a significant reduction in congestion on the National Highway System

#4- System Reliability

To improve the efficiency of the surface transportation system

#5- Freight Movement and Economic Vitality

To improve the national freight network, strengthen the ability of rural communities to access national and international trade markets, and support regional economic development

#6- Environmental Sustainability

To enhance the performance of the transportation system while protecting and enhancing the natural environment

#7- Reduced Project Delivery Delays

To reduce project costs, promote jobs and the economy, and expedite the movement of people and goods by accelerating project completion through eliminating delays in the project development and delivery process, including reducing regulatory burdens and improving agencies' work practices

Performance-based planning utilizes performance measures and performance targets to ensure the most efficient investment of transportation funds by increasing accountability, providing transparency, and linking investment decisions to key outcomes.

PERFORMANCE MEASURES & TARGETS

The Federal Transit Administration (FTA) and Federal Highway Administration (FHWA) have created highway and transit performance measures, and requirements for State DOTs, TPOs/MPOs and transit operators to establish and report performance targets for each performance measure. Performance measures are quantitative criteria used to evaluate progress of the seven national goals. In order to

determine the amount of progress made for each performance measure, the aforementioned agencies and organizations must establish baseline data and performance targets; benchmarks used to determine whether transportation investments make progress in achieving national goals and performance measures.

Once each State DOT develops its own performance targets for each performance measure, TPOs/MPOs are provided the option to either adopt the State's performance targets, or develop their own targets.



Safety



**Bridge and
Pavement
Condition**



**System
Performance**



**Transit Asset
Management**



In March 2016, the FHWA published the Highway Safety Improvement Program (HSIP) and Safety Performance Management (Safety PM) Measures Final Rules, effective April 14, 2016. The Safety PM Final Rules established safety performance measures to assess serious injuries and fatalities on all public roadways and carry out the HSIP. Additionally, the Safety PM Final Rules established a process for both State DOTs and TPOs to develop and report their safety targets and for FHWA to assess whether State DOTs have met, or are making significant progress toward meeting, their safety targets. The legislation works to improve data; foster transparency and accountability; and allow safety progress to be tracked at the national level. The HSIP annual report documents the statewide performance targets.

The State of Florida is committed to Vision Zero, a traffic safety policy aimed at achieving zero traffic

fatalities or serious injuries. As such, FDOT has set a statewide target of “0” for all five safety performance measures. Vision Zero is discussed in greater detail in the HSIP, the Florida Strategic Highway Safety Plan (SHSP), and the Florida Transportation Plan (FTP). FDOT set its safety performance targets on August 31, 2017. On February 27, 2018, the Ocala Marion TPO adopted its own safety performance targets. By adopting its own safety performance targets, the TPO is required to update the targets annually. The TPO most recently updated its safety targets on February 25, 2020. Figure 3 shows the safety performance targets set by FDOT and the TPO for each of the five performance measures.

The Ocala Marion TPO is committed to improving safety for all roadway users, which is demonstrated through planning and programming activities. The TIP includes specific investment priorities by using a project-prioritization and project-selection process that is based on the anticipated effect of reducing both fatal and serious injury crashes. The TPO also collects and analyzes crash data and trends, which is published in its Traffic Counts & Trends Manual. Additionally, the TPO is involved in the Marion County Community Traffic Safety Team (CTST); Safety Through Engineering; Education and Responsibility (STEER); the Youth Bike Rodeo; CarFit; Walk Your Kids to School Day; and the Safe Routes to School program.

Safety Performance Measures	FDOT Target (2020)	TPO Target (2020)	Marion County Results (2019)
Number of Fatalities	0	88	86
Rate of Fatalities per 100 Million Vehicle Miles Traveled (VMT)	0	1.86	1.48
Number of Serious Injuries	0	433	392
Rate of Serious Injuries per 100 Million VMT	0	9.19	8.44
Number of Non-motorized Fatalities and Non-motorized Serious Injuries	0	55	54

Figure 3: Performance Measure Targets and Results - Safety



In January 2017, the FHWA published the Bridge and Pavement Condition Performance Measures Final Rule. The second FHWA performance measure rule established six performance measures to assess pavement conditions and bridge conditions for the National Highway System (NHS). A map of the NHS in Marion County can be found in Appendix C.

The pavement condition measures represent the percentage of lane-miles on the Interstate and non-Interstate National Highway System (NHS) that are in good or poor condition. FHWA established five pavement condition metrics : International Roughness Index (IRI); cracking percent; rutting; faulting; and Present Serviceability Rating (PSR). FHWA set a threshold for each metric to establish good, fair, or poor condition. A pavement section is

classified as being in good condition if three or more metric ratings are good, and in poor condition if two or more metric ratings are poor. Pavement sections that are not good or poor are classified as fair.

FDOT established its statewide targets for bridge and pavement condition on May 18, 2018. The Ocala Marion TPO agreed to support the FDOT statewide targets on October 23, 2018.

The two-year and four-year targets represent bridge and pavement conditions at the end of calendar years 2022 and 2024.

The bridge condition measures represent the percentage of bridges, by deck area, on the NHS that are in good condition or poor condition. The condition of each bridge is evaluated by assessing four bridge components: deck, superstructure, substructure, and culverts. The Final Rule created a metric rating threshold for each component to establish good, fair, or poor condition. If the lowest rating of the four metrics is greater than or equal to seven, the structure is classified as good. If the lowest rating is less than or equal to four, the structure is classified as poor. If the lowest rating is five or six, it is classified as fair.

Bridge and Pavement Condition Performance Measures	FDOT/TPO Target (2022)	FDOT/TPO Target (2024)	Marion County Results (2018)
Pavement Measures			
Percent of Interstate pavements in good condition	Not Required	≥ 60%	56%
Percent of Interstate pavements in poor condition	Not Required	≤ 5%	0%
Percent of non-Interstate NHS pavements in good condition	≥ 40%	≥ 40%	40.2%
Percent of non-Interstate NHS pavements in poor condition	≤ 5%	≤ 5%	0%
Bridge Deck Area Measures			
Percent of NHS bridges by deck area in good condition	≥ 50%	≥ 50%	78.5%
Percent of NHS bridges by deck area in poor condition	≤ 10%	≤ 10%	0%

Figure 4: Performance Measure Targets and Results - Bridge and Pavement Condition



In January 2017, FHWA published the System Performance, Freight, and Congestion Mitigation and Air Quality (CMAQ) Performance Measures Final Rule. The third and final Performance Measures Rule, established six measures to assess the performance of the NHS, freight movement on the Interstate System, and traffic congestion and on-road mobile source emissions for the CMAQ program.

There are two NHS performance measures that represent the reliability of travel times for all vehicles on the Interstate and non-Interstate NHS. FHWA established the Level of Travel Time Reliability (LOTTR) metric to calculate reliability on both the Interstate and non-Interstate NHS. LOTTR is defined as the ratio of longer travel times (80th percentile) to a normal travel time (50th percentile) during four time periods from the hours of 6 AM to 8 PM each day (AM peak, midday, and PM peak on Mondays through Fridays and weekends). The LOTTR ratio is calculated for each segment of applicable roadway. A segment is reliable if its LOTTR is less than 1.5 during all time periods. If one or more time periods has a

LOTTR of 1.5 or above, that segment is unreliable. The measures are expressed as the percentage of person-miles traveled on the Interstate and non-Interstate NHS that are reliable.

The single freight movement performance measure represents the reliability of travel times for trucks on the Interstate System. FHWA established the Truck Travel Time Reliability (TTTR) Index, which is defined as the ratio of longer truck travel times (95th percentile) to a normal truck travel time (50th percentile). The TTTR is generated by dividing the longer truck travel time by a normal travel time for each segment of the Interstate system over five time periods from all hours of each day (AM peak, midday, and PM peak on Mondays through Fridays, overnights for all days, and weekends). This is averaged across the length of all Interstate segments in the state or MPO planning area to determine the TTTR index.

There are three traffic congestion and on-road mobile source emissions performance measures that represent peak hour excessive delay per capita (PHED), non-single occupancy vehicle (SOV) travel, and total on-road mobile source emissions reductions. The Ocala Marion TPO meets all current air quality standards and is not subject to establishing targets for these performance measures.

FDOT established its statewide targets for system performance on May 18, 2018. The Ocala Marion TPO agreed to support the FDOT statewide targets on October 23, 2018.

System Performance Measures	FDOT/TPO Target (2022)	FDOT/TPO Target (2024)	Marion County Results (2018)
Percent of person-miles on the Interstate system that are reliable (Interstate LOTTR)	≥ 75%	≥ 70 %	100%
Percent of person-miles on the non-Interstate NHS that are reliable (Non-Interstate NHS LOTTR)	Not Required	≥ 50 %	96%
Truck Travel Time Reliability (TTTR)	1.75	2	1.31

Figure 5: Performance Measure Targets and Results - System Performance



from the oversight of the TPO to the City of Ocala. The SunTran system includes seven fixed bus routes contracted through a third-party company. As the administrative body to SunTran, the City of Ocala is responsible for setting performance targets for Transit Asset Management. In July 2019, the City of Ocala set the transit asset targets below, thereby agreeing to plan and program projects in the TIP that, once implemented, will make progress toward achieving the transit asset targets.

On July 26, 2016, the FTA published the final Transit Asset Management rule, which requires that public transportation providers develop and implement transit asset management (TAM) plans, establish “state of good repair” standards and establish performance measures for four asset categories; rolling stock, equipment, transit infrastructure and facilities.

On July 1, 2019, SunTran, the public transit agency that operates primarily in the city of Ocala and in parts of unincorporated Marion County, moved

The chart shows the percentage of SunTran’s assets that have met or exceeded their Useful Life Benchmark (ULB) for each asset class in 2019 and their performance targets for the next four years. FTA defines ULBs as “... the expected lifecycle or the acceptable period of use in service for a capital asset, as determined by a transit provider, or the default benchmark provided by the FTA.” The performance targets assume the assets are replaced as they reach their ULB.

Asset Class	2019 Performance	2020 Target	2021 Target	2022 Target	2023 Target
Rolling Stock					
Buses	69%	0%	0%	0%	0%
Cutaways	0%	0%	0%	0%	100%
Equipment					
Non-Revenue Vehicles	80%	0%	0%	0%	20%
Facilities					
Maintenance Facility	0%	0%	0%	0%	0%

Figure 6: Performance Measure Targets and Results - Transit Asset Management



On July 19, 2018, the FTA published the Public Transportation Agency Safety Action Plan (PTASP) regulation, 49CFR Part 673, as required by 49 U.S.C. 5329(d). The effective date of the regulation was July 19, 2019, but was extended to December 31, 2020 due to the global pandemic. The PTASP regulation implements a risk-based Safety Management System approach and requires all recipients and sub-recipients of federal transit financial assistance to establish and certify an Agency Safety Plan and corresponding safety

performance targets. MPO/TPO's then have 180 days from the adoption of the PTASP targets set by the public transit agency (SunTran) to adopt or develop their own independent targets.

On December 1, 2020, SunTran submitted their PTASP and corresponding safety targets to the TPO, as adopted by City of Ocala City Council on November 30, 2020. Figure 7 displays the adopted SunTran PTASP targets.

[**Recommendation: TPO Board adoption of the SunTran PTASP safety targets on April 27, 2020**]

SunTran Safety Performance Targets 2020 Performance Targets based on collected data from previous three years							
Mode of Transit Service	Fatalities Total	Fatalities (per 100k vehicle revenue miles VRM)	Injuries Total	Injuries (per 100k vehicle revenue miles VRM)	Safety Events Total	Safety Events (per 100k vehicle revenue miles VRM)	Safety Reliability (VRM/failures)
Fixed Route Bus	0	0	1	0.20	5	1.03	7,492
ADA Paratransit	0	0	0	0	0	0	0

Figure 7: SunTran PTASP Safety Targets

A photograph of a person riding a bicycle on a paved path that curves through a forest. The person is wearing a pink shirt and a white helmet. The path is surrounded by tall pine trees and green grass. The sky is overcast.

FINANCIAL PLAN

The financial plan is determined during the development of the LRTP, as part of its Cost Feasible Plan. Once all projects have been determined as “needs”, the LRTP steering committee prioritizes the projects based on cost feasibility, using revenue forecasting from local, state and federally published sources. The cost feasible plan in the LRTP then becomes a prioritized project list. This list, known as the List of Priority Projects (LOPP), is then sent to FDOT annually, to be included in the next work program for funding. FDOT will decide which projects from the prioritized list or List of Prioritized Projects (LOPP) that can be reasonably funded with its cost/funding projections. The LOPP can be found in Figure 10 on page 23.

The 2020/21-2024/25 TIP is financially constrained for each year, meaning projects must be implemented using reasonably expected revenue sources. Projects in the TIP must use Year of Expenditure (YOE) dollars, which are dollars adjusted for inflation from the present time to the expected year of construction. The TIP includes the public and private financial resources that are reasonably expected to be available in order to accomplish the program. The TIP has been developed in cooperation with Marion County, the Cities of Belleview, Dunnellon, and Ocala, FDOT, SunTran, and Marion Transit. A summary of funds by funding source is included in Figure 8 ([23 CFR. 450.326(a) and Subsection 339.175(8), F. S.]).

All projects in the TIP are designated for funding from Title 23 and 49 of U.S.C funding sources and all regional transportation projects requiring federal action. Projects in the TIP are derived from the FDOT Work Program and must include a balanced 36-month forecast of revenue and expenditures and a five-year finance plan supporting the FDOT Work Program [339.135(4)(b)(5) F. S.]. Additionally, only projects that are reasonably expected to be funded may be included in the TIP.

Figure 8 provides a summary of the funding categories, associated acronyms, and whether the funding source is federal, state, or local.

Acronym	Funding Category	Funding Source
ACFP	Advanced Construction Freight Prog	Federal
ACID	Advanced Construction Safety	Federal
ACNP	Advanced Construction NHPP	Federal
ACSA	Advanced Construction (SA)	Federal
ACSL	Advanced Construction (SL)	Federal
ACSN	Advanced Construction (SN)	Federal
ACSS	Advanced Construction (SS)	Federal
ACTA	Advanced Construction (TA)	Federal
CIGP	County Incentive Grant Program	State
D	Unrestricted State Primary	State
DDR	District Dedicated Revenue	State
DIH	District In-House	State
DPTO	Public Transportation Office, State	State
DRA	Rest Areas	State
DS	State Primary Highways & Public Transportation Office	State
DU	State Primary, Federal Reimbursement Funds	Federal
DWS	Weigh Stations	State
FAA	Federal Aviation Administration	Federal
FTA	Federal Transit Administration	Federal
LF	Local Funds	Local
NHRE	National Highway Performance Program	Federal
PL	Metropolitan Planning	Federal
RHP	Rail Highway Crossing, Protective Devices	Federal
SA	Surface Transportation Program, Any Area	Federal
SL	Surface Transportation Program, Population <=200K	Federal
SN	Surface Transportation Program, Population <=5K	Federal
TALL	Transportation Alternative Program, Population <=200K	Federal
TALN	Transportation Alternative Program, Population <=5K	Federal
TALT	Transportation Alternative Program, Any Area	Federal
TRIP	Transportation Regional Incentive Program	State
TRWR	Wheels on the Road, TRIP	State

Figure 8: List of Funding Categories and Associated Funding Sources

Figure 9 provides a summary of the distribution of funds by funding category and by Fiscal Year.

Funding Category	2020/21	2021/22	2022/23	2023/24	2024/25	Total
ACFP	\$0	\$9,125,700	\$0	\$49,995	\$0	\$9,175,695
ACID	\$565,000	\$0	\$0	\$0	\$0	\$565,000
ACNP	\$0	\$32,312,804	\$0	\$0	\$0	\$32,312,804
ACSA	\$2,672,962	\$0	\$0	\$0	\$0	\$2,672,962
ACSL	\$19,747	\$0	\$0	\$0	\$0	\$19,747
ACSN	\$1,030,761	\$0	\$0	\$0	\$0	\$1,030,761
ACSS	\$1,353,218	\$407,200	\$4,102,536	\$786,286	\$0	\$6,649,240
CIGP	\$0	\$0	\$0	\$0	\$8,522,752	\$8,522,752
D	\$7,119,759	\$4,747,870	\$4,760,342	\$4,723,193	\$4,736,430	\$26,087,594
DDR	\$7,173,399	\$2,492,098	\$3,415,615	\$33,919,182	\$15,415,217	\$62,415,511
DIH	\$236,430	\$96,043	\$116,860	\$61,105	\$125,840	\$636,278
DPTO	\$846,440	\$733,150	\$769,342	\$807,344	\$832,375	\$3,988,651
DRA	\$0	\$0	\$25,348,332	\$0	\$0	\$25,348,332
DS	\$5,562,364	\$0	\$0	\$0	\$857,999	\$6,420,363
DU	\$1,013,039	\$1,041,831	\$1,090,203	\$1,140,993	\$1,346,686	\$5,632,752
DWS	\$0	\$2,170,339	\$0	\$0	\$0	\$2,170,339
FAA	\$0	\$1,800,000	\$5,850,000	\$0	\$0	\$7,650,000
FTA	\$2,325,554	\$2,395,321	\$2,467,181	\$2,541,196	\$2,617,431	\$12,346,683
LF	\$2,490,002	\$13,375,811	\$2,631,951	\$3,059,247	\$11,276,568	\$32,833,579
NHRE	\$0	\$0	\$5,522,605	\$0	\$0	\$5,522,605
PL	\$687,026	\$494,973	\$494,973	\$494,973	\$494,973	\$2,666,918
RHP	\$36,665	\$0	\$0	\$0	\$0	\$36,665
SA	\$12,696,779	\$0	\$20,695,207	\$0	\$0	\$33,391,986
SL	\$3,523,356	\$4,069,077	\$5,344,067	\$9,169,646	\$9,485,714	\$31,591,860
SN	\$1,077,160	\$3,105,650	\$236,113	\$2,794,946	\$0	\$7,213,869
TALL	\$0	\$772,678	\$0	\$24,932	\$253,001	\$1,050,611
TALN	\$0	\$252,377	\$0	\$252,270	\$0	\$504,647
TALT	\$826,584	\$1,923,087	\$0	\$2,224,590	\$0	\$4,974,261
TRIP	\$0	\$0	\$0	\$0	\$4,696,516	\$4,696,516
TRWR	\$0	\$0	\$0	\$0	\$3,407,729	\$3,407,729
Total	\$51,256,245	\$81,316,009	\$82,845,327	\$62,049,898	\$64,069,231	\$341,536,710

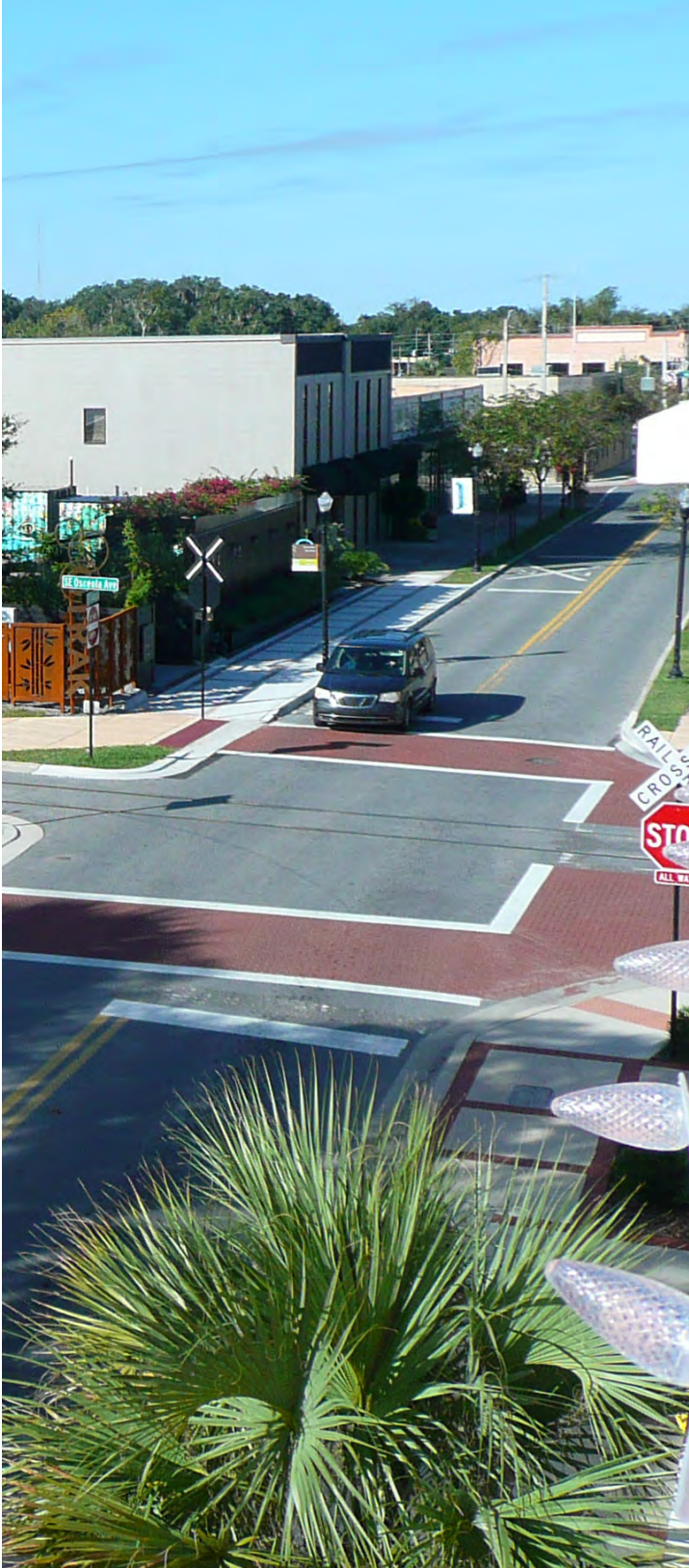
Figure 9: 5-Year Summary of Projects by Funding Category

Figure 10 provides a summary of the total funding over a five-year period by federal, state and local resources.

Funding Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Federal	\$27,827,851	\$57,700,698	\$45,802,885	\$19,479,827	\$14,197,805	\$165,009,066
State	\$20,938,392	\$10,239,500	\$34,410,491	\$39,510,824	\$38,594,858	\$143,694,065
Local	\$2,490,002	\$13,375,811	\$2,631,951	\$3,059,247	\$11,276,568	\$32,833,579
Total	\$51,256,245	\$81,316,009	\$82,845,327	\$62,049,898	\$64,069,231	\$341,536,710

Figure 10: 5-Year Summary of Projects by Funding Source

PROJECT SELECTION PROCESS



The TPO has recently changed its project selection and priority process. The process includes prioritizing projects that are closest to receiving construction funding, help achieve performance measures, are multimodal, have available funding and/or include local funding sources and partnerships.

The TPO's project selection process is consistent with 23 C.F.R 450.332(b), the TPO's 2040 LRTP, and with the aviation master plans, public transit development plans, and the approved local government comprehensive plans within the TPO service area, to the maximum extent feasible [s.339.175(8)(c)(7), F.S.]. A list of obligated projects, found in Appendix B, is a continuation of projects in the current TIP, and in some cases started in previous TIPs [23 CFR 450.334].

RANKING CRITERIA

The ranking criteria was narrowed down based on the adopted 2040 Long-Range Transportation Plan's (LRTP) Goals and Objectives. The goals from the 2040 LRTP that were used in this prioritization and selection process were Multimodal Choices (Goal #1), Economic Development and Growth (Goal #2), Safety and Security (Goal #3), Cooperation (Goal #4), and System Preservation (Goal #6). The ranking criteria is grouped into the following six categories:

1. Multimodal:

The ranking criteria looks at whether a project incorporates different modes of transportation into the project or is multimodal. Therefore, if a project incorporates bike lanes, sidewalks, transit options, or offers a new alternative, such as a trail, it receives one point for being multimodal.

2. Performance Measure:

Based on the latest federal transportation legislation, the Fixing America's Surface Transportation (FAST) Act was signed into law on December 4, 2015, which requires MPO/TPOs to measure the performance of projects. This is done by measuring projects on safety, system performance, pavement/bridge condition, and transit asset management. Therefore, the LOPP gives weight to any project that meets one of the performance measures, and an additional point if the project meets two. Please note: most projects could only obtain one point for a performance measure, as most performance measures require a project to either be on or demonstrate how it improves the performance of a corridor on the National Highway System (NHS). Therefore, most projects that obtained two points in this category were a part of the NHS.

3. Project Development:

This ranking criteria looks at where the projects are in their development. For example, if a project is in the Project Development & Environmental (PD&E) stage it gets one point, and it receives an additional point for each stage the project is in up until construction, which would be four points. Please note: projects can only qualify for one of the phases, with one to four points possible.

4. Funding Availability:

Due to limited funding, if a project has a lower cost associated with it, and/or a lower cost still needed for completion, the project can receive one additional point.

5. Local Revenue/Funding Source:

An additional category that staff thought was pertinent to the ranking system was local revenue. Therefore, if a project has local revenue being added to the project it receives an additional point.

6. Local Partnership:

The ranking criteria considers whether a project has a formal partnership between two agencies. For example, a project could be a Local Agency Program (LAP) project, or a project that FDOT manages or helps manage for another jurisdiction. In this case, the project would receive an additional point.

The Top 20 List of Priority Projects (LOPP) is shown in Figure 11 below. The following projects are identified in both the LOPP and TIP (referenced in the “Additional Information” section of the respective project page). Projects displayed show New Rank - FM Number (Page in TIP)

#1 - 435209-1 (p. 34) #12 - 433652-1 (p.52)
 #3 - 433651-1 (p.50) #14 - 436755-1 (p.67)
 #6/18 - 435484-1/2 (p. 63) #15 - 238648-1 (p.40)
 #8 - 433660-1 (p.42) #16 - 410674-2 (p.49)
 #11 - 433661-1 (p.43)

FY 2026 List of Priority Projects (LOPP)							
New Rank	Previous Rank	FM Number	Project Name	From	To	Description	Phase
1	1	435209-1	NW 49th Street Interchange		-	- New Interchange	ROW
2	2	-	SW 49th Avenue Phase 1	SW 66th St	SW 42nd St	Capacity project	CST
3	8	433651-1, 2, &3	CR 484/I-75 Interchange Operational Improvements	SW 20th Ave	CR 475A	Operations and Capacity Improvements	CST
4	16	-	SW 49th Avenue	CR 484	Marion Oaks Trail	Capacity project	CST
5	17	-	Emerald Road Extension	SE 92nd Loop	Emerald Road	New 2 Lane Road	CST
6	12	435484-1	Pruitt Trail	SR 200	Trailhead	Heart of Florida	CST
7	4	-	SW 44th Avenue	SR 200	SW 20th Street	New 4 Lane Capacity Project	CST
8	5	433660-1	US 441 Intersection Op Improvement II	SR 464	SR 464	Add dedicated turn lanes and pedestrian improvements	CST
9	7	431935-1	SR 40 Downtown Operational Improvement	US 441	NE 8th Ave	Pedestrian and Traffic Operation Improvements	ROW
10	11	238651-1	SR 200	CR 484	Citrus County Line	Adding 2 Lanes	CST
11	9	433661-1	SR 40/US 441 Intersection Operational Improvement	NW 2nd St	SW Broadway St	Add Dedicated Turn Lanes, Pedestrian Improvements, & Enhanced Illumination	CST
12	10	433652-1	SR 40/I-75 Interchange Operational Imprvemnts	SW 40th Ave	SW 27th Ave	Operations Improvement at I-75 Interchange & SW 27th Ave Intersection	CST
13	14	-	Countywide ITS Operations & Maintenance		-	- Operation & Maintenance	CST
14	21	436755-1	Indian Lake Trail	Silver Springs State Park	Indian Lake Trailhead	Local Trail Project	ROW
15	18	238648-1	US 41	SW 111th Pl Ln	SR 40	Add 2 Lanes	CST
16	19	410674-2	SR 40 East (End of 4 Lanes to E. of 314)	End of 4 Lanes	East of 314	Add 2 Lanes, and 2 Bridge Structures	CST
17	13	-	Santos to Baseline Trail	Baseline Trailhead	Santos Trailhead	Heart of Florida	DES
18	12	435484-2	Pruitt Trail	Trailhead	Bridges Road	Heart of Florida	DES
19	15		SW 49th Avenue	CR 484	Marion Oaks Manor	Add 2 Lanes	DES
20	6	-	CR 484 - Pennsylvania Ave Multi-Modal Improvements w/ Bridge Option	Blue Run Park	Mary Street	Pedestrian Bridge over Rainbow Springs and Multi-Modal Improvements along CR 484	DES

Figure 11: List of Top 20 Priority Projects

PROJECTS

This section of the TIP consists of a map of projects throughout Marion County and five smaller scale maps, two lists that indicate projects and their associated page number, a list of project phase acronyms and 63 individual project pages. Only projects tied to a location are shown in the Marion County map and Maps A-E.

A summary of changes to regionally significant transportation projects from the previous Fiscal Years 2019/20 to 2023/24 TIP is available in Appendix H.

Project Table of Contents:

Marion County Map	25
Map A	26
Map B	27
Map C	28
Map D	29
Map E	30
List of Projects by Project Type	31
Project Phase Acryonyms	32
List of Projects	33-103

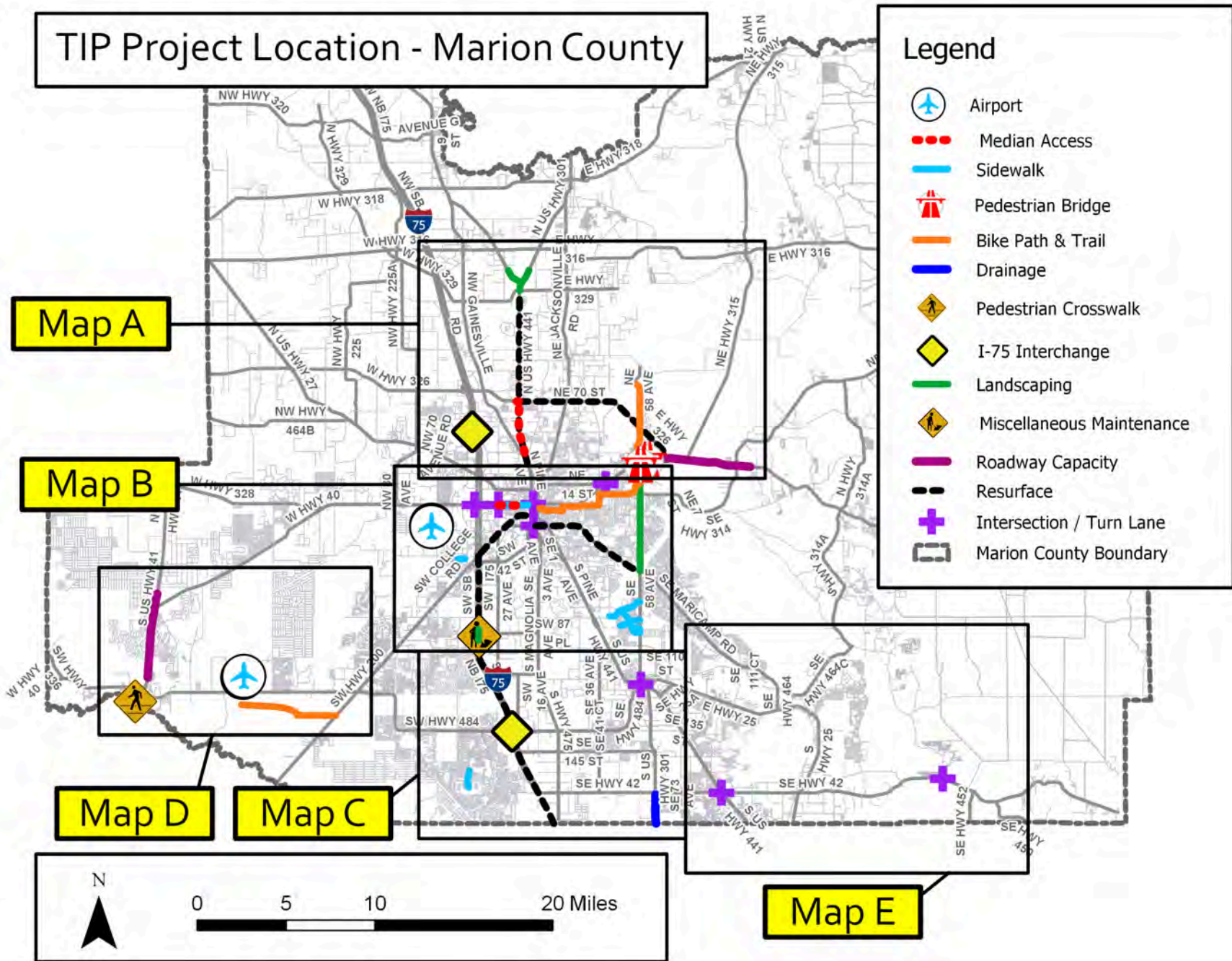


Figure 12: TIP Project Location Map - Marion County

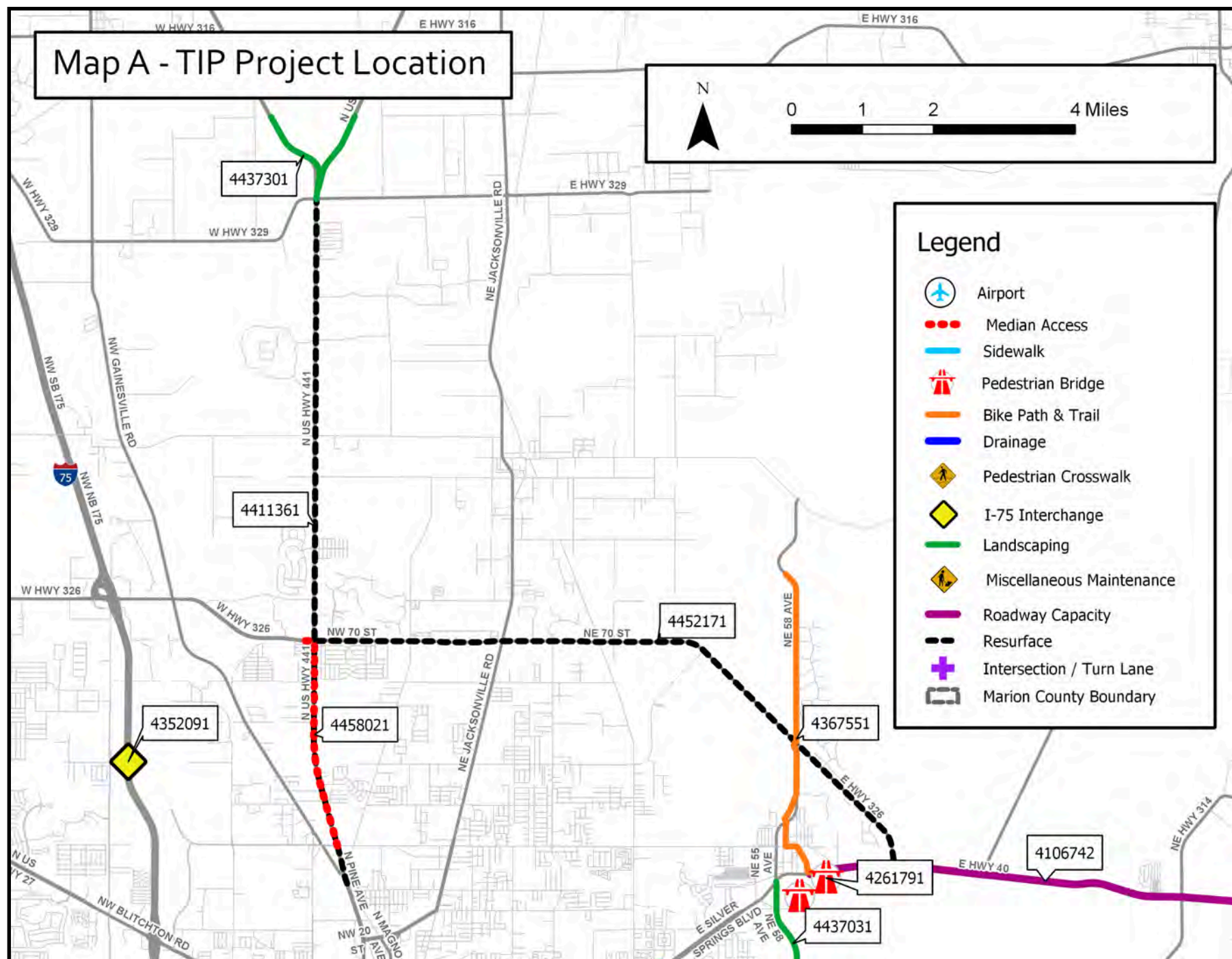


Figure 13: TIP Project Location - Map A

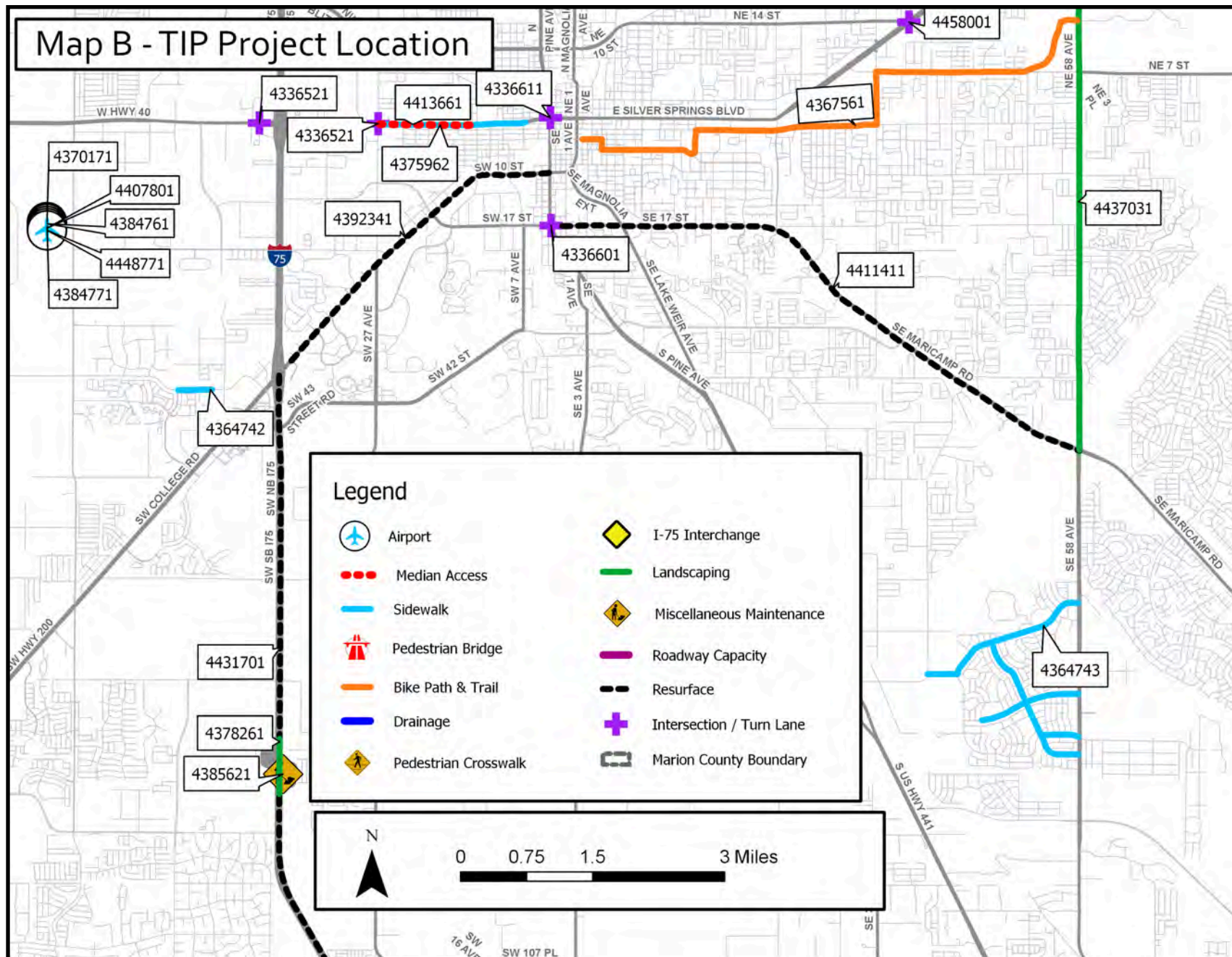


Figure 14: TIP Project Location - Map B

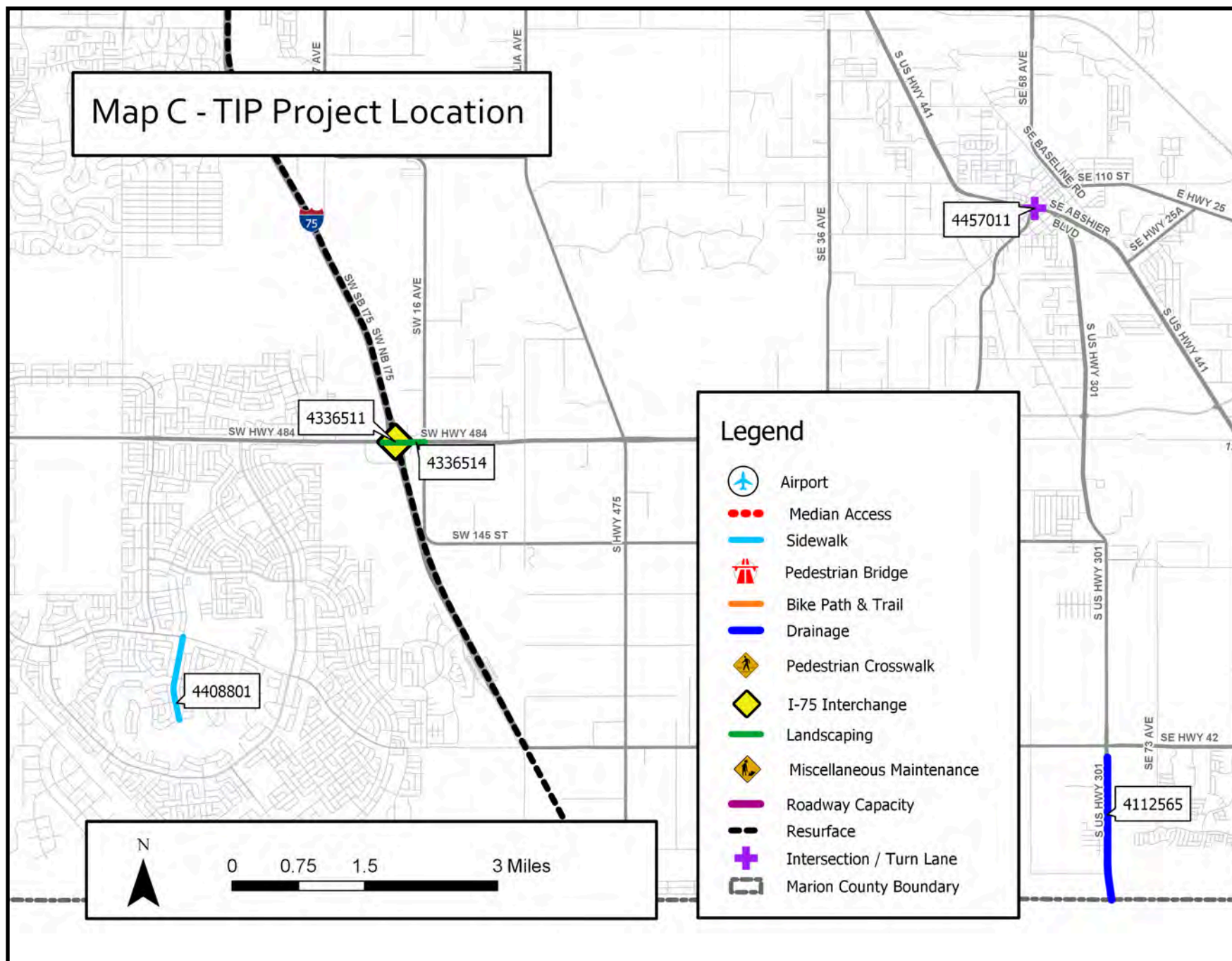


Figure 15: TIP Project Location - Map C

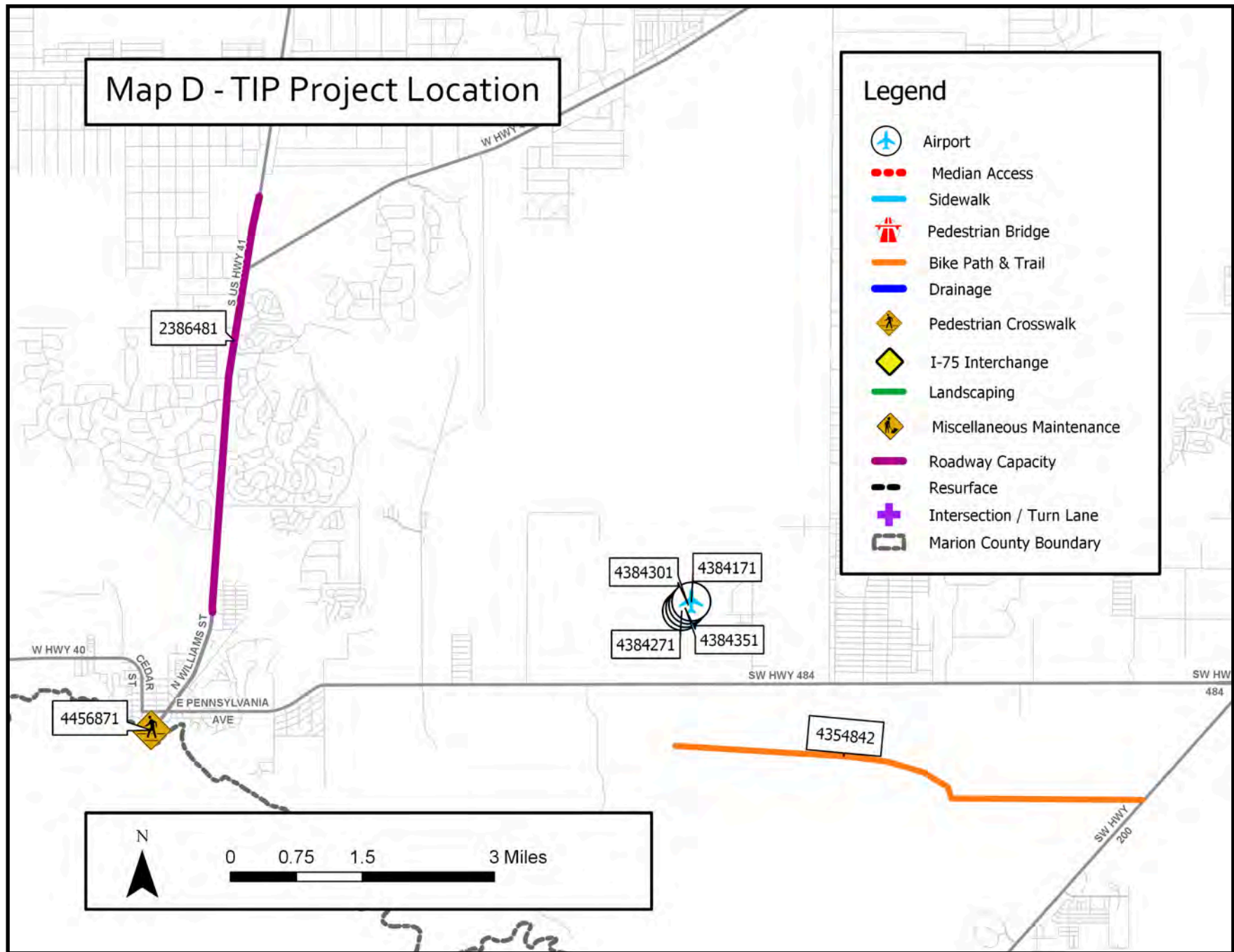


Figure 16: TIP Project Location - Map D

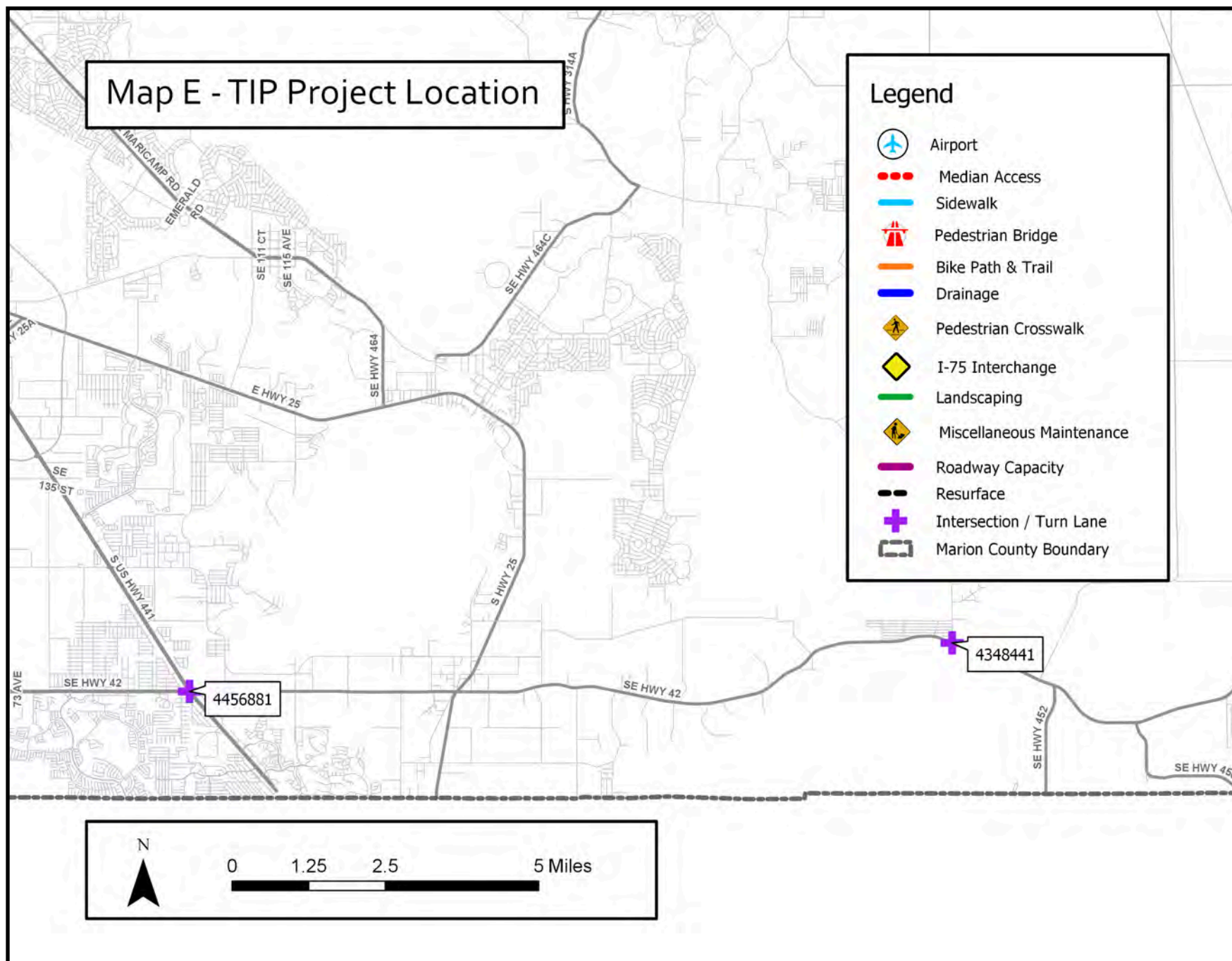


Figure 17: TIP Project Location - Map E



Projects by Type

Interstate Projects.....	33	4367561.....	68
4352091.....	34	4375962.....	69
4378261.....	35	4408801.....	70
4385621.....	36	4456871.....	71
4431701.....	37		
4453211	38	Airport Projects.....	72
US Route Projects.....	39	4370171.....	73
2386481.....	40	4384171.....	74
4112565.....	41	4384271.....	75
4336601.....	42	4384301.....	76
4336611.....	43	4384351.....	77
4411361.....	44	4384761.....	78
4437301.....	45	4384771.....	79
4456881.....	46	4407801.....	80
4457011.....	47	4448771.....	81
State & Local Road Projects.....	48	Transit/Funding/Grants.....	82
4106742.....	49	4271882.....	83
4336511.....	50	4314011.....	84
4336514.....	51	4333041.....	85
4336521.....	52	4333121.....	86
4348441.....	53	4393313.....	87
4392341.....	54	4393314.....	88
4411411.....	55	4393315.....	89
4413661.....	56	4407971.....	90
4437031.....	57	4424551.....	91
4452171.....	58	4424601.....	92
4458001.....	59	Routine Maintenance.....	93
4458021.....	60	4136153.....	94
Bicycle Trails & Sidewalk Projects.....	61	4181071.....	95
4261791.....	62	4233912.....	96
4354842.....	63	4291781.....	97
4363751.....	64	4291821.....	98
4364742.....	65	4363611.....	99
4364743.....	66	4363612.....	100
4367551.....	67	4466911.....	101
		4467911	102
		4469101.....	103

Figure 18 provides a list of project phases used in the individual project pages.

Acronym	Project Phase Information
ADM	Administration
CRT MTN	Contract Routine Maintenance
CST	Construction
CAP	Capital Grant
DES	Design
ENG	Engineering
ENV CON	Environmental/Conservation
INC	Construction Incentive/Bonus
MNT	Maintenance
MSC	Miscellaneous Construction
OPS	Operations
PD&E	Project Development & Environmental Study
PE	Preliminary Engineering
PLEMO	Planning and Environmental Offices Study
PLN	In House Planning
PST DES	Post Design
R/R CST	Railroad Construction
RELOC	Relocation
ROW	Rights-of-Way Support & Acquisition
RRU	Railroad & Utilities
RT MNT	Routine Maintenance
UTIL	Utilities Construction

Figure 18: Project Phase Acronyms

Interstate- 75 Projects



Project Description:

I-75 (SR 93) at NW 49th St.
from end of NW 49th St. to
end of NW 35th St.

Project Type: Interchange

FM Number: 4352091

Lead Agency: FDOT

Length: 0.1 miles

L RTP # (pg. #): Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$4,872,297

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$64,129,644

Additional Information:

Construction of a new I-75 interchange at NW 49th Street to facilitate projected increases in freight traffic. This project also includes extending NW 49th Street from NW 44th Avenue to NW 35th Avenue. The project is currently in the PD&E phase. (Priority Project #1)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PD&E	DIH	\$15,990	\$0	\$0	\$0	\$0	\$15,990
PE	DIH	\$23,968	\$0	\$0	\$0	\$0	\$23,968
ROW	LF	\$0	\$10,200,000	\$0	\$0	\$0	\$10,200,000
CST	SL	\$0	\$0	\$0	\$0	\$9,440,914	\$9,440,914
CST	LF	\$0	\$0	\$0	\$0	\$8,419,861	\$8,419,861
CST	CIGP	\$0	\$0	\$0	\$0	\$8,522,752	\$8,522,752
CST	DDR	\$0	\$0	\$0	\$0	\$14,415,217	\$14,415,217
CST	DIH	\$0	\$0	\$0	\$0	\$114,400	\$114,400
CST	TRIP	\$0	\$0	\$0	\$0	\$4,696,516	\$4,696,516
CST	TRWR	\$0	\$0	\$0	\$0	\$3,407,729	\$3,407,729
Total		\$39,958	\$10,200,000	\$0	\$0	\$49,017,389	\$59,257,347

Project Description: I-75 Marion County Rest Areas Landscaping

Project Type: Landscaping

FM Number: 4378261

Lead Agency: FDOT

Length: 0.6 miles

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$869,439

**Additional
Information:**

Vegetative installation and maintenance at the northbound rest area on I-75 in Marion County.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	DIH	\$0	\$0	\$0	\$0	\$11,440	\$11,440
CST	DS	\$0	\$0	\$0	\$0	\$857,999	\$857,999
Total		\$0	\$0	\$0	\$0	\$869,439	\$869,439

Project Description:

I-75 (SR 93) Rest Area
Marion County from N. of SR
484 to S. of SR 200

Project Type:

Miscellaneous Maintenance

FM Number:

4385621

Lead Agency:

FDOT

Length:

0.6 miles

LRTP # (pg. #):

Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$2,775,190

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$28,177,572

Additional Information:

Complete reconstruction of all facilities for the northbound rest area on I-75 in Marion County.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	DIH	\$0	\$0	\$54,050	\$0	\$0	\$54,050
CST	DRA	\$0	\$0	\$25,348,332	\$0	\$0	\$25,348,332
Total		\$0	\$0	\$25,402,382	\$0	\$0	\$25,402,382

Project Description: Wildwood Mainline Weigh In Motion (WIM) Screening

Project Type: Weigh Station

FM Number: 4453211

Lead Agency: FDOT

Length: 1.1 miles

LRTP # (pg. #): Goal 6: Objective 2 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$2,170,339

**Additional
Information:**

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	DWS	\$0	\$2,170,339	\$0	\$0	\$0	\$2,170,339
Total		\$0	\$2,170,339	\$0	\$0	\$0	\$2,170,339

US Route Projects



Project Description: SR 45 (US 41) from SW 110th St. to North of SR 40

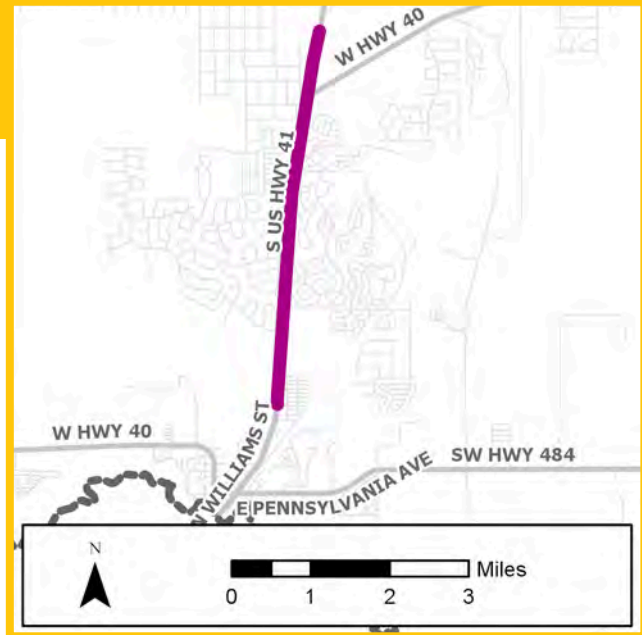
Project Type: Roadway Capacity

FM Number: 2386481

Lead Agency: FDOT

Length: 4.8 miles

LRTP # (pg. #): Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$27,464,790

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$71,271,622

**Additional
Information:**

Capacity expansion project to widen US 41 from two to four lanes, which includes a grassed median, paved shoulders, sidewalks, driveway reconstruction and full and directional median openings. The project is currently funded for construction in FY 2024. (Priority Project #15)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	DIH	\$0	\$0	\$0	\$55,550	\$0	\$55,550
CST	SL	\$0	\$0	\$0	\$8,909,646	\$0	\$8,909,646
CST	SN	\$0	\$0	\$0	\$2,794,946	\$0	\$2,794,946
CST	DDR	\$0	\$0	\$0	\$31,546,690	\$0	\$31,546,690
PE	ACSN	\$110,826	\$0	\$0	\$0	\$0	\$110,826
PE	SL	\$42,912	\$0	\$0	\$0	\$0	\$42,912
PE	SN	\$346,262	\$0	\$0	\$0	\$0	\$346,262
Total		\$500,000	\$0	\$0	\$43,306,832	\$0	\$43,806,832

Project Description: SR 35 (US 301) Dallas Pond Redesign

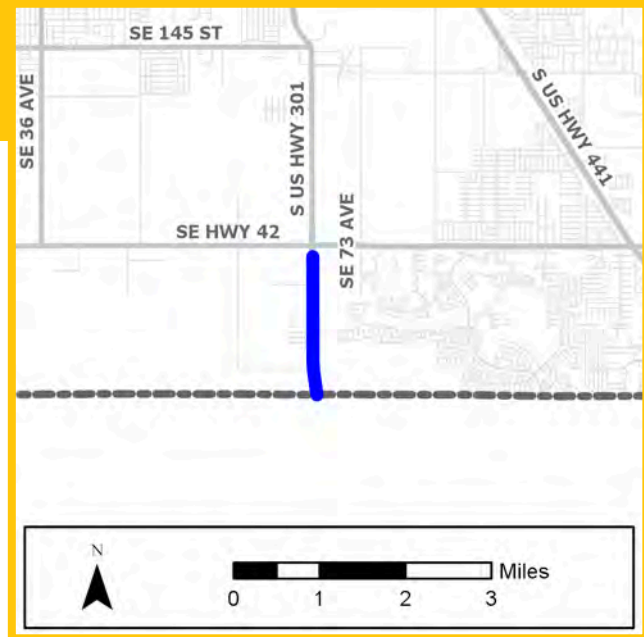
Project Type: Drainage

FM Number: 4112565

Lead Agency: FDOT

Length: 1.6 miles

LRTP # (pg. #): Goal 5: Objective 1 (2-10)



**Prior Cost
< 2020/21:**

\$425,229

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$892,144

**Additional
Information:**

Redesign the existing Dallas Pond, which is currently out of compliance, for water quality treatment, extension of the outfall, and acquisition of the drainage easement for future maintenance of the complete drainage system. Project is currently in the PD&E phase.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
ROW	DDR	\$150,000	\$52,000	\$14,000	\$0	\$0	\$216,000
ROW	DIH	\$17,000	\$16,000	\$0	\$0	\$0	\$33,000
ROW	DS	\$23,000	\$0	\$0	\$0	\$0	\$23,000
CST	DDR	\$0	\$185,402	\$0	\$0	\$0	\$185,402
CST	DIH	\$0	\$9,513	\$0	\$0	\$0	\$9,513
Total		\$190,000	\$262,915	\$14,000	\$0	\$0	\$466,915

Project Description: US 441 @ SR 464

Project Type: Intersection / Turn Lane

FM Number: 4336601

Lead Agency: FDOT

Length: 0.5 miles

LRTP # (pg. #): Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$1,249,934

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,644,934

**Additional
Information:**

Operational improvements to include the addition of an added NB left-turn lane and a modified NB right-turn lane. (Priority Project #8)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
ROW	DDR	\$210,000	\$130,000	\$30,000	\$0	\$0	\$370,000
ROW	DIH	\$15,000	\$10,000	\$0	\$0	\$0	\$25,000
Total		\$225,000	\$140,000	\$30,000	\$0	\$0	\$395,000

Project Description: US 441 from SR 40 to SR 40A (SW Broadway)

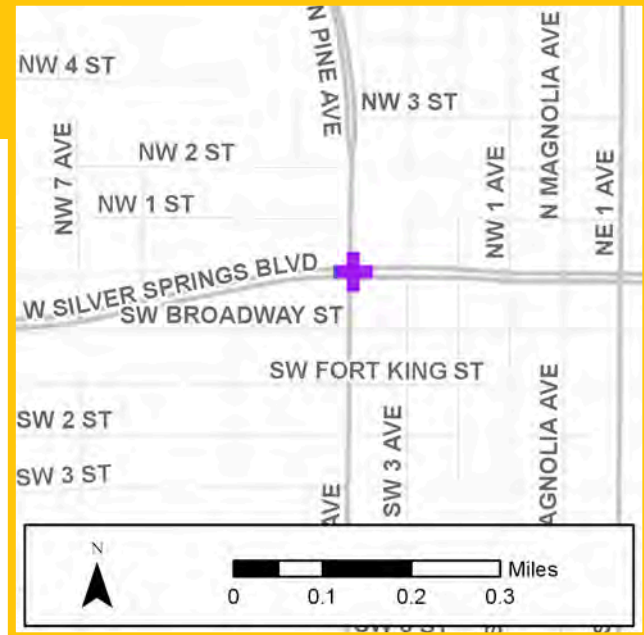
Project Type: Intersection / Turn Lane

FM Number: 4336611

Lead Agency: FDOT

Length: 0.5 miles

LRTP # (pg. #): Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$1,159,697

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$5,968,094

**Additional
Information:**

Extend northbound left-turn queue south to Broadway Street to increase storage capacity. (Priority Project #11)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	DDR	\$63,000	\$0	\$0	\$0	\$0	\$63,000
ROW	DDR	\$1,650,000	\$175,000	\$50,000	\$21,000	\$0	\$1,896,000
ROW	DIH	\$17,000	\$16,000	\$0	\$0	\$0	\$33,000
CST	SL	\$0	\$1,810,252	\$0	\$0	\$0	\$1,810,252
CST	LF	\$0	\$613,853	\$0	\$0	\$0	\$613,853
CST	DDR	\$0	\$373,591	\$18,701	\$0	\$0	\$392,292
Total		\$1,730,000	\$2,988,696	\$68,701	\$21,000	\$0	\$4,808,397

Project Description:

SR25/SR200/US301/US441
from CR 25A to US 301/
US441 Interchange

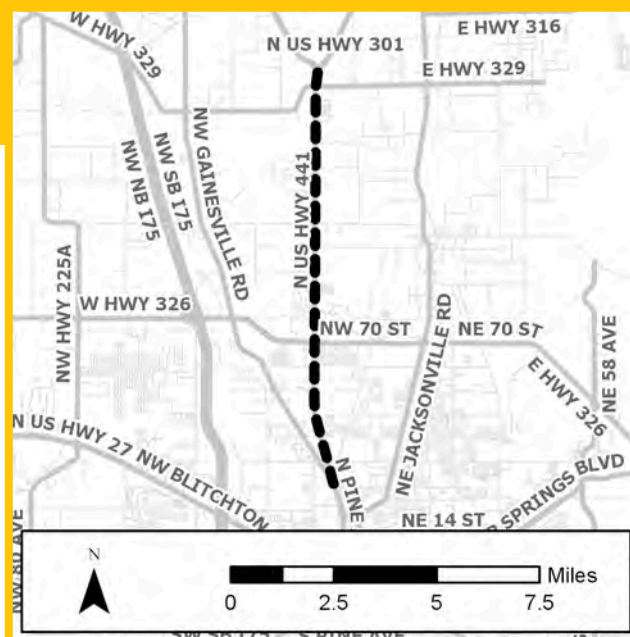
Project Type: Resurface

FM Number: 4411361

Lead Agency: FDOT

Length: 10.2 miles

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$1,799,734

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$21,395,079

Additional Information:

Routine resurfacing.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	SL	\$1,359,202	\$0	\$0	\$0	\$0	\$1,359,202
CST	SA	\$12,696,779	\$0	\$0	\$0	\$0	\$12,696,779
CST	DS	\$5,539,364	\$0	\$0	\$0	\$0	\$5,539,364
Total		\$19,595,345	\$0	\$0	\$0	\$0	\$19,595,345

Project Description:

US 301 / US 441 Split (The Y)
Just South of Split to North of Split

Project Type:

Landscaping

FM Number:

4437301

Lead Agency:

FDOT

Length:

2.6 miles

LRTP # (pg. #):

Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$626,635

Additional Information:

Landscaping between the two roads within the Split area.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	DDR	\$0	\$616,105	\$0	\$0	\$0	\$616,105
CST	DIH	\$0	\$10,530	\$0	\$0	\$0	\$10,530
Total		\$0	\$626,635	\$0	\$0	\$0	\$626,635

Project Description: US 27/US 441/Abshiver Blvd.
@ CR 42

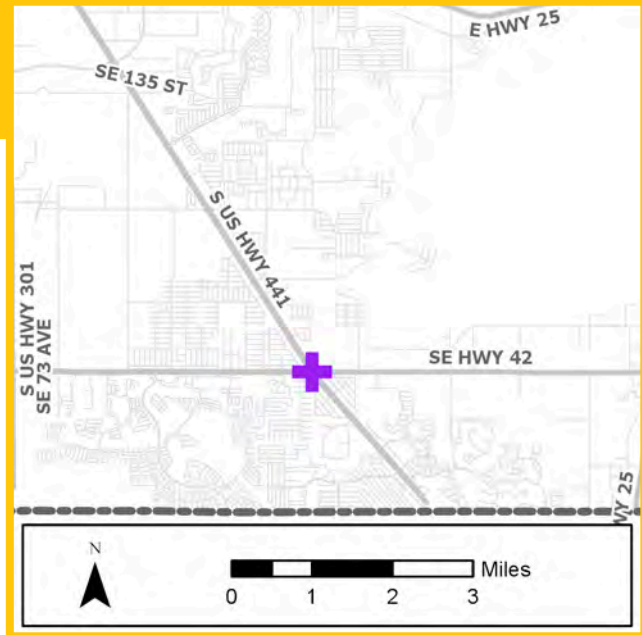
Project Type: Intersection / Turn Lane

FM Number: 4456881

Lead Agency: FDOT

Length: 0.1 miles

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$455,499

**Additional
Information:**

Traffic signal maintenance.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	ACID	\$155,000	\$0	\$0	\$0	\$0	\$155,000
CST	ACSS	\$0	\$0	\$300,499	\$0	\$0	\$300,499
Total		\$155,000	\$0	\$300,499	\$0	\$0	\$455,499

Project Description:

SE Abshier Blvd. from SE Hames Rd to N of SE Agnew Rd.

Project Type:

Intersection / Turn Lane

FM Number:

4457011

Lead Agency:

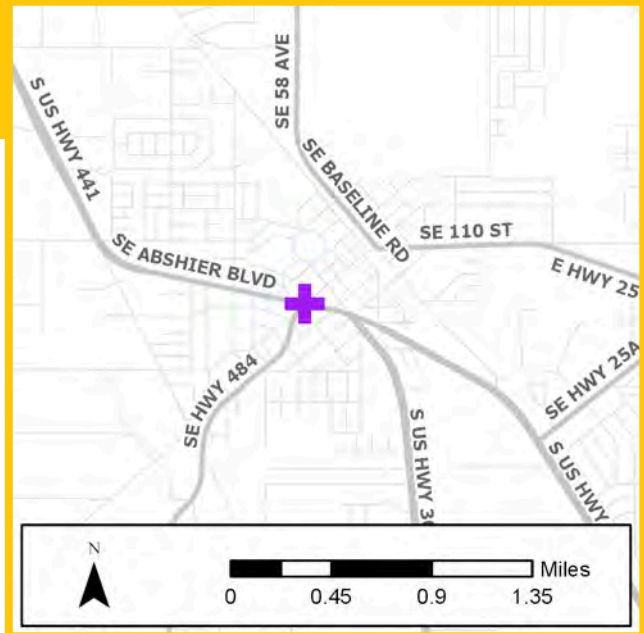
FDOT

Length:

0.2 miles

LRTP # (pg. #):

Goal 6: Objective 1, 3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,618,537

Additional Information:

Construct a traffic separator and conduct traffic signal maintenance.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	ACID	\$410,000	\$0	\$0	\$0	\$0	\$410,000
CST	ACSS	\$0	\$0	\$1,208,537	\$0	\$0	\$1,208,537
Total		\$410,000	\$0	\$1,208,537	\$0	\$0	\$1,618,537

State & Local Road Projects



Project Description: SR 40 from end of 4 lanes to east of CR 314

Project Type: Roadway Capacity

FM Number: 4106742

Lead Agency: FDOT

Length: 6.1 miles

LRTP # (pg. #): Goal 2: Objective 2 (2-9)



**Prior Cost
< 2020/21:**

\$12,328,612

**Future Cost
> 2024/25:**

\$160,316,895

**Total
Project Cost**

\$178,232,776

Additional Information:

Widen and reconstruct SR 40, which will include two 12-foot-wide lanes in each direction, separated by a 40-foot-wide grassed median. A 12-foot-wide multi-use trail will run along the north side of SR 40 from NE 60th Court to Ray Wayside Park. The Ocklawaha River Bridge will also be replaced with two low-profile bridges. Wildlife crossings are provided throughout the project. This project is scheduled to begin construction in 2029. (Priority Project #16)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
ROW	ACSA	\$2,577,781	\$0	\$0	\$0	\$0	\$2,577,781
ROW	ACSN	\$269,935	\$0	\$0	\$0	\$0	\$269,935
ROW	SL	\$428,876	\$0	\$0	\$0	\$0	\$428,876
ROW	SN	\$202,974	\$2,107,703	\$0	\$0	\$0	\$2,310,677
Total		\$3,479,566	\$2,107,703	\$0	\$0	\$0	\$5,587,269

Project Description: CR 484 from SW 20th Avenue to CR 475A

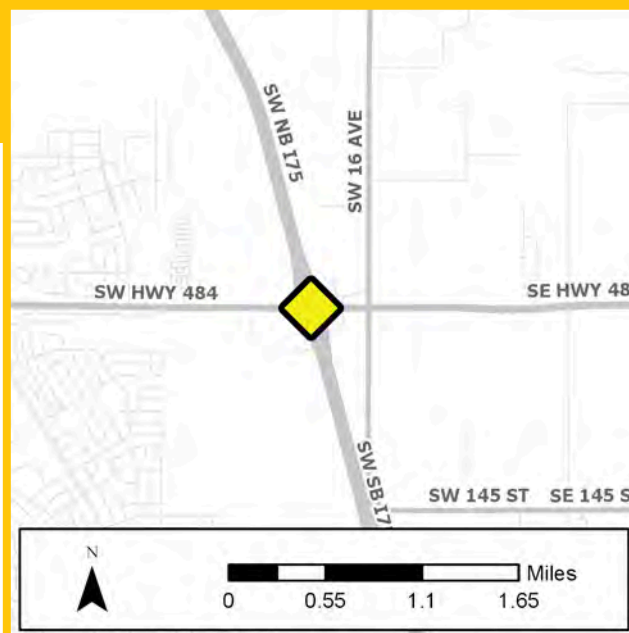
Project Type: Interchange

FM Number: 4336511

Lead Agency: FDOT

Length: 0.9 miles

LRTP # (pg. #): Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$6,006,887

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$17,453,874

**Additional
Information:**

Improve safety and traffic flow by adding turn lanes and turn lane extensions at CR 484/I-75 interchange and CR 484/CR475A intersection, reconstructing the westbound through lanes and modifying the existing I-75 bridge to accommodate the widening. Additionally, bicycle and pedestrian connectivity will be improved within the project limits. (Priority Project #3)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
ROW	ACSN	\$650,000	\$0	\$0	\$0	\$0	\$650,000
ROW	SL	\$50,000	\$323,396	\$0	\$0	\$0	\$373,396
ROW	SN	\$527,924	\$310,079	\$68,558	\$0	\$0	\$906,561
CST	ACFP	\$0	\$9,125,700	\$0	\$49,995	\$0	\$9,175,695
CST	SL	\$0	\$318,799	\$0	\$0	\$0	\$318,799
CST	LF	\$0	\$22,536	\$0	\$0	\$0	\$22,536
Total		\$1,227,924	\$10,100,510	\$68,558	\$49,995	\$0	\$11,446,987

Project Description: CR 484 from SW 20th Avenue to CR 475A

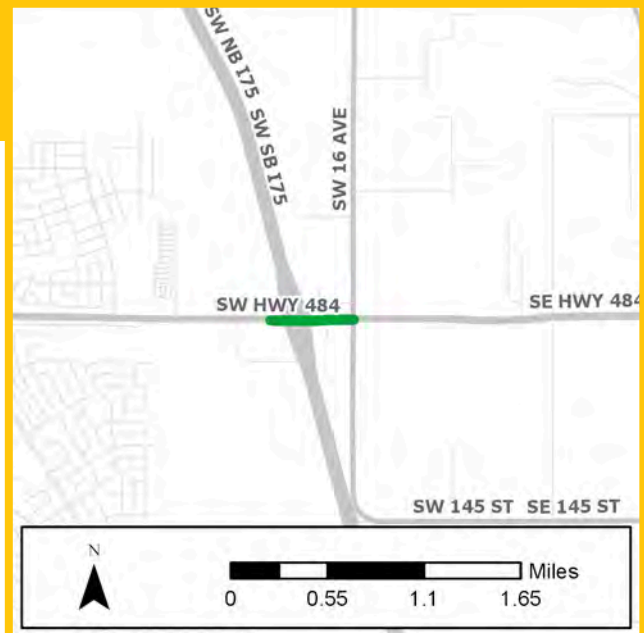
Project Type: Landscaping

FM Number: 4336514

Lead Agency: FDOT

Length: 0.5 miles

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$227,555

**Additional
Information:**

Landscaping for Project FM # 4336511 (CR 484 from SW 20th Ave. to CR 475A).

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	SN	\$0	\$60,000	\$0	\$0	\$0	\$60,000
CST	SN	\$0	\$0	\$167,555	\$0	\$0	\$167,555
Total		\$0	\$60,000	\$167,555	\$0	\$0	\$227,555

Project Description:

SR 40 Intersections at SW 40th Avenue and SW 27th Avenue

Project Type:

Intersection / Turn Lane

FM Number:

4336521

Lead Agency:

FDOT

Length:

0.8 miles

LRTP # (pg. #):

Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$1,989,729

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$5,419,204

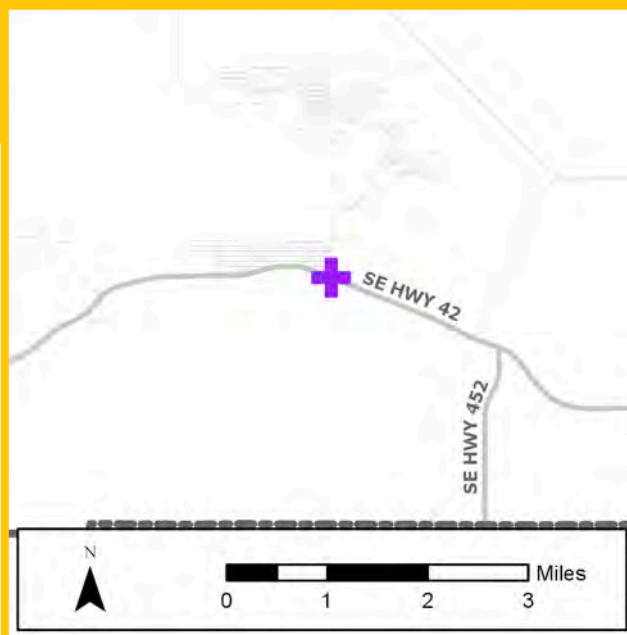
Additional Information:

Improve traffic operations by extending the existing left turn lanes along both directions of the SR 40/I-75 intersection, providing dual left-turn lanes and a right-turn lane for NS and SB I-75 exit ramps, creating dual left-turn lanes to all approaches to the SR 40/SW 27th Ave. intersection and an exclusive right-turn lane for EB SR 40 onto SB SW 27th Avenue. (Priority Project #12)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
ROW	SL	\$1,340,000	\$1,084,675	\$600,000	\$260,000	\$44,800	\$3,329,475
ROW	DIH	\$34,000	\$34,000	\$32,000	\$0	\$0	\$100,000
Total		\$1,374,000	\$1,118,675	\$632,000	\$260,000	\$44,800	\$3,429,475

Project Description:

CR 42 at SE 182nd

Project Type: Intersection / Turn Lane**FM Number:** 4348441**Lead Agency:** FDOT**Length:** 0.4 miles**LRTP # (pg. #):** Goal 6: Objective 1 (2-11)**Prior Cost
< 2020/21:**

\$46,012

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$453,212

Additional Information:

Construct eastbound left-turn lane on CR 42.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	ACSS	\$0	\$407,200	\$0	\$0	\$0	\$407,200
Total		\$0	\$407,200	\$0	\$0	\$0	\$407,200

Project Description: SR 200 from I-75 to SW 12th Avenue

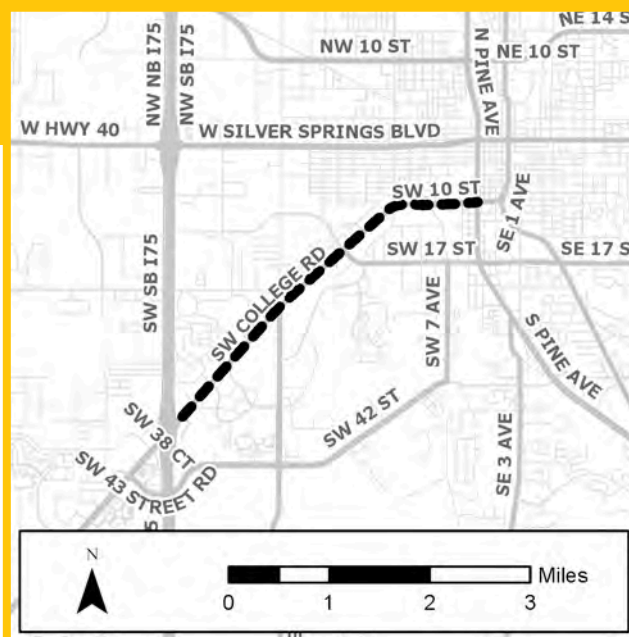
Project Type: Resurface

FM Number: 4392341

Lead Agency: FDOT

Length: 3.8 miles

LRTP # (pg. #): Goal 6: Objective 2,3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$8,034,933

**Additional
Information:**

Routine resurfacing.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	DDR	\$1,000,000	\$0	\$0	\$0	\$0	\$1,000,000
PE	DIH	\$10,000	\$0	\$0	\$0	\$0	\$10,000
CST	SA	\$0	\$0	\$6,205,569	\$0	\$0	\$6,205,569
CST	SL	\$0	\$0	\$793,149	\$0	\$0	\$793,149
CST	DDR	\$0	\$0	\$16,215	\$0	\$0	\$16,215
CST	DIH	\$0	\$0	\$10,000	\$0	\$0	\$10,000
Total		\$1,010,000	\$0	\$7,024,933	\$0	\$0	\$8,034,933

Project Description: SR 464 from SR 500 (US 27/301) to SR 35

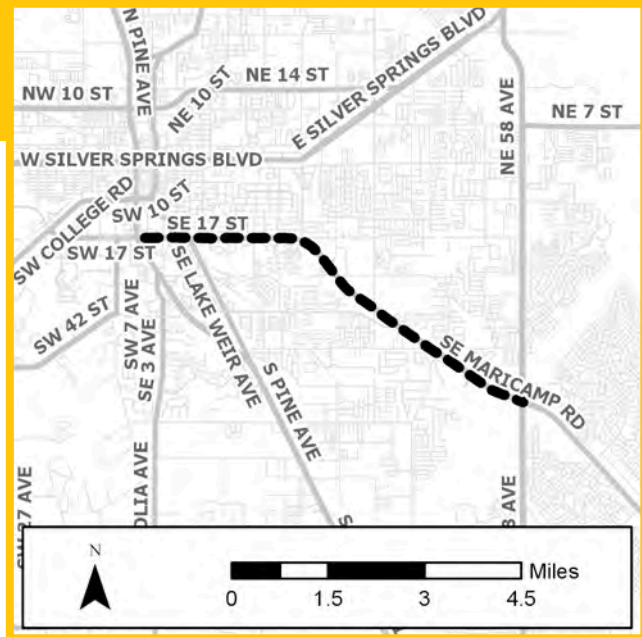
Project Type: Resurface

FM Number: 4411411

Lead Agency: FDOT

Length: 6.8 miles

LRTP # (pg. #): Goal 6: Objective 2,3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$18,016,873

**Additional
Information:**

Routine resurfacing.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	DDR	\$1,452,000	\$0	\$0	\$0	\$0	\$1,452,000
PE	DIH	\$10,000	\$0	\$0	\$0	\$0	\$10,000
CST	SA	\$0	\$0	\$14,489,638	\$0	\$0	\$14,489,638
CST	SL	\$0	\$0	\$2,065,235	\$0	\$0	\$2,065,235
Total		\$1,462,000	\$0	\$16,554,873	\$0	\$0	\$18,016,873

Project Description: SR 40 from SW 27th Ave. to MLK Jr. Ave.

Project Type: Median Access

FM Number: 4413661

Lead Agency: FDOT

Length: 0.8 miles

LRTP # (pg. #): Goal 6: Objective 1, 2 (2-11)



**Prior Cost
< 2020/21:**

\$462,448

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,005,666

**Additional
Information:**

Median access improvements- The project will include converting full median openings to directional medians, closing three of the existing full medians and extending some of the turn lanes. These modifications reduce traffic conflict points and separate turning movements along SR 40.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	ACSS	\$543,218	\$0	\$0	\$0	\$0	\$543,218
Total		\$543,218	\$0	\$0	\$0	\$0	\$543,218

Project Description:

SR 35 (SE 58th Ave) from SR CR 464 (SE Maricamp Rd) to SR 40

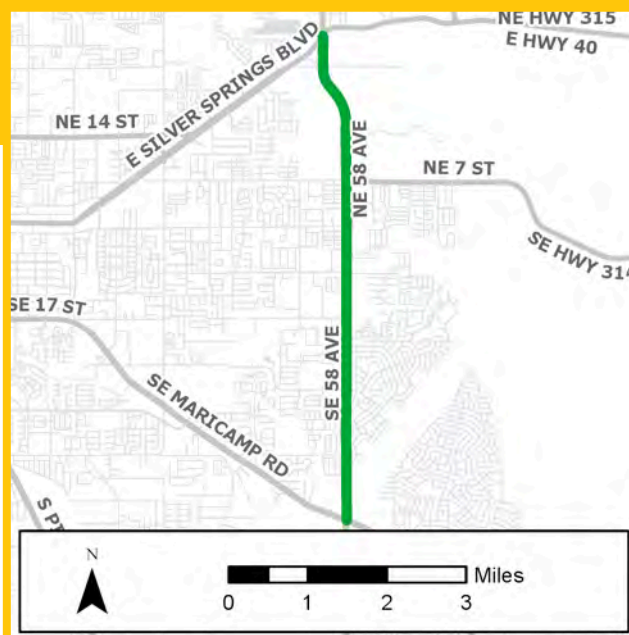
Project Type: Landscaping

FM Number: 4437031

Lead Agency: FDOT

Length: 6.2 miles

L RTP # (pg. #): Goal 5: Objective 3 (2-10)
Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$623,871

Additional Information:

Install landscaping on SR 35 (Baseline Rd.) from SR 40 to SR 464 in median and ponds, including gateway landscaping at the intersection of SR 35 and SR 364.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	DDR	\$550,399	\$0	\$0	\$0	\$0	\$550,399
CST	DIH	\$73,472	\$0	\$0	\$0	\$0	\$73,472
Total		\$623,871	\$0	\$0	\$0	\$0	\$623,871

Project Description: SR 326 from NW 12th Ave to SR 40

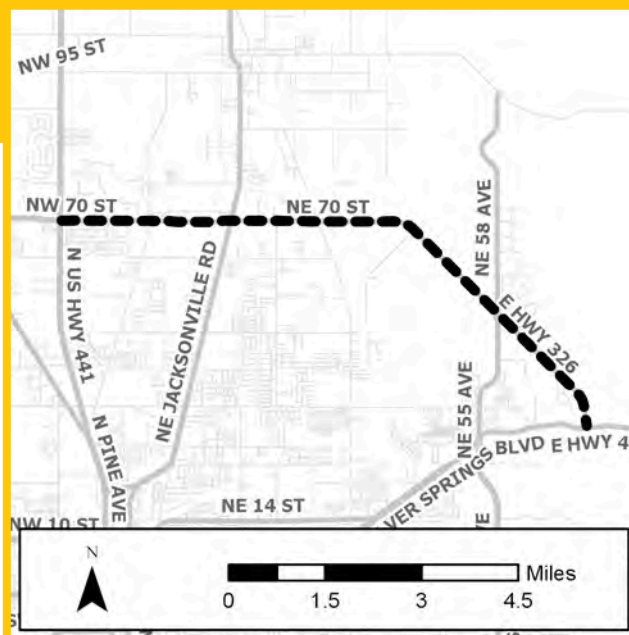
Project Type: Resurface

FM Number: 4452171

Lead Agency: FDOT

Length: 9.7 miles

LRTP # (pg. #): Goal 6: Objective 2,3 (2-11)



**Prior Cost
< 2020/21:**

\$250,000

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$9,795,855

**Additional
Information:**

Routine resurfacing.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	DDR	\$662,000	\$0	\$0	\$0	\$0	\$662,000
PE	DIH	\$10,000	\$0	\$0	\$0	\$0	\$10,000
CST	NHRE	\$0	\$0	\$5,522,605	\$0	\$0	\$5,522,605
CST	SL	\$0	\$0	\$973,741	\$0	\$0	\$973,741
CST	DDR	\$0	\$0	\$2,366,699	\$0	\$0	\$2,366,699
CST	DIH	\$0	\$0	\$10,810	\$0	\$0	\$10,810
Total		\$672,000	\$0	\$8,873,855	\$0	\$0	\$9,545,855

Project Description: E. SR 40 @ SR 492

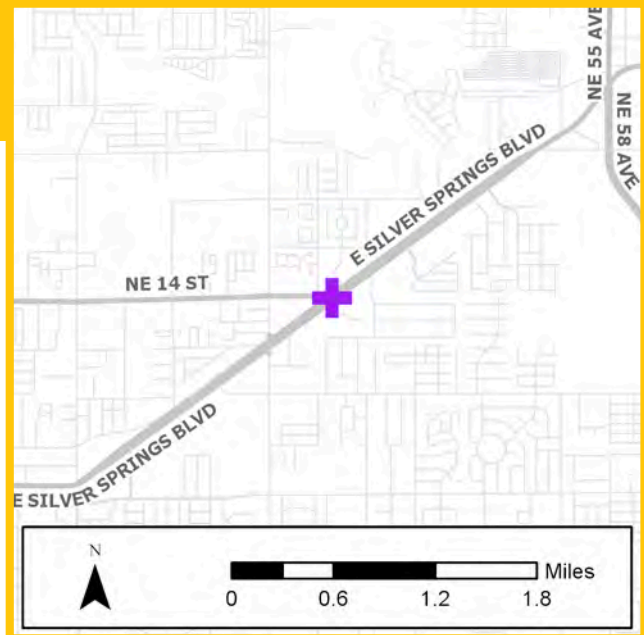
Project Type: Intersection / Turn Lane

FM Number: 4458001

Lead Agency: FDOT

Length: 0.1 miles

LRTP # (pg. #): Goal 3: Objective 2, 5 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$996,286

**Additional
Information:**

Replace traffic signals and install pedestrian signals and crosswalks.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	ACSS	\$210,000	\$0	\$0	\$0	\$0	\$210,000
CST	ACSS	\$0	\$0	\$0	\$786,286	\$0	\$786,286
Total		\$210,000	\$0	\$0	\$786,286	\$0	\$996,286

Project Description: SR 25 from NW 35th Street to SR 326

Project Type: Median Access

FM Number: 4458021

Lead Agency: FDOT

Length: 3.0 miles

LRTP # (pg. #): Goal 3: Objective 2 (2-9)
Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$2,604,273

**Additional
Information:**

Modify and close median openings and lengthen left-turn lanes.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	ACSS	\$440,000	\$0	\$0	\$0	\$0	\$440,000
CST	ACSS	\$0	\$0	\$2,164,273	\$0	\$0	\$2,164,273
Total		\$440,000	\$0	\$2,164,273	\$0	\$0	\$2,604,273

Bicycle & Pedestrian Projects



Project Description: Silver Springs State Park Pedestrian Bridges

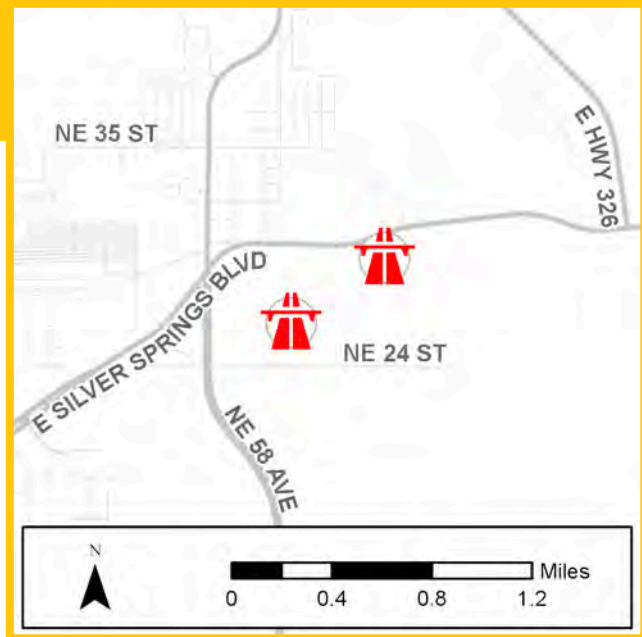
Project Type: Pedestrian Bridge

FM Number: 4261791

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 1: Objective 2 (2-8)



**Prior Cost
< 2020/21:**

\$1,446,412

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$4,105,251

**Additional
Information:**

Construction of two, 8-foot-wide, pedestrian bridges over, and boardwalks along, the tributaries of the Silver River within Silver Springs State Park.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	TALL	\$0	\$0	\$0	\$24,932	\$0	\$24,932
CST	TALN	\$0	\$0	\$0	\$252,270	\$0	\$252,270
CST	TALT	\$0	\$0	\$0	\$2,224,590	\$0	\$2,224,590
CST	DDR	\$0	\$0	\$0	\$151,492	\$0	\$151,492
CST	DIH	\$0	\$0	\$0	\$5,555	\$0	\$5,555
Total		\$0	\$0	\$0	\$2,658,839	\$0	\$2,658,839

Project Description: Pruitt Trail from SR 200 to Pruitt Trailhead

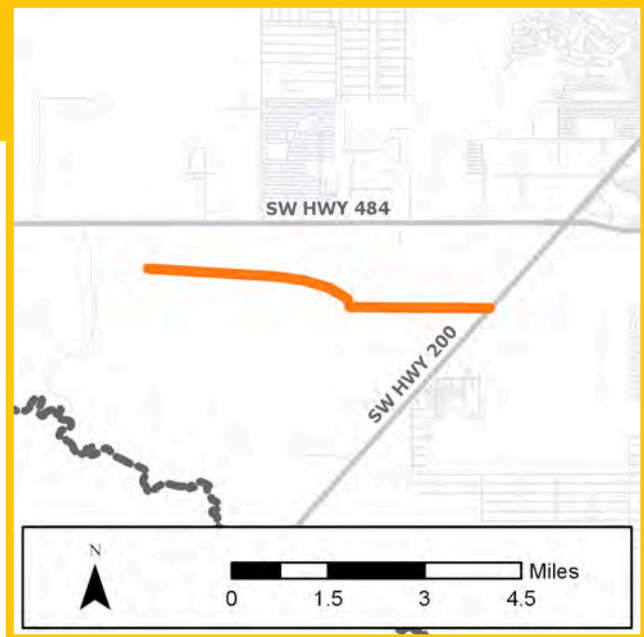
Project Type: Bike Path & Trail

FM Number: 4354842

Lead Agency: Marion County

Length: 5.5 miles

LRTP # (pg. #): Goal 1: Objective 2 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$2,158,000

**Additional
Information:**

This project has recently been separated into two sections. This particular section will construct a 12-foot-wide multi-modal path from SR 200 to the Pruitt Trailhead just south of CR 484. (Priority Project #18)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	SL	\$0	\$499,319	\$0	\$0	\$0	\$499,319
CST	SN	\$0	\$627,868	\$0	\$0	\$0	\$627,868
CST	TALL	\$0	\$296,279	\$0	\$0	\$0	\$296,279
CST	TALN	\$0	\$252,377	\$0	\$0	\$0	\$252,377
CST	TALT	\$0	\$482,157	\$0	\$0	\$0	\$482,157
Total		\$0	\$2,158,000	\$0	\$0	\$0	\$2,158,000

Project Description: Citywide Sidewalk Improvements

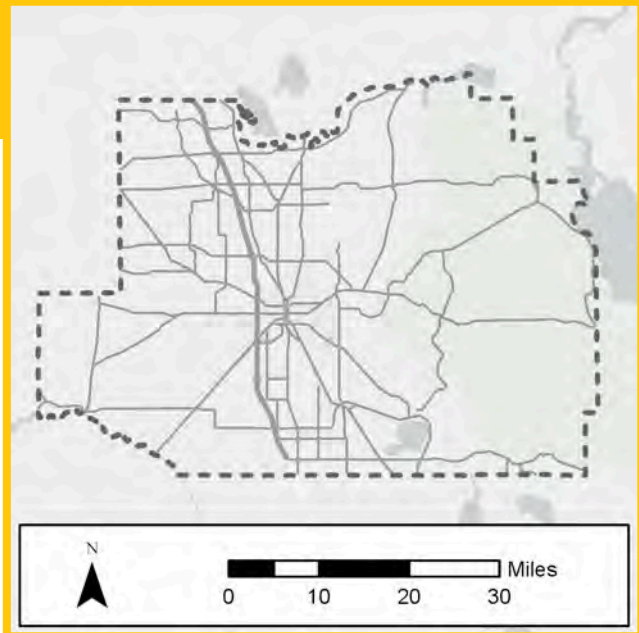
Project Type: Sidewalk

FM Number: 4363751

Lead Agency: City of Ocala

Length: N/A

LRTP # (pg. #): Goal 1: Objective 2 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$973,878

**Additional
Information:**

Provide continuity of pedestrian facilities and enhance safety of pedestrian activity.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	ACSA	\$95,181	\$0	\$0	\$0	\$0	\$95,181
CST	ACSL	\$19,747	\$0	\$0	\$0	\$0	\$19,747
CST	SL	\$32,366	\$0	\$0	\$0	\$0	\$32,366
CST	TALT	\$826,584	\$0	\$0	\$0	\$0	\$826,584
Total		\$973,878	\$0	\$0	\$0	\$0	\$973,878

Project Description: Saddlewood Elementary Sidewalk Improvements

Project Type: Sidewalk

FM Number: 4364742

Lead Agency: Marion County

Length: 0.3 miles

LRTP # (pg. #): Goal 1, Objective 2 (2-8)
Goal 3, Objective 1 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$317,096

**Additional
Information:**

Construct 5-foot-wide sidewalk from the Fore Ranch Community to Saddlewood Elementary to provide a safe route to school.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	SL	\$0	\$4,455	\$0	\$0	\$0	\$4,455
CST	TALL	\$0	\$285,794	\$0	\$0	\$0	\$285,794
CST	TALT	\$0	\$26,847	\$0	\$0	\$0	\$26,847
Total		\$0	\$317,096	\$0	\$0	\$0	\$317,096

Project Description: Legacy Elementary School Sidewalks

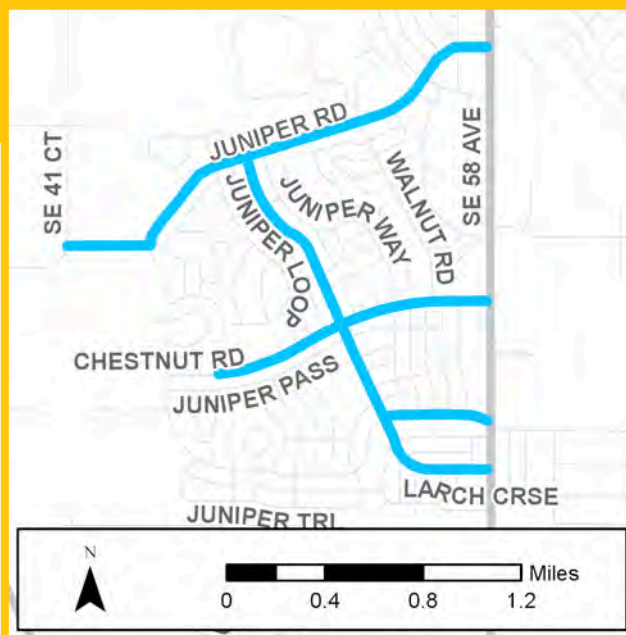
Project Type: Sidewalk

FM Number: 4364743

Lead Agency: Marion County

Length: 5.7 miles

L RTP # (pg. #): Goal 1: Objective 2 (2-8)
Goal 3: Objective 1 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,441,659

**Additional
Information:**

Construct sidewalks on Larch Road and SE 79th Street. Complete construction of sidewalks on Chestnut Road and Juniper Road.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CST	SL	\$0	\$28,181	\$0	\$0	\$0	\$28,181
CST	TALT	\$0	\$1,413,478	\$0	\$0	\$0	\$1,413,478
Total		\$0	\$1,441,659	\$0	\$0	\$0	\$1,441,659

Project Description:

Indian Lake Trail from Silver Springs State Park to Indian Lake Park

Project Type:

Bike Path & Trail

FM Number:

4367551

Lead Agency:

Marion County

Length:

4.8 miles

LRTP # (pg. #):

Goal 1: Objective 2 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$155,000

Additional Information:

Construct approximately five miles of a 12-foot wide multi-use trail to provide direct multimodal access to Indian Lake State Park. (Priority Project #14)

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	TALL	\$0	\$155,000	\$0	\$0	\$0	\$155,000
Total		\$0	\$155,000	\$0	\$0	\$0	\$155,000

Project Description:

Downtown Ocala Trail from SE Osceola Ave. to Silver Springs State Park

Project Type:

Bike Path & Trail

FM Number:

4367561

Lead Agency:

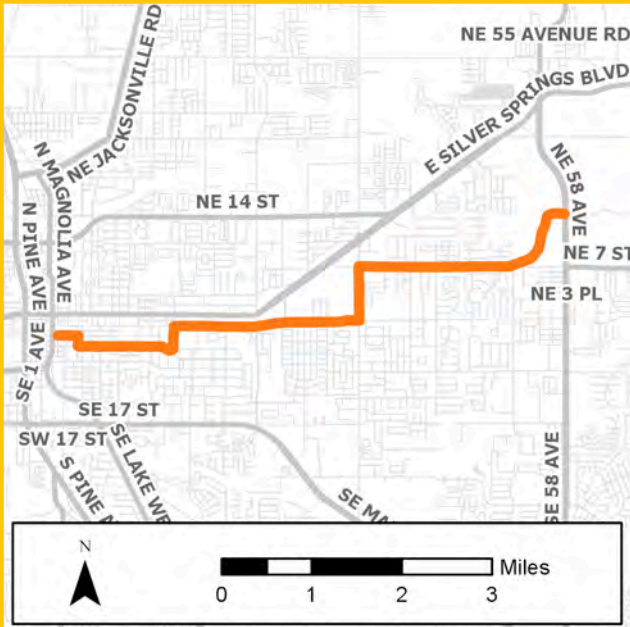
City of Ocala

Length:

7.0 miles

LRTP # (pg. #):

Goal 1: Objective 2 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$253,001

Additional Information:

Designate and construct an 8-foot to 12-foot multi-use trail from downtown Ocala to Silver Springs State Park. Sections of the trail may be combined with existing roadways used by vehicular traffic.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	TALL	\$0	\$0	\$0	\$0	\$253,001	\$253,001
Total		\$0	\$0	\$0	\$0	\$253,001	\$253,001

**SR 40/Silver Springs
Blvd. from NW 27th Ave.
to SW 7th Ave.**

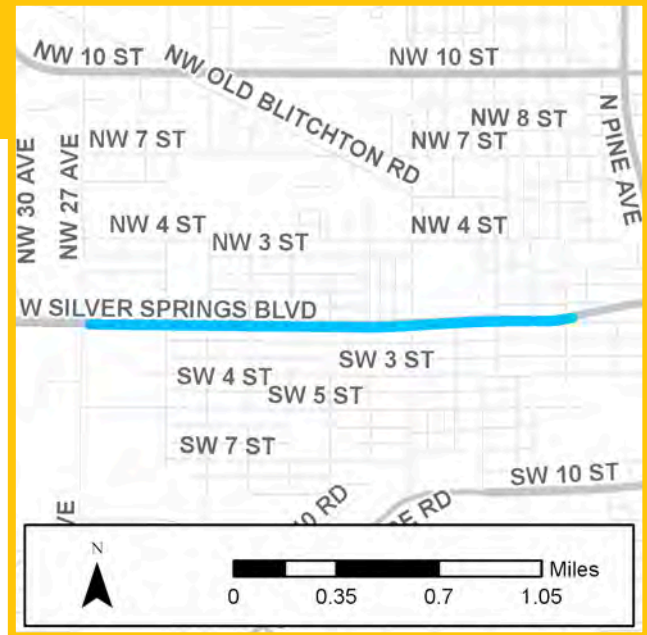
Sidewalk

4375962

FDOT

1.6 miles

Goal 1: Objective 2-4 (2-8)
Goal 3: Objective 3 (2-9)



**Total
Project Cost**

\$1,367,942

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	DDR	\$436,000	\$0	\$0	\$0	\$0	\$436,000
PE	DIH	\$10,000	\$0	\$0	\$0	\$0	\$10,000
CST	SL	\$0	\$0	\$911,942	\$0	\$0	\$911,942
CST	DIH	\$0	\$0	\$10,000	\$0	\$0	\$10,000
Total		\$446,000	\$0	\$921,942	\$0	\$0	\$1,367,942

Project Description:

Marion Oaks-Sunrise/
Horizon-Marion Oaks Manor
to Marion Oaks Golf Way

Project Type:

Sidewalk

FM Number:

4408801

Lead Agency:

Marion County

Length:

1.0 miles

LRTP # (pg. #):

Goal 1: Objective 2 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$36,210

Additional Information:

Construct a 5-foot-wide sidewalk from Marion Oaks Country Club to Marion Oaks Manor.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	TALL	\$0	\$35,605	\$0	\$0	\$0	\$35,605
PE	TALT	\$0	\$605	\$0	\$0	\$0	\$605
Total		\$0	\$36,210	\$0	\$0	\$0	\$36,210

Project Description:

US 41 N./ S. Williams St. from Brittan Alexander Bridge to River Rd.

Project Type: Pedestrian Crosswalk

FM Number: 4456871

Lead Agency: FDOT

Length: 0.1 miles

L RTP # (pg. #): Goal 1: Objective 2, 3 (2-8)
Goal 3: Objective 1, 2, 5 (2-9)



**Prior Cost
< 2020/21:**

\$5,000

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$594,227

Additional Information:

Install a pedestrian hybrid beacon and construct a directional median mid-block crossing.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	ACSS	\$160,000	\$0	\$0	\$0	\$0	\$160,000
CST	ACSS	\$0	\$0	\$429,227	\$0	\$0	\$429,227
Total		\$160,000	\$0	\$429,227	\$0	\$0	\$589,227



Airport Projects

Project Description:

Marion-Ocala International
Airport Drainage
Improvements

Project Type:

Airport

FM Number:

4370171

Lead Agency:

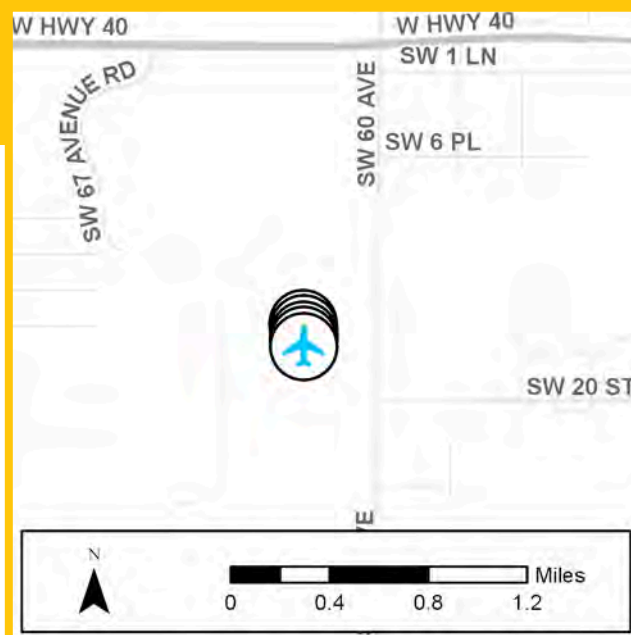
City of Ocala

Length:

N/A

L RTP # (pg. #):

Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$1,098,602

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,548,602

Additional Information:

Drainage improvements.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$90,000	\$0	\$0	\$0	\$0	\$90,000
CAP	DDR	\$360,000	\$0	\$0	\$0	\$0	\$360,000
Total		\$450,000	\$0	\$0	\$0	\$0	\$450,000

Project Description: Marion-Marion CO Airport Runway Improvements

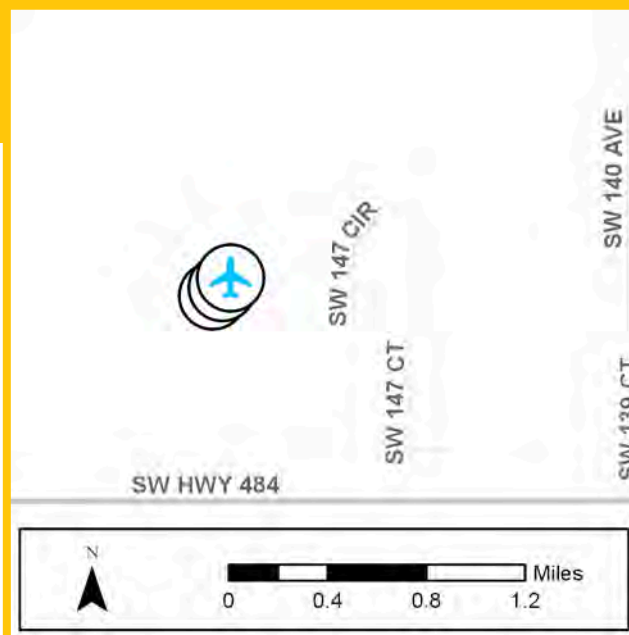
Project Type: Airport

FM Number: 4384171

Lead Agency: Marion County

Length: N/A

LRTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$182,000

**Additional
Information:**

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$36,400	\$0	\$0	\$0	\$0	\$36,400
CAP	DPT0	\$145,600	\$0	\$0	\$0	\$0	\$145,600
Total		\$182,000	\$0	\$0	\$0	\$0	\$182,000

Project Description: Marion Airfield Pavement Improvements

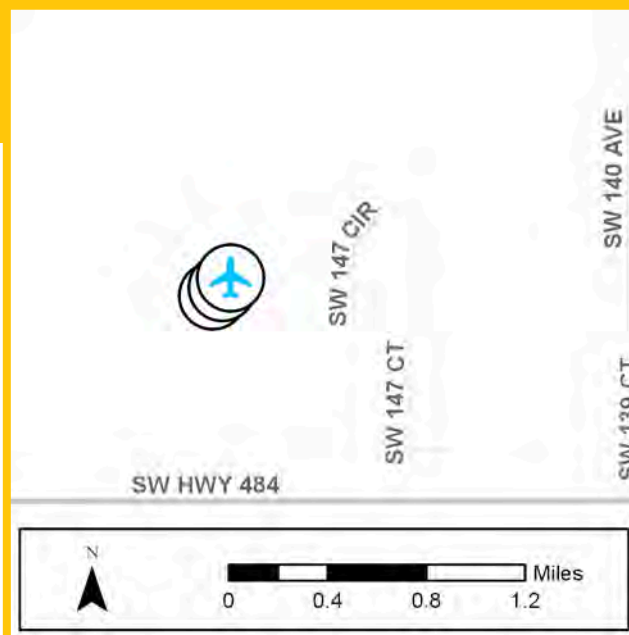
Project Type: Airport

FM Number: 4384271

Lead Agency: Marion County

Length: N/A

L RTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,625,000

**Additional
Information:**

Airfield pavement improvement.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$0	\$0	\$75,000	\$250,000	\$0	\$325,000
CAP	DDR	\$0	\$0	\$300,000	\$1,000,000	\$0	\$1,300,000
Total		\$0	\$0	\$375,000	\$1,250,000	\$0	\$1,625,000

Project Description: Marion-Marion CO Airport Hangar

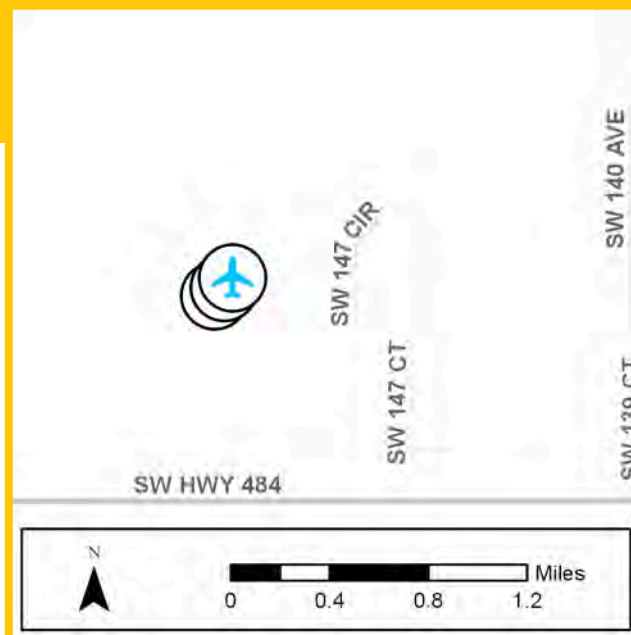
Project Type: Airport

FM Number: 4384301

Lead Agency: Marion County

Length: N/A

L RTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$450,000

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,250,000

**Additional
Information:**

Hangar improvements.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$160,000	\$0	\$0	\$0	\$0	\$160,000
CAP	DDR	\$640,000	\$0	\$0	\$0	\$0	\$640,000
Total		\$800,000	\$0	\$0	\$0	\$0	\$800,000

Project Description: Marion-Marion CO Airport Runway Rehabilitation

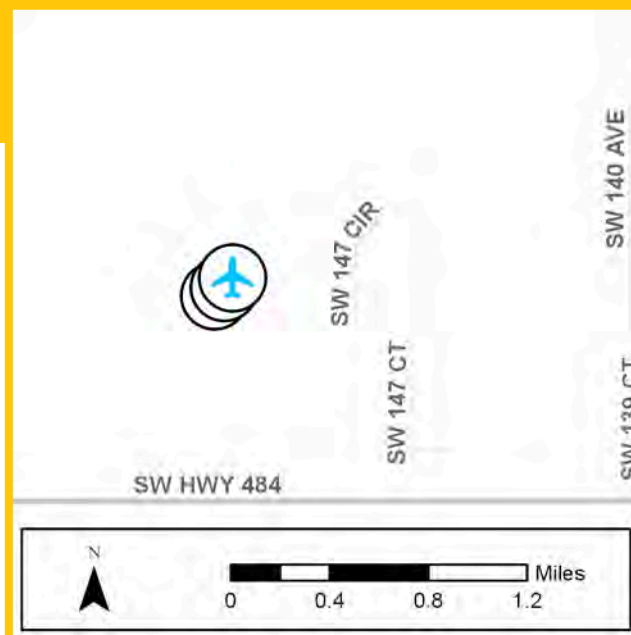
Project Type: Airport

FM Number: 4384351

Lead Agency: Marion County

Length: N/A

L RTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,000,000

**Additional
Information:**

Runway rehabilitation.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$0	\$200,000	\$0	\$0	\$0	\$200,000
CAP	DDR	\$0	\$800,000	\$0	\$0	\$0	\$800,000
Total		\$0	\$1,000,000	\$0	\$0	\$0	\$1,000,000

Project Description: Marion-Ocala Intl. Airfield Improvements

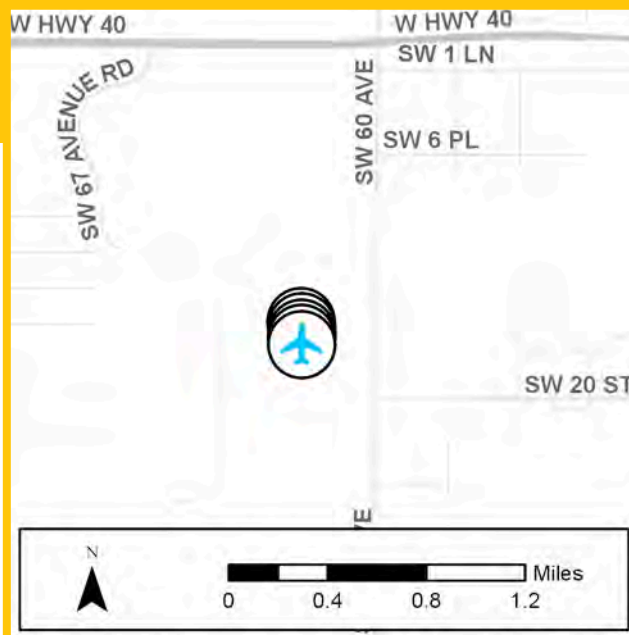
Project Type: Airport

FM Number: 4384761

Lead Agency: City of Ocala

Length: N/A

L RTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$2,000,000

**Additional
Information:**

Airfield improvements.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	FAA	\$0	\$1,800,000	\$0	\$0	\$0	\$1,800,000
CAP	LF	\$0	\$40,000	\$0	\$0	\$0	\$40,000
CAP	DDR	\$0	\$160,000	\$0	\$0	\$0	\$160,000
Total		\$0	\$2,000,000	\$0	\$0	\$0	\$2,000,000

Project Description: Marion-Ocala Intl. Taxiway Improvements

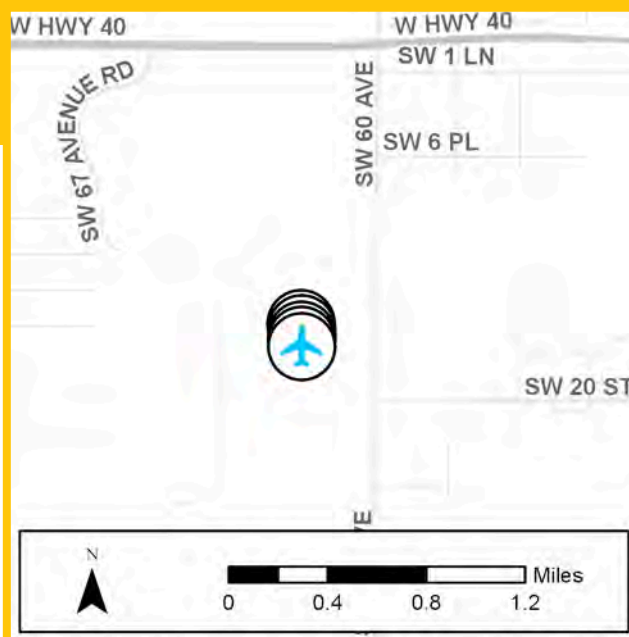
Project Type: Airport

FM Number: 4384771

Lead Agency: City of Ocala

Length: N/A

LRTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$6,500,000

**Additional
Information:**

Taxiway improvements.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	FAA	\$0	\$0	\$5,850,000	\$0	\$0	\$5,850,000
CAP	LF	\$0	\$0	\$130,000	\$0	\$0	\$130,000
CAP	DDR	\$0	\$0	\$520,000	\$0	\$0	\$520,000
Total		\$0	\$0	\$6,500,000	\$0	\$0	\$6,500,000

Project Description: Marion-Ocala Intl. Airfield Pavement Rehabilitation

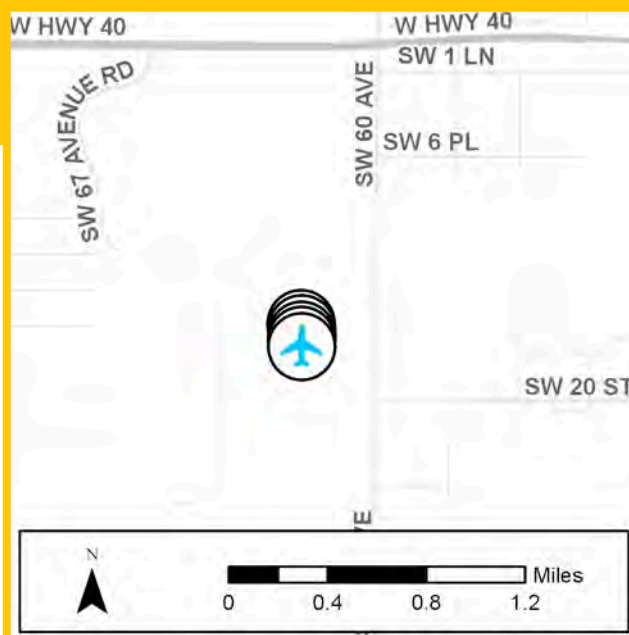
Project Type: Airport

FM Number: 4407801

Lead Agency: City of Ocala

Length: N/A

L RTP # (pg. #): Goal 2: Objective 3 (2-9)
Goal 3: Objective 3 (2-9)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,625,000

**Additional
Information:**

Airfield pavement improvements.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$0	\$0	\$25,000	\$300,000	\$0	\$325,000
CAP	DDR	\$0	\$0	\$100,000	\$1,200,000	\$0	\$1,300,000
Total		\$0	\$0	\$125,000	\$1,500,000	\$0	\$1,625,000

Project Description:

Marion-Ocala Intl. Hangar

Project Type:

Airport

FM Number:

4448771

Lead Agency:

No Lead Agency

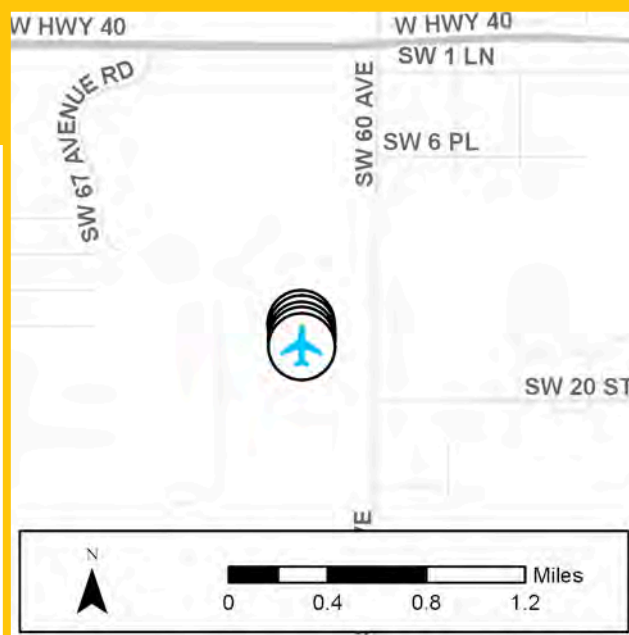
Length:

N/A

LRTP # (pg. #):

Goal 2: Objective 3 (2-9)

Goal 3: Objective 3 (2-9)

**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,250,000

**Additional
Information:**

Hangar improvements.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	LF	\$0	\$0	\$0	\$0	\$250,000	\$250,000
CAP	DDR	\$0	\$0	\$0	\$0	\$1,000,000	\$1,000,000
Total		\$0	\$0	\$0	\$0	\$1,250,000	\$1,250,000

Transit / Funding / Grants



Project Description:

SunTran/Ocala/Marion Urban
Capital Fixed Route FTA
Section 5307-2009

Project Type:

Capital for Fixed Route

FM Number:

4271882

Lead Agency:

City of Ocala

Length:

N/A

LRTP # (pg. #):

Goal 1 (2-8)



**Prior Cost
< 2020/21:**

\$14,676,277

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$30,109,671

Additional Information:

Capital Fixed Route FTA Section 5307-2009.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	FTA	\$2,325,554	\$2,395,321	\$2,467,181	\$2,541,196	\$2,617,431	\$12,346,683
CAP	LF	\$581,389	\$598,830	\$616,795	\$635,299	\$654,398	\$3,086,711
Total		\$2,906,943	\$2,994,151	\$3,083,976	\$3,176,495	\$3,271,829	\$15,433,394

Project Description: Marion-Section 5303, Ocala Marion TPO Planning Studies

Project Type: TPO Studies

FM Number: 4314011

Lead Agency: Ocala Marion TPO

Length: N/A

LRTP # (pg. #): Goal 1 - 6 (2-8 to 2-11)



**Prior Cost
< 2020/21:**

\$508,130

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$616,512

**Additional
Information:**

Ocala Marion TPO Planning Studies, Section 5303.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PLN	DU	\$86,706	\$0	\$0	\$0	\$0	\$86,706
PLN	LF	\$10,838	\$0	\$0	\$0	\$0	\$10,838
PLN	DPTO	\$10,838	\$0	\$0	\$0	\$0	\$10,838
Total		\$108,382	\$0	\$0	\$0	\$0	\$108,382

Project Description: Marion-Block Grant Operating Assit for Fixed Route Service

Project Type: Operating for Fixed Route

FM Number: 4333041

Lead Agency: City of Ocala

Length: N/A

LRTP # (pg. #): Goal 1 (2-8)



**Prior Cost
< 2020/21:**

\$3,528,695

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$6,355,161

**Additional
Information:**

Block Grant Operating Assistance for Fixed Route Service.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
OPS	LF	\$689,382	\$723,851	\$0	\$0	\$0	\$1,413,233
OPS	DPT0	\$689,382	\$723,851	\$0	\$0	\$0	\$1,413,233
Total		\$1,378,764	\$1,447,702	\$0	\$0	\$0	\$2,826,466

Project Description: Marion-Section 5311 Rural Transportation

Project Type: Operate/Admin. Assistance

FM Number: 4333121

Lead Agency: Marion Transit

Length: N/A

LRTP # (pg. #): Goal 1 (2-8)



**Prior Cost
< 2020/21:**

\$4,757,214

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$8,534,844

**Additional
Information:**

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
OPS	DU	\$921,373	\$967,442	\$0	\$0	\$0	\$1,888,815
OPS	LF	\$921,373	\$967,442	\$0	\$0	\$0	\$1,888,815
Total		\$1,842,746	\$1,934,884	\$0	\$0	\$0	\$3,777,630

Project Description: Ocala/Marion Urban Area FY 2020/2021-2021/2022 UPWP

Project Type: Transportation Planning

FM Number: 4393313

Lead Agency: Ocala Marion TPO

Length: N/A

LRTP # (pg. #): Goal 1 - 6 (2-8 to 2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,181,999

**Additional
Information:**

Ocala Marion TPO FY 2020/2021 – 2021/2022 Unified Planning Work Program (UPWP).

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PLN	PL	\$687,026	\$494,973	\$0	\$0	\$0	\$1,181,999
Total		\$687,026	\$494,973	\$0	\$0	\$0	\$1,181,999

Project Description: Ocala/Marion Urban Area FY 2022/2023-2023/2024 UPWP

Project Type: Transportation Planning

FM Number: 4393314

Lead Agency: Ocala Marion TPO

Length: N/A

L RTP # (pg. #): Goal 1 - 6 (2-8 to 2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$989,946

Additional Information:

Ocala Marion TPO FY 2022/2023 – 2023/2024 Unified Planning Work Program (UPWP).

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PLN	PL	\$0	\$0	\$494,973	\$494,973	\$0	\$989,946
Total		\$0	\$0	\$494,973	\$494,973	\$0	\$989,946

Project Description: Ocala/Marion Urban Area FY 2024/2025-2025/2026 UPWP

Project Type: Transportation Planning

FM Number: 4393315

Lead Agency: Ocala Marion TPO

Length: N/A

LRTP # (pg. #): Goal 1 - 6 (2-8 to 2-11)



**Prior Cost
< 2020/21:**
\$0

**Future Cost
> 2024/25:**
\$0

**Total
Project Cost**
\$494,973

Additional Information:

Ocala Marion TPO FY 2024/2025 – 2025/2026 Unified Planning Work Program (UPWP).

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PLN	PL	\$0	\$0	\$0	\$0	\$494,973	\$494,973
Total		\$0	\$0	\$0	\$0	\$494,973	\$494,973

Project Description: Ocala Marion TPO Planning Studies

Project Type: TPO Studies

FM Number: 4407971

Lead Agency: Ocala Marion TPO

Length: N/A

LRTP # (pg. #): Goal 1 - 6 (2-8 to 2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$562,401

**Additional
Information:**

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PLN	DU	\$0	\$74,389	\$74,389	\$74,389	\$226,752	\$449,919
PLN	LF	\$0	\$9,299	\$9,299	\$9,299	\$28,344	\$56,241
PLN	DPTO	\$0	\$9,299	\$9,299	\$9,299	\$28,344	\$56,241
Total		\$0	\$92,987	\$92,987	\$92,987	\$283,440	\$562,401

Project Description: Marion-SunTran Block Grant Operating Assistance

Project Type: Operating for Fixed Route

FM Number: 4424551

Lead Agency: City of Ocala

Length: N/A

LRTP # (pg. #): Goal: 1 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$4,724,238

**Additional
Information:**

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
OPS	LF	\$0	\$0	\$760,043	\$798,045	\$804,031	\$2,362,119
OPS	DPT0	\$0	\$0	\$760,043	\$798,045	\$804,031	\$2,362,119
Total		\$0	\$0	\$1,520,086	\$1,596,090	\$1,608,062	\$4,724,238

Project Description:

Marion-Marion Senior Services Section 5311 Rural Transportation

Project Type:

Operate/Admin. Assistance

FM Number:

4424601

Lead Agency:

Marion Transit

Length:

N/A

LRTP # (pg. #):

Goal 1 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$6,404,704

Additional Information:

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
OPS	DU	\$0	\$0	\$1,015,814	\$1,066,604	\$1,119,934	\$3,202,352
OPS	LF	\$0	\$0	\$1,015,814	\$1,066,604	\$1,119,934	\$3,202,352
Total		\$0	\$0	\$2,031,628	\$2,133,208	\$2,239,868	\$6,404,704

Project Description: 5310 Capital ARC Marion - Small Urban

Project Type: Capital Grant

FM Number: 4488161

Lead Agency: Marion Transit

Length: N/A

LRTP # (pg. #): Goal 1, Objectives 1,3,4 (2-8)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$6,200

**Additional
Information:**

Preventative maintenance funds for vehicles that provide transportation services to Advocacy Resource Center (ARC) in Marion County.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
CAP	DPT0	\$620	\$0	\$0	\$0	\$0	\$620
CAP	DU	\$4,960	\$0	\$0	\$0	\$0	\$4,960
CAP	LF	\$620	\$0	\$0	\$0	\$0	\$620
Total		\$6,200	\$0	\$0	\$0	\$0	\$6,200

Routine Maintenance



Project Description: Lighting Agreements

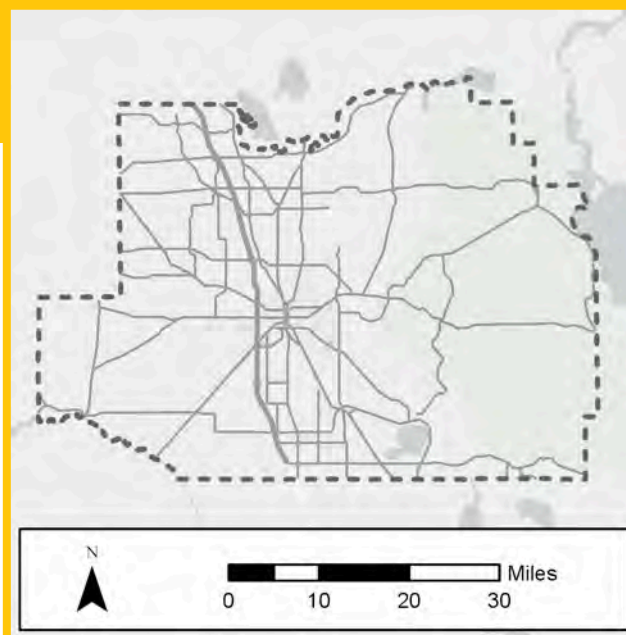
Project Type: Lighting

FM Number: 4136153

Lead Agency: FDOT

Length: N/A

L RTP # (pg. #): Goal 3: Objective 2 (2-9)
Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$4,604,594

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$6,748,323

**Additional
Information:**

Annual recurring funds to install and maintain illumination infrastructure on state roadways.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$403,786	\$415,897	\$428,369	\$441,220	\$454,457	\$2,143,729
Total		\$403,786	\$415,897	\$428,369	\$441,220	\$454,457	\$2,143,729

Project Description: Marion Primary In-House

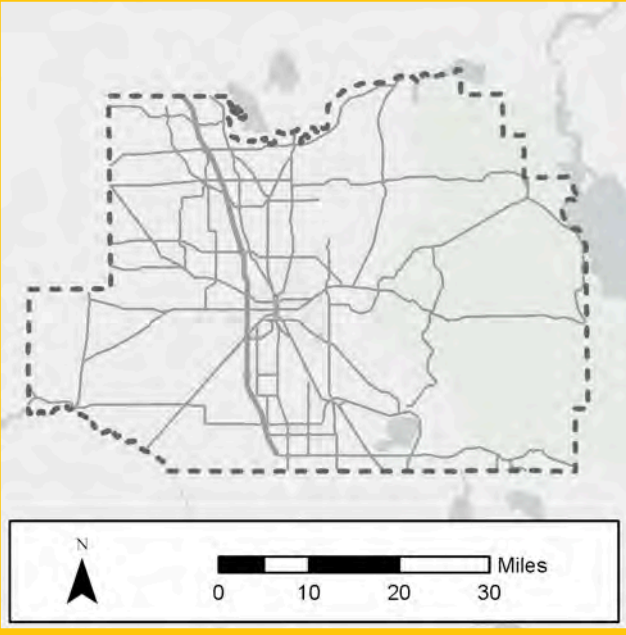
Project Type: Routine Maintenance

FM Number: 4181071

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**
\$35,459,872

**Future Cost
> 2024/25:**
\$0

**Total
Project Cost**
\$44,519,737

Additional Information:

Annual recurring funds for routine general maintenance of state roadways.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$1,831,973	\$1,831,973	\$1,831,973	\$1,781,973	\$1,781,973	\$9,059,865
Total		\$1,831,973	\$1,831,973	\$1,831,973	\$1,781,973	\$1,781,973	\$9,059,865

Project Description: Asphalt Resurfacing
Various Locations

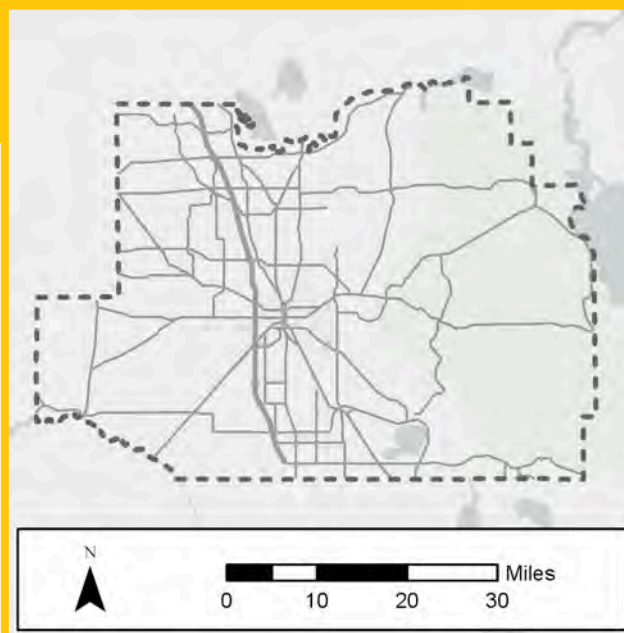
Project Type: Routine Maintenance

FM Number: 4233912

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$3,907,597

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$4,157,597

**Additional
Information:**

Annual recurring funds for asphalt resurfacing on state roadways.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$250,000	\$0	\$0	\$0	\$0	\$250,000
Total		\$250,000	\$0	\$0	\$0	\$0	\$250,000

Project Description: Unpaved Shoulder Repair

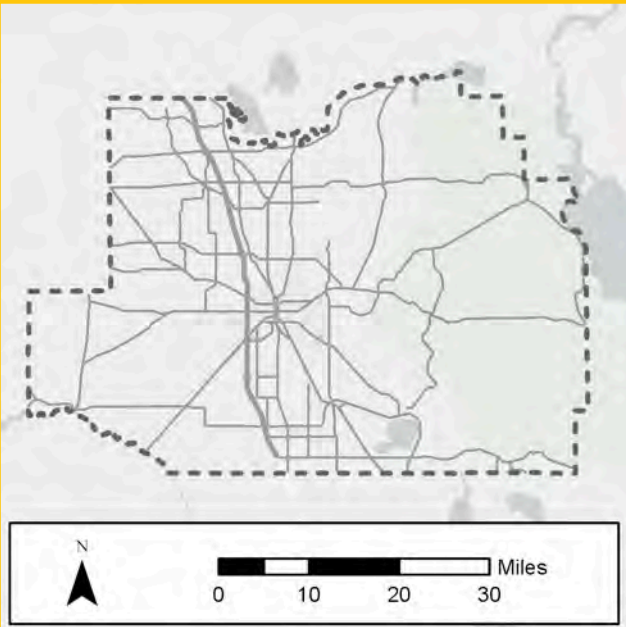
Project Type: Routine Maintenance

FM Number: 4291781

Lead Agency: FDOT

Length: N/A

L RTP # (pg. #): Goal 6: Objective 2,3 (2-11)



**Prior Cost
< 2020/21:**

\$1,411,063

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,631,063

Additional Information: Unpaved shoulder repair for state corridors.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$220,000	\$0	\$0	\$0	\$0	\$220,000
Total		\$220,000	\$0	\$0	\$0	\$0	\$220,000

Project Description: Pavement Markings - Thermoplastic and RPM's

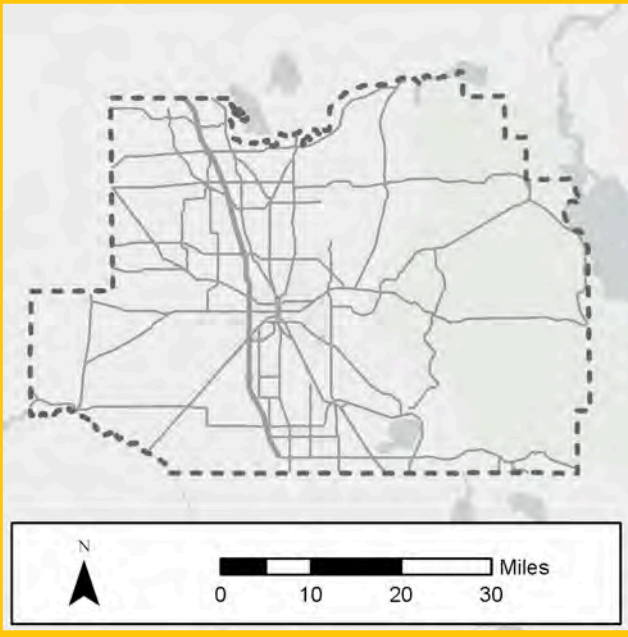
Project Type: Routine Maintenance

FM Number: 4291821

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 3: Objective 2 (2-9)
Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**

\$3,792,870

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$4,506,870

Additional Information: No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$714,000	\$0	\$0	\$0	\$0	\$714,000
Total		\$714,000	\$0	\$0	\$0	\$0	\$714,000

Project Description: ITS Operational Support - Marion County

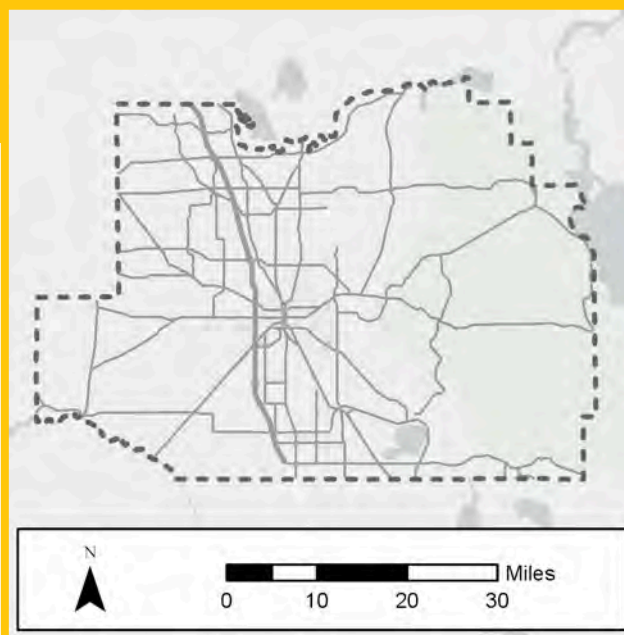
Project Type: ITS Communication System

FM Number: 4363611*

Lead Agency: Marion County

Length: N/A

LRTP # (pg. #): Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$160,000

**Additional
Information:**

Capital and operations support for Intelligent Transportation Systems (ITS) technology in Marion County.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	SL	\$160,000	\$0	\$0	\$0	\$0	\$160,000
Total		\$160,000	\$0	\$0	\$0	\$0	\$160,000

* Amended January 26, 2021

Project Description: ITS Operational Support - City of Ocala

Project Type: ITS Communication System

FM Number: 4363612*

Lead Agency: City of Ocala

Length: N/A

LRTP # (pg. #): Goal 6: Objective 1 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$110,000

**Additional
Information:**

Capital and operations support for Intelligent Transportation Systems (ITS) technology in the City of Ocala.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
PE	SL	\$110,000	\$0	\$0	\$0	\$0	\$110,000
Total		\$110,000	\$0	\$0	\$0	\$0	\$110,000

* Amended January 26, 2021

Project Description:

Aesthetics Area Wide

Project Type:

Routine Maintenance

FM Number:

4466911

Lead Agency:

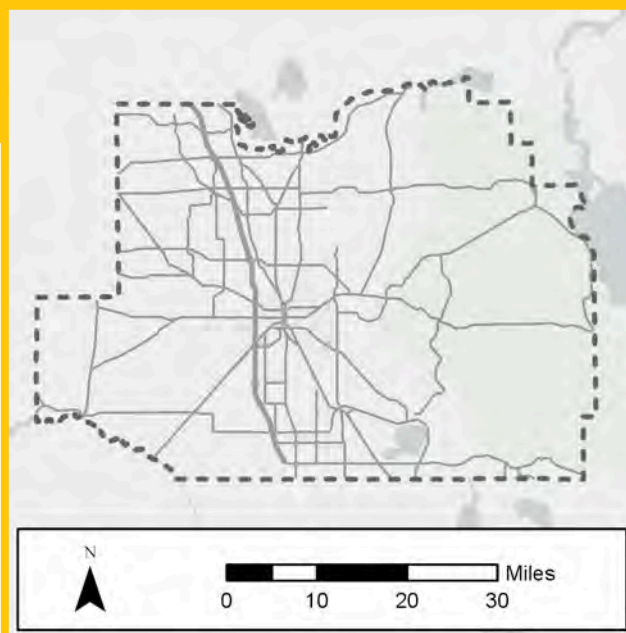
FDOT

Length:

N/A

LRTP # (pg. #):

Goal 5: Objective 3 (2-10)

**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$1,200,000

**Additional
Information:**

No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$1,200,000	\$0	\$0	\$0	\$0	\$1,200,000
Total		\$1,200,000	\$0	\$0	\$0	\$0	\$1,200,000

Project Description: LED Equipment Upgrades for 14 Crossings in Marion County

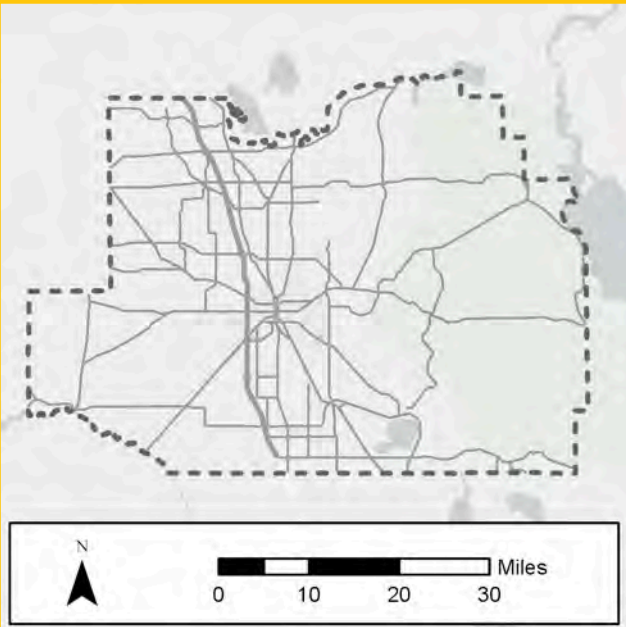
Project Type: Rail Safety Project

FM Number: 4467911

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 6: Objective 3 (2-11)



**Prior Cost
< 2020/21:**
\$0

**Future Cost
> 2024/25:**
\$0

**Total
Project Cost**
\$33,077

Additional Information: No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
RRU	RHP	\$33,077	\$0	\$0	\$0	\$0	\$33,077
Total		\$33,077	\$0	\$0	\$0	\$0	\$33,077

Project Description: Asset Maintenance
Marion County

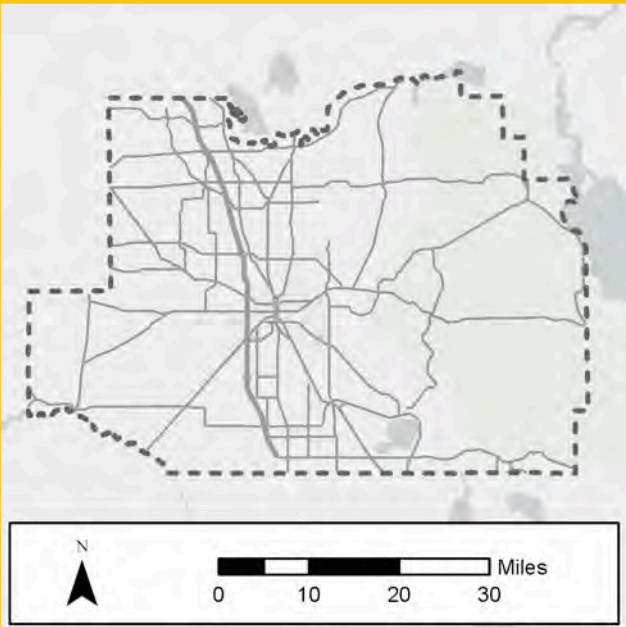
Project Type: Routine Maintenance

FM Number: 4469101

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 6: Objective 1-3 (2-11)



**Prior Cost
< 2020/21:**
\$0

**Future Cost
> 2024/25:**
\$0

**Total
Project Cost**
\$12,500,000

Additional Information: No additional information.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
MNT	D	\$2,500,000	\$2,500,000	\$2,500,000	\$2,500,000	\$2,500,000	\$12,500,000
Total		\$2,500,000	\$2,500,000	\$2,500,000	\$2,500,000	\$2,500,000	\$12,500,000

Project Description: NE 40th At Railroad Crossing #627890

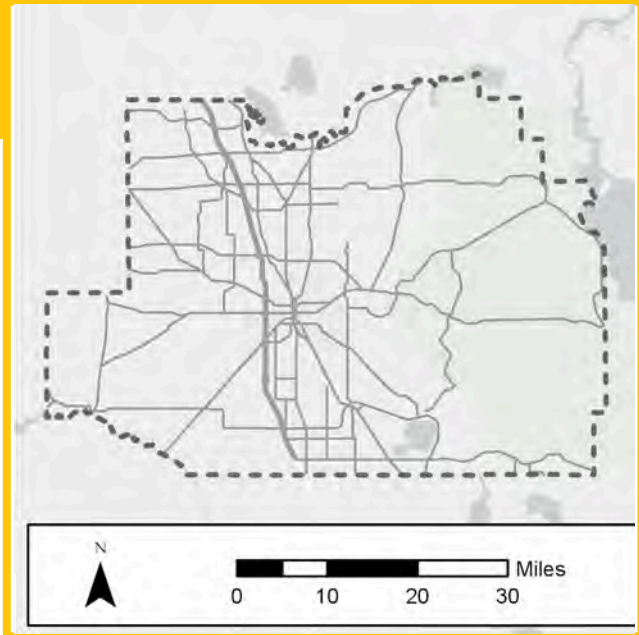
Project Type: Rail Safety Project

FM Number: 4488541

Lead Agency: FDOT

Length: N/A

LRTP # (pg. #): Goal 6: Objectives 2,3 (2-11)



**Prior Cost
< 2020/21:**

\$0

**Future Cost
> 2024/25:**

\$0

**Total
Project Cost**

\$3,588

**Additional
Information:**

Replacement of existing incandescent bulbs and lenses with LED bulbs and lenses at CSX crossing #627890X on NE 40th in Ocala.

Phase	Fund Source	2020/21	2021/22	2022/23	2023/24	2024/25	Total
RHP	RRU	\$3,588	\$0	\$0	\$0	\$0	\$3,588
Total		\$3,588	\$0	\$0	\$0	\$0	\$3,588

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APPENDIX F: PUBLIC COMMENTS

Comments Received	Ocala Marion TPO Response
City of Ocala - Growth Management Department - Received 5/20/20	
The TPO should correct pages 84 and 90 in the TIP to indicate that this is Block Grant funding and not 5307.	This comment has been incorporated into the Final TIP
Public Comment - Received 5/29/20	
You are already, wisely, putting an overpass on NE 36 Ave over the railroad tracks. But even more of a bottleneck and magnet for crazy, unsafe drivers is where NE 8 Ave crosses 14 St. The main problem is the very short left turn lane on 8th between the tracks and the intersection ... big enough for only 1½ cars. The antics of drivers to push their way to the front of the intersection is legendary. That is where an overpass (car or train) is desperately needed.	Thank you for your comment. This comment has been provided to the City of Ocala Engineering Office.
Federal Highway Administration - Received 6/2/20	
23 CFR 450.316(a)(1)(vi) requires a demonstration of explicit consideration and response to public input. The TIP states that it takes public input into consideration but it is not demonstrated on how this managed or accomplished.	Text informing the reader to this chart has been added to the "Public Involvement" section on page 7.
23 CFR 450.316(d) requires the involvement of Federal Lands since the Ocala National Forest occupies a large portion of the TPO area. There was no evidence that the Federal Public Lands (Ocala Natl.Forest) was included.	The TPO informed the U.S Forest Service that the Draft TIP was available for review on 5/27/20
23 CFR 450.326(g)(2) requires that the estimated total cost for projects which may extend beyond the timeframe of the TIP be included. Future cost estimates were not identified in the review.	The estimate total cost for projects extending beyond the timeframe of the TIP are included on each individual project page.
There should be at least one formal public hearing held during the TIP development. This is part of the TPO's PPP but it was unclear if a hearing had occurred.	The TPO's PPP does not require a formal public hearing to be held during the development of the TIP.
Since the TPO had adopted the TPM Consensus Document in the TIP in 2019 (as an amendment), there are two options. One, the Consensus Document must again be included in the TIP. Or the TPO Board may adopt the Document as a stand-only item.	The TPO will present the TPM Consensus Document to the TPO Board for adoption on 6/23/20 as a stand-only item.
Ocala Marion TPO's Technical Advisory Committee - Received 6/10/20	
Page 35: SR 484 should be CR 484	Project Description must stay consistent with FDOT Work Program
Page 44-45: Interchange and "The Y" should be consistent	Project Description must stay consistent with FDOT Work Program
Page 46: US 441 first in title and correct Abshier Blvd or omit it	Project Description must stay consistent with FDOT Work Program
Page 47: Change or reorder Abshier Blvd to US 441	Project Description must stay consistent with FDOT Work Program
Page 55: SR 500 should be US 441	Project Description must stay consistent with FDOT Work Program
Page 63: Map line goes to Bridges Road. Should stop at the Pruitt Trailhead	Map has been updated
Page 66: Map is incorrect. Reference Project Application Map	Map has been updated
Page 70: Map is incorrect. Check aerial based on road and from/to	Map has been updated

Florida Department of Transportation (FDOT) - Received 6/24/20

Provide MPO Adoption Date	Text has been included on the cover page
Page 21 states TPO's project selection process is consistent but does not address "how" it is consistent	Comment is not defined by FDOT as "critical" and is not addressed in the final document
FS ([s. 339.175(8)(c)(7) F.S.]) stated on page 21, each project references LRTP. See markups on document for specific corrections	LRTP Page number(s) indicating a project's applicable Goal(s)/ Objective(s) have been included to all projects
Please provide the Certification statement (for FHWA/FTA quadrennial certification)	The Ocala Marion TPO is not a TMA and is therefore not subject to the FHWA/FTA quadrennial certification
Introduced on page 10 (discussion of Transportation Disadvantaged), Figure 2 should be explained/ referenced. Please include a list of improvements funded the TD Funds	Comment is not defined by FDOT as "critical" and is not addressed in the final document
Include project page for FM #4384171 and FM #4466911	Both project pages have been added (p.74 and p.100, respectively)
Numerous pages: Match "Project Descriptions" with FDOT Work Program	The Project Descriptions on the following pages of the final TIP have been corrected: 34-37, 40-47, 50-53, 55, 57, 59-60, 63-64, 67, 69-71, 73, 83-92, 96, 98
Page 3: Include Appendix H in Table of Contents	Text has been included
Explanation of Bridge and Pavement Condition (is stated) on page 14 but no anticipated effect explained. Transit Asset Management figure and explanation of goals is hard to follow and there is no anticipated effect stated from achieving the 0% target goal. Suggest to define a "0%" Target.	Comment is not defined by FDOT as "critical" and is not addressed in the final document
Page 14: List the anticipated effects of achieving performance targets	Comment is not defined by FDOT as "critical" and is not addressed in the final document
Page 17, correct 450.324(a) to 450.326(a), distribution of funds provided on page 19 and 20	Text has been updated on page 17. Funding distribution on page 19 and 20 is not incorrect.
Does the TIP demonstrate that there are sufficient funds (federal, state, local and private) to implement proposed transportation system improvements, identifies any innovative financing techniques through comparison of revenues and costs for each year? It is recommended that the TIP include a table(s) that compares the funding sources and amounts, by year to the total project costs. [23 C.F.R. 450.326(k)]; [23 C.F.R. 450.326(j)]; [s. 339.175(8)(c)(3) F.S.].	The following comment was provided by FDOT: "Awaiting word back from Central Office regarding concurrence."
Did the MPO make the draft TIP available to all review agencies and affected parties? Refer distribution list in MPO Handbook, page 5-21 – 5-24	The following comment was provided by FDOT: "Need confirmation from FDOT."
Did the MPO upload the document into the MPO Document Portal for review by District staff, Office of Policy Planning, Florida Commission for the Transportation Disadvantaged, Bureau of Community Planning, FTA, & FHWA?	The following comment was provided by FDOT: "Need concurrence from D5 Liaison"
Page 23: Include List of Priority Projects	List has been included

p.43: Correct total funding amount on line 5 and 6	Text has been updated
p.44: Change "Goal 6, Objective 1" to "Goal 6, Objective 3"	Text has been updated
p.46: Change "Intersection/Turn Lane" to "Traffic Signals"	Project Type is a TPO-developed classification system
p.56: Combine both rows in funding table	Rows have been combined
p.59: Change "Intersection/Turn Lane" to "Traffic Signals"	Project Type is a TPO-developed classification system
p.59: Correct Phase and Funding Source for each row	Text has been updated
p.63: Check line 5 and 6 of funding chart	Funding amounts were correct
p.83: Check Total funding for FY 2020/21	Funding amounts were correct
p.86: Check Total funding for FY 2020/21	Funding amounts were correct

APPENDIX G: GLOSSARY OF TERMS AND ACRONYMS

APPENDIX H: MAJOR CHANGES FROM 2019/2020-2023/2024 TIP

Project Number / FM Number	Project Description	Change from 19/20-23/24 TIP	Change In Total Funding (If Applicable)
4348441	CR 42 at SE 182nd Ave. Rd	No Change	N/A
4336511	CR 484 from SW 20th Ave. to CR 475A	No Change	N/A
4443821	CR 484 / PENNSYLVANIA AVE @ CROSSING # 622599-D	Fully Funded	N/A
4352091	I-75 at NW 49th St. from end of NW 49th St. to end of NW 35th St.	Funding Increase	\$58,318,200
4436231	I-75 (State Road 93)	No Change	N/A
4436241	I-75 (State Road 93)	No Change	N/A
4409002	I-75 FRAME OFF SYSTEM	Fully Funded	N/A
4385621	I-75 MARION COUNTY REST AREAS	Funding Decrease	\$20,221
4378261	I-75 MARION COUNTY REST AREAS	Funding Decrease	\$88,377
4363611	ITS OPERATIONAL SUPPORT	No Change	N/A
4317983	NE 36TH AVENUE	Fully Funded	N/A
4443831	SE 36 AVE @ CROSSING # 627220-F	Fully Funded	N/A
4432701	SR 25 / 200 TO ALACH BRIDGE 360025 & 360026	Fully Funded	N/A
4356602	SR 326	Fully Funded	N/A
4437031	SR 35 (SE 58TH AVE) FROM CR 464 (SE MARICAMP RD) TO SR 40	No Change	N/A
4112565	SR 35 (US 301) DALLAS POND REDESIGN	Funding Increase	\$236,597
4336521	SR 40 from SW 40th Ave. to SW 27th Ave.	Funding Decrease	\$2,504,748
4413661	SR 40 from SW 27th Ave. to MLK Jr. Ave.	Funding Increase	\$64,400
4106742	SR 40 from end of 4 lanes to east of CR 314	Funding Decrease / Constructed Delayed - Est. to Begin 2029)	\$23,963,634
4431701	I-75 from Sumter County Line to SR 200	Funding Decrease	\$2,375,139
4437301	US 301 / US 441 Split (The Y) from south of Split to north of Split	Funding Increase	\$26,680
2386481	US 41 from SW 110th St. to north of SR 40	Funding Decrease	\$10,469,145
4392381	US 441 from SR 35 to SR 200	Fully Funded	N/A
4336611	US 441/US 27/South Pine Avenue from SW 3rd St. to NW 2nd St.	Funding Decrease	\$107,604
4411361	US 441 from CR 25A (NW Gainesville Rd.) to US 301/441 Interchange	Funding Increase	\$5,606,809
4356861	US 441 at SE 98th Lane	Fully Funded	N/A
4336601	US 441 at SR 464	Funding Decrease	\$90,948
4447671	US 441 SLOPES AT RR OVER PASS B/W SE 3RD AVE & SE 30TH ST	Fully Funded	N/A
4453211	WILDWOOD MAINLINE WEIGH IN MOTION (WIM) SCREENING	Funding Decrease	\$57,711

APPENDIX I: LIST OF PROJECTS IN 2040 LRTP

The chart below shows projects included in both the TIP and the TPO's 2040 Long-Range Transportation Plan (LRTP). Please note that the details of projects, including the project description, may vary slightly to how the project is identified in the 2040 LRTP. Also, projects listed in the LRTP may be listed on other pages, in addition to the pages shown below.

TIP Page Number	FM Number	2040 LRTP Page Number	2040 LRTP Project Name
34	4352091	5-2	I-75 @ NW 49th Street
40	2386481	5-2	US 41 from SW 111th Place Ln to SR 40
46	4456881	3-10, 3-11	US-441/US-27 at CR-42
49	4106742	5-2	SR 40 from NE 60th Ct to CR 314
50	4336511	5-4	I-75 at CR 484
52	4336521	5-2	SR 40 @ I-75 (SW 27th Ave to SW 40th Ave)
67	4367551	3-23	Indian Lake Trail: Silver Springs State Park to Indian Lake Trailhead
68	4367561	5-2	Downtown Ocala Trail: Ocala City Hall to Silver Springs State Park

APPENDIX J: “ROLL FORWARD” TIP



TO: TPO Board Members

FROM: Rob Balmes, Director

RE: Amendment of FY 2020/21 to 2024/25 Transportation Improvement Program (TIP) – Transit Safety Targets

Performance Management is a strategic approach to connect investment and policy decisions to help achieve performance goals. The Moving Ahead for Progress in the 21st Century Act (MAP-21) requires State DOTs and MPO/TPO's to conduct performance-based planning by tracking performance measures and setting data-driven targets to improve those measures.

More specifically, on July 19, 2018, the Federal Transit Administration (FTA) issued a requirement to all transit agencies to publish a Public Transportation Agency Safety Plan (PTASP) and corresponding safety targets. The effective date of this regulation was July 19, 2020, but was later extended to December 31, 2020 due to the global pandemic. On November 30, 2020, SunTran through the City of Ocala City Council adopted a PTASP and corresponding safety targets.

SunTran Safety Performance Targets							
Performance Targets based on collected data from the previous three years							
Mode of Transit Service	Fatalities Total	Fatalities (per 100k vehicle revenue miles) VRM)	Injuries Total	Injuries (per 100k vehicle revenue miles VRM)	Safety Events Total	Safety Events (per 100k vehicle revenue miles VRM)	System Reliability (VRM/ failures)
Fixed Route Bus	0	0	1	.20	5	1.03	7,492
ADA Paratransit	0	0	0	0	0	0	0

Upon adoption, MPO/TPO's are then required by law within 180 days to either adopt the local transit agency (SunTran) safety targets into their respective planning processes and performance management, or develop their own independent targets.

Based on a review of the PTASP and corresponding safety targets, the Technical Advisory Committee (TAC), Citizens Advisory Committee (CAC) and TPO staff recommend adoption

Cooperative and comprehensive planning for our transportation needs

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

of SunTran's safety targets and to amend the FY 2020/21 to 2024/25 TIP as proposed in the attached documentation.

If you have any questions regarding the proposed TIP amendment, please contact me at 438-2631.

PUBLIC TRANSIT

Safety Performance



MAP-21 Performance Management

March 2021

OVERVIEW

The Federal Transit Administration (FTA) has established requirements through 49 CFR 673 for Public Transportation Agency Safety Plans (PTASP) and related performance measures as authorized by the Moving Ahead for Progress in the 21st Century Act (MAP-21). This rule requires certain operators of public transportation systems that receive federal financial assistance under 49 U.S.C. Chapter 53 to develop and implement PTASP based on a Safety Management Systems (SMS) approach. Development and implementation of agency safety plans will help ensure that public transportation systems are safe nationwide. This fact sheet summarizes the requirements of this rule and the responsibilities of Florida's transit providers and Metropolitan Planning Organizations (MPOs) in implementing the rule.

PUBLIC TRANSPORTATION AGENCY SAFETY PLANS (PTASP)

Federal Rule Applicability

RECIPIENTS AND SUB-RECIPIENTS OF FTA 5307 FUNDS	FTA is deferring applicability for operators that only receive 5310 and/or 5311 funds.
SMALL PUBLIC TRANSPORTATION PROVIDERS (5307S)	Agencies: a) without rail; and b) with fewer than 101 revenue vehicles in operation during peak service may complete their own plan or have their plan drafted or certified by their state DOT.

PUBLIC TRANSPORTATION SAFETY PERFORMANCE MEASURES

FATALITIES

Total number of reportable fatalities and rate per total vehicle revenue miles by mode.



INJURIES

Total number of reportable injuries and rate per total vehicle revenue miles by mode.

SAFETY EVENTS

Total number of reportable events and rate per total vehicle revenue miles by mode.



SYSTEM RELIABILITY

Mean distance between major mechanical failures by mode.

TIMELINE

BY JULY 20, 2021

Transit providers must have in place a Public Transportation Agency Safety Plan that meets federal requirements and must have established transit safety targets. After this date, transit providers must update transit safety targets annually.

AFTER JULY 20, 2021

Update or amendments to the LRTP and TIP after this date must be developed according to the Transit Safety Rule.

WITHIN 180 DAYS AFTER DATE OF TRANSIT PROVIDER ACTION

Safety targets must be established by MPOs.

WITH TIP OR LRTP UPDATE

MPOs may choose to update targets for their planning area.

- Transit Providers
- MPOs

2021 2022 2023 2024

PTASP CERTIFICATION AND REVIEW

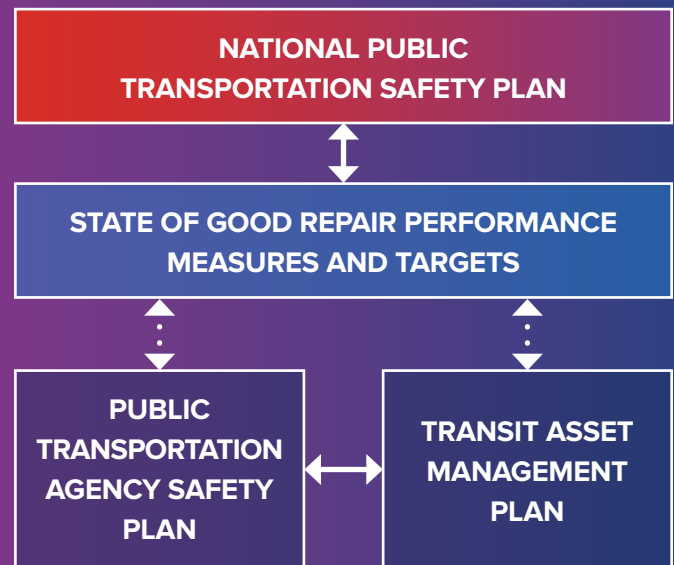
RELATIONSHIP OF PTASP TO FLORIDA REQUIREMENTS

Florida requires each Section 5307 and/or 5311 transit provider to have an adopted System Safety Program Plan (SSPP) (Chapter 14-90, Florida Administrative Code). The FTA PTASP rule and Florida's SSPP requirements are similar, but have some differences. Because Section 5307 providers in Florida must already have a SSPP, FDOT recommends that transit agencies revise their existing SSPPs to be compliant with the new FTA PTASP requirements.

FDOT has issued guidance to providers to assist them with revising existing SSPPs to be compliant with the FTA requirements.

While the PTASP rule requires transit providers to establish safety performance targets, the SSPP does not.

PTASP RELATIONSHIP TO OTHER FEDERALLY REQUIRED PLANS AND PRODUCTS



REQUIREMENTS

COORDINATION WITH METROPOLITAN, STATEWIDE, AND NON-METROPOLITAN PLANNING PROCESSES

- » Public transit providers will coordinate with FDOT and affected MPOs in the selection of transit safety performance targets.
- » Providers will give written notice to the MPO(s) and FDOT when the provider establishes transit safety targets. This notice will provide the established targets and the date of establishment.
- » MPOs that establish their own transit safety targets will coordinate with the public transit provider(s) and FDOT in the selection of transit safety performance targets. The MPOs will give written notice to the public transit providers and FDOT when the MPO establishes its own transit safety targets.
- » MPOs that agree to support a public transit provider's safety targets will provide FDOT and the public transit providers documentation that the MPO agrees to do so.
- » Public transit providers that annually draft and certify a PTASP must make the PTASP and underlying safety performance data available to FDOT and the MPOs to aid in the planning process.
- » Public transit providers will update the PTASP and establish transit safety targets annually. MPOs are not required to establish transit safety targets annually. Instead, subsequent MPO transit safety targets must be established when the MPO updates the TIP or LRTP.
- » If two or more providers operate in an MPO planning area and establish different safety targets for a measure, the MPO may establish a single target for the MPO planning area or establish a set of targets for the MPO planning area that reflect the differing transit provider targets.

FOR MORE INFORMATION PLEASE CONTACT

Scott Philips, Statewide Metropolitan Planning Analyst
Florida Department of Transportation Office of Policy Planning
Scott.Philips@dot.state.fl.us | (850) 414-4801

Proposed Amended Page to the TPO Fiscal Years 2020/21 to 2024/25 TIP - PTASP Safety, page 17



On July 19, 2018, the FTA published the Public Transportation Agency Safety Action Plan (PTASP) regulation, 49CFR Part 673, as required by 49 U.S.C. 5329(d). The effective date of the regulation was July 19, 2019, but was extended to December 31, 2020 due to the global pandemic. The PTASP regulation implements a risk-based Safety Management System approach and requires all recipients and sub-recipients of federal transit financial assistance to establish and certify an Agency Safety Plan and corresponding safety

performance targets. MPO/TPO's then have 180 days from the adoption of the PTASP targets set by the public transit agency (SunTran) to adopt or develop their own independent targets.

On December 1, 2020, SunTran submitted their PTASP and corresponding safety targets to the TPO, as adopted by City of Ocala City Council on November 30, 2020. Figure 7 displays the adopted SunTran PTASP targets.

[Recommendation: TPO Board adoption of the SunTran PTASP safety targets on April 27, 2020]

SunTran Safety Performance Targets 2020 Performance Targets based on collected data from previous three years							
Mode of Transit Service	Fatalities Total	Fatalities (per 100k vehicle revenue miles VRM)	Injuries Total	Injuries (per 100k vehicle revenue miles VRM)	Safety Events Total	Safety Events (per 100k vehicle revenue miles VRM)	Safety Reliability (VRM/failures)
Fixed Route Bus	0	0	1	0.20	5	1.03	7,492
ADA Paratransit	0	0	0	0	0	0	0

Figure 7: SunTran PTASP Safety Targets

SunTran PTASP - for reference

SunTran

City of Ocala

Public Transportation Agency Safety Plan (PTASP)

November 2020



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SECTION 1: Establishment of Public Transportation Agency Safety Plan (PTASP)

This document serves as the City of Ocala's Public Transportation Agency Plan (PTASP) for its Bus Transit system (SunTran) located in Ocala/Marion County Florida. It is intended to encompass all current and future operations, services and projects and applies to all activities which involve planning, design, procurement, installation and testing of equipment or facilities, operations, maintenance, support activities, and the environment in which the transit system operates.

Public Transportation Agency Safety Plan (PTASP) Rule

The City of Ocala (SunTran) is committed to comprehensive safety planning. As an operator of a small public transportation system that receives Federal Financial assistance under Title 49 of the United States Code (USC), the City of Ocala subject to Florida Transportation Administration (FTA) 49 CFR Part 673 Final Rule and as delineated in Florida Administrative Code (FAC) Section 14-90.004(1), has adopted the principles and methods of Safety Management Systems (SMS) as the basis for enhancing the safety of its public transportation system. The plan incorporates the framework and principles of SMS for the City of Ocala (SunTran) Transit operations and all applicable Contract organization(s) to the extent practical and consistent with applicable requirements for each SMS component as indicated below:



The City of Ocala has established a PTASP that meets or exceeds the General Requirements of 49 CFR Part 673 Final Rule and of FAC 14-90.004 and establishes the SMS policies for the City of Ocala Administrative employees delegated with Administration oversight, authority and responsibility for SunTran's transit system as well as all employees for the Contractor organization awarded oversight, authority and responsibility for SunTran's Operation and Fleet Maintenance services. Each share a responsibility and commitment to comprehensive safety planning.

General PTASP Requirements

The PTASP adheres to the fundamentals and framework of SMS and reflects the specific safety objectives, standards and priorities for SunTran and the City of Ocala including the following required elements:

- ✓ The Safety Plan and subsequent updates will be signed by the Accountable Executive and approved by the City of Ocala City Council
- ✓ The Safety Plan documents the processes and activities related to SMS implementation
- ✓ The Safety Plan includes performance targets based on the safety performance criteria established under the National Public Transportation Safety Plan (NSP), and the state of good repair standards established in the regulations that implement the National Transit Asset Management System and included in the NSP.
- ✓ The Safety Plan will comply with the minimum performance standards authorized through the NSP
- ✓ The City of Ocala will establish a process and timeline for conducting an annual review and update of the Safety Plan
- ✓ The City of Ocala and Contractor will maintain the Safety Plan in accordance with the recordkeeping requirements in subpart D of Part 673

Issuance and Update

The SMS plan will be reviewed and updated, as applicable, annually beginning on the date of issuance. Immediate changes to PTASP SMS procedures deemed paramount to safety mitigation may be authorized by the Operations/Fleet Maintenance Contractor's Regional Executive via a signed SMS Immediate Policy Amendment Change Memo that has been reviewed and approved by the City's Transit Manager/SMS Chief Safety Officer.

For these immediate changes, the Contractor General Manager (CONTR GM) will be responsible for ensuring communication to all concerned parties through established internal communication venues and the update will be noted on the PTASP Activity Log by the Contractor Operations Manager (CONTR OM).

Scope and Objectives

The SMS has been established consistent with business needs and regulatory impetus. The SMS is designed to reduce safety risks to an acceptable level through a continuous process of hazard identification and safety risk management practices to achieve the following goals:

- Reducing transit safety, employee, and environmental risks by better managing the City of Ocala's Transit's safety risks and setting goals to eliminate or reduce risks.
- Communication of safety risks to employees and their roles and responsibilities related to risks.
- Increase awareness of safety issues at all levels, thereby providing a better framework/structure for management to play a leadership role in addressing safety concerns.

- Continuous improvement of Contractor organization SMS and risk controls.
- Compliance with all applicable state and federal regulations.
- Foster a culture of change management so that safety issues are identified, and risks are eliminated or reduced in the planning process and delays or other impediments to business goals are avoided.

The SMS applies specifically to all contract organizations subject to Florida Department of Transportation (FDOT) and FTA regulations on SMS and all City of Ocala Transit operations.

Agency Overview

Marion County is in north central Florida and is bordered by seven counties; Alachua and Putnam to the north, Volusia and Lake to the east, Sumter and Citrus to the south, and Levy to the west. According to the 2010 Census, the county includes a total area of 1,663 square miles, with 1,585 square miles of land and 78 square miles of water. The population of Marion County is concentrated in the county seat of Ocala, which is also the largest city, located in the geographic center of the county.

SunTran has been in operation since 1998 and provides fixed-schedule service on six routes in Marion County, mostly centered in Ocala, with one route operating from Ocala to the Silver Springs Shores area southeast of Ocala. Most routes operate 5:00 AM–10:00 PM on weekdays and Saturdays.

On July 1, 2019 SunTran moved from the oversight of the Ocala Marion Transportation Planning Organization (TPO) to the City of Ocala and is now a division of the City's Growth Management Department. All transit system administration, planning and fiscal oversight is conducted by the City's Growth Management Department. The SunTran system's seven fixed bus routes daily operations and maintenance are contracted through a third-party company, (RATPDEV). RATPDEV contracts SunTran's paratransit services through Marion Transit Services (MTS).

Capital assets that SunTran owns, operates, and has a direct capital responsibility comprises the following asset categories:

Rolling Stock

- Fifteen (15) Vehicles for transporting of passengers;
- Five (5) Non-revenue service vehicles for use in its daily operations

Equipment

- One (1) Rotary Lift used for vehicle maintenance

Facilities


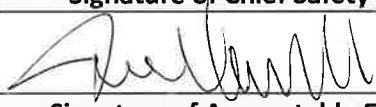

- One (1) Maintenance Facility located on the City of Ocala Annex property at 1805 NE 30th Avenue, Building 900, Ocala, Florida
- Two (2) hubs serving as major transfer stations for the fixed-route services, including the Downtown/Central Transfer Station, also known as Ocala Union Station, and the Marion County Health Department Transfer Station.

Transit Agency Information

City of Ocala – Public Transit Bus System	
Transit Agency Name	SUNTRAN
Transit Agency Address	201 SE 3 rd St, 2 nd Floor Ocala, FL 34471
Name and Title of Accountable Executive	Tye Chighizola City Growth Management Director
Name of Chief Safety Officer or SMS Executive	Steven Neal City Growth Management Transit Manager
Mode of Service Covered by this Plan	Fixed Route/ADA Paratransit
Does the Agency Provide Transit Services on Behalf of Another Transit Agency or Entity?	NO
Description of Arrangement(s)	N/A
Name and Address of Transit Agency or Entity for Which Service Is Provided	N/A

Plan Development Approval and Certification of Compliance

The City of Ocala certifies that it has established this Public Transportation Agency Safety Plan (PTASP) meeting all requirements of Part 673 by the required deadline from the final rule.

Name of Entity That Drafted This Plan	City of Ocala Growth Management Transit Division	
Signature of Chief Safety Officer		11-18-2020
	Signature of Chief Safety Officer	Date
Signature of the Accountable Executive		11/18/2020
	Signature of Accountable Executive	Date
Approval by City Manager		11/18/20
	Signature of City Manager	Date
Certification of Compliance	FTA CALLED @ 8:51 AM CERTIFIED	11/19/2020
	Name of Individual/Entity That Certified Plan	Date
Relevant Documentation (Title and Location)	A copy of the approved Public Transportation Agency Safety Plan (PTASP) is maintained on file in the Growth Management Department Transit Division Office of the Transit Manager/Chief Safety Officer	

Plan Development Approval and Certification of Compliance

The City of Ocala Growth Management Department's Transit Manager/City SMS Executive ensures that the PTASP is developed, implemented, and maintained in an appropriate and effective manner. The Contract Operator (RATP Dev) with oversight of Operations and Fleet Maintenance assists the City Transit Manager in this effort. Any changes in policy, organization, rules, regulations, or operations necessitating plan adjustments are to be accomplished within the established guidelines of this plan and require review and approval by the Accountable Executive and/or Chief Safety Officer (CSO). The PTASP will have ongoing updates as necessary including changes that will be implemented immediately. All updates to the plan will be recorded on the PTASP activity log of this plan.

Plan Review and Modification

The SMS operates under a principle of continuous improvement. To this end the PTASP must be reviewed annually and revised as needed to reflect changes in SunTran's organizational structure, procedures, equipment, facilities, and operating environment.

All changes in safety policy, goals, or objectives require the review and approval of the Accountable Executive and/or CSO.

The process for revising the PTASP includes a thorough review of the current PTASP by the Growth Management Department Transit Management Team, the Contract Operator for Oversight of SunTran's Operations and Fleet Maintenance Department. At the time of the review, participants will discuss performance targets and any other safety hazards identified previously. The Transit Manager will also notify FDOT and TPO staff in writing of any proposed changes to the PTASP for review and approval as appropriate prior to making changes. The Accountable Executive will review and approve any changes, signing the new PTASP, then forward to the City of Ocala City Council for review and certification of compliance. All updates to the plan will be recorded on the PTASP activity log of this plan.

Plan Review and Modification

Revision Number	Section/Pages Affected	Reason for Change	Date Issued
Original	All document	New Document	November 17, 2020

Safety Objectives and Performance Targets

It is the mission of SunTran to provide safe reliable public transit services to the City of Ocala and its community. To implement the City of Ocala's safety policies, goals and objectives; this plan requires coordination, integration, communication, and cooperation among all directors, managers, supervisors, departments and SunTran employees.

The City of Ocala has set the following performance targets for SunTran based on the safety performance criteria established under the National Public Transportation Safety Plan (NSP), and the state of good repair standards established in the regulations that implement the National Transit Asset Management System and are included in the NSP. These are delineated in Section 5 - Safety Assurance.

Safety Performance Targets							
Performance Targets are based on collected data from the previous three years for SunTran.							
Mode of Transit Service	Fatalities Total	Fatalities (per 100,000 vehicle revenue miles (VRM))	Injuries Total	Injuries (per 100,000 vehicle revenue miles (VRM))	Safety Events Total	Safety Events (per 100,000 vehicle revenue miles (VRM))	System Reliability (VRM/failures)
Fixed Route Bus	0	0	1	.20	5	1.03	7,492
ADA Paratransit	0	0	0	0	0	0	0

Agencies Coordination

The City of Ocala to aid in the planning process will make its safety performance targets available to the FDOT and the TPO each year after its formal adoption by the City and will also coordinate with both in the identification of safety performance targets.

Agency Coordination		
Targets Transmitted to the State	State Entity Name	Date Targets Transmitted
	Florida Department of Transportation (FDOT)	December 1, 2020
Targets Transmitted to the MPO	Metropolitan Planning Organization Name	Date Targets Transmitted
	Ocala Marion County Transportation Planning Organization (TPO)	December 1, 2020

Commonly Used Acronyms

The following acronyms apply to all related information in this manual:

Acronym	Term
ADA	American's with Disabilities Act of 1990
AE	Accountable Executive
ALARP	As Low as Reasonably Practicable
ASP	Agency Safety Plan (also referred to as PTASP in Part 673)
CAP	Corrective action plan
CEMP	Comprehensive Emergency Management Plan
CFR	Code of Federal Regulations
CONTR	Contractor
CSO	Chief Safety Officer
DIR	Director
CONTR GM	Contractor General Manager
CONTR OM	Contractor Operations Manager
CONTR FM	Contractor Fleet Manager
FAC	Florida Administrative Code
FDOT	Florida Department of Transportation
FTA	Federal Transportation Administration
HSP	Hazard Security Plan
NSP	National Public Transportation Safety Plan
NTD	National Transit Database
NTSB	National Transportation Safety Board
PTASP	Public Transit Agency Safety Plan (Replaces SSPP)
SA	Safety Assurance
SGR	State of Good Repair
SMS	Safety Management System
SMT	Site Management Team
SOP	Standard Operating Procedure
SRA	Safety Risk Assessment
SRM	Safety Risk Management
SPP	Security Program Plan
SSPP	System Safety Program Plan (Replaced by PTASP)
TASC	Transit Agency Safety Council
TAM	Transit Asset Management
TPO	Transportation Planning Organization
TSI	Transit Safety Institute
ULB	Useful life benchmark

Definitions of Terms Used in the Agency Safety Plan

The following definitions apply to all related information in this manual.

Accident – an Event that involves any of the following: a loss of life; a report of a serious injury to a person; a collision of public transit vehicles; an evacuation for life safety reasons; at any time, whatever the cause.

Accountable Executive – a single, identifiable person who has ultimate responsibility for carrying out the agency's Public Transportation Agency Safety Plan (PTASP) and Transit Asset Management (TAM) Plan; and control or direction over the human and capital resources needed to develop and maintain both the agency's PTASP, in accordance with 49 U.S.C. 5329(d), and the agency's TAMP, in accordance with 49 U.S.C. 5326.

Audit – an examination of records and related materials, including, but not limited to, those related to financial accounts.

Chief Safety Officer or SMS Executive – an adequately trained individual who has the responsibility for safety and reports directly to a transit agency's chief executive officer, general manager, president, or equivalent officer.

Contractor – entity that provides operations or maintenance services to a transit agency under a contract and is accountable on the terms of the contract.

Corrective Action Plan – a plan developed by recipient that describes the actions the recipient will take to minimize, mitigate, correct, or eliminate risks and hazards, and the schedule for taking those actions. Either a State Safety Oversight Agency (FDOT), or FTA may require SunTran to develop and carry out a corrective action plan.

Equivalent Authority – an entity that carries out duties similar to that of a Board of Directors for a recipient or sub recipient of FTA funds under 49 U.S.C. Chapter 53, including sufficient authority to review and approve a recipient or sub recipient's Public Transportation Agency Safety Plan.

External Service Provider – performs operations, maintenance, safety, or risk management services related to transit service delivery from outside a recipient's immediate organizational structure and work is performed under an inter or intra governmental agreement, statute or regulation, not a contract.

Event – any Accident, Incident, or Occurrence.

Florida Department of Transportation (FDOT) – state agency that administers rules and regulations as outlined in Florida Administrative Code Chapter 14-90

Florida Administrative Code Chapter 14-90 – is the official compilation of the administrative rules and regulations of state agencies that outlines state law regarding bus systems specific to operational, maintenance, and safety rules concerning public transportation.

Hazard – any real or potential condition that can cause injury, illness, or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of the transit system or damage to the environment.

Hazard Report – a report filed regarding a hazard identified in the workplace.

Incident – an Event that involves any of the following: a personal injury that is not a serious injury, one or more injuries requiring medical transport; or damage to facilities, equipment, rolling stock, or infrastructure that disrupts the operations of the transit agency.

Investigation – the process of determining the casual and contributing factors of an accident, incident or hazard for purpose of preventing reoccurrence and mitigating risk to the lowest manageable level practicable.

National Public Transportation Safety Plan – a plan to improve the safety of all public transit systems that receive Federal financial assistance under 49 U.S.C. Chapter 53.

Near Miss – a safety event where conditions with potential to generate an accident, incident, or occurrence existed, but where an accident, incident, or occurrence did not occur because the conditions were contained by chance or by existing safety risk mitigations.

Near Miss Report – a report filed from a narrowly avoided collision or other accident.

Occurrence - an event without any personal injury in which any damage to facilities, equipment, rolling stock, or infrastructure does not disrupt the operations of the transit agency.

Operator –a public transportation system provider of public transportation as defined under 49 U.S.C. 5302.

Performance Measure –an expression based on a quantifiable indicator of performance or condition that is used to establish targets and to assess progress toward meeting the established targets as prescribed by the National Public Transportation Safety Plan for the following: 1) fatalities; 2) injuries; 3) safety events; and 4) system reliability

Performance Target – a specific quantifiable safety performance level related to safety management activities established in the National Public Transportation Safety Plan (NSP)

Public Transportation Agency Safety Plan (PTASP)– a documented comprehensive agency safety plan as required by 49 U.S.C. 5329 and Part 673.

Recipient – a State or local government authority, or any other operator of public transportation that receives financial assistance under 49 U.S.C. Chapter 53. The Ter, “recipient” includes State Safety Oversight Agencies.

Recordable Injury – Injury resulting in lost time at work.

Reporting Manager – An employee’s direct supervisor.

Risk – the composite of predicted severity and likelihood of the potential effect of a hazard

Risk Assessment – a systematic study or examination and determination of a hazard to establish the significance or value of the risk.

Risk Mitigation – a method or methods to eliminate or reduce the effects of hazards to its lowest manageable level practicable.

Root Cause – The exact cause of an incident or accident where had the root cause found not to be present, the accident or incident would not have happened.

Safety Assurance – the processes within the transit agency’s Safety Management System that functions to ensure the implementation and effectiveness of safety risk mitigation; and to ensure that the transit agency meets or exceeds its safety objectives and activities through the collection, analysis, and assessment of information.

Safety Management Policy – the transit agency’s documented commitment to safety, which defines the agency’s safety objectives and the accountabilities and responsibilities of its employees regarding safety.

Safety Management System (SMS) – the formal, top-down organization-wide approach to managing safety risk and assuring effectiveness of the agency’s safety risk mitigation. SMS includes effective systematic procedures, practices, and policies for managing risks and hazards.

Safety Performance Target – a performance target related to safety management activities.

Safety Promotion –a combination of training and communication of safety information to support SMS policy and procedure practices throughout the transit agency as applied to the agency’s public transportation system.

Safety Review - an on-site assessment to determine if a bus transit system has adequate safety management controls in place and functioning in accordance with the safety standards provided and incorporated by reference in this rule chapter.

Safety Risk Management – a process within the transit agency’s Agency Safety Plan for identifying hazards and analyzing, assessing, and mitigating safety risk.

Serious Injury – an injury which (1) requires hospitalization for more than 48 hours, commencing within 7 days from the date the injury was received; (2) results in a fracture of any bone (except simple fractures of fingers, toes, or noses); (3) causes severe hemorrhages, nerve, muscle, or tendon damage; (4) involves an internal organ; or (5) involves second or third-degree burns, or any burns affecting more than 5 percent of the body surface.

Small Public Transportation Provider – means a recipient or sub recipient of Federal financial assistance under U.S.C. 5307 that has one hundred (100) or fewer vehicles in peak revenue service and does not operate a rail fixed guideway public transportation system.

State of good repair –the condition in which a capital asset can operate at a full level of performance.

State Safety Oversight Agency – an agency established by a State that meets the requirements and performs the functions specified by 49 U.S.C. 5329 and the regulations set forth in 49 CFR part 659 or 49 CFR part 674.

SunTran – the City of Ocala’s Fixed Route/ADA public transportation system serving the City of Ocala and Marion County, Florida

Transit Agency –an operator of a public transportation system

Transit Asset Management (TAM)– the strategic and systematic practice of procuring, operating, inspecting, maintaining, rehabilitating, and replacing transit capital assets to manage their performance, risks, costs over their life cycles, for purpose of providing safe, cost effective, and reliable public transportation, as required by 49 U.S.C. 5326 and 49 CFR Part 625.

Transit Asset Management Plan (TAMP) – a plan developed for SunTran pursuant to 49 CFR part 625 that includes, at minimum, capital asset inventories and condition assessments, decision support tools, and investment prioritization.

SECTION 2: Safety Accountability and Responsibilities

The City of Ocala establishes the necessary authorities, accountabilities, and responsibilities for the management of safety among the following individuals for both the City of Ocala Transit Agency (SunTran) and the awarded Contractor for Operations and Fleet Maintenance (RAPT Dev) as they relate to the development and management of SMS. Each functional area provides distinct roles and carries out specific safety management responsibilities to ensure the protection of passengers, employees, the community served and City of Ocala property.

All employees at all levels are expected to conduct work in the safest manner possible in accordance with approved site procedures and policies that enhances employee health and safety. Active employee engagement in the promotion and safe reporting of hazards is paramount to the SMS Framework and the success of the City's PTASP at both the City level and Contractor level. The Contractor's Key SMS Staff is responsible for implementing SMS processes outlined in the City of Ocala's PTASP fostering a safety culture that promotes safety awareness, training and encourages effective employee safety reporting and communication. The Contractor will perform Safety Assurance activities, including documentation, internal controls, monitoring and auditing of their departmental compliance with the PTASP and other supporting programs, plans and procedures. The Contractor is also responsible for identifying and reporting all safety hazards to the Chief Safety Officer working together to develop and implement strategies to eliminate and/or mitigate hazard risk to the lowest level practicable.

The SMS Safety Council is the driving force for ensuring that reported safety items are appropriately addressed, concluded and tested. The City of Ocala Transit Manager and the Contractor (RAPT Dev) General Manager will also implement and use safety committees to review and evaluate SunTran's safety- related processes, activities, and issues.

SMS Organizational Structure and Roles and Responsibilities

The City of Ocala has developed an SMS organizational structure for SunTran that ensures effective and efficient operation of the PTASP and gives assurance that, with visible and explicit support from executive management and through an open communication system for employee safety reporting, all staff will have a proactive role in fostering a safety culture that promotes Safety as its number one (1) priority.

City of Ocala SMS Key Staff Roles and Responsibilities

(Accountable Executive) - City Growth Management Department Director

The City of Ocala Growth Management Director has been designated as the Accountable Executive for the PTASP and meets the requirements specified in 49 CFR Part 673.5 and 673.23(d)(1). The Director is accountable for ensuring that the PTASP is effectively implemented throughout the SunTran transit system, and ensuring action is taken, as necessary, to address any substandard safety performance in SunTran's PTASP. The Director may delegate specific responsibilities, but the ultimate responsibility and accountability for the implementation and maintenance of the PTASP and TAM Plan for SunTran; with control or direction over the human and capital resources needed to develop and maintain both the PTASP in accordance with 49 USC 5329; and the TAMP in accordance with 49 USC 5326; rests with the Director.

(Chief Safety Officer/City SMS Executive) - City Growth Management Transit Manager

The Accountable Executive has designated the Growth Management Department Transit Manager as the City's Chief Safety Officer (CSO) / SMS Executive who has authority and responsibility for development of SMS policies and procedures and day-to-day implementation and operation of the City's PTASP. The Transit Manager holds a direct line of reporting to the Growth Management Director and will assist in ensuring that resources are available to achieve the outcomes of the SMS. The CSO/City SMS Executive has key responsibility to include but not limited to the following:

- ❖ Full implementation of the SMS across the SunTran Transit System reviewing and updating the PTASP at least annually;
- ❖ Provide guidance of SMS processes to all delegated City staff that have line and technical management responsibilities for SunTran under the SMS;
- ❖ Ensure integration with Public Safety and Emergency Management personnel that have input into, or output from the SMS for emergencies and abnormal operations and return to normal operations; developing plans and procedures in support of the transit system's public safety and emergency management activities; and
- ❖ Develop criteria and establish the provision and use of performance measure dashboards to monitor SMS safety performance targets and overall Operations and Fleet Maintenance activities for SunTran with collaborative support from the Contractor (RATP Dev) identified Key SMS employees.

Contractor SMS Key Staff Roles and Responsibilities

(Site SMS Executive) - General Manager

The General Manager has been designated as the Site SMS Executive and is responsible for providing strategic direction and leadership in accordance with the City's PTASP assuring full compliance from all contractor level employees in accordance with all rules and regulations outlined in the PTASP and the City of Ocala's contractual agreement for Operations and Fleet Maintenance of the City of Ocala's transit system (SunTran). The General Manager is responsible for ensuring accountability for SMS performance is at the highest level and throughout the agency to meet all safety performance objectives outlined by the City of Ocala for SunTran and that appropriate allocation of resources are available (i.e. funding, staffing, training materials, etc.). The Site SMS Executive has key responsibility to include but not limited to the following:

- ❖ Ensure safety information moves up, down, and across the agency
- ❖ Effectively communicate roles and responsibilities to all relevant individuals with support from the City of Ocala and Corporate Regional Executive(s)
- ❖ Ensure that all system changes are evaluated, coordinated, documented and approved by the CSO in compliance with the risk management and safety assurance processes adopted within the PTASP
- ❖ Ensure that all employees will be adequately trained in safety performance and awareness fostering a culture where Safety is number one (1) priority
- ❖ Ensure that the employee safety reporting program component is implemented without reprisal

(SMS Manager / Site Operations Safety Liaison) - Operations Manager

The CSO has appointed the Contractor Operations Manager (CONTR OM); having **subject matter expertise** in SMS implementation, day-to day operation of SMS, and the tools and activities required for SMS documentation; as the SMS Manager to assist with the development of the PTASP and provide assistance for the implementation phases of the PTASP for the City and at the site level. The SMS Manager has key responsibility to include but not limited to the following:

- ❖ Assist the City CSO with the three SMS Implementation Phases (Phase 1 – Planning, Organization and Policy Development, Phase 2 - Safety Risk Management and Phase 3 – Safety Assurance)
- ❖ Draft the PTASP and other safety policy documents related to SMS implementation for the City of Ocala and Contractor (RATP Dev)
- ❖ Establish criteria and guidance for the activities and tools for hazard identification and analysis at the site level
- ❖ Develop hazard identification, analysis, safety risk evaluation and mitigation documentation; and develop and deliver training to relevant personnel at site level
- ❖ Assist with development of SunTran's employee safety reporting program
- ❖ Assist with development of safety performance monitoring and measurement tools and activities and provide periodic reports on safety performance advising senior management on safety matters
- ❖ Maintain all SMS safety management documentation
- ❖ Plan and organize safety training and
- ❖ Assist with Transit Agency Safety Council (TASC) / Safety Committee planning

In addition, the Operations Manager as Site Operations Safety Liaison will provide department leadership in the implementation, operation and performance of all SunTran Operations SMS activities in compliance with the PTASP with assistance from the Site Safety Officer and other Dispatch personnel.

(Site Fleet Safety Liaison) - Maintenance Manager

The Maintenance Manager as Site Fleet Safety Liaison will provide department leadership in the implementation, operation and performance of all SunTran Fleet Maintenance SMS activities in compliance with the PTASP with assistance from the Site Safety Officer. The Maintenance Manager will manage and coordinate function related reporting, monitoring and auditing of the Maintenance department ensuring that safety measures and procedures are in place for system reliability.

(Site Safety Officer) – Dispatch Supervisor

The Site Safety Officer will assist the SMS Manager/Operations Manager with the Safety Risk Management and Safety Assurance components at the site level ensuring that appropriate safety procedures and guidelines are followed for evaluating and mitigating safety hazards to the lowest level reasonably practicable. The Safety Officer will also serve as chairperson for the Site Safety Committee and will conduct field observations.



Supervisors

Supervisors are tasked with familiarizing employees under their supervision of all safety requirements and hazards associated with the work to be performed through open communication and training. They will work and collaborate with the Safety Officer and Department Managers responding to identified hazards and incidents that impact safety performance and targets and assist with risk mitigation to eliminate and/or minimize the risk to the lowest level reasonably practicable.

Frontline Employees

All employees are required to become familiar with the safety procedures for their assigned work activity and adopt a culture where safety is priority. Employees are expected to perform their work safely and call attention to hazards that may impact that safety performance. All mishaps and incidents must be reported to the immediate Supervisor and/or Safety Liaison in accordance with established requirements for the protection of themselves, co-workers, customers, facilities, and equipment.

SMS Safety Council/Committee Roles and Responsibilities

Transit Agency Safety Council - TASC

The Transit Agency Safety Council (TASC) is comprised of key staff from both the City level and Contractor level that have the capability to employ multiple disciplines for SunTran; having access to high level budgeting solutions; to meet and mitigate hazards to the lowest level reasonably practicable. The council will work to develop action plans to ensure adequate resources are available to achieve the outcomes of SMS. TASC meetings will be held monthly (or as often as needed).

Safety Committee

The Safety Committee will bring Contractor level management and employees together to achieve and maintain a safe, healthy workplace. Members of this committee are individuals engaged in the day to day operations and will also include the SMS CSO, Operations and Fleet SMS Safety Liaisons and frontline employees from each functional area of operations and fleet maintenance. The Dispatch Safety Supervisor will serve as the Safety Committee Chairperson. The committee will review and jointly evaluate all safety hazards reported and make recommendations to improve safety. Meetings are held bi-monthly (or as often as needed) and may include program reviews, injury reviews, and reviews of employee concerns.

SunTran's SMS Key Personnel Contact Information

City of Ocala SMS Key Personnel

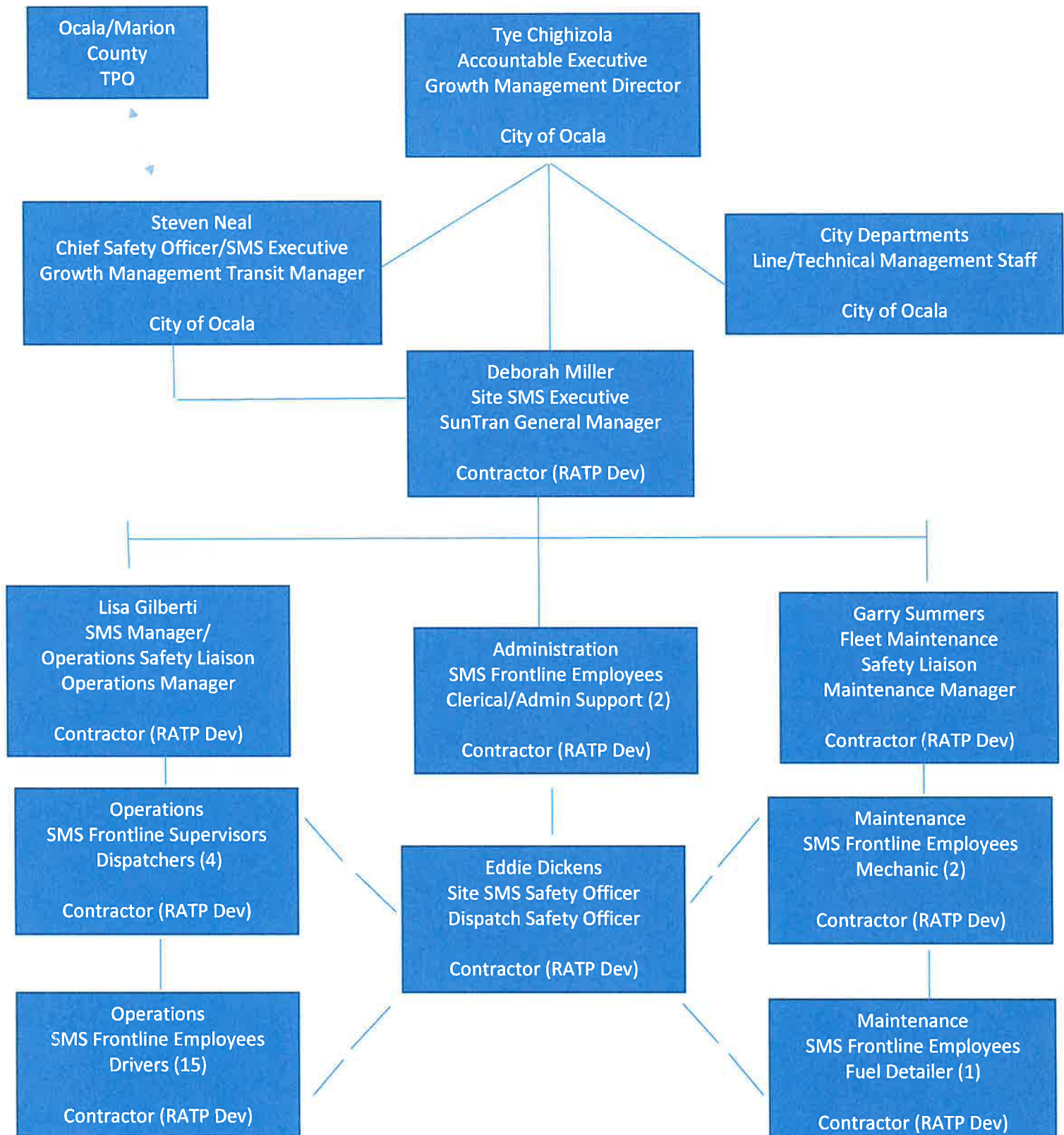
Name	Position/SMS Role	Contact Information
Tye Chighizola	Growth Management Director/Accountable Executive 201 SE 3 rd Street, 2 nd Floor	(352) 629-8286
Steven Neal	Transit Manager/Chief Safety Officer/SMS Executive 201 SE 3 rd Street, 2 nd Floor	(352) 629-8286

Contractor (RATP Dev) SMS Key Personnel

Name	Position/SMS Role	Contact Information
Debbie Miller	General Manager / SMS Site Executive 1805 NE 30 th Ave, Building 900	(352) 401-6939
Lisa Gilberti	Operations Manager/SMS Manager/SMS Operations Safety Liaison 1805 NE 30 th Ave, Building 900	(352) 401-6958
Garry Summers	Maintenance Manager/SMS Fleet Safety Liaison 1805 NE 30 th Ave, Building 900	(352) 401-6746
Eddie Dickens	Dispatch Supervisor/SMS Site Safety O Committee Chairperson 1805 NE 30 th Ave, Building 900	(352) 401-6475

(Organizational Chart Illustration on next page)

SUNTRAN'S SMS ORGANIZATIONAL CHART



SECTION 3: Safety Management Policy

Introduction

The purpose of the PTASP is to recognize and correct unsafe acts and conditions, to promote safety awareness, and to assist in the prevention of injuries and illness as well as incidents that are harmful to the environment. The PTASP is intended to cover all current and future transit operations, services and projects.

The City of Ocala has established safety objectives, performance targets, and performance measures in coordination with SunTran's Contractor organization (RATP Dev). Operational and safety training, accident investigation, Standard Operating Procedures (SOP), and audit/inspection programs are documented and referenced in this PTASP. The PTASP is reviewed annually to ensure all systems, equipment, facilities, plans, procedures, manuals, and training programs comply with established safety requirements; and that the plan reflects current SMS accountability and responsibilities for implementation and continuous improvement.

Responsibility for making our operations safer for everyone lies with each one of us - from executive management to frontline employees. The Safety Management Policy Statement included below summarizes the City of Ocala's commitment and assurance that this plan will be administered throughout all SunTran transit service departments and will be monitored regularly for compliance and efficiency in carrying out the processes outlined within the PTASP.

We will develop and embed a safety culture in all our activities that recognizes the importance and value of effective safety management and acknowledges that safety is paramount. We will clearly explain for all staff their accountabilities and responsibilities for the development and operation of the SMS. We will establish a non-punitive employee safety reporting program, train staff on safety management, document our findings and safety risk mitigations, and strive for continuous improvement of our safety performance.

SunTran's Management Policy Statement

The City of Ocala is committed to providing a safe, comfortable, and accessible transit service as a viable means of mobility to the citizens and visitors of Ocala/Marion County. Safety is the number one (1) priority and is a core value to SunTran. To ensure the highest level of safety performance we are implementing, developing and improving strategies, management systems, and the processes to ensure that all our activities uphold to the highest level of safety performance. We will develop and embed a safety culture in all our activities that recognizes the importance and value of effective safety management and acknowledge that safety is paramount always. Delegated Executive Management will lead all transit service activities, from project planning through operations and maintenance with a balanced allocation of organizational resources to support this goal. Any outside contractor who is in service to SunTran has the duty to adhere to the City's PTASP; to recognize, report and correct hazards; to work in a safe manner; to promote safety awareness; and to actively assist in accident prevention.

All levels of management and all employees are accountable for the delivery of the highest level of safety performance, starting with the Director of Growth Management. The Transit Manager is responsible for ensuring that all employees and contractors will support safety management by ensuring that hazards are identified and reported and that all reasonable steps are taken to perform activities established as part of the SMS. Each department manager is also responsible for implementing the SMS in their transit area of responsibility and actively support and promote the SMS ensuring staff compliance with all processes and procedures. We will also work to ensure that all frontline transit employees are provided with adequate and appropriate safety information and training and are competent in safety matters.

For passengers and employees of SunTran, the City will minimize the safety risk associated with transit service to its lowest level practicable and whenever possible, exceed legislative and regulatory requirements and standards. We will foster an open communication system whereby employees at all levels are encouraged to report all safety hazards and concerns without fear of reprisal.

The City of Ocala has established safety performance targets for SunTran to help measure the overall effectiveness of its processes and ensure the transit system meets the City's PTASP safety objectives. The City will evaluate ongoing SunTran's SMS performance by analyzing key safety performance indicators, reviewing inspections, investigations and corrective action reports, and auditing the processes that support the SMS which will become the basis for revising or developing safety objectives, safety performance targets and plans with the goal of continuous safety improvement.

The City of Ocala will:

- Provide appropriate resources to comply with all federal, state, and local safety-related requirements, rules, and standards for development and implementation of SMS activities within the PTASP.
- Enhance hazard identification and analysis, and safety risk evaluation activities to include: (1) establish and measure our safety performance against realistic, data-driven safety performance indicators and targets;



(2) develop an employee safety reporting program that supports continuous improvement and (4) ensure externally supplied systems and services meet all transit safety performance standards.

- Ensure that no action will be taken against any employee who discloses a safety concern through the employee safety reporting program (unless disclosure indicates, beyond any reasonable doubt, an illegal act, gross negligence, or a deliberate or willful disregard of regulations or procedures).

The SMS Executive Management Team for (SunTran) hereby adopts the principles and methods of SMS as the basis for enhancing the safety of public transportation. All rules, regulations, policies, guidance, best practices, and technical assistance administered will, to the extent practical and consistent with legal and other applicable requirements, follow the principles and methods of SMS.

The signatures in this section attest that this plan is understood, accepted and approved; and that the Key SMS Team is fully committed to implementing the SMS through the City's PTASP and achieving its safety goals and objectives.

_____ (Accountable Executive) – Director of Growth Management Signature	_____ Date
_____ (Chief Safety Officer/SMS Executive) – Transit Manager Signature	_____ Date
_____ (SMS Contract Executive) - Contractor Regional Manager Signature	_____ Date
_____ (SMS Site Executive) - Contractor General Manager Signature	_____ Date



Annual Safety Certification and Adoption

Annual Safety Certification and Adoption

Date: _____
Name: City of Ocala – SunTran Transit
Address: 1805 NE 30th Ave, Building 900
Ocala, FL. 34470

In accordance with FTA 49 CFR Part 673 Final Rule, the bus system named above hereby adopts and certifies to the following:

- 1. The adoption of the City of Ocala Safety Management System (SMS) for calendar year 2020
- 2. Compliance with adopted standards of the Public Transportation Agency Safety Plan (PTASP), for calendar year 2020
- 3. Performance of safety inspections on all buses operated in accordance with Rule 14-90.009, for calendar year 2020

Signature: _____
Name: Sandra Wilson
Title: City Manager, City of Ocala

Signature: _____
Name: Tye Chighizola
Title: Growth Management Director, City of Ocala – SunTran Transit

Safety Management Policy Communication

Employee engagement is crucial to a functioning SMS. All employees and contractors will support safety management by ensuring that hazards are identified and reported.

The City of Ocala (SunTran) recognizes that communication is the essential component to the promotion of its safety objectives, target and safety culture and will use a variety of methods to communicate issues important to the operation of the SMS. The PTASP will be made available to all employees and will be maintained and kept in an accessible electronic file and in hard copy format by key SMS Personnel in locations accessible to all employees under their supervision and management.

Safety Management Policy Communication Methods

Communication systems will be put in place to enable greater awareness of SunTran's safety objectives and performance targets as well as provide on-going safety communication from top, down and across the agency. This strategy will complement existing safety communication channels to make everyone aware of SMS-related safety issues and their roles and responsibilities related to those issues.

Safety communication will comprise both internal and external communication tools/venues to include face to face meetings and interactions, posting and/or distribution of bulletins, department notices, and memoranda. All posted information can be found at a central location in each department area easily accessible to employees. Other communication methods include posters, signs, brochures, training materials, rule books, and operating procedures.

Internal Communication

SunTran's comprehensive employee safety communication program includes the following elements:

- ❖ Initial SMS Training for all existing employees and new hires with signed acknowledgement
- ❖ Regular Employee Bulletin Board Announcements and Safety Alerts
- ❖ Intranet/Telephone and/or Email Communications
- ❖ Regular safety meetings and/or training sessions
- ❖ Safety advisories (local and corporate)
- ❖ Facility/department safety inspections and audits with written reports and follow-up responses to employees as appropriate

External Communication

The City of Ocala recognizes that certain information may not be appropriate for external communication to the public unless required by federal, state or local regulations. Therefore, any information regarding general SMS operation and specific risks identified will only be communicated to the appropriate governing body in consultation with Risk Management/Accountable Executive/ CSO and other City Administrator entities where appropriate.

Employee Safety Reporting Program

The City of Ocala understands that SMS is dependent upon ongoing management commitment to communication. One of management's most important responsibilities under SMS is to encourage and motivate others to want to communicate openly, authentically and without concern for reprisal.

The City of Ocala and its Contract Provider (RATP Dev) communicates safety and safety performance information throughout SunTran that conveys information on hazards and safety risks relevant to employees' roles and responsibilities and informs employees of safety actions taken in response to reports submitted through an employee safety reporting program, among other information.

All employees have the responsibility to report any adverse safety conditions; events or acts; any observed or foreseeable hazards; and any safety concerns. Employees may report via the following methods:

- ❖ Reporting directly to a Key SMS staff member of their own area or another area
- ❖ Reporting directly to the Department Manager
- ❖ Reporting directly to the Dispatch Safety Committee Chairperson
- ❖ Reporting directly to the General Manager and or City Transit Manager
- ❖ Reporting via email, text, voice or written document to any of the above
- ❖ Reporting directly (in person) to the immediate supervisor

All employees also have the option of reporting anonymously at any time. Employees who do not report anonymously will receive feedback from the key SMS staff member in their area as to the disposition of the report. Any person receiving a report of a hazard will immediately notify the key SMS staff member in his or her department.

All reports will be documented and investigated in a timely manner. All Hazards determined to be unacceptable and undesirable by the Safety Liaison for the Operations and/or Fleet Maintenance Department will be referred to the City Transit Manager/CSO and Contractor General Manager/SMS Executive to ensure it is addressed immediately with mitigation or elimination. The hazard will be tracked by the SMS Manager and the corrective action plan will be monitored through full resolution by the designated SMS Executive and FDOT when appropriate. (Further outlined in Part II Section 5 Safety Risk Management Process).

Employee Protected – Self Reporting

The following self-reported (employees committing violations and subsequently reporting themselves to management) violations can be reported as an initial instance without disciplinary action:

- ❖ Traffic Signal violations not resulting in an accident, injury or damage to property.
- ❖ Failure to report an adverse event immediately, but within 4 hours of occurrence. All information connected to the investigation of the reported event will fall under this protection
- ❖ Hours of Service violations.
- ❖ Reporting a safety concern that investigation reveals is not valid.
- ❖ Failure to wear proper PPE.

- ❖ Operating a revenue vehicle without proper equipment and uniform, including carrying the CDL on the employee's person.
- ❖ Fatigue that presents an unacceptable hazardous condition if duties are continued.

A second instance of a self-reported violation will be evaluated by SunTran's General Manager or the appropriate Department Manager to determine if circumstances warrant disciplinary action.

A third instance of the same violation will result in disciplinary action, whether self-reported or not.

Employee Unprotected - Self Reporting

No willful violations will be subject to self-reporting protections. This includes but is not limited to any violations of Drug and Alcohol policies or requirements, criminal acts, or failure to report any criminal acts immediately.

Integration with Public Safety and Emergency Management

The Emergency Management Division of the Marion County Sheriff's Office is Marion County's lead agency for coordination of emergency and disaster response activities to ensure a cooperative effort in response to all aspects of disasters. The Emergency Management Division is responsible for developing and coordinating programs that protect the public's health and safety from large scale hazards and natural disasters. Emergency management's objective is to provide a comprehensive and aggressive emergency preparedness response, recovery, and mitigation program to save lives, protect property and reduce the effects of disasters in Marion County.

The City of Ocala and Marion County Comprehensive Emergency Management Plan (CEMP) provides a framework that allows staff to plan, prepare for and respond to disaster events. The CEMP also lays out the purposes necessary to allow the Ocala community to recover from a wide range of disasters that adversely affect health, safety, or general welfare of Ocala residents. The City's CEMP is required to integrate with the State of Florida's Plan so that all efforts complement each other's. Per Marion County's CEMP, Marion County Transit Services is the lead agency for any type of transportation emergency support. However, The City of Ocala and SunTran system is trained and ready to provide transportation support as needed.

Marion County Emergency Management will coordinate emergency operations Countywide to ensure a cooperative effort in response to all aspects of disasters. The objectives of the plan include:

- ❖ Minimize suffering, loss of life, personal injury, and damage to property resulting from emergency and disaster conditions;
- ❖ Minimize disaster related material shortages and service system disruptions which would adversely affect the City's residents and economy;
- ❖ Provide immediate relief for our community and enhance short and long-range recovery following a disaster; and
- ❖ Provide training and support to enable City personnel to respond adequately to disastrous situations.

Periodic exercises, drills, and training sessions will occur to test the City's department plans, to assure that all personnel and departments are familiar with the CEMP and assure that the CEMP remains valid and effective.

SunTran's Contractor (RATP Dev) General Manager and Management Team will coordinate and the activities for emergency and disaster response involving the City of Ocala's transit services.

SMS Plan Documentation and Recordkeeping

The City of Ocala understands the importance of continuous monitoring and reporting of the status of the SMS program. At all times, the City of Ocala (SunTran) maintains documents that set forth and support its PTASP, including implementation of SMS and results from SMS processes and activities that are included in whole, or by reference, that describe the programs, policies, and procedures that the City of Ocala uses to carry out the PTASP. The City of Ocala maintains these documents for a minimum of three years.

In addition to any documents or records required elsewhere by Part 673, SunTran maintains perpetually records of:

- ❖ Safety risk mitigations developed in accordance with 673.25;
- ❖ Results from SunTran performance assessments as required under 673.27; and
- ❖ Employee safety training taken for purposes of compliance with this part and in accordance with the requirements of 49 CFR 673 and 674.

In accordance with the City's PTASP, the Contractor SMS Manager is responsible for the maintenance of the documentation for SunTran's Safety Risk Management Process and Safety Hazard and Risk Assessment Log for the transit site. Each month, a report will be submitted to the Contractor General Manager and City Transit Manager on the status of SMS deficiencies and failure; corrective actions for SMS gaps identified; and internal control department safety audits and corrective actions. The Site SMS Executive/Contractor General Manager will provide a monthly status summary to the CSO/City Transit Manager on issues needing immediate attention regarding SMS compliance, including unacceptable or undesirable hazards, and resource allocation for corrective action. (Plan documentation and recordkeeping is further described in Section 5.5).

The PTASP will be kept in electronic as well as hard copy format and will be readily available for access upon request by the FTA, other Federal entities as required, FDOT, TPO and all SunTran transit personnel.

SECTION 4: Safety Risk Management Process

Introduction

The City of Ocala has established a Safety Risk Management (SRM) process for all elements of its public transportation system including employees, contractors, infrastructure, vehicles and equipment, revenue and non-revenue service activities as well as collaborations with emergency management personnel (i.e. first responders or other local agency employees). All management, staff, contractors, and suppliers are required to implement safety risk management methodology and safety and system assurance throughout the planning, testing, and operational phases of public transportation projects. Safety Hazards that cannot be eliminated are to be controlled by mitigation to the level that is “as low as reasonably practicable” (ALARP). Safety Risk hazard identification and resolution is a system process managed by the City’s Transit Manager/ CSO with assistance from the Contractor SMS Site Manager for (RATP Dev) and other Key SMS Organizational staff. The City’s Transit Manager/CSO with support from the Transit Agency Safety Council (TASC) and Contractor Key SMS Staff will conduct formal analyses for all identified safety hazards resulting from system audits, operational or other changes, safety analysis in design and procurement contracts to include the following:

- ❖ Identification of potential/existing safety hazards;
- ❖ Assessment of severity and probability of occurrence/reoccurrence of each potential safety risk;
- ❖ Timely awareness of safety hazards for those who must resolve them;
- ❖ Ability to track and control safety risks through all phases of a project’s life cycle; and
- ❖ Formal Safety and Security Certification where applicable

The SRM component is comprised of the processes, activities, and tools necessary to identify and analyze hazards and evaluate safety risks in its operations and supporting activities. The City of Ocala recognizes the need to ensure use of both a proactive (i.e. employee safety reporting) and reactive (i.e. safety event investigation) approach to the reporting and investigation of safety hazards and the need to carefully examine whether the agency has taken sufficient precautions to minimize the harm, or if further mitigations are necessary. Safety hazard identification, assessment and mitigation is the core element of the City’s PTASP, requiring timely correction of unsafe conditions, ideally before serious accident, injury or damage occurs. The methodology employed by the formal SMS process for safety hazard identification and risk management of resolution allows the City of Ocala to examine how organizational factors such as (i.e. allocation of resources, established operational procedures, frontline supervision and training, and human performance issues) contribute to incidents, accidents, and near miss occurrences. SMS builds on this experience by increasing the focus on safety hazard identification across the agency and broadening the scope of safety data collection and assessment, promoting and fostering a safety culture that encourages proactive safety reporting and safety risk management.

The SRM process is comprised of the following activities each having specific procedures and accountabilities to ensure that the safety hazard has been mitigated to the level “as low as reasonably practicable”.

- ❖ Identification, analysis and evaluation of safety hazards,
- ❖ Safety risk assessment

- ❖ Safety risk mitigation, and
- ❖ Documented system SRM tracking

The following outlines in detail the established criteria for each of the above listed activities to identify, evaluate and prioritize the safety risk associated with potential consequences; and is committed to the allocation of resources necessary to address the potential consequences of these hazards.

Safety Hazard Identification and Analysis

The City's objective of hazard identification and risk assessment is to identify and define hazardous conditions likelihood and enter them into the hazard mitigation process before those conditions or associated actions cause or contribute to an accident. Although it is virtually impossible for the City to identify every hazard, there are two basic time-tested methods used for orderly identification of hazards: inductive and deductive.

The inductive hazard identification method consists of an analysis of system components to identify their respective failure modes and the effects they will have on the total system. This method assumes the failure of single elements or events and, through analysis, determines the potential consequential effects on the system or subsystem. The City of Ocala uses inductive hazard identification at the onset of new capital projects to ensure that potential, but not yet realized, hazards are addressed.

Techniques commonly used for inductive hazard identification include:

- Preliminary Hazard Analysis (PHA)
- Sub-System Hazard Analysis (SSHA)
- Operating Hazard Analysis (OHA)

The deductive hazard identification method involves defining an undesired effect or event (e.g., collision, derailment, or fire) and then deducing the possible conditions or system component faults (or combinations thereof) which are necessary to cause the undesired effect or event. The technique most commonly used for deductive hazard identification is Fault Tree Analysis.

Conversely, accident analysis is an example of deductive identification of hazards that have been physically realized. SunTran deduces from the accident and the circumstances of the accident how the mitigation of hazards could take place.

Methods of Safety Hazard Identification

Every employee is required to report all hazard or unsafe conditions to his/her Supervisor, Department Manager or other appropriate authority as defined in the PTASP. However, employees may also communicate the identification of a potential hazard directly to the City's Transit Manager/CSO or any safety staff member verbally or in writing or by communicating through other established communication channels within the Employee Safety Reporting Program. SunTran defines **hazard** and **risk** as the following:

Hazard – (any real or potential condition that can cause injury, illness, or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of the transit system or damage to the environment).

Risk - (the composite of predicted severity and likelihood of the potential effect of a hazard)

Safety hazards may be identified using different internal and external sources such as those listed in the following table. SunTran applies risk assessment criteria to the identified hazards based on their estimated severity and likelihood of occurrence to determine acceptance of the risk or need for corrective action to further reduce the risk to the lowest level reasonably practicable.

(This table is intended to illustrate typical activities and is not intended to be all inclusive).

Table 1 Typical Safety Hazard Identification Activities and Schedule

Activities	Schedule
Conduct formal analyses prepared and submitted by contractors	As required by contract
Conduct informal observations, inspections and analyses	Daily
Conduct design reviews as part of design process	As required by contract
Field inspections and observations during project construction and testing	Daily during project duration
Field observations and inspections of regular and special operations	Daily
Review of control logs, operations records and reports	Daily & Monthly Reporting
Review maintenance activities, reports and records	Daily & Monthly Reporting
Rules Compliance activities	Daily
Review and investigate employee and passenger observations and complaints	Daily
Perform safety trends analysis	Daily & Monthly
Perform investigations of hazards, adverse advents, close calls (near misses) and safety reports	As required
Formal inspections and audits	Per inspection and audit cycle
Review external agency reports and recommendations	As required
Participate in and conduct peer reviews of other transit properties	As required
Safety Committee, Drivers' and All Staff Meetings	As Scheduled

For SunTran, most safety hazards typically are identified in the field and reported to Dispatch and are entered on a Daily Operations Log completed by the Dispatch Supervisor on Duty. These hazards are addressed immediately by the responsible departments through established plans, protocols and procedures and corrective measures and do not require entry onto the Safety Hazard and Risk Assessment log as indicated in this plan.

Safety hazards which are not resolved at the operating, maintenance or other front-line department level are appropriately reported to and investigated by the affected Operations or Fleet Maintenance department SMS Safety Liaison. If the Department Safety Liaison assesses the reported safety hazard to be severe enough to require changes to operating procedures, maintenance procedures, and or training programs, the matter will then progress to the SMS Manager to record the safety hazard on the event log and present to the Site Safety Committee to assist with safety risk mitigation and/or elimination of the hazard. The Contractor Site SMS Executive will be the person responsible for monitoring all corrective actions through its full resolution. The CSO/Transit Manager for the City may also be notified to provide support through full resolution.

If there is a significant severity of the safety hazard (i.e. poses a real and immediate threat to life, property, or the environment) or risk frequency of the hazard, such as the occurrence of accidents, the CSO/Transit Manager for the City will be notified immediately and be brought to the attention of the Accountable Executive for immediate intervention/action. When the hazard requires other resources to eliminate or mitigate to lowest level reasonably acceptable, it may merit an assessment by TASC. TASC will assess the severity and frequency of the risk and create

a formal corrective action plan per its CAP process to mitigate or resolve the safety hazard. The CSO/Transit Manager is the person responsible for monitoring all formal corrective action plans through its full resolution.

In accordance with the FTA and FDOT standard requirements, if it is determined that the final risk assessment of the hazard identified is “unacceptable” using the criteria and assessment process specified in its PTASP, the City of Ocala will notify the FDOT within 24 hours following the determination. The City Transit Manager will transmit an electronic copy via email or a hard copy via fax of the appropriately completed worksheets, forms or other materials documenting the unacceptable hazard. Status reports of the unacceptable hazard investigation will be submitted via email at least monthly, by the 10th of each month, until the investigation is completed.

Upon the completion of the investigation of the “unacceptable” hazard, a Final Hazard Investigation report will be submitted to FDOT for review and final approval that includes a description of activities, findings, identified casual factors, and a corrective action plan, if applicable. The report is not to be considered final until all conditions are met, and the report is approved by the FDOT.

Safety Risk Assessment

Safety Risk Assessment Process

The City of Ocala assesses safety risk associated with identified safety hazards using its safety risk assessment process. This includes an assessment of the likelihood and severity of the consequences of hazards, including existing mitigations, and prioritizing hazards based on safety risk. The City of Ocala defines hazard severity categories as a quantitative measure of the worst credible safety hazard resulting from a personnel error, environmental conditions, design inadequacies, and procedural deficiencies for a system or component failure or malfunction as indicated in Table II below.

TABLE II SAFETY HAZARD SEVERITY TABLE

category	description	hazard definition
1	Catastrophic	Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies may cause dire events resulting in major system loss, thereby requiring immediate cessation of the unsafe activity or operation.
2	Critical	Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies may cause severe harm to persons or major system damage thereby requiring immediate action including immediate cessation of the unsafe activity or operation.
3	Marginal	Operating conditions may cause minor harm or minor system damage such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies can be counteracted or controlled without serious injury, illness or major system damage.
4	Negligible	Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies will result in no, or less than minor, harm or system damage.

The City of Ocala describes the likelihood that a hazard may occur in potential occurrences per unit of time, events, items or activity. The City of Ocala derives qualitative hazard probability from research, analysis, and evaluation of safety data from the operating experience of SunTran and/or other similar transit authorities. A qualitative hazard likelihood ranking for SunTran is as follows in Table III:

TABLE III HAZARD LIKELIHOOD TABLE

Frequency	Description	Probability
Frequent	A	Likely to occur frequently to an individual item. Continuously experienced in the fleet inventory.
Probable	B	Will occur several times in life of an item; will occur frequently in fleet/inventory.
Occasional	C	Likely to occur sometime in life of an item; will occur several times in fleet/inventory.
Remote	D	Unlikely, but possible to occur in life of an item; unlikely but can be expected to occur in fleet/inventory.
Improbable	E	So unlikely, it can be assumed occurrence will not be experienced to an individual item; unlikely to occur but possible in fleet/inventory.
Eliminated	F	Hazard is incapable of occurring.

Before implementation of any corrective action, The City of Ocala has established a hazard safety risk severity category (1 through 4) and a likelihood ranking (A through E) which are combined to form a numerical value called a Risk Index, reflecting both severity and probability of occurrence for each identified hazard. SunTran assigns a Risk Index to a hazard before implementation of any corrective action. The range of likelihood Risk Indices is shown in the following matrix.

TABLE IV SAFETY HAZARD RISK INDEX

Frequency of Occurrence	1 Catastrophic	2 Critical	3 Marginal	4 Negligible
(A) Frequent	1A	2A	3A	4A
(B) Probable	1B	2B	3B	4B
(C) Occasional	1C	2C	3C	4C
(D) Remote	1D	2D	3D	4D
(E) Improbable	1E	2E	3E	4E
(F) Eliminated	N/A	N/A	N/A	N/A

Safety Risk Mitigation

The City of Ocala acts to eliminate identified safety hazards or to reduce the associated risk. In accordance with the risk acceptance criteria below, the City eliminates “unacceptable” hazards or reduces their associated risk to an acceptable level. If this is impossible or impractical, alternatives are recommended to the appropriate City’s transit management decision makers.

The risk assessment and acceptance criteria assist SunTran’s management in understanding the amount of risk involved by accepting the safety hazard relative to the costs (schedule, dollars, operations, etc.) to reduce the hazard’s risk to an acceptable level. The following table identifies the hazard acceptance criteria:

TABLE V SAFETY HAZARD RISK ACCEPTANCE CRITERIA

	Hazard Risk Index	Decision Authority	Special Conditions
	1A, 1B, 2A, 2B, 3A	Unacceptable	Requires immediate resolution
	1C, 1D, 2C, 2D, 3B, 3C	Undesirable	Requires Chief Safety Officer review and concurrence from the Accountable Executive
	1E, 2E, 3D, 3E, 4A, 4B	Acceptable with Review	Requires Chief Safety Officer and Transit Agency Safety Council (TASC) review
	4C, 4D, 4E	Acceptable	None

The order of precedence for satisfying system safety requirements and resolving (eliminating or controlling) hazards for SunTran is as follows:

- ❖ **Design for Minimum Risk** - The primary safety effort during the design phase of a project will be an attempt to eliminate hazards through design selections (e.g., fail safe, redundancy).
- ❖ **Incorporate Safety Devices**. Hazards that cannot be eliminated or controlled through design selection are controlled to an acceptable level through use of fixed, automatic or other protective safety design features or devices, including PPE.
- ❖ **Provide Warning Devices** - Where it is not possible to preclude the existence or occurrence of a hazard through design selection or use of safety devices, warning devices will be installed for the timely detection of the hazard condition and the generation of an adequate warning signal.
- ❖ **Develop Special Procedures, Equipment and Training** - Where it is not possible to eliminate or reduce the magnitude of an existing or potential hazard through design selection or the use of safety and warning devices; special procedures, including the use of personal protective equipment, will be developed by (The City of Ocala or its Contractors, as required) to control the hazard. All applicable personnel are trained on the procedures and equipment in accordance with SunTran’s Standard Operating Procedures.

Safety Hazard Notifications, Thresholds and Reporting

This section describes the process used by SunTran to conduct accident/incident/hazard investigations, notify appropriate external agencies, and document these activities.

Safety Risk Management Meetings

To ensure an on-going involvement in SunTran’s safety hazard management process, FDOT will be invited to participate in meetings held at least quarterly in conjunction with TASC to review the Safety Hazard Risk Assessment and Tracking Log, Corrective Action Plan Monitoring Log, and the other SunTran activities associated with the hazard

management process. The City Transit Manager will submit to FDOT a proposed date and location for the meeting and a proposed agenda.

During the meetings, FDOT may request and review any records maintained by SunTran documenting the results of its hazard management process. If these records are not available at the meetings, SunTran will transmit them via email or in hard copy via mail or fax after the conclusion of the meeting.

SunTran will prepare meeting minutes from each meeting, being sure to document any identified action items or required activities. The meeting minutes are prepared and submitted to the City Transit Manager for TASC committee approval at the next meeting.

Corrective Action Plan Procedures

SunTran applies risk assessment criteria to the identified hazards based on their estimated severity and likelihood of occurrence to determine acceptance of the risk or the need for corrective action to further reduce the risk. In accordance with FDOT requirements, SunTran is required to develop corrective action plans for various deficiencies and hazards identified through on-site safety and security review process, accident or hazard investigations, internal safety or security reviews. Either FDOT or the City of Ocala may identify a need for corrective actions. If the FDOT identifies a need for corrective action, it will notify the City of Ocala in writing.

Causes for Initiation of Corrective Action Plan:

- ❖ **On Site FDOT or FTA Safety and Security Review** – Upon receipt of the final report for an external regulatory agency safety or security review, the City of Ocala will develop a corrective action plan to correct identified deficiencies and submit the corrective action plan (CAP) as required
- ❖ **Accident/Incident/Hazard Investigations** – Regardless of the agency conducting the investigation process, any final report indicating findings and recommendations for addressing deficiencies or unsafe conditions with SunTran will be the primary responsibility of the City's Operations and Maintenance Contractor SMS Staff to correct. Upon receipt of the final report, the Contractor will have 15 calendar days to develop a corrective action plan or methodology to correct identified deficiencies.
- ❖ **Internal Safety and Security Review** - If the City of Ocala finds areas of non-compliance during internal audits of SunTran's Agency Safety Plan or Security and Emergency Preparedness Plan, those areas of non-compliance must be remedied by a corrective action plan within 30 calendar days. If FDOT rejects SunTran's annual safety or security audit report, the City will have **15 calendar days** to develop a corrective action plan to correct identified deficiencies.

Corrective Action Plan Required Components:

- ❖ Identified noted Hazard or Deficiency
- ❖ Date Corrective Action Plan was opened
- ❖ Process, Plan or Mechanism to address and resolve deficiency
- ❖ Deadline for Implementation of Plan of Action
- ❖ Departments and Persons who will be responsible For Implementation

Safety Hazard Risk Documentation and Monitoring

Safety Hazard and Risk Management Documentation

The Site Operations and Fleet Maintenance Safety Liaisons are responsible to appropriately document the following information for safety hazards identified in their respective areas, including:

- ❖ How the safety hazard was recognized and reported;
- ❖ A description of the safety hazard and the immediate corrective action(s) taken;
- ❖ The Initial Risk Assessment, based on the likelihood and severity of the hazard if nothing was done and using the risk assessment matrix in the City of Ocala's PTASP Chapter 5 Safety Risk Management Process (Sections 5.1.0 – 5.6.0);
- ❖ Results of the investigation, including the circumstances, events and causal factors(s) leading up to the safety hazard;
- ❖ Additional corrective action that was or will be done to reduce the likelihood and/or severity of the safety risk (including schedule and responsibility);
- ❖ The Final Risk Assessment, based on the likelihood of the safety hazard to occur and its likely severity when the proposed corrective action/resolution is in place.

This information will be submitted at least weekly to the Site SMS Manager to review and monitor each department's compliance with SRM activities. The SMS Manager will ensure that any deficiencies or failures in this area are immediately documented and transmitted to the appropriate SMS personnel for corrective action.

Safety Hazard and Risk Assessment Tracking

The City of Ocala has established a Safety Hazard and Risk Assessment Log for SunTran which reflects the consolidation of information in the SRM process. The Safety Hazard and Risk Assessment log contains all safety hazards meeting the unacceptable or undesirable thresholds. The Log includes the following required information:

- **ID Number** – refers to the number assigned to the hazard by SunTran.
- **Safety Hazard Description** – refers to a brief narrative summary of the hazard – what it is; where it is located; what elements it is comprised of; and element of SunTran's operation affected by the hazard (i.e., facilities, vehicles, personnel training and procedures, etc.).
- **Date Identified** – refers to the date the hazard was identified at SunTran.
- **Safety Hazard Source** – indicates the mechanism used to identify the hazard, (i.e., operator report, near miss, accident investigation, results of internal safety or security review/audit, rules compliance or

training program; maintenance failure, facility, equipment or vehicle inspection, trend analysis, formal hazard analysis, etc.).

- **Safety Hazard Risk Index** – refers to the hazard severity and hazard frequency (or risk index) ratings initially assigned to the hazard by SunTran.
- **Safety Hazard Mitigation/CAPs** – refers to the actions recommended by the City of Ocala on behalf of SunTran to address the hazard and bring it into a level of risk acceptable to management.
- **Status** – refers to the status of the recommendations. Status may be designed as pending, open, in progress, or closed.

In accordance with the City's PTASP the Contractor SMS Manager is responsible for the maintenance of the Safety Risk Management Process and Safety Hazard and Risk Assessment Log for the transit site. The Contractor SMS Manager will ensure that all defined criteria for safety hazard identification and safety risk assessment is entered and a safety risk rating has been assigned. The following are specific safety hazards that must be immediately reported to the CSO/City Transit Manager when identified; whether it is mitigated at the Contractor Management level and/or at the City of Ocala level:

- ❖ All Unacceptable Safety Hazard Risks;
- ❖ Safety Risks identified from audits from outside agencies (FDOT, SSO, FTA and OSHA);
- ❖ Safety Risks identified from accident investigations;
- ❖ Safety Hazards where corrective action will cost more than \$5,000; or
- ❖ When warranted by the SMS Site Executive

TABLE VI SAMPLE SAFETY HAZARD AND RISK ASSESSMENT TRACKING LOG

#	Identified Hazard	Hazard Description	Risk before Mitigation Measures			Risk Elimination or Mitigation Measures	Risk After Mitigation Measures			Verification
			Severity	Likelihood	Risk Hazard Index		Severity	Likelihood	Risk Hazard Index	
EXAMPLE	New large cutaways have a blind spot in the right front corner of the vehicles	Cannot see vehicles and pedestrians near the right front corner of the vehicle causing near misses and or possible vehicle and pedestrian strikes.	II	A	High	1. Order different model of cutaway going forward 2. Attach blind spot mirrors and/or body cameras to increase visibility and reduce likelihood of an accident 3. Provide training to all operators on blind spot avoidance and awareness techniques	II	C	Medium	Instances of near miss, pedestrian strikes, and vehicle strikes in small cutaways are zero for last year.
1					#N/A					
2					#N/A					



The Tracking Log is submitted by the 10th of each month to the City of Ocala Transit Manager/CSO. The Transit Manager reviews the Monthly Safety Hazard and Risk Assessment Tracking Log and forwards any questions or requests for information to the Contractor (RATP Dev). In addition, the City of Ocala conducts at minimum quarterly meetings with the Contractor (RATP Dev) to review the Tracking Log and the other activities associated with the safety risk management process. An invitation along with an agenda will also be sent to the Grants Manager for FDOT and TPO for the quarterly meeting. The quarterly safety risk management meetings are discussed further in other sections.

SECTION 5: Safety Assurance

Safety Assurance is accomplished through implementation of safety oversight and risk monitoring activities. Safety performance measures are used to select improvement targets, monitor safety performance and encourage continuous improvements in service delivery. As the City of Ocala implements its SMS, several activities will be initiated, and tools will be developed to support these safety oversight and risk monitoring activities. Safety assurance includes safety reviews, evaluations, inspections, as well as safety data collection, tracking and analysis from various resources, including investigations; and development of Key Performance Indicators (KPI's).

The City has developed and implemented a safety assurance process for SunTran consistent with 49 CFR Part 673 to ensure SunTran complies with or exceeds the established safety standards set forth in the PTASP and Chapter 14-90, FAC Requirements. These processes will allow the City of Ocala to:

- ❖ Monitor SunTran for compliance with, and sufficiency of, the agency's procedures for operations and maintenance;
- ❖ Monitor SunTran operations to identify hazards not identified through the Safety Risk Management process (per 49 CFR 673.25);
- ❖ Monitor SunTran operations to identify any safety risk mitigations that may be ineffective, inappropriate, or were not implemented as intended;
- ❖ Conduct investigations of safety events, including the identification of casual factors; and
- ❖ Monitor information reported through any internal safety reporting programs.

Results from the above processes are compared against recent performance trends monthly, quarterly and annually by the City of Ocala and Contractor SMS Key Staff to determine where action needs to be taken. The Transit Manager/CSO will review the performance of individual safety risk mitigations during scheduled Safety Committee/Council meetings, based on the reporting schedule determined. The SMS Manager enters any identified non-compliant or ineffective activities, including mitigations, back into the SRM process for re-evaluation by the Site Safety Committee and/or TASC with oversight by the City of Ocala and Contractor SMS Executives (City Transit Manager and Contractor General Manager).

These processes will provide the confidence to the City of Ocala leadership that the organization and system is functioning at an acceptable level of safety.

Safety Performance Measuring and Monitoring Activities

The City of Ocala has established safety objectives; performance targets and performance measures in coordination with its Contract Provider (RATP Dev), FDOT and Marion County TPO in compliance with all requirements set forth in FTA's PTASP and the NSP. The initial focus of SunTran's performance measure and established safety performance targets is based on existing data delivered to the National Transit database (NTD) for:

- ❖ Fatalities – total number of reportable fatalities and rate per total vehicle revenue miles;
- ❖ Injuries – total number of reportable injuries and rate per total vehicle revenue miles;
- ❖ Safety Events – total number of reportable events and rate per total vehicle revenue miles;
- ❖ System Reliability – mean distance between major mechanical failures

SunTran also establishes performance criteria and monitoring in other areas including Rules and Procedure Compliance, Facilities and Equipment, Vehicle Inspections and Preventive Maintenance, Safety Data Collection and Analysis, Internal Safety Audit Processes, Accident and Incident Reporting and Investigation, Internal System Safety Audit and Review, Drug and Alcohol Program and Medical Monitoring, and Employee Safety Reporting and Training. SunTran will maintain 100% compliance with all safety performance requirements through use of the following performance measure activities:

- ❖ Safety audits; informal inspections;
- ❖ Regular safety review of onboard camera footage to assess drivers and specific incidents;
- ❖ Employee safety reporting program;
- ❖ Investigation of safety occurrences;
- ❖ Daily data gathering and monitoring of data related to service delivery; and
- ❖ Regular vehicle inspections and preventive maintenance.
- ❖ Adherence to schedules set and acceptable measures
- ❖ Appropriate CAPS for findings and reasonable timeframe for closure of CAPS in coordination with federal, state and local oversight agencies as necessary

Transit Asset Management/State of Good Repair

The City of Ocala also addresses the requirements of 49 CFR Parts 625 and 630, TAM and State of Good Repair (SGR), through the City's TAM Plan, which includes TAM and SGR performance measures. The TAM Plan allows SunTran to predict the impact of its policies and investment justification decisions on the condition of its assets throughout the asset's life cycle and enhances the ability to maintain SGR by proactively investing in an asset before the asset's condition deteriorates to an unacceptable level. The goal of these policies is to allow the City of Ocala to determine and predict the cost to improve SunTran asset condition(s) at various stages of the asset life cycle while balancing prioritization of capital, operating, and expansion needs. The two foundational criteria of SGR performance measures are useful life benchmarks (ULB) and Condition.

Operations and Maintenance Rules and Procedures

Bus Operations are strictly governed by policies and procedures outlined in the Standard Operating Procedures (SOPs) Rule Book, and Operations Manuals prepared by the Contractor Organization. Fleet Maintenance rules and procedures are contained in the Maintenance Plan and manufacturers' manuals. These publications cover all rules and procedures that are necessary to operate a safe and efficient bus system.

Review of Operations and Maintenance Rules and procedures are conducted as necessary by the CSO and Contractor General Manager. These reviews are conducted when system monitoring, and data analysis imply that either the SOPs or rules are not effective or when change or expansion occurs. Review also occurs annually during the internal safety audit process.

All rules compliance findings of non-compliance are evaluated by the Contractor General Manager and CSO, and where appropriate, are managed through SunTran's safety hazard risk management process in compliance with Part II (Safety Risk Management) of this Safety Plan.

Operations Personnel Rules Compliance

Daily inspections of operators are required prior to pull-out. Dispatch Supervisors enforce rules and procedures in the field by observing, correcting, and documenting safety-related behaviors and activities of operators and system elements. Daily and weekly operational checks are made in the field that include but are not limited to:

- Speed checks (yards, intersections)
- Observation checks for time and load
- General observations of vehicles, signals, and system for deficiencies; and
- Follow up on patron complaints
- Performance of ride checks to ensure operator rules compliance during revenue operation

Periodic spot checks are made as result of an accident, request, and/or at random. Management may also conduct random checks that include but are not limited to:

- General vehicle operation
- Attention to duty
- Signal compliance
- Door operation

Maintenance Personnel Rules Compliance

Maintenance Supervisors enforce rules and procedures by observing and monitoring employee and contractor performance on the bus system and at worksite. Rules and procedures monitored and observed for compliance include but are not limited to:

- General safety
- Proper use of tools, equipment and machinery
- Proper use of personal protective equipment
- Right-of-way safety
- Fire safety
- Material handling and storage
- Quality Assurance inspections and audits of procedures, including rule compliance

Facilities, Equipment and Vehicle Inspections

An essential element of SunTran's Safety Management program is regular inspection of all bus system facilities and safety-critical equipment on a regular basis according to company policies and SOPs, equipment manufacturer's guidelines and recommendations, and as required by local, state, and federal regulations. In addition, facilities and equipment are also inspected by departments and/or Safety staff as result of accident reports. Inspections are documented on checklists, filled out at time of inspection to assure a consistent level of monitoring and general maintenance. The checklists and written reports are issued following the inspections and all action items are put into the work order system.

Facilities Inspections

All SunTran administrative and maintenance buildings comply with applicable code requirements and have various fire/life safety features that may include:

- Fire extinguishers and alarms
- Handrails and guardrails
- Fences and gates
- Sprinkler systems
- Emergency exits and lighting
- Emergency communications systems
- Emergency shower
- Eyewash stations
- Chemical/paint safety

Facility inspections are performed monthly. Critical items/conditions disclosed during inspection are repaired immediately. Non-critical items/conditions are cycled through work order procedure. Any items identified by maintenance as critical issues are evaluated by the City's Facility Director, and where appropriate, are managed through SunTran's hazard management process in compliance with this PTASP.

Equipment and Vehicle Inspections

The frequency of equipment inspections depends upon the level of hazard associated with operation, industry standards, and contractor supplier recommendations.

The Fleet Maintenance Department has several audit checks in place to ensure that inspections are being properly conducted and completed. These audit checks include performing audits of the maintenance inspection and testing, doing monthly reviews of number inspections scheduled vs. number completed, and ensuring equipment is thoroughly checked through the preventive maintenance program procedures.

SunTran will perform scheduled preventive maintenance on all vehicles at every 6,000 miles according to the agency's maintenance plan. As preventive maintenance inspections are scheduled by projected mileage, SunTran will allow 600-mile deviations in mileage interval, so long as the actual mileage interval meets the manufacturer's recommended maintenance schedule.

Preventive maintenance activities are continuously monitored by the Fleet Director and assigned Maintenance personnel. Inspection tasks are periodically updated to reflect fleet needs and enhance operational efficiency and safety. The Maintenance Director also conducts follow-up activities after audits to ensure employee compliance with maintenance rules.

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.

TABLE VI PREVENTIVE MAINTENANCE INSPECTION TABLE

❖ Vehicle Equipment	❖ Cycles
Revenue and Non-Revenue Vehicles	<p>Fluids, including, but not limited to, oil and antifreeze are tested regularly as part of the general maintenance warranty, and contract compliance procedures.</p> <p>A preventive maintenance plan is in place for all ADA-mandated accessibility features.</p> <p>Maintenance checks are performed for wheelchair lifts on bus fleet. Lifts are routinely scheduled for maintenance at the manufacturer's recommended intervals.</p>

Vehicle Equipment Program Documentation

Maintenance personnel maintain a variety of vehicle maintenance documentation including accurate time records on each vehicle, service dates, work order details (inspections, repairs, and overhauls), and all Preventative Maintenance Inspection (PMI) data, as well as documentation for facility/equipment inspections. Preventive, corrective, and scheduled maintenance is tracked through spreadsheets and/or database to perform failure analyses and determine remedial actions. Records of each vehicle are sufficiently detailed to quickly determine the life of sub-assemblies, and to enable trend analysis. The City of Ocala and SunTran management also review equipment trends for planning purposes.

The scope of the bus/non-revenue vehicle maintenance plan is to provide safe, clean, reliable transit service to SunTran customers through the adoption and implementation of sound maintenance practices as prescribed by law and based on SunTran's experience and expertise. The bus/non-revenue vehicle maintenance plan is implemented daily through the conduct of normal business operations. All bus/non-revenue vehicle maintenance checklists include recommended manufacture, supplier, or builder procedures, programs, and guidelines. The current systems provide notification to management if scheduled intervals are missed, and corrective action is taken.

Safety Data Acquisition and Analysis

The City of Ocala understands that implementing and maintaining a robust SMS requires acquiring safety-related data from various sources and analyzing and distributing that data to adequately control hazards, ensure continuous improvement, inform SunTran management and staff of safety-related system status, ensure the appropriation of sufficient resources to address system hazards, and identify appropriate mitigations for newly emerging or latent hazards as well as meet external reporting requirements. Trend analysis is performed on safety data as a means of identifying hazards, effective or ineffective mitigations, and contributing factors of adverse events.

Data Acquisition

Safety data is collected, documented and analyzed from numerous sources by all departments. Sources include but are not limited to:

- ❖ Accident/Incident Reports
- ❖ External agency Reports and Publications
- ❖ City Official Concerns
- ❖ Claims Reports
- ❖ Daily Operations Reports
- ❖ Maintenance Reports

- ❖ Employee Concerns
- ❖ Employee Occupational Injury Reports
- ❖ FTA Bulletins and Safety Advisories
- ❖ Homeland Security Alerts
- ❖ Internal Audit Reports
- ❖ FDOT/FTA Reviews
- ❖ Passenger Concerns
- ❖ Field Inspections, Assessments and Observations
- ❖ Safety Meetings
- ❖ Special Occurrence Reports
- ❖ Police Reports, concerns and investigations

Safety data collection also involves obtaining technical information, data and reports for use in systems development of program elements. Sources for such data include but are not limited to:

- ❖ Department of Homeland Security (DHS)
- ❖ Environmental Protection Agency (EPA)
- ❖ Federal Transit Administration (FTA)
- ❖ FDOT
- ❖ State & Federal Statutes
- ❖ Safety Data Sheets (SDS)
- ❖ National Transportation Institute (NTI)
- ❖ Occupational Safety and Health Administration (OSHA)

Other data and information sources include building codes and professional society guidelines, and information technology and cybersecurity standards organizations.

Safety Data Analysis

Used as part of the hazard management process, data collection and analysis are used to identify hazards before they cause accidents by such techniques as trend analysis. Analysis of safety data will help the City of Ocala improve system performance, not only in respect to safety, but also in overall delivery of service to the public. 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.

SunTran's Operations and Fleet Maintenance departments under the direction of Key SMS Personnel collect and track their safety-related data to identify causal factors and undesirable trends, including those related to hazards. The investigation may include interviews, testing and analysis of related documentation. Identified hazards are tracked and findings requiring corrective action are submitted to the SMS Manager and the other SunTran department(s) for review, assessment, concurrence and discussion of further appropriate mitigations. The City's Transit Manager/CSO reviews all safety data analysis, and verifies compliance with SMS and this PTASP, and provides expert advice to SunTran Management and TASC.

Safety Data Access

To ensure that all departments can properly fulfill their respective responsibilities for collecting, analyzing, and distributing hazard-related data, SunTran's respective departments collect, analyze and report on requisite data as indicated in Table VII.

TABLE VII DATA ACCESS TABLE

Minimum Required Data	Provider
Accident records, near-miss records, employee injury forms, and related accident data	Operations
Operator training programs and records	Operations Training
Maintenance training programs and records	Maintenance Training
Accident/incident investigation reports, complaints and hazards	Operations/City and SunTran Administration
Medical Services information	Operations, Human Resources
Right-of-Way Allocation records	Growth Management Infrastructure/Procurement/Operations
Safety records of individual division employees relative to accidents and rule violations	Operations
Records of inspections, maintenance work, accident-related activities and emergency responses	Maintenance
Modifications to equipment and facilities	Maintenance and City Growth Management Capital Program
System-wide policies and procedures, operating orders and general notices	Chief Safety Officer/ Growth Management/Infrastructure
Complete and current personnel files	Contractor General Manager/Human Resources
Contractor's safety-related programs and procedures	Contractor General Manager/City Growth Management Transit Manager
List of hazardous materials and equipment	Maintenance, Operations
Employee Concerns	All Departments & Functions

Please note this table represents major categories of data, and does not list all sources or data collected, analyzed and reported upon by the City of Ocala for SunTran.

Internal Safety Audit Process

Internal safety reviews and inspections are critical components of an integrated system safety program. All departments are required to assess internally their own compliance with SMS through the authority and oversight of the Key SMS Personnel in each department. The SMS Executives for both the City and Contractor (City Transit Manager and Contractor General Manager) will provide both support to the programs in development of compliance documentation and assessment checklists, and direct oversight of the program by means of its own

safety and security audit program under the direction of the City Growth Management Director/Accountable Executive.

The internal audit program will encompass all SMS requirements as laid out in this PTASP, and in the departmental documentation detailing how the SMS program is implemented within each department/functional area and will be conducted starting November 1 of each calendar year and ending prior to the end of the same calendar year utilizing the internal audit checklist included in the Appendix.

System Safety and Security Audit Objectives

The Internal Safety and Security Audit Process is a proactive approach to verify that the City of Ocala's SMS is robust, has been properly implemented, all foreseeable hazards have been identified and properly mitigated, and continuous improvement is achieved. Additionally, compliance with this PTASP is assessed through the audit process. Specifically, the Internal Safety and Security Audit Process is implemented to:

- ❖ To assess the effectiveness of safety and security programs;
- ❖ To identify process deficiencies;
- ❖ To identify hazards in the operational system and verify current mitigations are effective;
- ❖ To identify weaknesses in system safety and system security programs;
- ❖ To verify that corrective actions are being closed efficiently and to evaluate their effectiveness;
- ❖ To recommend system safety and system security improvements;
- ❖ To provide management with an assessment of the system safety and system security program;
- ❖ To assure continuing evaluation of safety and security-related programs, issues, awareness and reporting.

Corrective Actions

In accordance with FDOT requirements, SunTran is required to develop corrective action plans for various deficiencies and hazards identified through on-site safety and security review process, accident or hazard investigations, and internal safety or security reviews. Either THE FDOT or the City of Ocala may identify the need for corrective actions. If the FDOT identifies a need for corrective action, it will notify the City of Ocala in writing.

All Corrective Actions will be appropriately reported to the FDOT per SunTran's procedures previously outlined in Section 4 - Safety Risk Management Process.

Compliance with Local, State and Federal Requirements

All SunTran employees are required to comply with all applicable federal, state and local statutory requirements. This includes licensing, motor vehicle and street operations statutes, and labor law.

Drug and Alcohol Program and Medical Monitoring

SunTran maintains a Zero Tolerance drug and alcohol program in compliance with U.S. Department of Transportation and FTA regulations and to ensure the safe operation and maintenance of systems and equipment.

The program includes criteria for random testing of safety sensitive personnel and testing for cause either accident related or from observed behavior.

Drug and alcohol testing and information about drug and alcohol abuse is included in SunTran's Drug and Alcohol Policy. The program is administered by SunTran's Drug and Alcohol Substance Abuse Program Manager which includes verification of compliance with the program and training. Training is given to all employees during orientation training. Revisions to the program are distributed to all employees and if necessary, follow-up training is also provided. Compliance and knowledge of the program is accomplished through direct supervision of employees and annual refresher training.

SunTran's Medical Examination requirements include a pre-employment examination for applicants, an examination at least once every two (2) years for exiting drivers, and a return to duty examination for any driver prior to returning to duty after having been off duty for 30 days or more due to an illness, medical condition, or injury. Employees may be required to take physical examinations at other times if management deems it necessary. SunTran will not allow a driver to operate a transit vehicle without having on file a completed medical examination certificate dated within the past 24 months.

Accident and Incident Reporting, Investigation and Corrective Action Plans

This section outlines the actions to be taken by all employees for any safety event related to SunTran Transit vehicles, passengers, employees or property while either operating vehicles and/or performing other job -related tasks. An event is defined as any accident, incident or occurrence. Each is further defined as follows:

The definition of an **accident** is an event that involves any of the following: a loss of life; a report of a serious injury to a person; a collision of public transit vehicles; a runaway train; an evacuation for life safety reasons; or any derailment of a rail transit vehicle, at any location, at any time, whatever the cause. The definition of an **incident** is an event that involves any of the following: a personal injury that is not a serious injury, one or more injuries requiring medical transport; or damage to facilities, equipment, rolling stock, or infrastructure that disrupts the operations of a transit agency. The definition of an **occurrence** is an event without any personal injury in which any damage to facilities, equipment, rolling stock, or infrastructure does not disrupt the operations of the transit agency. The definition of a **near miss** is a safety event where conditions with potential to generate an accident, incident, or occurrence existed, but where an accident, incident, or occurrence did not occur because the conditions were contained by chance or by existing safety risk mitigations.

Procedures for Reporting Accident, Incident or Occurrence

The following are the procedures for reporting accidents, incidents or occurrences for the Contract Provider (RATP Dev) Operations and Maintenance department personnel:

Employee Responsibilities:

- ❖ All employees must immediately report any accident, incident or occurrence to the Department Manager/Supervisor or Dispatcher on duty regardless of injury or property damage

- ❖ Employees must complete all required reporting paperwork providing details and supporting documentation as necessary on the same day or next day if after hours

If the event involves a passenger vehicle:

- ❖ Remain calm and assess the situation
- ❖ Secure the vehicle (Set Brake, place in neutral & turn on 4-way hazards)
- ❖ Contact Dispatch via radio
- ❖ Provide dispatch with exact location, description of accident, number and type of injuries
- ❖ Secure the scene (Not to move the vehicle unless directed by emergency responders or Supervisors. Place triangles and assist passengers with first aid (if warranted))
- ❖ Request passengers to fill out courtesy comment cards and obtain other witness statements if available
- ❖ Obtain facts about the other vehicles involved and begin filling out accident or incident paperwork
- ❖ Give only information requested by Law Enforcement (DO NOT discuss the accident with anyone other than law Enforcement and Supervisor and DO NOT make any statements concerning liability).
- ❖ Under no circumstances should an operator leave the scene of an accident prior to the arrival of Law Enforcement unless directed to do so by a supervisor or other accident investigator.
- ❖ Supervisor on scene will be the primary accident investigator and will secure medical assistance and or triage the scene to mitigate further damage or injury.
- ❖ The primary accident investigator will take photos, collect witness/passenger courtesy comment cards, interview passengers and other witnesses if allowed, review video and begin supervisor incident reporting paperwork. They will also be responsible for determining post-accident FTA drug and alcohol testing as applicable.
- ❖ The Employee Accident or Incident report should be completed and submitted to the department Manager the same day during working hours, or, next day if the accident or incident occurred during non-business hours.

Supervisor/Manager Responsibilities:

- ❖ Once report is submitted to the appropriate department Manager, all information regarding the accident or incident will then be reviewed, investigated and forwarded to the Contractor General Manager for final review.
- ❖ The original report with all signatures and supporting documentation should be followed by mail or hand delivery within two (2) business days to the SMS Manager.
- ❖ The City Transit Manager will be notified of all accidents or incidents that involve loss of life, serious injury and or property damage or loss

Procedures for Reporting Near Miss

The City of Ocala's PTASP requires proactive reporting of safety hazards or safety concerns on the part of all employees to maintain a proactive position on risk. Each employee, regardless of his or her position within the organization, is expected to cooperate in all aspects of safety reporting.

When an employee becomes aware of a hazard or near miss, they shall submit a report at the end of the shift using one of the following two reporting forms: 1) SunTran's Hazard Incident Report Form or 2) SunTran Driver's View Form for any system deficiencies, road hazards, passenger concerns, etc. that require the attention of management for resolution.

A full investigation may not be required for all near misses. In this case, the Department Manager/Safety Liaison, will determine the level of investigation appropriate to effectively address the report and will forward the final completed investigation report and other documentation to the SMS Manager who will be responsible for documenting and recording on the hazard event tracking log.

When the contributing or causal factor is not readily determined the SMS Safety Liaison for the respective department will review and conduct the follow-up investigations using same procedures as outlined for other safety events.

Accident or Incident Investigation and Corrective Action

As with any investigation, time is of the essence, therefore SunTran's SMS Management team will promptly and thoroughly investigate all safety events that result in product, service, and employee safety risk. Every effort will be made to conclude investigations within 7 business days of the incident. Investigations are a methodical search into an event where information relating to factors that may have caused or contributed to the event are discovered.

The investigation process is comprised of the following three phases:

- 1) **Phase 1 - Initial Investigation and interview** – (In this phase all relevant and pertinent information is obtained and documented accordingly)
- 2) **Phase 2 - Root Cause Determination** – (In this phase contributing or causal factors are identified, assessed)
- 3) **Phase 3 - Prevention/Corrective Action stage** – In this phase recommendations/strategies for corrective action to eliminate or reduce risk is implemented

Assigned personnel will gather all relevant documentation and forward their initial report findings along with supporting documentation to the Site SMS Manager for entry into the Hazard Safety Log. The following documents are required to be submitted in the event of an **accident or incident**:

- ❖ Accident or Incident Report from Employee and Supervisor Report
- ❖ Police report (if apply)
- ❖ FTA Post Accident Drug and Alcohol Testing Decision Form
- ❖ Any additional documentation (optional)

The following documents are required to be submitted in the event of occurrence or near miss:

- ❖ SunTran Driver View Form and/or SunTran Incident Report
- ❖ SMS Hazard Near Miss Employee Reporting Form
- ❖ Any additional documentation (optional)

The SMS Site Manager with assistance from the Department Safety Liaisons and Safety Officer will review and evaluate documentation provided to determine causal or contributing factors from findings that identify risk that require further course of actions. Based on the hazard analysis matrix included herein the appropriate mitigation will be implemented for acceptable and non-acceptable hazards.

As detailed in SunTran's Risk Management Process an investigation report is prepared and submitted to the Safety Committee for review for all safety events to determine if:

- ❖ the safety event was preventable or non-preventable,
- ❖ requires discipline and/or retraining
- ❖ the causal factor(s) indicate(s) that a safety hazard contributed to or was present during the event; and
- ❖ the accident appears to involve underlying organizational causal factors beyond just individual employee behavior.

The SMS Site Manager will then forward findings to the appropriate departments to develop a corrective action plan (CAP) where appropriate. A formal corrective action process may not be necessary for every safety event. In all cases all pertinent information for each safety event will be tracked on the hazard log and followed through to completion. The CAP form will be assigned a number and placed on the hazard log with the corresponding hazard for tracking purposes.

The corrective action plan will contain:

- a. Action to be taken
- b. Proposed completion date
- c. Individual or department responsible for implementation

The SMS Site Manager will follow up the accident or incident accordingly and inform Contractor General Manager and City CSO of the progress. The Site SMS Manager will also submit at minimum monthly updates as well as a copy of all reports identifying need for a formal corrective action plan. When corrective actions are completed, the Site SMS Manager will enter a close date on the Hazard Safety Log.

SMS Documentation and Recordkeeping for Safety Events

The City of Ocala maintains documented procedures for conducting safety investigations of events (accidents, incidents, and occurrences, or near miss as defined by FTA) to find causal and contributing factors and review the existing mitigations in place at the time of the event. These procedures also reflect all traffic safety reporting and investigation requirements established by the City and State. The CSO has assigned the SMS Site Manager to maintain all documentation of SunTran's investigation policies, processes, forms, checklists, activities, and results.



Accident or incident documentation will be filed and maintained in electronic and paper copy in the SMS Site Manager/Operation's Manager's office.

SECTION 6: Safety Promotion

This section outlines SunTran's commitment to safety communication and competencies and training for all employees and contractors directly responsible for safety including refresher training.

Safety Communication

The City of Ocala fosters open and robust communication regarding safety between all levels of SunTran and understands that SMS is dependent upon ongoing management commitment to communication. In addition, the CSO supports all other departments in ensuring that safety messaging and awareness are communicated effectively within each department.

One of management's most important responsibilities under SMS is to encourage and motivate others to want to communicate openly, authentically and without concern for reprisal. Representative of the City's commitment is our employee safety reporting policy and program as described in Section 3 - Safety Management Policy of the PTASP. The Employee Safety Reporting Program sets forth the requirements for both the formal and informal reporting that supports our SMS. Employees are required and encouraged to report hazards, take responsibility for safety in their tasks and work areas, educate themselves on safety in addition to formal training, and attend safety briefings, trainings, activities and events.

Finally, all levels of the agency are required, through formal and informal communications, to ensure that safety information is disseminated throughout the agency. SunTran uses notices, posters and bulletins to ensure all employees are aware of the agency's and their own safety commitments and requirements.

Communication Method

SunTran communicates safety and safety performance information throughout that conveys information on hazards and safety risks relevant to employees' roles and responsibilities and informs employees of safety actions taken in response to reports submitted through an employee safety reporting program, among other information.

Methods of communicating safety information to SunTran employees include face-to-face meetings and interactions, posting and/or distribution of bulletins, department notices, and memoranda. Posted information can be found at a central location in each department easily accessible to employees. Other communication methods include posters, signs, brochures, training materials, rule books, and operating procedures.

SunTran's comprehensive employee safety program includes the following elements:

- ❖ Facility/location safety inspections and audits with written reports and follow-up responses to employees as appropriate;
- ❖ Periodic employee awareness training;
- ❖ Monthly safety committee meetings;
- ❖ Special request employee safety training programs;
- ❖ Safety posters and notices

Safety Competencies and Training

The City of Ocala has established a comprehensive safety training program for all SunTran employees and contractors directly responsible for the management of safety in its transit system. The training program includes refresher training, as necessary.

SunTran's Management Team provides thorough, relevant, and ongoing education and training for all employees to ensure that assigned duties are completed safely and effectively. SunTran requires all employees to be properly trained to perform their jobs safely; to this end, SunTran employs operations and maintenance training with integral safety components to inform employees about job hazards and the appropriate methods for controlling these hazards. Training records are kept in each employee's file.

Training mechanisms include classroom, written and video communications, field exercises, and drills. There are formal training programs for operators and employees involved in maintenance activities. These include training classes, training manuals, lesson plans and field observation.

Testing is conducted as necessary to ensure training effectiveness and all safety training is documented. Tests are given to all new operators to ensure knowledge. Refresher and In-Service training of operators can occur as result of accident investigations, long-term absences, and observations. General refresher training for all operators is scheduled on annual cycle. The frequency and amount of training conducted by the various departments depends upon regulatory requirements and the level of hazard associated with the operation. The CSO will work together with SunTran's Operations and Maintenance Contract service provider to ensure that safety elements are included in the curricula and that safety information is disseminated to affected employees. More specifically, this effort includes:

- ❖ Identifying requirements for all SunTran training as it impacts safety. This encompasses New Employee and Refresher training related to procedures and equipment including manufacturers training and retraining requirements identified as result of accident investigations.
- ❖ Reviewing all training programs for safety adequacy
- ❖ Assessing the effectiveness of training courses and on-the-job experience
- ❖ Providing specific training with specialized curricula to operators, mechanics, and emergency response personnel with the introduction of new vehicle technologies.

Policy 1 – Employees must actively participate in new employee training relevant to the specific job being performed.

- ❖ Training curriculum must be based on federal, state, local, company and contract requirements, incorporating national standards when applicable.
- ❖ Training curriculum must be comprehensive and sufficient in length to enable employees to safely and confidently operate in their work environment.
- ❖ Employees must be trained for all assigned tasks and equipment used on the job.
- ❖ Employees must complete all required hours of each training program.
- ❖ Employee performance must be evaluated and documented upon completion of each training program.
- ❖ Employees must complete a final written exam upon completion of applicable training programs.

- ❖ Training curriculum must be linked to the performance objectives for which employees will be evaluated while on the job.
- ❖ Supervisors and Managers will not authorize or instruct any employee to perform work for which employee has not been trained.

Policy 2 – Employees must actively participate in refresher training or in-service education programs when new requirement, duties, tasks, systems or processes are added or introduced as part of job requirements.

- ❖ New requirements include but are not limited to:
- ❖ Vehicles, equipment, machinery, tools
- ❖ Chemicals or materials
- ❖ Laws, regulations, standards, policies or procedures
- ❖ Transfer to a new job
- ❖ Leave of absence
- ❖ Special circumstances or conditions requiring additional training
- ❖ Supervisors must coordinate refresher training for employees based on current operating trends. Refresher training should be used for accident prevention and trend reversal.
- ❖ Supervisors must ensure that refresher training is provided annually for each employee based on state and contract requirements.
- ❖ Supervisors must inform employees when in-service training is required and provide information regarding the date and time of training.
- ❖ Employees who refuse to comply with refresher or in-service training requirements will be subject to disciplinary action.

Policy 3 – Employees must attend and participate in mandatory, regularly scheduled safety meetings.

- ❖ Supervisors must inform employees of the date and time of safety meetings.
- ❖ Supervisors must arrange for make-up meetings in event that an employee is absent from a safety meeting.
- ❖ Supervisors must ensure that employees have access to and check bulletin boards, orders, and safety notices daily.

Policy 4 – New Operators must complete all required hours of New Operator Training, including both classroom and Behind-The-Wheel (BTW) hours.

- ❖ New Operator curriculum must be based on national training standards, incorporating all federal, state, local, company, and contract requirements.
- ❖ New Operators must be evaluated after completion of each Classroom and Behind-The-Wheel (BTW) training module.
- ❖ BTW hours are defined as actual driving hours behind the wheel, or “hands on the wheel time.”
- ❖ Make-up driving or classroom sessions must be provided for employees who are absent or short on hour requirements.
- ❖ Operators must complete a final written exam upon completion of New Operator Training.

- ❖ Training progress and verification of program completion must be documented and kept in the employee's file.
- ❖ Supervisors or Managers will not authorize or instruct any Operator to operate vehicles for which the Operator has not received proper training.
- ❖ Supervisors must ensure that training curriculum meets all required hours as mandated by specific client, state, local or contractual requirements.
- ❖ Supervisors must ensure that all Instructors have access to standardized training materials in order to teach key subject areas appropriately.
- ❖ Training curriculum must be reviewed and evaluated annually to ensure that training content is relevant, appropriate, and up-to-date.

Policy 5 – Operators must successfully pass on-board evaluations at the end of the training process and before being released to revenue service.

- ❖ Supervisors or other qualified personnel must board the bus and observe the Operator while operating the vehicle.
- ❖ Operator Evaluation forms must be completed and kept in the Operator's file.
- ❖ Supervisors or other qualified personnel must conduct an additional evaluation within 30 days after release into the field for all new Operators.

Policy 6 – Employees responsible for operating a vehicle must actively participate in post-accident training following a preventable accident.

- ❖ Post-accident training content will be based on the root cause of the accident.
- ❖ Operators must complete post-accident training prior to returning to driving duties.
- ❖ Operator performance must be documented and kept on file, showing that the Operator re-mastered the learning points/driving skills associated with the accident.

Policy 7 - System-wide SMS Training

All Key SMS personnel, including Departmental Key SMS personnel, the SMS Executive, and the CSO must receive their FTA certifications through the Transit Safety Institute (TSI) according to the requirements above within 3 years from the date of this Plan. The Accountable Executive will be certified through the FTA-mandated training for that position once FTA has implemented the requisite training program through TSI.

SunTran has also implemented an internal SMS training program to educate all employees on their roles in SMS and the requirements of the Safety Plan. This training is tailored to the employee's responsibilities and is broken down into three levels:

- 1) Executive Management Level, also including Departmental Key SMS Personnel
- 2) Technical Management Level (Supervisors, Superintendents, area Managers)
- 3) Front Line Employees

This training will be implemented over the next 2 years as the City of Ocala implements its SMS program system-wide; the program will then be ongoing through SunTran's New Employee Training program. All employees will receive training in the PTASP and their SMS responsibilities before they begin work at SunTran.

Policy 8 – Safety Related Training

To ensure that all operations and maintenance personnel performing safety-related work are properly trained, qualified, and certified on an ongoing basis as needed, SunTran has established the following categorized safety-related training programs.

Safety-related work at SunTran is defined as vehicle operation; maintenance of vehicles, equipment, infrastructure and facilities; operations and maintenance direct supervision; and operations dispatch.

TABLE I SAFETY-RELATED WORK TRAINING CATEGORIES

Training	Operator	Supervisor	Maintenance
Bus Operator Training	✓		
Bus Equipment Maintenance Training			✓
Service Supervisor Training		✓	
Maintenance Inspection Training			✓
Post-Accident Retraining	✓		
Operator Extended Absence Training	✓		
Communications/Dispatch Training		✓	
Standard Operating Procedures (SOP) Training	✓	✓	✓

SECTION 7: State of Florida Rule 14-90 Requirements

Security Program Plan

In accordance with Rule 14-90, The City of Ocala (SunTran) Transit Division has adopted, and implemented a Security Program Plan (SPP), which covers the security portion of the system safety program plan (SSPP). The SPP contains information about prevention, mitigation, preparedness, response, recovery, and associated organizational responsibilities.

The 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
- ❖ Requirements for private contract transit providers that engage in continuous or recurring transportation services for compensation as result of a contractual agreement with SunTran transit system.
- ❖ Procedures for SPP maintenance and distribution.
- ❖ Requirements for the Transit Operator

Per Rule 14-90, the SPP has been adopted separately from the SMS. 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 secured location by management and given only to the applicable personnel within the agencies and departments responsible for activities in the plan. On site access to the SPP is granted to regulatory authorities (FDOT, FTA, etc.) on an as needed basis.

Select portions of the SPP may be shared with employees depending on their job responsibilities.

Hazard and Security Plan Training

SunTran offers all drivers training on Safety and Security – the training program is as follows:

TSI computer-based training offers a classroom setting and discussion to ensure material is adequately covered.

- ❖ Inspecting for Security
- ❖ Identifying threat
- ❖ Threats and Management Steps

National Safety Institute and FTA Federal Transit Administration. Directs and offers presentations in a classroom discussion in following areas.

- ❖ System Security Awareness (Warning Signs) 20 min Video
- ❖ Vehicle Pre-Trip Inspection and Post Trip Inspection - Drivers are instructed in classroom and instructed when performing an actual inspection. All Drivers perform a pre-trip inspection before taking any vehicle

on the road. This is part of the training for a new driver as well as continued training for all Citrus County Drivers. This education is part theory and part practical training.

- ❖ Drivers receive instruction for hazardous materials on the bus. The information is reviewed at the start of new hire bus orientation, during quarterly refresher training, including Emergency Management training that details what is hazardous that should not be transported.
- ❖ Observation by Employees includes suspicious activity. Drivers receive instruction from TSI training program with discussion and videos giving drivers a look at how to handle situations, and how to identify threats on their daily route.
- ❖ Driver Management Security Situations – The Customer Service training has detailed instruction that includes how an operator should respond to passenger situations.
 - a. Review the rules with the passengers
 - b. Complaints and defusing arguments – reviewed in driver training
 - c. Calling into dispatch for back-up
 - d. Maintaining control of the vehicle and reporting all incidents.

All Drivers must report any Incident or Hazard concern to the Dispatcher and or Supervisor. All drivers will receive instruction on how to report or write up any safety event or incident that takes place on or during the daily route.

State of Florida Minimum Operational, Safety and Maintenance Requirements

To establish a plan for selecting and training operators. The Contractor Operations Manager is responsible for overall compliance with all operating and driving requirements including the recruiting, training, and supervision of employees including drivers pursuant to Rule 14-90.

Qualification and Background Checks

The Contractor Operations Manager is responsible for ensuring that the following minimum standards are met when hiring new drivers:

1. Completed Employment Application 2. Must possess Valid Class B or C Florida driving license with “P” endorsement.	3. Conduct Criminal background check and driving records check including, but not limited to, the following items. <ul style="list-style-type: none"> ❖ Valid Driver’s License check ❖ Social Security Number validations ❖ Criminal history Level II background check ❖ Employment reference checks
4. Successful completion of the DOT pre-employment physical including, eye examination, Federal Transportation Administration (FTA) alcohol and drug-screening test 5. Signed acknowledgement of receipt and agreement to comply with drug-free workplace policy	6. Successful completion of required orientation, training and testing to demonstrate and ensure adequate skills and capabilities to safely operate each type of bus before driving on a street or highway.
7. Signed acknowledgement of receipt of operational policies and procedures manual(s)	8.

The Contractor Operations Manager shall ensure that all driver license records are reviewed and copies of the review results indicating the licenses are valid are placed in personnel files and maintained for five (5) years. A Driver License Verification List will be used to track the expiration dates of all licenses to ensure validity. Per the Employee handbook, all drivers are required to report to the supervisor immediately of receiving a ticket or having an accident while in their personal vehicle. Employees must notify management within two (2) weeks if there are any other changes in the status of driver licenses. The General Manager will perform criminal background and Motor Vehicle Record checks annually.

Medical Exams (Pre-employment and During employment)

The Contractor General Manager must administer an acceptable medical examination program for driver positions and other applicable personnel. This includes the following:

1. Medical examination for all applicants.
2. Medical examinations every two (2) years unless any condition requires more frequent exams
3. Return to duty medical examinations after having been off duty for 30 or more days due to illness, medical condition or injury (Rule 14- 90.0041(1).
4. All information will be in a FDOT Drivers Physical Exams Log.
5. Log will provide employee name, next due date, years approved.
6. A file of original FDOT paperwork will be kept for reference.
7. The operator will receive a copy to comply with driving standards.

All examinations will be recorded on the FDOT Form #725-030-11 for transit system drivers. The medical examinations will be performed by an approved licensed, Doctor of Medicine or Osteopathy, Physician Assistant, registered Nurse practitioner, or ophthalmologist/optometrist (visual section only). The health professional performing the examination will maintain the original executed form and issue a certification copy to the Transit Operator that will be placed in the employee's file. The Contractor Operations Managers will not allow any driver to operate a transit vehicle without having a completed medical examination certification dated within the past twenty-four (24) months. All employee records are retained for a minimum of five years past employment.

Training, Testing, and Supervision

The safe operation of vehicles and the safe transportation of passengers is one of SunTran's highest priorities. Our passengers depend on the knowledge, judgment, and skills of the drivers for their safety and welfare. The training program prepares drivers for these responsibilities but must also go beyond the initial new hire training.

The Operations Manager will develop and maintain a Training Manual for new hire training and testing of employees as part of the Safety Training Program. The training manual shall include but not be limited to the following topics:

1. Communication and handling of unsafe conditions, security threats, and emergencies.
2. Familiarization and operation of safety and emergency equipment, wheelchair lift/ramp equipment, and restraining devices.
3. Application and compliance with all applicable federal and state laws, rules and regulations.

4. Communications- Cellular and electronic devices policy.
5. Drug free workplace Policy.
6. Daily vehicle inspection form completion pursuant to Rule 14-90.006, F.A.C.
7. Training and testing to demonstrate and ensure adequate skills and capabilities to safely operate each type of bus. A vehicle checklist filled out and signed by the operators and driver trainees will be maintained documenting completion of training and testing.
8. Bus transit systems shall provide written operational and safety procedures to all bus drivers before driving on streets or highways unsupervised.
9. A Driver Final Road Evaluation will be conducted by the General Manager before releasing a driver out on their own
10. In addition, all drivers will complete a defensive driver course and a distracted driving course. This includes a Driver evaluation every three (3) years that will review vehicle inspection, Wheelchair loading and Securement, following a Behind the Wheel road test.

The assigned Driver Trainer is responsible for training all New Hire's and Continuing Education. All driver training adheres to (Rule 14-90.004). Records detailing administered training for each employee shall be maintained for five (5) years. At a minimum training will include:

TRAINING TOPICS	
Transit system safety and operational policies/procedures	Vehicle & Equipment Inspections
Basic operations and maneuvering	Equipment Familiarization
Boarding and alighting passengers	Operation of wheelchair lifts & ramps
Handling of emergencies & security threats	Radio Procedures
Defensive driving (must be taken every three years)	Use of electronic devices/wireless communications
Passenger assistance and securement	Driving conditions
Security & threat awareness	SMS Principles & Employee Safety Hazard Reporting
Applicable Local, State, & Federal laws, rules, & regulations	Substance abuse policy

Refresher Training/Continuing Education

SunTran will provide ongoing opportunities for drivers to practice their skills. Annual refresher quarterly training and continuing education will be provided and designed to keep the drivers up to date on safety issues/trends and to build confidence to better perform job duties in a safe accident-free manner. The types of instruction will include:

Classroom instruction – eLearning.
Behind the Wheel Evaluations.
Safety Instructional Videos.
Safety alerts and continuing education on current changes or topics that may affect Transit drivers.

Substance Abuse (Drug & Alcohol) Testing

SunTran is committed to providing safe, dependable, and economical transportation service to its passengers. It is the agency's goal to provide a safe, healthy and satisfying working environment, free of the potential dangers posed

by a safety-sensitive employee's use of prohibited drugs or misuse of alcohol. In meeting these goals, it is our policy to:

- ❖ Assure that employees are not impaired in their ability to perform assigned duties in a safe productive and healthy manner.
- ❖ Create a work place 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.
- ❖ Encourage employees to seek professional assistance when substance abuse adversely affects their ability to perform their assigned duties.

This complies with the Federal Transit Administration regulations codified as 49 CFR Part 655, as amended and USDOT regulations codified as 49 CFR Part 40. All other provisions are implemented under the authority of the United States Department of Transportation (USDOT) and the FTA.

The General Manager and Operations Manager are responsible for the administration and oversight of the program. This includes all testing and reporting to FTA. Along with the Drug and Alcohol Management Information System (DAMIS) reporting on a yearly basis.

- ❖ Procedures for Transportation Workplace Drug and Alcohol Testing are codified as 49 CFR Part 40.
- ❖ The (FTA) Regulations Prevention of Prohibited Drug Use and Alcohol Misuse in Transit Operations, which are codified as 49 CFR Part 655.

Employee Applicability

The USDOT/FTA testing program apply to all safety-sensitive SunTran employees. The policy also applies to volunteers who are required to hold a Commercial Driver's License (CDL). Adherence to this policy and the USDOT/FTA testing program is a condition of employment in a safety-sensitive position with SunTran Transit. All employees of SunTran who perform, or could be called upon to perform, any of the following duties are defined as safety-sensitive employees:

- ❖ Operate a public transportation vehicle, while in or out of service.
- ❖ Operate an ancillary vehicle when the vehicle requires a commercial driver's license.
- ❖ Control the movement of a public transportation vehicle.
- ❖ Perform maintenance on a vehicle or equipment used in public transportation.
- ❖ Carry a firearm as part of transit security detail.

Employee Training

Safety-sensitive employees will receive at least 60 minutes of training on the effects and consequences of prohibited drug use on personal health, safety, and the work environment, and on the signs and symptoms that may indicate prohibited drug use. Including, 60 minutes on the physical, behavioral and performance indicators of probable alcohol use.

Supervisors who make reasonable suspicion determinations shall receive at least 60 minutes of training on the physical, behavioral and performance indicators of probable drug use and 60 minutes on the physical, behavioral and performance indicators of probable alcohol use.

All employees receive a copy of the Substance Abuse Management Policy. This includes ongoing annual training requirements for safety sensitive employees.

Preventive Maintenance

A preventative maintenance schedule is implemented to inspect for safety hazards and to maintain vehicles in a manner conforming to safety regulations. SunTran will perform scheduled preventive maintenance on all vehicles at every 6,000-mile interval following the sequence “A”, “B”, “A”, “C”, according to the agency’s maintenance plan. As preventative maintenance inspections are scheduled by projected mileage, the agency will allow (+-) 600-mile deviations in mileage interval, so long as the actual mileage interval meets the manufacturer’s recommended maintenance schedule. Inspection “A” will be performed every 6,000 miles, inspection “B” will be performed every 12,000 miles, and inspection “C” will be performed every 24,000 miles on each vehicle. Safety inspections are part of the maintenance inspections and will be performed at least once every year with inspection type “C” on each vehicle. 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 due to unavoidable circumstances, preventative maintenance will temporarily be 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.

SunTran’s Fleet Maintenance Manager 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 four 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.
- ❖ 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. When needed a report can be printed for auditing purposes.

Transit Vehicle Failures

SunTran follows these guidelines for mechanical failures. If a Bus breaks down offsite away from the Transit Center, or we receive a phone call from the driver or by two-way radio, the process is as follows:

- Missing belt or a Brake Issue, the vehicle will be towed into Fleet.
- Electrical issues, Fleet may send road repair, or the vehicle will be towed.
- Vehicle Checklists sheets, Service Due remove from service send to Fleet maintenance same day or next day.
- Lift problem, remove from service send to Fleet maintenance for repair that same day.
- Brake issue; remove from service send to Fleet maintenance for repair that same day.
- Steering issue; remove from service send to Fleet maintenance for repair that same day. All vehicles for repair are placed into a serve area. Once repaired by Fleet maintenance, all completed vehicles are placed in line for use.

The Managers, Supervisors, and Dispatchers follow this process for the safe performance of all transit vehicles and equipment.

Hazard and Security Plan (HSP)

In accordance with Rule 14-90.004(2), SunTran has adopted, and implemented a Hazard and Security Plan (HSP), often referred to as the 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 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 result of a contractual agreement with the bus transit system.
- ❖ Procedures for HSP maintenance and distribution.

Records Management

14-90 requires that system safety documents be maintained and retained by the agency for at least four years. Records of daily bus inspections and any corrective action documentation must be retained by the agency for a minimum of two weeks.

The General Manager for SunTran is responsible for implementing a records 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 Hazard Safety Plan 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 is considered a confidential document and will be retained in a secure location by management.

SunTran will maintain and retain the following records for at least four years:

- ❖ Records of bus driver background checks and qualifications (Contractor General Manager)
- ❖ Detailed descriptions of training administered and completed by each bus driver (Contractor Operations Manager).
- ❖ 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 (Payroll).
- ❖ Event investigation reports, corrective action plans, and related supporting documentation (City of Ocala Transit Manager or assigned Contractor designee).
- ❖ Records of preventive maintenance, regular maintenance, inspections, lubrication, and repairs performed for each bus (Fleet Maintenance Manager).
- ❖ Records of annual safety inspections and documentation of any required corrective actions (City of Ocala Transit Manager).
- ❖ Completed and signed CDL Medical cards for each bus driver (Contractor Operations Manager).

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

An organized electronic filing system will be maintained by the agency and 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.

Bus Safety Inspections

Safety inspections are part of the maintenance inspections and are performed at least once every year on all buses operated by SunTran and contracted service providers. The Contractor Fleet Maintenance Manager is responsible for ensuring that each individual performing a bus safety inspection is qualified as follows:

- ❖ Understands the requirements set forth in Rule 14-90 and can identify defective components.
- ❖ Is knowledgeable of and has mastered the methods, procedures, tools, and equipment used when performing an inspection.
- ❖ Has 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 Rule 14-90. Specific operable equipment and devices as required by Rule 14-90 include the following as applicable to Type I and II buses:

- 1) Horn
- 2) Windshield wipers
- 3) Mirrors
- 4) Wiring and batteries
- 5) Service and parking brakes
- 6) Warning devices
- 7) Directional signals
- 8) Hazard warning signals
- 9) Lighting systems and signaling devices
- 10) Handrails and stanchions
- 11) Standee line and warning
- 12) Doors and brake interlock devices
- 13) Step-wells and flooring
- 14) Emergency exits
- 15) Tires and wheels
- 16) Suspension system
- 17) Steering system
- 18) Exhaust system
- 19) Seat belts
- 20) Safety equipment
- 21) Equipment for transporting wheelchairs
- 22) 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.
- ❖ 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.

Safety Data

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 SunTran 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 SunTran management both qualitatively and quantitatively for safety hazard identification, resolution and risk management purposes. The analysis will be conducted and will account for frequency, severity, causal factors, and acceptability of occurrences. 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/or law enforcement agencies on, at minimum, an annual basis for awareness and support.

Operating and Driving Requirements

14-90.006 requires that bus transit systems establish operational and driving requirements. The 14-90 requirements relating to this section are noted below and presented as general text.

The Contractor Operations Manager is responsible for overall compliance with all operating and driving requirements.

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

- a. 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.
- b. Commercial operators 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.
- c. SunTran management will annually check Motor Vehicle Records (MVR) for all commercial operators for investigating information on license suspensions, revocations, accidents, traffic violations, unpaid summons, etc. SunTran's Operations Management will also check driver license status of each driver utilizing the FDOT website - <https://www6.hsmv.state.fl.us/DLCheck/main.jsp>.
- d. 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.
- e. Rule 14-90 defines "On Duty" and "Off Duty" status of commercial operators as follows:
 1. "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.
 2. "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.
- f. Commercial operators 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.
- g. Commercial operators 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.

- h. 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.
- i. Commercial operators 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.
- j. Commercial operators 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.
- k. Commercial operators are required to conduct daily vehicle inspections and reporting of all defects and deficiencies likely to affect safe operation or cause mechanical malfunctions.
- l. Commercial operators 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 Vehicle Inspection form and should be submitted to the Operations Supervisor.
- m. The Supervisor will review the list of daily inspection reports that have a problem listed and document corrective actions taken as a result of any deficiencies identified by daily inspections. The Operations Supervisor will submit the deficiencies to Fleet for correction.
- n. 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.
- o. Commercial operators 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.
- p. 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.
- q. Passengers will not be permitted to stand on buses not designed and constructed for that purpose.
- r. 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.
- s. Commercial operators are required to be properly secured to the driver's seat with a restraining belt at all times while the bus is in motion.
- t. 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.
- u. Buses will not be left unattended in an unsafe condition with passengers aboard at any time.
- v. Commercial operators are prohibited from leaving keys in the vehicle for any reason at any time the bus is left unattended.
- w. 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.

Qualification and Selection of Commercial Operators

14-90.004(3) requires bus transit systems establish criteria and procedures for the selection, qualification, and training of all commercial operators. The criteria shall include the following:

- (a) Driver qualifications and background checks meeting minimum hiring standards.
- (b) Driving and criminal background checks for all new commercial operators.
- (c) Verification and documentation of valid driver licenses for all employees who drive buses.
- (d) 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.
- (e) Bus transit systems shall provide written operational and safety procedures to all bus commercial operators before driving on streets or highways unsupervised.
- (f) The provisions in paragraphs (d) and (e), above, shall not apply to 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.
- (g) Bus transit systems shall maintain the following records for at least four years:
 - 1. Records of bus driver background checks and qualifications.
 - 2. Detailed descriptions of training administered and completed by each bus driver.
 - 3. A record of each bus driver's duty status which shall include total days worked, on-duty hours, driving hours, and time of reporting on and off duty each day.
- (h) Each bus transit system shall establish a drug-free workplace 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, hereby incorporated by reference.
- (i) Bus transit systems shall require that commercial operators write and submit a daily bus inspection report pursuant to Rule 14-90.006, F.A.C.

SunTran is responsible for ensuring that the following minimum standards are met when hiring new commercial operators:

- ❖ Must possess a valid Florida driving license of appropriate class and endorsements.
- ❖ 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:
 - ❖ Complete Driving records through the Florida Department of Motor Vehicles.
 - ❖ E-Verify is used to determine the right to work in the USA.
 - ❖ Last 2 years Previous Employer Drug & Alcohol Questionnaire
 - ❖ Level 2 Background Check through the Florida Department of Law Enforcement.
 - ❖ Employment reference checks.
 - ❖ 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.
- ❖ 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 operations and safety procedures before driving on a street or highway unsupervised:
 1. Communication and handling of unsafe conditions, security threats, and emergencies.
 2. Familiarization and operation of safety and emergency equipment, wheelchair lift equipment, and restraining devices.
 3. Application and compliance with all applicable federal and state laws, rules and regulations.
- ❖ Commercial operators are required to write and submit a daily bus inspection report pursuant to 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:
 1. 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.
 2. Bus transit systems shall provide written operational and safety procedures to all bus commercial operators 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 SunTran to screen applicants to eliminate those that pose a safety or security threat to the agency or would not be able to carry out agency safety and security policies.

Driver Safety Training and Testing

14-90.004(3) establishes driver 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.

All employees and commercial operators of SunTran 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 Operations Manager 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, and testing requirements. All training and testing activities will be adequately documented by the designated Driver Trainer. The Driver Trainer 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.

The following section discusses the training and testing programs to be administered by the Driver Trainer.

Initial Driver Training and Testing

Upon hire and prior to being placed into road service, all commercial operators are required to complete training and testing in the following areas:

- a. Bus transit system safety and operational policies and procedures.
- b. Operational bus and equipment inspections.
- c. Bus equipment familiarization.
- d. Basic operations and maneuvering.
- e. Boarding and alighting passengers.
- f. Operation of wheelchair lift and other special equipment.
- g. Defensive driving.
- h. Passenger assistance and securement.
- i. Handling of emergencies and security threats.
- j. Security and threat awareness, follows Chapter 14-90 Regulations.
- k. Driving conditions.

As part of the driver training program, specific procedures have been incorporated within 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 commercial operators are required to undergo an operator evaluation with an experienced driver trainer. A new-hire training record 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 Driver Trainer. Certificates of completion will be maintained in the driver files for a minimum of 5 years.

All newly hired employees are also provided instructional training by the Operations Manager per agency's HSP. Commercial operators are given instruction in SunTran rules and standard operating procedures in the following areas:

- ❖ General rules of the agency including employee conduct codes.
- ❖ Personal appearance and conduct, covering uniforms, grooming, and employee conduct.
- ❖ Customer service, covering expectations of employees when dealing with the public, including instruction on how, to whom to report security incidents, and types of individuals and/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, which provides instruction on radio procedure for both routine and emergency radio traffic. Including instruction on reporting crimes, suspicious acts, and potentially hazardous situations.
- ❖ Report writing, which provides instruction on report writing, and reporting requirements.
- ❖ Substance abuse policy, which implements a drug and alcohol testing program.
- ❖ Occupational Safety and Health Administration (OSHA) standards, covering blood borne pathogens and other occupational exposure to health hazards.

Wireless Communication

According to 14-90.004, bus transit systems must implement a wireless communication plan and procedure that provides for the safe operation of the bus transit vehicle. The wireless communication plan and procedure shall assure that:

- a. The use of a personal wireless communication device is prohibited while the transit vehicle is in motion, and*
- b. All personal wireless communications devices are turned off with any earpieces removed from the operator's ear while occupying the driver's seat.*

A policy on the use of a wireless communications device issued to the operator by the bus transit system for business related purposes must be developed that assure:

- a. Guidelines are developed that allow for the use of a wireless communications device in emergency situations, and*
- b. The use of a wireless communications device does not interfere with the operator's safety related duties.*

Also, bus transit systems shall develop a driver educational training program addressing:

- a. The proper use of a wireless communications device issued to the operator by the Bus Transit System while in the performance of their safety related duties, and*
- b. The hazards associated with driving and utilizing a wireless communications device.*

“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.

SunTran requires all commercial operators to fully comply with the following wireless communication policies.

Policies on the use of a personal wireless communication device:

- a. The use of a personal wireless communication device is prohibited while the transit vehicle is in motion.
- b. All personal wireless communication devices must be turned off with any earpieces removed from the operator's ear while occupying the driver's seat.
- c. 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.
- d. Commercial operators 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.
- e. 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.
- f. Employees are permitted to use wireless communication devices issued by the bus transit system in the following situations –
 2. A driver needing to communicate with the dispatcher and vise-versa.
 3. A driver requesting medical or emergency assistance.
 4. A driver reporting an illegal activity, a traffic accident, a road hazard, or a safety or security threat.
 5. A Limited English Proficient person needs translation service.

SunTran requires all employees to follow the radio operating procedures. In addition, SunTran has developed a driver educational training and testing program on the proper use of a wireless communications device while in the performance of safety related duties and hazards associated with driving and utilizing these devices. The wireless communications device training and testing is included in Driver Training which all commercial operators are required to complete upon hire, before driving on a street or highway unsupervised.

On-Going/Refresher Training and Testing

The Operations Manager will develop and maintain a Training Manual for ongoing and refresher training and testing of employees. The manual will contain training course content, curriculum, lesson plans, and testing requirements. On-going/refresher training and testing sessions will be conducted as necessary to remain compliant with Rule 14-90. The commercial operators are required to attend training and testing in all areas specified by Rule 14-90 at least once every three years. All training and testing activities are to be recorded and retained in files for a minimum of five years.

Remedial Training and Testing

SunTran will employ remedial training for commercial operators who have been involved in a serious collision or have developed unsafe driving behavior 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 Operations Manager will determine the appropriate remedial training and testing, the results of which will also be documented and retained in files.

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 number of specific activities to ensure personnel who will be conducting activities in response to emergencies use the standard Incident Command System (ICS).

The SunTran HSP 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. All training and testing activities will also be recorded and retained in files.



TO: TPO Board Members

FROM: Rob Balmes, Director

**RE: Amendment to the Fiscal Years (FY) 2020/21 to 2021/22
Unified Planning Work Program (UPWP)**

An amendment is requested to the current FY 2020/21 to 2021/22 Unified Planning Work Program (UPWP). The amendment will include the carryforward of Federal Transit Administration (FTA) 5305(d) grant funding identified in the prior FY 2016/17 to 2017/18 UPWP. The total balance of \$36,382 of the grant is proposed to be carried forward to the FY 20/21 to 21/22 UPWP Task 7 Special Projects, and be allocated to support a Safety Action Plan. Included with this memo are current and proposed funding in Table 7A by Federal (FTA), State and Local, along with the revised total budget summary for FY 20/21.

If you have any questions regarding the proposed UPWP amendment or the grant funding, please contact me at 438-2631.

TASK 7: SPECIAL PROJECTS - Original

Purpose

Identifies special projects and activities that are non-recurring, such as planning studies and research in support of various transportation issues.

Previous Work Completed

The completed special transportation planning activities of the TPO in FY 2018/19 and FY 2019/20.

- Completed Pennsylvania Avenue Multimodal Improvements Study in 2019.
- Completed Regional Trails Facilities Plan in 2019.

Required Activities

The special project activities planned for FY 2020/21 and FY 2021/22, including end product(s) and completion date(s).

Activity	End Product(s)	Completion Date(s)
Congestion Management Plan (CPM) major update, including policy procedures and state of system reports	Updated CMP document(s) and corresponding databases, maps	October 2021
Complete a Safety Plan and/or strategies to improve safety for all users in Marion County	Safety Plan/Study	April 2022
Complete Economic and Community Benefits of Bicycling and Trails Study in Marion County	Study Report	April 2022
Develop a timesheet tool to support monitoring and reporting for invoicing and record keeping	Timesheet Tool and Database	June 2021
Conduct corridor or subarea studies to improve mobility, safety and support economic development in Marion County	Studies	As requested
Complete transportation studies for major activity centers (e.g. downtown, employment hub)	Studies	As requested
Assess/identify vulnerable road and bridge assets that may be disrupted or damaged by extreme weather events	Study	As needed
Plan for the integration of automated, connected, electric, shared vehicles and other emerging technologies	Study	As needed

Responsible Agency: Ocala Marion TPO

Responsible Staff: TPO Director, TPO Assistant Director, Transportation Planner, Consultant.

Budget Summary

The estimated budget for Task 7 in FY 2020/21 and FY 2021/22 is summarized in Tables 7A and 7B.

Table 7A: Task 7 Estimated Budget for FY 2020/21

Task 7						
Estimated Budget detail for FY 2020/21						
Budget Category	Budget Category Description	FHWA (PL)	FTA 5305(d)	TD	Local	Total:
A. Personnel						
	Salaries & Benefits	\$ 34,691	\$ 11,500	\$ -		\$ 46,191
	Total:	\$ 34,691	\$ 11,500	\$ -		\$ 46,191
B. Consultant						
	*Consultants	\$ 186,538	\$ 59,807	\$ -		\$ 246,345
	Total:	\$ 186,538	\$ 59,807	\$ -		\$ 246,345
C. Travel						
	Travel Expenses	\$ -	\$ -	\$ -		\$ -
	Total:	\$ -	\$ -	\$ -		\$ -
181						
		\$ -	\$ -	\$ -		\$ -
	Total:	\$ -	\$ -	\$ -		\$ -
TOTAL BUDGET		\$ 221,229	\$ 71,307	\$ -		\$ 292,536

Table 7B: Task 7 Estimated Budget for FY 2021/22

Task 7						
Estimated Budget detail for FY 2021/22						
Budget Category	Budget Category Description	FHWA (PL)	FTA 5305(d)	TD	Local	Total:
A. Personnel						
	Salaries & Benefits	\$ 15,117	\$ -	\$ -		\$ 15,117
	Total:	\$ 15,117	\$ -	\$ -		\$ 15,117
B. Consultant						
	*Consultants	\$ 16,303	\$ 19,215	\$ -		\$ 35,518
	Total:	\$ 16,303	\$ 19,215	\$ -		\$ 35,518
C. Travel						
	Travel Expenses	\$ -	\$ -	\$ -		\$ -
	Total:	\$ -	\$ -	\$ -		\$ -
D. Direct Expenses						
		\$ -	\$ -	\$ -		\$ -
	Total:	\$ -	\$ -	\$ -		\$ -
TOTAL BUDGET		\$ 31,420	\$ 19,215	\$ -		\$ 50,635

*In addition to the funding amounts for consultant services listed in Tables 7A and 7B, a Congestion Management Plan (CMP) and an Economic Study regarding the impacts of cycling and trails are documented in the previous UPWP FY 18-20. The TPO will utilize authorized 5305(d) and PL funds to support the completion of a Congestion Management Plan, Safety Action Plan and Economic Study of cycling and trails from executed grants in FY 19/20 and 20/21, in addition to authorized PL funds in FY 20/21 and 21/22. For more financial information regarding these projects, access the TPO website at the following link: <https://ocalamariontpo.org/plans-and-programs/unified-planning-work-plan-upwp>.

TASK 7: SPECIAL PROJECTS - Proposed

Purpose

Identifies special projects and activities that are non-recurring, such as planning studies and research in support of various transportation issues.

Previous Work Completed

The completed special transportation planning activities of the TPO in FY 2018/19 and FY 2019/20.

- Completed Pennsylvania Avenue Multimodal Improvements Study in 2019.
- Completed Regional Trails Facilities Plan in 2019.

Required Activities

The special project activities planned for FY 2020/21 and FY 2021/22, including end product(s) and completion date(s).

Activity	End Product(s)	Completion Date(s)
Congestion Management Plan (CPM) major update, including policy procedures and state of system reports	Updated CMP document(s) and corresponding databases, maps	October 2021
Complete a Safety Plan and/or strategies to improve safety for all users in Marion County	Safety Plan/Study	April 2022
Complete Economic and Community Benefits of Bicycling and Trails Study in Marion County	Study Report	April 2022
Develop a timesheet tool to support monitoring and reporting for invoicing and record keeping	Timesheet Tool and Database	June 2021
Conduct corridor or subarea studies to improve mobility, safety and support economic development in Marion County	Studies	As requested
Complete transportation studies for major activity centers (e.g. downtown, employment hub)	Studies	As requested
Assess/identify vulnerable road and bridge assets that may be disrupted or damaged by extreme weather events	Study	As needed
Plan for the integration of automated, connected, electric, shared vehicles and other emerging technologies	Study	As needed

Responsible Agency: Ocala Marion TPO

Responsible Staff: TPO Director, TPO Assistant Director, Transportation Planner, Consultant.

Budget Summary - **Proposed**

The estimated budget for Task 7 in FY 2020/21 and FY 2021/22 is summarized in Tables 7A and 7B.

Table 7A: Task 7 Estimated Budget for FY 2020/21

Task 7								
Estimated Budget detail for FY 2020/21								
		FHWA (PL)	FTA 5305(d) FY 20/21	*FTA 5305(d) Carry Forward			Local	Total:
Budget Category	Budget Category Description			Federal (FTA)	FDOT Match	Local Match		
A. Personnel								
	Salaries & Benefits	\$ 34,691	\$ 11,500	\$ -	\$ -	\$ -	\$ -	\$ 46,191
	Total:	\$ 34,691	\$ 11,500	\$ -	\$ -	\$ -	\$ -	\$ 46,191
B. Consultant								
	# Consultants	\$ 186,538	\$ 59,807	\$ -		\$ -	\$ -	\$ 246,345
	Safety Action Plan	\$ -	\$ -	\$ 29,106	\$ 3,638	\$ 3,638	\$ -	\$ 36,382
	Total:	\$ 186,538	\$ 59,807	\$ 29,106	\$ 3,638	\$ 3,638	\$ -	\$ 282,727
C. Travel								
	Travel Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Direct Expenses								
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL BUDGET		\$ 34,691	\$ 11,500	\$ 29,106	\$ 3,638	\$ 3,638		\$ 328,918

Table 7B: Task 7 Estimated Budget for FY 2021/22

Task 7						
Estimated Budget detail for FY 2021/22						
Budget Category	Budget Category Description	FHWA (PL)	FTA 5305(d)	TD	Local	Total:
A. Personnel						
	Salaries & Benefits	\$ 15,117	\$ -	\$ -		\$ 15,117
	Total:	\$ 15,117	\$ -	\$ -		\$ 15,117
B. Consultant						
	# Consultants	\$ 16,303	\$ 19,215	\$ -		\$ 35,518
	Total:	\$ 16,303	\$ 19,215	\$ -		\$ 35,518
C. Travel						
	Travel Expenses	\$ -	\$ -	\$ -		\$ -
	Total:	\$ -	\$ -	\$ -		\$ -
D. Direct Expenses						
		\$ -	\$ -	\$ -		\$ -
	Total:	\$ -	\$ -	\$ -		\$ -
TOTAL BUDGET		\$ 31,420	\$ 19,215	\$ -		\$ 50,635

*Carry Forward FTA 5305(d) grant funding (Contract G1U98, FY 16/17)

#In addition to the funding amounts for consultant services listed in Tables 7A and 7B, a Congestion Management Plan (CMP) and an Economic Study regarding the impacts of cycling and trails are documented in the previous UPWP FY 18-20. The TPO will utilize authorized 5305(d) and PL funds to support the completion of a Congestion Management Plan, Safety Action Plan and Economic Study of cycling and trails from executed grants in FY 19/20 and 20/21, in addition to authorized PL funds in FY 20/21 and 21/22. For more financial information regarding these projects, access the TPO website at the following link: <https://ocalamariontpo.org/plans-and-programs/unified-planning-work-plan-upwp>.

SUMMARY BUDGET TABLES - Original

FISCAL YEAR 2020/2021 AGENCY PARTICIPATION SUMMARY BY TASK AND FUNDING SOURCE

FY 2020/21 FUNDING SOURCES												
TASK	ELEMENT	Planning Funds (PL)		Local	FTA Section 5305(d)		TD	SunTran	Total			Task Total
		FHWA	**FDOT Soft Match	Local Fund	FY 2020/21 FTA 5305(d)		State	^ FTA 5307	Federal	State	Local	
					FTA	**FDOT Soft Match						
1	Admin (Less 1B)	\$ 314,463	\$ 56,824	\$ -	\$ 14,905	\$ 3,726	\$ 4,411	\$ -	\$ 329,368	\$ 4,411	\$ -	\$ 333,779
1B	CFMPOA*	\$ 5,000	\$ 904	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -	\$ -	\$ 5,000
2	Data/Safety	\$ 22,599	\$ 4,084	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,599	\$ -	\$ -	\$ 22,599
3	LRP	\$ 41,717	\$ 7,538	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 41,717	\$ -	\$ -	\$ 41,717
4	SRP	\$ 28,217	\$ 5,099	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,217	\$ -	\$ -	\$ 28,217
5	Public Trans.	\$ 6,738	\$ 1,218	\$ -	\$ -	\$ -	\$ 22,327	\$ 69,800	\$ 6,738	\$ 22,327	\$ -	\$ 29,065
6	Public Inv.	\$ 47,063	\$ 8,504	\$ -	\$ 494	\$ 123	\$ -	\$ -	\$ 47,557	\$ -	\$ -	\$ 47,557
7	Special Proj.	\$ 221,229	\$ 39,976	\$ -	\$ 71,307	\$ 17,827	\$ -	\$ -	\$ 292,536	\$ -	\$ -	\$ 292,536
8	Local Funds	\$ -	\$ -	\$ 3,500	\$ -	\$ -	\$ -		\$ -	\$ -	\$ 3,500	\$ 3,500
TOTAL:		\$ 687,026	\$ 124,146	\$ 3,500	\$ 86,706	\$ 21,676	\$ 26,738	\$ 69,800	\$ 773,733	\$ 26,738	\$ 3,500	\$ 803,970
*FHWA PL Funds transferred per MetroPlan Orlando for CFMPOA agreement. CFMPO Alliance members include: MetroPlan Orlando, River to Sea TPO, Space Coast TPO, Lake-Sumter MPO, Ocala Marion TPO												
**All federal funds, including fund transfers, apply the required non-federal match (FDOT State Soft Match)												
^ Total FTA 5307 Funding to SunTran. Not included in TPO Funding totals in this table												

FY 2020/21 AGENCY PARTICIPATION										
TASK	ELEMENT	FHWA	FTA	FDOT	TD	Local	Total	CFMPO Transfer	*Consultant	^ SunTran
1	Admin	\$ 319,463	\$ 14,905	\$ -	\$ 4,411	\$ -	\$ 338,779	\$ 5,000	\$ -	\$ -
2	Data/Safety	\$ 22,599	\$ -	\$ -	\$ -	\$ -	\$ 22,599	\$ -	\$ -	\$ -
3	LRP	\$ 41,717	\$ -	\$ -	\$ -	\$ -	\$ 41,717	\$ -	\$ 10,960	\$ -
4	SRP	\$ 28,217	\$ -	\$ -	\$ -	\$ -	\$ 28,217	\$ -	\$ -	\$ -
5	Public Trans.	\$ 6,738	\$ -	\$ -	\$ 22,327	\$ -	\$ 29,065	\$ -	\$ -	\$ 69,800
6	Public Inv.	\$ 47,063	\$ 494	\$ -	\$ -	\$ -	\$ 47,557	\$ -	\$ 4,030	\$ -
7	Special Proj.	\$ 221,229	\$ 71,307	\$ -	\$ -	\$ -	\$ 292,536	\$ -	\$ 246,345	\$ -
8	Local Funds	\$ -	\$ -	\$ -	\$ -	\$ 3,500	\$ 3,500	\$ -	\$ 500	\$ -
TOTAL:		\$ 687,026	\$ 86,706	\$ -	\$ 26,738	\$ 3,500	\$ 803,970	\$ 5,000	\$ 261,835	\$ 69,800
*Consultant charges not included in total, as they are already calculated within each agencies charges for that specific task										
^SunTran 5307 funding not included in total as agency budget and tasks are separate from TPO										

ESTIMATED BUDGET DETAIL FISCAL YEAR (FY) 2020/2021

JULY 1, 2020 - JUNE 30, 2021 BUDGET					
Budget Category/Description	FHWA (PL)	FTA 5305(d) FY 20/21	TD	Local	Total
A. Personnel					
Salaries and Fringe Benefits	\$ 413,621	\$ 16,500	\$ 22,327	\$ -	\$ 452,448
Subtotal:	\$ 413,621	\$ 16,500	\$ 22,327	\$ -	\$ 452,448
B. Consultant Services					
Consultant Services	\$ 206,034	\$ 60,301	\$ -	\$ 500	\$ 266,835
Subtotal:	\$ 206,034	\$ 60,301	\$ -	\$ 500	\$ 266,835
C. Travel					
Travel	\$ 9,864	\$ 1,573	\$ 1,069	\$ 500	\$ 13,006
Subtotal:	\$ 9,864	\$ 1,573	\$ 1,069	\$ 500	\$ 13,006
D. Direct Expenses					
Postage & Freight	\$ 332	\$ 42	\$ 16	\$ -	\$ 390
Rent & Leases - Equip. (Copier)	\$ 2,158	\$ 338	\$ 104	\$ -	\$ 2,600
Advertising - Legal	\$ 1,660	\$ 208	\$ 716	\$ -	\$ 2,584
Insurance Premiums	\$ 1,362	\$ -	\$ -	\$ -	\$ 1,362
Printing & Binding (Educational)	\$ 415	\$ 52	\$ 20	\$ -	\$ 487
Office Supplies	\$ 3,735	\$ 468	\$ 180	\$ 500	\$ 4,883
Operating - Computer Software	\$ 5,686	\$ 712	\$ 274	\$ -	\$ 6,672
Dues & Memberships	\$ -	\$ -	\$ -	\$ 2,000	\$ 2,000
Machinery & Equipment	\$ 2,905	\$ 364	\$ 140	\$ -	\$ 3,409
Subtotal:	\$ 18,253	\$ 2,184	\$ 1,450	\$ 2,500	\$ 24,387
E. Indirect Expenses					
Marion County Cost Allocation	\$ 39,254	\$ 6,148	\$ 1,892	\$ -	\$ 47,294
SubTotal:	\$ 39,254	\$ 6,148	\$ 1,892	\$ -	\$ 47,294
Revenues	\$ 687,026	\$ 86,706	\$ 26,738	\$ 3,500	\$ 803,970
Expenditures	\$ 687,026	\$ 86,706	\$ 26,738	\$ 3,500	\$ 803,970

SUMMARY BUDGET TABLES - Proposed

FISCAL YEAR 2020/2021 AGENCY PARTICIPATION SUMMARY BY TASK AND FUNDING SOURCE

FY 2020/21 FUNDING SOURCES																	
TASK	ELEMENT	Planning Funds (PL) Local			FTA Section 5305(d)					TD	SunTran	Total			Task Total		
		FHWA	**FDOT Soft Match	Local Fund	FY 2020/21 FTA 5305(d)		Carry Forward FTA 5305(d)					State	^ FTA 5307	Federal		State	Local
					FTA	**FDOT Soft Match	FTA	FDOT Match	Local Match								
1	Admin (Less 1B)	\$ 314,463	\$ 56,824	\$ -	\$ 14,905	\$ 3,726				\$ 4,411	\$ -	\$ 329,368	\$ 4,411	\$ -	\$ 333,779		
1B	CFMPOA*	\$ 5,000	\$ 904	\$ -	\$ -	\$ -				\$ -	\$ -	\$ 5,000	\$ -	\$ -	\$ 5,000		
2	Data/Safety	\$ 22,599	\$ 4,084	\$ -	\$ -	\$ -				\$ -	\$ -	\$ 22,599	\$ -	\$ -	\$ 22,599		
3	LRP	\$ 41,717	\$ 7,538	\$ -	\$ -	\$ -				\$ -	\$ -	\$ 41,717	\$ -	\$ -	\$ 41,717		
4	SRP	\$ 28,217	\$ 5,099	\$ -	\$ -	\$ -				\$ -	\$ -	\$ 28,217	\$ -	\$ -	\$ 28,217		
5	Public Trans.	\$ 6,738	\$ 1,218	\$ -	\$ -	\$ -				\$ 22,327	\$ 69,800	\$ 6,738	\$ 22,327	\$ -	\$ 29,065		
6	Public Inv.	\$ 47,063	\$ 8,504	\$ -	\$ 494	\$ 123				\$ -	\$ -	\$ 47,557	\$ -	\$ -	\$ 47,557		
7	Special Proj.	\$ 221,229	\$ 39,976	\$ -	\$ 71,307	\$ 17,827	\$ 29,106	\$ 3,638	\$ 3,638	\$ -	\$ -	\$ 321,642	\$ 3,638	\$ 3,638	\$ 328,918		
8	Local Funds	\$ -	\$ -	\$ 3,500	\$ -	\$ -				\$ -		\$ -	\$ -	\$ 3,500	\$ 3,500		
TOTAL:		\$ 687,026	\$ 124,146	\$ 3,500	\$ 86,706	\$ 21,676	\$ 29,106	\$ 3,638	\$ 3,638	\$ 26,738	\$ 69,800	\$ 802,839	\$ 30,376	\$ 7,138	\$ 840,352		
*FHWA PL Funds transferred per MetroPlan Orlando for CFMPOA agreement. CFMPO Alliance members include: MetroPlan Orlando, River to Sea TPO, Space Coast TPO, Lake-Sumter MPO, Ocala Marion TPO and Polk TPO																	
**All federal funds, including fund transfers, apply the required non-federal match (FDOT State Soft Match)																	
^ Total FTA 5307 Funding to SunTran. Not included in TPO Funding totals in this table																	

FY 2020/21 AGENCY PARTICIPATION										
TASK	ELEMENT	FHWA	FTA	FDOT	TD	Local	Total	CFMPO Transfer	*Consultant	^ SunTran
1	Admin	\$ 319,463	\$ 14,905	\$ -	\$ 4,411	\$ -	\$ 338,779	\$ 5,000	\$ -	\$ -
2	Data/Safety	\$ 22,599	\$ -	\$ -	\$ -	\$ -	\$ 22,599	\$ -	\$ -	\$ -
3	LRP	\$ 41,717	\$ -	\$ -	\$ -	\$ -	\$ 41,717	\$ -	\$ 10,960	\$ -
4	SRP	\$ 28,217	\$ -	\$ -	\$ -	\$ -	\$ 28,217	\$ -	\$ -	\$ -
5	Public Trans.	\$ 6,738	\$ -	\$ -	\$ 22,327	\$ -	\$ 29,065	\$ -	\$ -	\$ 69,800
6	Public Inv.	\$ 47,063	\$ 494	\$ -	\$ -	\$ -	\$ 47,557	\$ -	\$ 4,030	\$ -
7	Special Proj.	\$ 221,229	\$ 100,413	\$ 3,638	\$ -	\$ 3,638	\$ 328,918	\$ -	\$ 246,345	\$ -
8	Local Funds	\$ -	\$ -	\$ -	\$ -	\$ 3,500	\$ 3,500	\$ -	\$ 500	\$ -
TOTAL:		\$ 687,026	\$ 115,812	\$ 3,638	\$ 26,738	\$ 7,138	\$ 840,352	\$ 5,000	\$ 261,835	\$ 69,800
*Consultant charges not included in total, as they are already calculated within each agencies charges for that specific task										
^SunTran 5307 funding not included in total as agency budget and tasks are separate from TPO										

ESTIMATED BUDGET DETAIL FISCAL YEAR (FY) 2020/2021

JULY 1, 2020 - JUNE 30, 2021 BUDGET								
Budget Category/Description	FHWA (PL)	FTA 5305(d) FY 20/21	FTA 5305(d) Carry Forward			TD	Local	Total
			FTA	FDOT	Local			
A. Personnel								
Salaries and Fringe Benefits	\$ 413,621	\$ 16,500	\$ -	\$ -	\$ -	\$ 22,327	\$ -	\$ 452,448
Subtotal:	\$ 413,621	\$ 16,500	\$ -	\$ -	\$ -	\$ 22,327	\$ -	\$ 452,448
B. Consultant Services								
Consultant Services	\$ 206,034	\$ 60,301	\$ 29,106	\$ 3,638	\$ 3,638	\$ -	\$ 500	\$ 266,835
Subtotal:	\$ 206,034	\$ 60,301	\$ 29,106	\$ 3,638	\$ 3,638	\$ -	\$ 500	\$ 303,217
C. Travel								
Travel	\$ 9,864	\$ 1,573	\$ -	\$ -	\$ -	\$ 1,069	\$ 500	\$ 13,006
Subtotal:	\$ 9,864	\$ 1,573	\$ -	\$ -	\$ -	\$ 1,069	\$ 500	\$ 13,006
D. Direct Expenses								
Postage & Freight	\$ 332	\$ 42	\$ -	\$ -	\$ -	\$ 16	\$ -	\$ 390
Rent & Leases - Equip. (Copier)	\$ 2,158	\$ 338	\$ -	\$ -	\$ -	\$ 104	\$ -	\$ 2,600
Advertising - Legal	\$ 1,660	\$ 208	\$ -	\$ -	\$ -	\$ 716	\$ -	\$ 2,584
Insurance Premiums	\$ 1,362	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,362
Printing & Binding (Educational)	\$ 415	\$ 52	\$ -	\$ -	\$ -	\$ 20	\$ -	\$ 487
Office Supplies	\$ 3,735	\$ 468	\$ -	\$ -	\$ -	\$ 180	\$ 500	\$ 4,883
Operating - Computer Software	\$ 5,686	\$ 712	\$ -	\$ -	\$ -	\$ 274	\$ -	\$ 6,672
Dues & Memberships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000	\$ 2,000
Machinery & Equipment	\$ 2,905	\$ 364	\$ -	\$ -	\$ -	\$ 140	\$ -	\$ 3,409
Subtotal:	\$ 18,253	\$ 2,184	\$ -	\$ -	\$ -	\$ 1,450	\$ 2,500	\$ 24,387
E. Indirect Expenses								
Marion County Cost Allocation	\$ 39,254	\$ 6,148	\$ -	\$ -	\$ -	\$ 1,892	\$ -	\$ 47,294
SubTotal:	\$ 39,254	\$ 6,148	\$ -	\$ -	\$ -	\$ 1,892	\$ -	\$ 47,294
Revenues	\$ 687,026	\$ 86,706	\$ 29,106	\$ 3,638	\$ 3,638	\$ 26,738	\$ 3,500	\$ 840,352
Expenditures	\$ 687,026	\$ 86,706	\$ 29,106	\$ 3,638	\$ 3,638	\$ 26,738	\$ 3,500	\$ 840,352



Revision Number: 5

Fiscal Year: 2020/21

Contract #: G1U98

Fund: FTA - 5305

Form: 1 of: 1

Part of a De-Ob: ☒ No

No

Revision Type: Amendment

Modification Required Documentation

- ☐ Task Pages (including task budget tables)-Original & Proposed
☐ Agency Participation Budget Table-Original & Proposed
☐ Fund Summary Budget Table-Original & Proposed

- ☐
- Signed Cost Certification**

- ☒ **Task Pages** (including task budget tables)-Original & Proposed
- ☒ **Agency Participation Budget Table**-Original & Proposed
- ☒ **Fund Summary Budget Table**-Original & Proposed

- ☐
- Signed Cost Certification

- ☒
- MPO Meeting Agenda

- ☐ **TIP Modification**

- ☒
- Amended Agreement

FDOT	Reviewer:	Action:
	Comments:	
FHWA / FTA	Reviewer:	Action:
	Comments:	



TO: TPO Board Members

FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner

RE: Evaluation of the Community Transportation Coordinator (CTC), FY 2021

Pursuant to Chapter 427 Florida Statutes 427.015(2), the performance of the Community Transportation Coordinator (CTC) shall be evaluated annually based on the Commission for the Transportation Disadvantaged's (CTD) approved evaluation criteria. TPO staff conducted the evaluation during the month of January and February.

The evaluation includes an analysis of all relevant elements within the operations of Marion Transit Services. Examples include:

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

The CTC Evaluation is being submitted to the Board for review and approval.

Any questions, additional comments and/or suggestions please submit to Liz Mitchell, liz.mitchell@marioncountyfl.org.

CTC

EVALUATION WORKBOOK

Florida Commission for the



Transportation Disadvantaged

CTC BEING REVIEWED: _____

COUNTY (IES): _____

ADDRESS: _____

CONTACT: _____ **PHONE:** _____

REVIEW PERIOD: _____ **REVIEW DATES:** _____

PERSON CONDUCTING THE REVIEW: _____

CONTACT INFORMATION: _____

LCB EVALUATION WORKBOOK

ITEM	PAGE
REVIEW CHECKLIST _____	3
EVALUATION INFORMATION _____	5
ENTRANCE INTERVIEW QUESTIONS _____	6
GENERAL QUESTIONS _____	9
CHAPTER 427, F.S. _____	13
RULE 41-2, F.A.C. _____	22
COMMISSION STANDARDS _____	32
LOCAL STANDARDS _____	33
AMERICANS WITH DISABILITIES ACT _____	36
FY GRANT QUESTIONS _____	42
STATUS REPORT _____	43
ON-SITE OBSERVATION _____	45
SURVEYS _____	47
LEVEL OF COST WORKSHEET # 1 _____	52
LEVEL OF COMPETITION WORKSHEET #2 _____	53
LEVEL OF AVAILABILITY WORKSHEET #3 _____	55

REVIEW CHECKLIST & SCHEDULE

COLLECT FOR REVIEW:

- ☐ APR Data Pages
- ☐ QA Section of TDSP
- ☐ Last Review (Date:_____)
- ☐ List of Omb. Calls
- ☐ QA Evaluation
- ☐ Status Report (from last review)
- ☐ AOR Submittal Date
- ☐ TD Clients to Verify
- ☐ TDTF Invoices
- ☐ Audit Report Submittal Date

ITEMS TO REVIEW ON-SITE:

- ☐ SSPP
- ☐ Policy/Procedure Manual
- ☐ Complaint Procedure
- ☐ Drug & Alcohol Policy (see certification)
- ☐ Grievance Procedure
- ☐ Driver Training Records (see certification)
- ☐ Contracts
- ☐ Other Agency Review Reports
- ☐ Budget
- ☐ Performance Standards
- ☐ Medicaid Documents

ITEMS TO REQUEST:

- ☐ **REQUEST INFORMATION FOR RIDER/BENEFICIARY SURVEY** (Rider/Beneficiary Name, Agency who paid for the trip [sorted by agency and totaled], and Phone Number)
- ☐ **REQUEST INFORMATION FOR CONTRACTOR SURVEY** (Contractor Name, Phone Number, Address and Contact Name)
- ☐ **REQUEST INFORMATION FOR PURCHASING AGENCY SURVEY** (Purchasing Agency Name, Phone Number, Address and Contact Name)
- ☐ **REQUEST ANNUAL QA SELF CERTIFICATION** (Due to CTD annually by January 15th).
- ☐ **MAKE ARRANGEMENTS FOR VEHICLES TO BE INSPECTED** (Only if purchased after 1992 and privately funded).

INFORMATION OR MATERIAL TO TAKE WITH YOU:

- ☐ Measuring Tape
- ☐ Stop Watch

EVALUATION INFORMATION

An LCB review will consist of, but is not limited to the following pages:

1	Cover Page
5 - 6	Entrance Interview Questions
12	Chapter 427.0155 (3) Review the CTC monitoring of contracted operators
13	Chapter 427.0155 (4) Review TDSP to determine utilization of school buses and public transportation services
19	Insurance
23	Rule 41-2.011 (2) Evaluation of cost-effectiveness of Coordination Contractors and Transportation Alternatives
25 - 29	Commission Standards and Local Standards
39	On-Site Observation
40 – 43	Surveys
44	Level of Cost - Worksheet 1
45- 46	Level of Competition – Worksheet 2
47 - 48	Level of Coordination – Worksheet 3

Notes to remember:

- **The CTC should not conduct the evaluation or surveys. If the CTC is also the PA, the PA should contract with an outside source to assist the LCB during the review process.**
- **Attach a copy of the Annual QA Self Certification.**

CTC EVALUATION

INTRODUCTION:

In accordance with Florida Statutes, Chapter 427, and the Florida Commission for the Transportation Disadvantaged, the Marion County Community Transportation Coordinator (CTC) evaluation is conducted annually by members of the Transportation Disadvantaged Local Coordinating Board (TDLCB) with assistance from the Ocala Marion Transportation Planning Organization (TPO) staff. The TDLCB evaluates the CTC in order to ensure quality of service is being provided in the most cost effective and efficient manner. The evaluation encompasses management, operations, service, safety, vehicle maintenance, drivers and training, utilizing the Commission for the Transportation Disadvantaged CTC Evaluation Workbook.

The final workbook with the recommendations will be transmitted to the Florida Commission for the Transportation Disadvantaged and the Marion County CTC by the TPO staff. The CTC will forward a status report to the TDLCB within 30 working days.

The evaluation report and recommendations to the CTC were presented to the TDLCB at the March 18, 2021 meeting.

ENTRANCE INTERVIEW QUESTIONS

INTRODUCTION AND BRIEFING:

- ☐ Describe the evaluation process (LCB evaluates the CTC and forwards a copy of the evaluation to the CTD).
- ☐ The LCB reviews the CTC once every year to evaluate the operations and the performance of the local coordinator.

The LCB will be reviewing the following areas:

- ☐ Chapter 427, Rules 41-2 and 14-90, CTD Standards, and Local Standards
- ☐ Following up on the Status Report from last year and calls received from the Ombudsman program.
- ☐ Monitoring of contractors.
- ☐ Surveying riders/beneficiaries, purchasers of service, and contractors
- ☐ The LCB will issue a Review Report with the findings and recommendations to the CTC no later than 30 working days after the review has concluded.
- ☐ Once the CTC has received the Review Report, the CTC will submit a Status Report to the LCB within 30 working days.
- ☐ Give an update of Commission level activities (last meeting update and next meeting date), if needed.

USING THE APR, COMPILE THIS INFORMATION:

1. OPERATING ENVIRONMENT:

- ☐ RURAL ☐ URBAN

2. ORGANIZATION TYPE:

- ☐ PRIVATE-FOR-PROFIT
- ☐ PRIVATE NON-PROFIT
- ☐ GOVERNMENT
- ☐ TRANSPORTATION AGENCY

3. NETWORK TYPE:

- ☐ SOLE PROVIDER
☐ PARTIAL BROKERAGE
☐ COMPLETE BROKERAGE

4. NAME THE OPERATORS THAT YOUR COMPANY HAS CONTRACTS WITH:

5. NAME THE GROUPS THAT YOUR COMPANY HAS COORDINATION CONTRACTS WITH:

Coordination Contract Agencies				
Name of Agency	Address	City, State, Zip	Telephone Number	Contact

6. NAME THE ORGANIZATIONS AND AGENCIES THAT PURCHASE SERVICE FROM THE CTC AND THE PERCENTAGE OF TRIPS EACH REPRESENTS?
(Recent APR information may be used)

Name of Agency	% of Trips	Name of Contact	Telephone Number

7. REVIEW AND DISCUSS TD HELPLINE CALLS:

	Number of calls	Closed Cases	Unsolved Cases
Cost			
Medicaid			
Quality of Service			
Service Availability			
Toll Permit			
Other			

GENERAL QUESTIONS

Use the TDSP to answer the following questions. If these are not addressed in the TDSP, follow-up with the CTC.

1. DESIGNATION DATE OF CTC:
2. WHAT IS THE COMPLAINT PROCESS?

IS THIS PROCESS IN WRITTEN FORM? ☐ Yes ☐ No
(Make a copy and include in folder)

Is the process being used? ☐ Yes ☐ No

3. DOES THE CTC HAVE A COMPLAINT FORM? ☐ Yes ☐ No
(Make a copy and include in folder)
4. DOES THE COMPLAINT FORM INCORPORATE ALL ELEMENTS OF THE CTD'S
UNIFORM SERVICE REPORTING GUIDEBOOK?

☐ Yes ☐ No

5. DOES THE FORM HAVE A SECTION FOR RESOLUTION OF THE COMPLAINT?
☐ Yes ☐ No

Review completed complaint forms to ensure the resolution section is being filled out and follow-up is provided to the consumer.

6. IS A SUMMARY OF COMPLAINTS GIVEN TO THE LCB ON A REGULAR BASIS?
☐ Yes ☐ No

7. WHEN IS THE DISSATISFIED PARTY REFERRED TO THE TD HELPLINE?

8. WHEN A COMPLAINT IS FORWARDED TO YOUR OFFICE FROM THE
OMBUDSMAN PROGRAM, IS THE COMPLAINT ENTERED INTO THE LOCAL
COMPLAINT FILE/PROCESS?

☐ Yes ☐ No

If no, what is done with the complaint?

9. DOES THE CTC PROVIDE WRITTEN RIDER/BENEFICIARY INFORMATION OR BROCHURES TO INFORM RIDERS/ BENEFICIARIES ABOUT TD SERVICES?

☐ Yes ☐ No If yes, what type?

10. DOES THE RIDER/ BENEFICIARY INFORMATION OR BROCHURE LIST THE OMBUDSMAN NUMBER?

☐ Yes ☐ No

11. DOES THE RIDER/ BENEFICIARY INFORMATION OR BROCHURE LIST THE COMPLAINT PROCEDURE?

☐ Yes ☐ No

12. WHAT IS YOUR ELIGIBILITY PROCESS FOR TD RIDERS/ BENEFICIARIES?

There are various documents that they are required to provide in order to meet eligibility along with a vetting process that considers physical abilities, age, medical conditions, income level and location of residence.

Please Verify These Passengers Have an Eligibility Application on File:

TD Eligibility Verification			
Name of Client	Address of client	Date of Ride	Application on File?

13. WHAT INNOVATIVE IDEAS HAVE YOU IMPLEMENTED IN YOUR COORDINATED SYSTEM?

14. ARE THERE ANY AREAS WHERE COORDINATION CAN BE IMPROVED?
15. WHAT BARRIERS ARE THERE TO THE COORDINATED SYSTEM?
16. ARE THERE ANY AREAS THAT YOU FEEL THE COMMISSION SHOULD BE AWARE OF OR CAN ASSIST WITH?
17. WHAT FUNDING AGENCIES DOES THE CTD NEED TO WORK CLOSELY WITH IN ORDER TO FACILITATE A BETTER-COORDINATED SYSTEM?
18. HOW ARE YOU MARKETING THE VOLUNTARY DOLLAR?

GENERAL QUESTIONS

Findings:

Recommendations:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC contracts for compliance with 427.0155(1), F.S.

“Execute uniform contracts for service using a standard contract, which includes performance standards for operators.”

ARE YOUR CONTRACTS UNIFORM? ☐ Yes ☐ No

IS THE CTD’S STANDARD CONTRACT UTILIZED? ☐ Yes ☐ No

DO THE CONTRACTS INCLUDE PERFORMANCE STANDARDS FOR THE TRANSPORTATION OPERATORS AND COORDINATION CONTRACTORS?

☐ Yes ☐ No

DO THE CONTRACTS INCLUDE THE PROPER LANGUAGE CONCERNING PAYMENT TO SUBCONTRACTORS? (Section 21.20: Payment to Subcontractors, T&E Grant, and FY)

☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Operator Name	Exp. Date	SSPP	AOR Reporting	Insurance

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC last AOR submittal for compliance with 427. 0155(2)
“Collect Annual Operating Data for submittal to the Commission.”

REPORTING TIMELINESS

Were the following items submitted on time?

a. Annual Operating Report ☐ Yes ☐ No

Any issues that need clarification? ☐ Yes ☐ No

Any problem areas on AOR that have been re-occurring?

List:

b. Memorandum of Agreement ☐ Yes ☐ No

c. Transportation Disadvantaged Service Plan ☐ Yes ☐ No

d. Grant Applications to TD Trust Fund ☐ Yes ☐ No

e. All other grant application (____%) ☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC monitoring of its transportation operator contracts to ensure compliance with 427.0155(3), F.S.

“Review all transportation operator contracts annually.”

WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS OPERATOR(S) AND HOW OFTEN IS IT CONDUCTED?

Is a written report issued to the operator? ☐ Yes ☐ No

If **NO**, how are the contractors notified of the results of the monitoring?

WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS COORDINATION CONTRACTORS AND HOW OFTEN IS IT CONDUCTED?

Is a written report issued? ☐ Yes ☐ No

If **NO**, how are the contractors notified of the results of the monitoring?

WHAT ACTION IS TAKEN IF A CONTRACTOR RECEIVES AN UNFAVORABLE REPORT?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

ASK TO SEE DOCUMENTATION OF MONITORING REPORTS.

COMPLIANCE WITH CHAPTER 427, F.S.

Review the TDSP to determine the utilization of school buses and public transportation services [Chapter 427.0155(4)]

“Approve and coordinate the utilization of school bus and public transportation services in accordance with the TDSP.”

HOW IS THE CTC USING SCHOOL BUSES IN THE COORDINATED SYSTEM?

Rule 41-2.012(5)(b): *"As part of the Coordinator's performance, the local Coordinating Board shall also set an annual percentage goal increase for the number of trips provided within the system for ridership on public transit, where applicable. In areas where the public transit is not being utilized, the local Coordinating Board shall set an annual percentage of the number of trips to be provided on public transit."*

HOW IS THE CTC USING PUBLIC TRANSPORTATION SERVICES IN THE COORDINATED SYSTEM?

☐ N/A

IS THERE A GOAL FOR TRANSFERRING PASSENGERS FROM PARATRANSIT TO TRANSIT?

☐ Yes ☐ No

If YES, what is the goal?

Is the CTC accomplishing the goal? ☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS REQUIREMENT? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review of local government, federal and state transportation applications for TD funds (all local, state or federal funding for TD services) for compliance with 427.0155(5).

“Review all applications for local government, federal, and state transportation disadvantaged funds, and develop cost-effective coordination strategies.”

IS THE CTC INVOLVED WITH THE REVIEW OF APPLICATIONS FOR TD FUNDS, IN CONJUNCTION WITH THE LCB? (TD Funds include all funding for transportation disadvantaged services, i.e. Section 5310 [formerly Sec.16] applications for FDOT funding to buy vehicles granted to agencies who are/are not coordinated)

☐ Yes ☐ No

If Yes, describe the application review process.

If no, is the LCB currently reviewing applications for TD funds (any federal, state, and local funding)? ☐ Yes ☐ No

If no, is the planning agency currently reviewing applications for TD funds?
☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review priorities listed in the TDSP, according to Chapter 427.0155(7).

“Establish priorities with regard to the recipients of non-sponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust monies.”

REVIEW THE QA SECTION OF THE TDSP (ask CTC to explain):

WHAT ARE THE PRIORITIES FOR THE TDTF TRIPS?

HOW ARE THESE PRIORITIES CARRIED OUT?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Ensure CTC compliance with the delivery of transportation services, 427.0155(8).

“Have full responsibility for the delivery of transportation services for the transportation disadvantaged as outlined in s. 427.015(2).”

Review the Operational section of the TDSP

1. Hours of Service:

2. Hours of Intake:

3. Provisions for After Hours Reservations/Cancellations?

4. What is the minimum required notice for reservations?

5. How far in advance can reservations be place (number of days)?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the cooperative agreement with the local WAGES coalitions according to Chapter 427.0155(9).

“Work cooperatively with local WAGES coalitions established in Chapter 414 to provide assistance in the development of innovative transportation services for WAGES participants.”

WHAT TYPE OF ARRANGEMENT DO YOU HAVE WITH THE LOCAL WAGES COALITION?

HAVE ANY INNOVATIVE WAGES TRANSPORTATION SERVICES BEEN DEVELOPED?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

CHAPTER 427

Findings:

Recommendations:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.006(1), Minimum Insurance Compliance

“...ensure compliance with the minimum liability insurance requirement of \$100,000 per person and \$200,000 per incident...”

WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS?

WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS IN THE OPERATOR AND COORDINATION CONTRACTS?

HOW MUCH DOES THE INSURANCE COST (per operator)?

Operator	Insurance Cost

DOES THE MINIMUM LIABILITY INSURANCE REQUIREMENTS EXCEED \$1 MILLION PER INCIDENT?

☐ Yes ☐ No

If yes, was this approved by the Commission? ☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.006(2), Safety Standards.
“...shall ensure the purchaser that their operations and services are in compliance with the safety requirements as specified in Section 341.061(2)(a), F.S. and 14-90, F.A.C.”

*Date of last SSPP Compliance Review*_____, *Obtain a copy of this review.*

Review the last FDOT SSPP Compliance Review, if completed in over a year, check drivers' records. If the CTC has not monitored the operators, check drivers' files at the operator's site.

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

ARE THE CTC CONTRACTED OPERATORS IN COMPLIANCE WITH THIS SECTION?

☐ Yes ☐ No

DRIVER REQUIREMENT CHART

[illegible]

Sample Size:	1-20 Drivers – 50-100%	21-100 Drivers – 20-50%	100+ Drivers – 5-10%
---------------------	------------------------	-------------------------	----------------------

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.006(3), Drug and Alcohol Testing

“...shall assure the purchaser of their continuing compliance with the applicable state or federal laws relating to drug testing...”

With which of the following does the CTC (and its contracted operators) Drug and Alcohol Policy comply?

- ☐ FTA (Receive Sect. 5307, 5309, or 5311 funding)
- ☐ FHWA (Drivers required to hold a CDL)
- ☐ Neither

REQUEST A COPY OF THE DRUG & ALCOHOL POLICY AND LATEST COMPLIANCE REVIEW.

DATE OF LAST DRUG & ALCOHOL POLICY REVIEW: _____

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

Comments:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.011(2), Evaluating Cost-Effectiveness of Coordination Contractors and Transportation Alternatives.

“...contracts shall be reviewed annually by the Community Transportation Coordinator and the Coordinating Board as to the effectiveness and efficiency of the Transportation Operator or the renewal of any Coordination Contracts.”

1. IF THE CTC HAS COORDINATION CONTRACTORS, DETERMINE THE COST-EFFECTIVENESS OF THESE CONTRACTORS.

Cost [CTC and Coordination Contractor (CC)]

	CTC	CC #1	CC #2	CC #3	CC #4
Flat contract rate (s) (\$ amount / unit)					
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)					
Special or unique considerations that influence costs?					
Explanation:					

2. DO YOU HAVE TRANSPORTATION ALTERNATIVES? ☐ Yes ☐ No
 (Those specific transportation services approved by rule or the Commission as a service not normally arranged by the Community Transportation Coordinator, but provided by the purchasing agency. Example: a neighbor providing the trip)

Cost [CTC and Transportation Alternative (Alt.)]

	CTC	Alt. #1	Alt. #2	Alt. #3	Alt. #4
Flat contract rate (s) (\$ amount / unit)					
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)					
Special or unique considerations that influence costs?					
Explanation:					

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☐ Yes ☐ No

RULE 41-2

Findings:

Recommendations:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with Commission Standards

“...shall adhere to Commission approved standards...”

Review the TDSP for the Commission standards.

Commission Standards	Comments
Local toll free phone number must be posted in all vehicles.	
Vehicle Cleanliness	
Passenger/Trip Database	

Adequate seating	
Driver Identification	
Passenger Assistance	
Smoking, Eating and Drinking	

Two-way Communications	
Air Conditioning/Heating	
Billing Requirements	

COMMISSION STANDARDS

Findings:

Recommendations:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with Local Standards

“...shall adhere to Commission approved standards...”

Review the TDSP for the Local standards.

Local Standards	Comments
Transport of Escorts and dependent children policy	
Use, Responsibility, and cost of child restraint devices	
Out-of-Service Area trips	
CPR/1st Aid	
Driver Criminal Background Screening	
Rider Personal Property	
Advance reservation requirements	
Pick-up Window	

<i>Measurable Standards/Goals</i>	<i>Standard/Goal</i>	<i>Latest Figures</i>	<i>Is the CTC/Operator meeting the Standard?</i>
Public Transit Ridership	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
On-time performance	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Passenger No-shows	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Accidents	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Roadcalls <i>Average age of fleet:</i>	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Complaints <i>Number filed:</i>	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Call-Hold Time	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	

LOCAL STANDARDS

Findings:

Recommendations:

COMPLIANCE WITH AMERICANS WITH DISABILITIES ACT

REVIEW COPIES OF THE PUBLIC INFORMATION PROVIDED.

DOES PUBLIC INFORMATION STATE THAT ACCESSIBLE FORMATS ARE
AVAILABLE UPON REQUEST? ☐ Yes ☐ No

ARE ACCESSIBLE FORMATS ON THE SHELF? ☐ Yes ☐ No

IF NOT, WHAT ARRANGEMENTS ARE IN PLACE TO HAVE MATERIAL
PRODUCED IN A TIMELY FASHION UPON REQUEST?

DO YOU HAVE TTY EQUIPMENT OR UTILIZE THE FLORIDA RELAY SYSTEM?
☐ Yes ☐ No

IS THE TTY NUMBER OR THE FLORIDA RELAY SYSTEM NUMBERS LISTED WITH
THE OFFICE PHONE NUMBER? ☐ Yes ☐ No

Florida Relay System:
Voice- 1-800-955-8770
TTY- 1-800-955-8771

**EXAMINE OPERATOR MANUALS AND RIDER INFORMATION. DO CURRENT
POLICIES COMPLY WITH ADA PROVISION OF SERVICE REQUIREMENTS
REGARDING THE FOLLOWING:**

Provision of Service	Training Provided	Written Policy	Neither
Accommodating Mobility Aids			
Accommodating Life Support Systems (O ₂ Tanks, IV's...)			
Passenger Restraint Policies			
Standee Policies (persons standing on the lift)			
Driver Assistance Requirements			
Personal Care Attendant Policies			
Service Animal Policies			
Transfer Policies (From mobility device to a seat)			
Equipment Operation (Lift and securement procedures)			
Passenger Sensitivity/Disability Awareness Training for Drivers			

RANDOMLY SELECT ONE OR TWO VEHICLES PER CONTRACTOR (DEPENDING ON SYSTEM SIZE) THAT ARE IDENTIFIED BY THE CTC AS BEING ADA ACCESSIBLE AND PURCHASED WITH PRIVATE FUNDING, AFTER 1992. CONDUCT AN INSPECTION USING THE ADA VEHICLE SPECIFICATION CHECKLIST.

N/A None of the vehicles were purchased with private funding.

INSPECT FACILITIES WHERE SERVICES ARE PROVIDED TO THE PUBLIC (ELIGIBILITY DETERMINATION, TICKET/COUPON SALES, ETC...).

IS A RAMP PROVIDED? ☐ Yes ☐ No

ARE THE BATHROOMS ACCESSIBLE? ☐ Yes ☐ No

Bus and Van Specification Checklist

Name of Provider:

Vehicle Number (either VIN or provider fleet number):

Type of Vehicle: ☐ Minivan ☐ Van ☐ Bus (>22')
 ☐ Minibus (<= 22') ☐ Minibus (>22')

Person Conducting Review:

Date:

Review the owner's manual, check the stickers, or ask the driver the following:

- ☐ The lift must have a weight limit of at least 600 pounds.
- ☐ The lift must be equipped with an emergency back-up system (in case of loss of power to vehicle). Is the pole present?
- ☐ The lift must be "interlocked" with the brakes, transmission, or the door, so the lift will not move unless the interlock is engaged. Ensure the interlock is working correctly.

Have the driver lower the lift to the ground:

- ☐ Controls to operate the lift must require constant pressure.
- ☐ Controls must allow the up/down cycle to be reversed without causing the platform to "stow" while occupied.
- ☐ Sufficient lighting shall be provided in the step well or doorway next to the driver, and illuminate the street surface around the lift, the lighting should activate when the door/lift is in motion. Turn light switch on, to ensure lighting is working properly.

Once the lift is on the ground, review the following:

- ☐ Must have an inner barrier to prevent the mobility aid from rolling off the side closest to the vehicle until the platform is fully raised.
- ☐ Side barriers must be at least 1 ½ inches high.
- ☐ The outer barrier must be sufficient to prevent a wheelchair from riding over it.
- ☐ The platform must be slip-resistant.
- ☐ Gaps between the platform and any barrier must be no more than 5/8 of an inch.
- ☐ The lift must have two handrails.
- ☐ The handrails must be 30-38 inches above the platform surface.
- ☐ The handrails must have a useable grasping area of 8 inches, and must be at least 1 ½ inches wide and have sufficient knuckle clearance.
- ☐ The platform must be at least 28 1/2 inches wide measured at the platform surface, and 30 inches wide and 48 inches long measured 2 inches above the platform surface.

- ☐ If the ramp is not flush with the ground, for each inch off the ground the ramp must be 8 inches long.
- ☐ Lifts may be marked to identify the preferred standing position (suggested, not required)

Have the driver bring the lift up to the fully raised position (but not stowed):

- ☐ When in the fully raised position, the platform surface must be horizontally within 5/8 inch of the floor of the vehicle.
- ☐ The platform must not deflect more than 3 degrees in any direction. To test this, stand on the edge of the platform and carefully jump up and down to see how far the lift sways.
- ☐ The lift must be designed to allow boarding in either direction.

While inside the vehicle:

- ☐ Each securement system must have a clear floor area of 30 inches wide by 48 inches long.
- ☐ The securement system must accommodate all common wheelchairs and mobility aids.
- ☐ The securement system must keep mobility aids from moving no more than 2 inches in any direction.
- ☐ A seat belt and shoulder harness must be provided for each securement position, and must be separate from the security system of the mobility aid.

Vehicles under 22 feet must have:

- ☐ One securement system that can be either forward or rear-facing.
- ☐ Overhead clearance must be at least 56 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.

Vehicles over 22 feet must have:

- ☐ Must have 2 securement systems, and one must be forward-facing, the other can be either forward or rear-facing.
- ☐ Overhead clearance must be at least 68 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.
- ☐ Aisles, steps, and floor areas must be slip resistant.
- ☐ Steps or boarding edges of lift platforms must have a band of color which contrasts with the step/floor surface.

COMPLIANCE WITH AMERICANS WITH DISABILITIES ACT

Table 1. ADA Compliance Review - Provider/Contractor Level of Service Chart

Name of Service Provider/ Contractor	Total # of Vehicles Available for CTC Service	# of ADA Accessible Vehicles	Areas/Sub areas Served by Provider/Contractor

BASED ON THE INFORMATION IN TABLE 1, DOES IT APPEAR THAT INDIVIDUALS REQUIRING THE USE OF ACCESSIBLE VEHICLES HAVE EQUAL SERVICE?

☐ Yes ☐ No

ADA COMPLIANCE

Findings:

Recommendations:

FY ____/____ GRANT QUESTIONS

**The following questions relate to items specifically addressed in the FY _
____/____ Trip and Equipment Grant.**

DO YOU KEEP ALL RECORDS PERTAINING TO THE SPENDING OF TDTF DOLLARS FOR FIVE YEARS? (Section 7.10: Establishment and Maintenance of Accounting Records, T&E Grant, and FY _____)

☐ Yes ☐ No

ARE ALL ACCIDENTS THAT HAVE RESULTED IN A FATALITY REPORTED TO THE COMMISSION WITHIN 24 HOURS AFTER YOU HAVE RECEIVED NOTICE? (Section 14.80: Accidents, T/E Grant, and FY _____)

☐ Yes ☐ No

ARE ALL ACCIDENTS THAT HAVE RESULTED IN \$1,000 WORTH OF DAMAGE REPORTED TO THE COMMISSION WITHIN 72 HOURS AFTER YOU HAVE RECEIVED NOTICE OF THE ACCIDENT? (Section 14.80: Accidents, T/E Grant, and FY _____)

☐ Yes ☐ No

STATUS REPORT FOLLOW-UP FROM LAST REVIEW(S)

DATE OF LAST REVIEW: _____

STATUS REPORT DATED: _____

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

ON-SITE OBSERVATION OF THE SYSTEM

RIDE A VEHICLE WITHIN THE COORDINATED SYSTEM. REQUEST A COPY OF THE MANIFEST PAGE THAT CONTAINS THIS TRIP.

Date of Observation:

Please list any special guests that were present:

Location:

Number of Passengers picked up/dropped off:

Ambulatory

Non-Ambulatory

Was the driver on time? ☒ Yes ☐ No - How many minutes late/early?

Did the driver provide any passenger assistance? ☒ Yes ☐ No

Was the driver wearing any identification? ☒ Yes: ☒ Uniform ☐ Name Tag
☒ ID Badge ☐ No

Did the driver render an appropriate greeting?

☒ Yes ☐ No ☐ Driver regularly transports the rider, not necessary

If CTC has a policy on seat belts, did the driver ensure the passengers were properly belted?

☒ Yes ☐ No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?

☒ Yes ☐ No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?

☒ Yes ☐ No

Does the vehicle have working heat and air conditioning?

☒ Yes ☐ No

Does the vehicle have two-way communications in good working order?

☒ Yes ☐ No

If used, was the lift in good working order?

☒ Yes ☐ No

Was there safe and appropriate seating for all passengers?

☒ Yes ☐ No

Did the driver properly use the lift and secure the passenger?

☒ Yes ☐ No

If No, please explain:

CTC: Marion Transit County: Marion

Date of Ride: 2/3/21

Funding Source	No. of Trips	No. of Riders/Beneficiaries	No. of Calls to Make	No. of Calls Made
CTD	1	1	1	1
Medicaid				
Other ADA	5	5	5	5
Other				
Other)				
Other				
Totals	6	6	6	6

Number of Round Trips	Number of Riders/Beneficiaries to Survey
0 – 200	30%
201 – 1200	10%
1201 +	5%

Note: Attach the manifest



Scheduled Trips Summary - FL_Marion

For Time Period: 2/3/2021

Printed: 2/2/2021 3:50:51PM

Run Name: Unassigned

Vehicle: Bus 1405

Driver Name:

Driver

Signature

Miles Out

Miles In

Cash

Tickets

Customer Name

Pick Up Time

Pick Up Address

Drop Off Time

Drop Off Address

Mobility Type

Customer Pay

Telephone Ext.

Request Time: 8:15 am

Funding Source: ADA

Assistance Needs: General Comments [*ADA Client/1 hour window unless TD trip.]

Saint Clair, Abel

8:30:00AM

9 Fir Drive Pl
Ocala, FL 34472

9:00:00AM

Ocala Home Division
2860 SE 1st Ave
Ocala, FL 34471

Ambulatory

\$ 0.00

(352) 512-4831

Request Time: 9:00 am

Funding Source: TD

Assistance Needs: Requires Door-to-Door assistance

Corcoran, Robert

9:00:00AM

Silver Springs Shores
9321 Spring Rd
Ocala, FL 34472

9:30:00AM

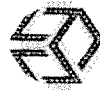
Walmart
34 Bahia Ave
Ocala, FL 34472

Ambulatory

\$ 2.00

(352) 687-4873

RouteMatch Software



Driver Name	Pick Up Time	Pick Up Address	Drop Off Time	Drop Off Address	Mobility Type	Customer Pay	Telephone Ext.
Request Time: 9:30 am Funding Source: ADA Assistance Needs:							
Kearney, McKinley	9:30:00AM	Silver Springs Shores 510 Clear Rd Ocala, FL 34472	10:00:00AM	Regions Bank - Shores 9297 Se Maricamp Rd Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 687-8911
Request Time: 10:00 am Funding Source: ADA Assistance Needs: General Comments [Palm Gardens]							
Fletcher, Leonie	9:45:00AM	Family Care Spec 2300 Se 17th St #402 Ocala, FL 34471	10:15:00AM	Publix 7578 Se Maricamp Rd Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 680-0279
Request Time: 10:15 am Funding Source: ADA Assistance Needs: General Comments [*ADA Client/1 hour window unless TD trip.]							
Kearney, McKinley	10:30:00AM	Regions Bank - Shores 9297 Se Maricamp Rd Ocala, FL 34472	11:00:00AM	Publix 7578 Se Maricamp Rd Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 687-8911
Request Time: 11:00 am Funding Source: ADA Assistance Needs: General Comments [Palm Gardens]							
Corcoran, Robert	11:30:00AM	Walmart 34 Bahia Ave Ocala, FL 34472	12:00:00PM	Silver Springs Shores 9321 Spring Rd Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 687-4873
Request Time: 11:30 am Funding Source: ADA Assistance Needs:							

Customer Name	Pick Up Time	Pick Up Address	Drop Off Time	Drop Off Address	Mobility Type	Customer Pay	Telephone Ext.
Fletcher, Leonie	12:15:00PM	Publix 7578 Se Maricamp Rd Ocala, FL 34472	12:45:00PM	Silver Springs Shores 303 Oak Track Dr Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 680-0279

Request Time: 12:15 pm

Funding Source: ADA

Assistance Needs: General Comments [*ADA Client/1 hour window unless TD trip.]

VanBlarcom, Christine	12:30:00PM	Silver Springs Shores 4 Clear Pl Ocala, FL 34472	1:00:00PM	Associates for Evaluation 1515 E Silver Springs Blvd #217 Ocala, FL 34470	Ambulatory	\$ 2.00	(941) 615-7069 <i>n/s</i>
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Request Time: 1:00 pm

Funding Source: ADA

Assistance Needs:

Kearney, McKinley	1:00:00PM	Publix 7578 Se Maricamp Rd Ocala, FL 34472	1:30:00PM	Silver Springs Shores 510 Clear Rd Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 687-8911
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Request Time: 1:00 pm

Funding Source: ADA

Assistance Needs: General Comments [Palm Gardens]

Banfield, William	1:30:00PM	Silver Springs Shores 7 Emerald Ct Ocala, FL 34472	2:00:00PM	Regions Bank - Shores 9297 Se Maricamp Rd Ocala, FL 34472	Ambulatory	\$ 2.00	(352) 537-0915
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Request Time: 2:00 pm

Funding Source: ADA

Assistance Needs:

Mary Nugent wheelchair



RouteMatch
Software

RIDER/BENEFICIARY SURVEY

Staff making call: Andrea Melvin
Date of Call: 2/3/21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 2/3/21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care
☐ Employment ☒ Life-Sustaining/Other
☒ Nutritional

6) Did you have a problem with your trip on 2/3/21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

- ☐ Drivers - specify
☐ Vehicle condition

- ☐ Reservations - specify length of wait
☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

15

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

Nicest people. I love these people. The best
drivers - outstanding!

RIDER/BENEFICIARY SURVEY

Staff making call: Andrea Melvin

County: Marion

Date of Call: 2/3/21

Funding Source: N/A

1) Did you receive transportation service on 2/3/21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None

☐ 3-5 Times

☐ 1-2 Times

☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible

☐ Space not available

☐ Lack of funds

☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical

☐ Education/Training/Day Care

☐ Employment

☒ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 2/3/21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

- ☐ Drivers - specify
☐ Vehicle condition

- ☐ Reservations - specify length of wait
☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

In the past occasional late pick up, but
lately very good.

RIDER/BENEFICIARY SURVEY

Staff making call: Andrea Melvin

County: Marion

Date of Call: 2/3/21

Funding Source: N/A

1) Did you receive transportation service on 2/3/21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☒ Other ☐ 1-2 Times/Week ☐ 3-5 Times/Week
1-2x month

4) Have you ever been denied transportation services?

☒ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care
☐ Employment ☒ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on 2/3/21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.) meets my needs.

Additional Comments:

I'd like to compliment Trish. She understands.

Dispatch + Reservations always try to accommodate me.

Yvonne, Brenda + Mickey are great.

RIDER/BENEFICIARY SURVEY

Staff making call: Andrea Melvin

County: Marion

Date of Call: 2/3/21

Funding Source: N/A

1) Did you receive transportation service on 2/3/21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None

☐ 3-5 Times

☐ 1-2 Times

☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible

☐ Space not available

☐ Lack of funds

☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical

☐ Education/Training/Day Care

☐ Employment

☒ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 2/3/21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

It's my way to get around because I don't drive and I can't use Suntran.

Additional Comments:

Everyone's been great. Service has been much better over the last year and a half than before then.

ON-SITE OBSERVATION OF THE SYSTEM

RIDE A VEHICLE WITHIN THE COORDINATED SYSTEM. REQUEST A COPY OF THE MANIFEST PAGE THAT CONTAINS THIS TRIP.

Date of Observation: 2/2/2021

Please list any special guests that were present: N/A

Location: Northeast Ocala

Number of Passengers picked up/dropped off: 2

Ambulatory 0

Non-Ambulatory 2

Was the driver on time? ☒ Yes ☐ No - How many minutes late/early?

Did the driver provide any passenger assistance? ☒ Yes ☐ No

Was the driver wearing any identification? ☒ Yes: ☐ Uniform ☐ Name Tag
☒ ID Badge ☐ No

Did the driver render an appropriate greeting?
☒ Yes ☐ No ☐ Driver regularly transports the rider, not necessary

If CTC has a policy on seat belts, did the driver ensure the passengers were properly belted?
☒ Yes ☐ No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?
☒ Yes ☐ No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?
☒ Yes ☐ No

Does the vehicle have working heat and air conditioning?
☒ Yes ☐ No

Does the vehicle have two-way communications in good working order?
☒ Yes ☐ No

If used, was the lift in good working order?
☒ Yes ☐ No

Was there safe and appropriate seating for all passengers?

☒ Yes ☐ No

Did the driver properly use the lift and secure the passenger?

☒ Yes ☐ No

If No, please explain:

CTC: Marion Transit County: Marion

Date of Ride: 2/2/2021

Funding Source	No. of Trips	No. of Riders/Beneficiaries	No. of Calls to Make	No. of Calls Made
CTD	1	2		
Medicaid				
Other				
Other				
Other)				
Other				
Totals	1	2		

Number of Round Trips	Number of Riders/Beneficiaries to Survey
0 – 200	30%
201 – 1200	10%
1201 +	5%

Note: Attach the manifest



Scheduled Trips Summary - FL_Marion

For Time Period: 2/2/2021

Printed: 2/1/2021 1:13:33PM

Run Name: Unassigned
Driver Name:

Vehicle: Bus 1405

Driver Tish Miles Out 175.279 Cash

Signature [Signature] Miles In Tickets

Customer Name	Pick Up Time	Pick Up Address	Drop Off Time	Drop Off Address	Mobility Type	Customer Pay	Telephone Ext.
Johnson, Nicole	8:30:00AM	4945 NE 15th Place Ocala, FL 34470	9:00:00AM	Employ U 1515 E Silver Springs Blvd Suite #130 Ocala, FL 34470	Lift to Load	\$ 2.00 <u>[Signature]</u>	(302) 242-2453

unding Source: ADA
assistance Needs:

Peltier, Sylvia	8:30:00AM	Cypress Villas 667 Ne 26th Ct Apt #D Ocala, FL 34470	9:00:00AM	Publix 3450 E Silver Springs Blvd Ocala, FL 34470	Ambulatory	\$ 2.00 <u>[Signature]</u>	(618) 435-7365
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unding Source: ADA
assistance Needs: General Comments [Client is requesting for driver to honk the horn...]

Morgan, Robert	9:15:00AM	Silver Springs Manor 5401 E Silver Springs Blvd #22 Silver Springs, FL 34488	9:45:00AM	Advanced Imaging 2300 Se 17th St #800 Ocala, FL 34471	Lift to Load	\$ 2.00	(352) 361-1726
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unding Source: ADA
assistance Needs: General Comments [USES WALKER/ LTL/ O2 GOOD 4HRS]

Customer Name	Pick Up Time	Pick Up Address	Drop Off Time	Drop Off Address	Mobility Type	Customer Pay	Telephone Ext.
Peltier, Sylvia	11:00:00AM	Publix 3450 E Silver Springs Blvd Ocala, FL 34470	11:30:00AM	Cypress Villas 667 Ne 26th Ct Apt #D Ocala, FL 34470	Ambulatory	\$ 2.00	(618) 435-7365
Funding Source: ADA Assistance Needs: General Comments [Client is requesting for driver to honk the horn..]							
Taylor, Rachelleah	12:30:00PM	905 Ne 4th St Ocala, FL 34470	1:00:00PM	Associated Comprehensive Eye Care 2437 E Fort King St Ocala, FL 34471	Ambulatory	\$ 2.00	(352) 512-5520
Funding Source: ADA Assistance Needs: Visually Impaired; Requires Door-to-Door assistance [Client Blind]							

RIDER/BENEFICIARY SURVEY

Staff making call: ANTON SCHAUERTE County: Marion
Date of Call: 2/2/21 Funding Source: N/A

1) Did you receive transportation service on 2/2/2021 ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☒ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

"I'm glad we have Marion Transit. It's
been a blessing for me and I'm sure
it has been for others, too."

RIDER/BENEFICIARY SURVEY

Staff making call: ANTON SCHAUERTE County: Marion
Date of Call: 2/2/21 Funding Source: N/A

1) Did you receive transportation service on 2/2/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☒ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

"All the drivers are courteous, kind, and
helpful. I have no problem with any of
the drivers. They are so nice."

ON-SITE OBSERVATION OF THE SYSTEM

RIDE A VEHICLE WITHIN THE COORDINATED SYSTEM. REQUEST A COPY OF THE MANIFEST PAGE THAT CONTAINS THIS TRIP.

Date of Observation:

2-4-21

Please list any special guests that were present:

N/A.

Location:

MARION OAKS - GOLD LINE

Number of Passengers picked up/dropped off:

2

Ambulatory

2

Non-Ambulatory

Was the driver on time?



Yes



No - How many minutes late/early?

Did the driver provide any passenger assistance?



Yes



No

Was the driver wearing any identification?



Yes:



Uniform



Name Tag



ID Badge



No

Did the driver render an appropriate greeting?



Yes



No



Driver regularly transports the rider, not necessary

If CTC has a policy on seat belts, did the driver ensure the passengers were properly belted?



Yes



No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?



Yes



No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?



Yes



No

Does the vehicle have working heat and air conditioning?



Yes



No

Does the vehicle have two-way communications in good working order?



Yes



No

If used, was the lift in good working order?



Yes



No

Was there safe and appropriate seating for all passengers?

☒ Yes ☐ No

Did the driver properly use the lift and secure the passenger?

☒ Yes ☐ No

If No, please explain:

CTC: TOM WILDER County: MARION

Date of Ride: 2-4-21

Funding Source	No. of Trips	No. of Riders/Beneficiaries	No. of Calls to Make	No. of Calls Made
CTD				
Medicaid				
Other <u>5311</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>
Other				
Other)				
Other				
Totals	<u>2</u>	<u>2</u>	<u>2</u>	<u>2</u>

Number of Round Trips	Number of Riders/Beneficiaries to Survey
0 – 200	30%
201 – 1200	10%
1201 +	5%

Note: Attach the manifest



Scheduled Trips Summary - FL_Marion

For Time Period: 2/4/2021

Printed: 2/3/2021 4:10:20PM

Run Name: Unassigned

Vehicle: Bus 1603

Driver Name:

Driver

Miles Out

Cash

Signature

Miles In

Tickets

Customer Name	Pick Up Time	Pick Up Address	Drop Off Time	Drop Off Address	Mobility Type	Customer Pay	Telephone Ext.
Cotto, Daisy	9:00:00AM	Marion Oaks 14581 Sw 38th Terrace Rd Ocala, FL 34473	9:30:00AM	Walmart 9570 Sw Highway 200 Ocala, FL 34481	Ambulatory	\$ 2.00	(862) 224-7264

Funding Source: 5311

Assistance Needs: General Comments []

Cotto, Daisy	11:30:00AM	Walmart 9570 Sw Highway 200 Ocala, FL 34481	12:00:00PM	Marion Oaks 14581 Sw 38th Terrace Rd Ocala, FL 34473	Ambulatory	\$ 2.00	(862) 224-7264
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Funding Source: 5311

Assistance Needs: General Comments []

RIDER/BENEFICIARY SURVEY

Staff making call: L. Mitchell
Date of Call: 2 / 4 / 21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on _____? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☒ None

☐ 3-5 Times

☐ 1-2 Times

☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible

☐ Space not available

☐ Lack of funds

☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☐ Medical

☐ Education/Training/Day Care

☐ Employment

☐ Life-Sustaining/Other

☒ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

Very good

RIDER/BENEFICIARY SURVEY

Staff making call: L. Mitchell
Date of Call: 2/4/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 2/4/21? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No
If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☐ Medical ☐ Education/Training/Day Care
☐ Employment ☒ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

Drivers are very professional and
very helpful

RIDER/BENEFICIARY SURVEY

Staff making call: Tracey Sopp County: Marion
Date of Call: 2/11/21 Funding Source: N/A

1) Did you receive transportation service on 2/2/21? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☒ Other ☐ 1-2 Times/Week ☐ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☒ Nutritional

6) Did you have a problem with your trip on _____?

☒ Yes. If yes, please state or choose problem from below

☐ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

aggressive driver - nothing major

☒ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

9

8) What does transportation mean to you? (Permission granted by Michael McElam for use in publications.)

Mobility, ability to get where I need to go.

Additional Comments:

RIDER/BENEFICIARY SURVEY

Staff making call: Tracey Sapp
Date of Call: 2/11/21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 2/11/21? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☒ Nutritional

6) Did you have a problem with your trip on _____?

☒ Yes. If yes, please state or choose problem from below

☐ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☒ Drivers - specify *-Very slow*
☐ Vehicle condition

☐ Reservations - specify length of wait
☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10

8) What does transportation mean to you? (Permission granted by Rene Micerola for use in publications.)
"My life line"

Additional Comments:

'We would like Tuesday & Thursdays for shopping if possible

RIDER/BENEFICIARY SURVEY

Staff making call: Tracey Sapp

County: Marion

Date of Call: 2/12/21

Funding Source: N/A

1) Did you receive transportation service on 2/11/2021? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☒ Other ☐ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by Ronald Muzzy for use in publications.)
Being able to get around.

Additional Comments:

RIDER/BENEFICIARY SURVEY

Staff making call: Tracey Sapp

County: Marion

Date of Call: 2/11/2021

Funding Source: N/A

1) Did you receive transportation service on 2/11/20? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by Willie Luke for use in publications.)

"Everything to me"

Additional Comments:

The ability to get to the Dr means the
world to me.

RIDER/BENEFICIARY SURVEY

Staff making call: Tracey Sapp
Date of Call: 2/11/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 2/10/21? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☒ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by Valerie for use in publications.)

"Without it I don't know what I would do"

Additional Comments:

Drivers go over and beyond in their
jobs. Loves every one of them. They make
me feel safe on that van. This service is such
a blessing, they don't make us feel like a problem.

RIDER/BENEFICIARY SURVEY

Staff making call: Susan Hanley
Date of Call: 02/08/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/08/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much? I do not have a copay for my dialysis appointments on M-W-F. I pay \$4 roundtrip for doctor appointments.

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week
3x weekly since 2006 (dialysis)

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care
☐ Employment ☐ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on 02/08/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

8

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

individual had no additional comments

RIDER/BENEFICIARY SURVEY

Staff making call: Susan Hanley
Date of Call: 02/09/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 01/19/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☒ Other ☐ 1-2 Times/Week ☐ 3-5 Times/Week
2-3x monthly

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care
☐ Employment ☐ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on 01/19/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

They are great. The drivers are very nice and they always
say Hi and talk to me. I tell you what they are so polite
and the other people on the bus are nice too.

RIDER/BENEFICIARY SURVEY

Staff making call: Susan Hanley
Date of Call: 02/10/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/05/2021? ☒ Yes or ☐ No

shopping trip

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much? \$2.00 one-way \$4.00 roundtrip

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☒ Nutritional → + shopping

6) Did you have a problem with your trip on 02/05/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by Dannie Hopkins for use in publications.)

Additional Comments:

I have been using them for a long time. I broke my neck and they
have really helped me get to Walmart or the doctor. All the drivers and
dispatchers are considerate and good. I do sometimes gripe to them, but
that is on me when I am having a frustrating day. The drivers are
very helpful and even help me find a motorized cart in
Walmart's parking lot.

RIDER/BENEFICIARY SURVEY

Staff making call: Susan Hanley
Date of Call: 02/10/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/10/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week
I have MS and have clinic appointments weekly.

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 02/10/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10 +

8) What does transportation mean to you? (Permission granted by Marylou Dutton for use in publications.)

Additional Comments:

Honestly, without Marion Transit, I would not be here. It is
heaven sent. They are very polite and care about you and
your disability. They treat you with respect. These drivers
are on the front line and people need to be patient with them.

RIDER/BENEFICIARY SURVEY

Staff making call: Susan Hanley
Date of Call: 02/11/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/11/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☒ Yes or ☐ No

If so, how much? \$4 roundtrip

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 02/11/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

I give them 99.9%. I just wish they could pick me
up earlier for shopping trips so I do not get home so
close to my seizure medication time.

RIDER/BENEFICIARY SURVEY

Staff making call: Susan Hanley
Date of Call: 02 / 11 / 2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/11/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☒ Yes or ☐ No

If so, how much? \$4 roundtrip

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 02/11/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

8 to 9

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

I really like Albert. He is one of the better drivers. Sometimes
when there is a different driver it does not go quite as
smoothly. I feel that sometimes they overschedule dialysis
riders.

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/04/2021

County: Marion
Funding Source: N/A

* Alvin - regular driver

1) Did you receive transportation service on 02/01/2021? ☒ Yes or ☐ No
Monday

* Riding for over 3 years

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

Monday 6) Did you have a problem with your trip on 02/01/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by Nancy Ascierto for use in publications.) Getting to my doctor

Additional Comments:

(Ms. Ascierto)

Alvin is the best. She[↑] has ~~two~~^{error} two
family members but they work and cannot drive
her.

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/04/2021

County: Marion
Funding Source: N/A

Tuesday

1) Did you receive transportation service on 02/02/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services? 2-3x/wk

☒ Yes

☐ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☒ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☒ Other Called in too close to an appointment

5) What do you normally use the service for?

☒ Medical MD, PT ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 02/02/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

9

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

Riding Marion Trans for 2+ years and is
Very appreciative of the service.

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/04/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on Could not recall exact date? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No
Currently in the hospital

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week

Wound care - every other day
Dialysis - 3x/wk

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care
☐ Employment ☐ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10!

8) What does transportation mean to you? (Permission granted by Yolanda Belo for use in publications.) I am happy that they provide a professional service to get to places I need to be.

Additional Comments:

As a retired nurse, she was very impressed at how professional, nice, and on time Transit is. She did not know about the stopping, so she said she would inquire once she is out of the hospital.

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/04/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 01/29/2021? ☒ Yes or ☐ No

2) Were you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

\$4.00 / round trip

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care
☐ Employment ☐ Life-Sustaining/Other
☒ Nutritional - Shopping

6) Did you have a problem with your trip on 01/29/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

Client Wished for ^{error}~~other~~ transportation to other
places than doctor or shopping, like Senior Centers
or Silver Sneakers locations.

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/05/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on Few weeks ago ~01/14/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☒ Other ☐ 1-2 Times/Week ☐ 3-5Times/Week

L when needed

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None

☐ 3-5 Times

☐ 1-2 Times

☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible

☐ Space not available

☐ Lack of funds

☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical

☐ Education/Training/Day Care

☐ Employment

☐ Life-Sustaining/Other

☒ Nutritional

6) Did you have a problem with your trip on ~01/14/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10!

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

She has been using Marion Transit for over 25
years. The schedulers are very nice, excellent people.
She wished shopping could be moved to Tuesday instead of
Monday due to holidays, like President's Day.

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/08/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/04/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☒ Nutritional - Groceries

6) Did you have a problem with your trip on 02/04/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

9

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

RIDER/BENEFICIARY SURVEY

Staff making call: M. Mulligan
Date of Call: 02/08/2021

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 02/01/2021? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week
↳ Sometimes Every other week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?

☐ Medical ☐ Education/Training/Day Care
☐ Employment ☐ Life-Sustaining/Other
☒ Nutritional

6) Did you have a problem with your trip on 02/01/2021?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10+!

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

RIDER/BENEFICIARY SURVEY

Staff making call: Shakyla Irby
Date of Call: 1 / 18 / 21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 1/1/21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 1/1/21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

- ☐ Drivers - specify
- ☐ Vehicle condition

- ☐ Reservations - specify length of wait
- ☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

N/A

RIDER/BENEFICIARY SURVEY

Staff making call: Shakyla Irby
Date of Call: 1 / 18 / 21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 1/15/21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 1/15/21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost

☐ Pick up times not convenient ☐ Late pick up-specify time of wait

☐ Assistance ☐ Accessibility

☐ Service Area Limits ☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

A safe way to get to one place to another

RIDER/BENEFICIARY SURVEY

Staff making call: Shakyla Irby
Date of Call: 1 / 22 / 21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 1 / 19 / 21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☒ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on 1 / 19 / 21?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

- ☐ Drivers - specify
- ☐ Vehicle condition

- ☐ Reservations - specify length of wait
- ☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

N/A

RIDER/BENEFICIARY SURVEY

Staff making call: Shakyla Wby
Date of Call: 1 / 22 / 21

County: Marion
Funding Source: N/A

1) Did you receive transportation service on 1 / 18 / 21? ☒ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☒ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☒ 1-2 Times/Week ☐ 3-5 Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☒ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☒ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice

☐ Cost

☐ Pick up times not convenient

☐ Late pick up-specify time of wait

☐ Assistance

☐ Accessibility

☐ Service Area Limits

☐ Late return pick up - length of wait

☐ Drivers - specify

☐ Reservations - specify length of wait

☐ Vehicle condition

☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

10

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

N/A

Contractor Survey

Marion County

Florida Center for the Blind

Contractor name (optional)

1. Do the riders/beneficiaries call your facility directly to cancel a trip?

☐ Yes ☒ No

2. Do the riders/beneficiaries call your facility directly to issue a complaint?

☐ Yes ☒ No

3. Do you have a toll-free phone number for a rider/beneficiary to issue commendations and/or complaints posted on the interior of all vehicles that are used to transport TD riders?

☐ Yes ☐ No N/A

If yes, is the phone number posted the CTC's?

☐ Yes ☐ No N/A

4. Are the invoices you send to the CTC paid in a timely manner?

☐ Yes ☐ No N/A

5. Does the CTC give your facility adequate time to report statistics?

☒ Yes ☐ No

6. Have you experienced any problems with the CTC?

☐ Yes ☒ No

If yes, what type of problems?

Comments:

We have an agreement to have MT transport our clients to our facility for training purposes. They are trained on how to ride public transportation independently without assistance. Once training is complete MT transports our clients to doctors appointments and shopping as needed. They pay the \$2.00 fare and once qualified they ride under TD qualifications.

Contractor Survey

Marion County

Advocacy Resources Center

Contractor name (optional)

1. Do the riders/beneficiaries call your facility directly to cancel a trip?

☐ Yes ☒ No

2. Do the riders/beneficiaries call your facility directly to issue a complaint?

☐ Yes ☒ No

3. Do you have a toll-free phone number for a rider/beneficiary to issue commendations and/or complaints posted on the interior of all vehicles that are used to transport TD riders?

☐ Yes ☒ No

If yes, is the phone number posted the CTC's?

☐ Yes ☒ No

4. Are the invoices you send to the CTC paid in a timely manner?

☐ Yes ☐ No N/A

5. Does the CTC give your facility adequate time to report statistics?

☐ Yes ☐ No N/A

6. Have you experienced any problems with the CTC?

☐ Yes ☒ No

If yes, what type of problems?

Comments:

We have an agreement with MT for them to utilize our fleet of buses during an emergency situation if needed, to transport riders.

Level of Cost Worksheet 1

Insert Cost page from the AOR.

INSERTED



CTC Expense Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Expense Sources						
Labor	\$ 1,532,431	\$ 205,352	\$ 1,737,783	\$ 1,532,769	\$ 168,211	\$ 1,700,980
Fringe Benefits	\$ 443,602	\$ 37,198	\$ 480,800	\$ 424,742	\$ 34,418	\$ 459,160
Services	\$ 257,859	\$ 0	\$ 257,859	\$ 289,071	\$ 0	\$ 289,071
Materials & Supplies Consumed	\$ 378,170	\$ 78,666	\$ 456,836	\$ 421,427	\$ 91,402	\$ 512,829
Utilities	\$ 32,428	\$ 12,477	\$ 44,905	\$ 29,813	\$ 6,654	\$ 36,467
Casualty & Liability	\$ 144,655	\$ 33,471	\$ 178,126	\$ 88,767	\$ 27,960	\$ 116,727
Taxes	\$ 854	\$ 0	\$ 854	\$ 782	\$ 0	\$ 782
Miscellaneous	\$ 17,186	\$ 0	\$ 17,186	\$ 13,450	\$ 0	\$ 13,450
Interest	\$ 994	\$ 0	\$ 994	\$ 504	\$ 0	\$ 504
Leases & Rentals	\$ 10,621	\$ 0	\$ 10,621	\$ 14,683	\$ 0	\$ 14,683
Capital Purchases	\$ 389,179	\$ 58,930	\$ 448,109	\$ 0	\$ 50,000	\$ 50,000
Contributed Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 0	\$ 0	\$ 0	\$ 328,059	\$ 0	\$ 328,059
Purchased Transportation Services						
Bus Pass	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
School Board (School Bus)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Transportation Network Companies (TNC)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Taxi	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Contracted Operator	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Total - Expense Sources	\$ 3,207,979	\$ 426,094	\$ 3,634,073	\$ 3,144,067	\$ 328,645	\$ 3,522,712

Level of Competition Worksheet 2

1. Inventory of Transportation Operators in the Service Area

	Column A Operators Available	Column B Operators Contracted in the System.	Column C Include Trips	Column D % of all Trips
Private Non-Profit				
Private For-Profit				
Government				
Public Transit Agency				
Total				

2. How many of the operators are coordination contractors? _____

3. Of the operators included in the local coordinated system, how many have the capability of expanding capacity? _____

Does the CTC have the ability to expand? _____

4. Indicate the date the latest transportation operator was brought into the system. _____

5. Does the CTC have a competitive procurement process? _____

6. In the past five (5) years, how many times have the following methods been used in selection of the transportation operators?

	Low bid
	Requests for qualifications
	Negotiation only

	Requests for proposals
	Requests for interested parties

Which of the methods listed on the previous page was used to select the current operators?

7. Which of the following items are incorporated in the review and selection of transportation operators for inclusion in the coordinated system?

	Capabilities of operator
	Age of company
	Previous experience
	Management
	Qualifications of staff
	Resources
	Economies of Scale
	Contract Monitoring
	Reporting Capabilities
	Financial Strength
	Performance Bond
	Responsiveness to Solicitation

	Scope of Work
	Safety Program
	Capacity
	Training Program
	Insurance
	Accident History
	Quality
	Community Knowledge
	Cost of the Contracting Process
	Price
	Distribution of Costs
	Other: (list)

8. If a competitive bid or request for proposals has been used to select the transportation operators, to how many potential operators was the request distributed in the most recently completed process? _____

How many responded? _____

The request for bids/proposals was distributed:

_____ Locally _____ Statewide _____ Nationally

9. Has the CTC reviewed the possibilities of competitively contracting any services other than transportation provision (such as fuel, maintenance, etc...)? _____

Level of Availability (Coordination)

Worksheet 3

Planning – What are the coordinated plans for transporting the TD population?

Public Information – How is public information distributed about transportation services in the community?

Certification – How are individual certifications and registrations coordinated for local TD transportation services?

Eligibility Records – What system is used to coordinate which individuals are eligible for special transportation services in the community?

Call Intake – To what extent is transportation coordinated to ensure that a user can reach a Reservationist on the first call?

Reservations – What is the reservation process? How is the duplication of a reservation prevented?

Trip Allocation – How is the allocation of trip requests to providers coordinated?

Scheduling – How is the trip assignment to vehicles coordinated?

Transport – How are the actual transportation services and modes of transportation coordinated?

Dispatching – How is the real time communication and direction of drivers coordinated?

General Service Monitoring – How is the overseeing of transportation operators coordinated?

Daily Service Monitoring – How are real-time resolutions to trip problems coordinated?

Trip Reconciliation – How is the confirmation of official trips coordinated?

Billing – How is the process for requesting and processing fares, payments, and reimbursements coordinated?

Reporting – How is operating information reported, compiled, and examined?

Cost Resources – How are costs shared between the coordinator and the operators (s) in order to reduce the overall costs of the coordinated program?

Information Resources – How is information shared with other organizations to ensure smooth service provision and increased service provision?

Overall – What type of formal agreement does the CTC have with organizations, which provide transportation in the community?



February 3, 2021

Florida Department of Transportation, District Five
Attn: Ms. Diane Poitras, Transit Programs Administrator
420 W. Landstreet RD
Orlando, FL 32824

RE: AGENCY CONTACT INFORMATION

To: District Five

This letter provides certification of the current agency contacts:

- Ms. Jennifer Martinez, Executive Director – jmartinez@marionseniorservices.org
- Mr. Tom Wilder, Transportation Director – twilder@marionseniorservices.org
- Ms. Rhonda Blaney, Finance Director – rblaney@marionseniorservices.org
- Mr. Herman Schulz, Transit Manager – hschulz@marionseniorservices.org
- Ms. Karen Williams, Trips Manager – kwilliams@marionseniorservices.org
- Mr. Ken McKelvy, Transit Manager – kmckelvy@marionseniorservices.org

Sincerely,


Tom Wilder, Transportation Director



Florida Department of Transportation

RICK SCOTT
GOVERNOR

133 South Semoran Blvd.
Orlando, Florida 32807

MIKE DWYER
SECRETARY

October 8, 2018

Tom Wilder, Transportation Director
Marion Senior Services
1101 SW 20th Court
Ocala, FL 34471

RE: Compliance Notice for the Marion Senior Services 2018 Triennial Review

Dear Mr. Wilder:

This letter is to confirm that our site visit for the 2018 Marion Senior Services Triennial Review on July 9, 2018 was satisfactory and we have found your agency to comply with the Florida Department of Transportation's (FDOT) regulations for providing public transportation services and for receiving federal funding under 49 U.S.C. § 5310, § 5311, and § 5339. A summary of review findings is provided as an appendix to this Compliance Notice. Your agency's response was received by the FDOT reviewer via the Corrective Action Plan (CAP) on September 14, 2018.

Your cooperation during the entire process was greatly appreciated and we look forward to working with you in the future to provide safe and efficient 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 (407) 482-7860, dpoitras@fdot.com or Kayla Costello (407) 482-7887, kcostello@fdot.com.

Sincerely,

Diane Poitras
Transit Programs Administrator
FDOT District Five

Attachment 1 – Triennial Review CAP Matrix

DP/kc

CERTIFIED TO BE A TRUE &
EXACT COPY OF ORIGINAL

Tom Wilder

Tom Wilder

COMPLAINT & COMPLIMENTS PROCEDURE

1.0 Purpose

1.1 This document spells out the proper procedure for handling Complaints or Compliments for Marion Transit. Because we provide a community service, the agency is subject to receiving complaints and/or compliments regarding our service, employees or both.

Marion Transit strives to provide excellent service to our clients/customers.

Customers have the right to:

- File complaints without fear of retaliation;
- Prompt investigations and effective resolutions; and
- Current and complete program information.

Customers are responsible for:

- Filing complaints in a timely manner (state local time frame), and
- Providing CTC with pertinent information.

Determination of complaint:

- Title VI: Discrimination based on race, color, religion, sex, or national origin.
- ADA: Discrimination of qualified disabled individual, solely by reason of such disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in programs, services or activities sponsored by a public entity.

Time Frame for complaints:

- Title VI: No later than 180 days from the date of the alleged discrimination.
- ADA: No later than 60 days from the date of the alleged discrimination.
- Record retention of complaints filed is 5 years.

Note: Title VI / ADA Complaint form is available on Marion Transit webpage.

2.0 Roles Responsibilities

2.1 Supervisors/Managers – responsible for ensuring that complaints are fully investigated in a timely manner. Proposed actions for improvement are documented and if warranted disciplinary action is taken. Compliments are also documented and discussed with the employee.

2.2 Drivers/Employees – responsible for providing a service to our customers that meet or exceed expectations. Notify their respective supervisor as soon as practical of any potential

Page 2 COMPLAINT & COMPLIMENTS PROCEDURE CONTINUED

situation(s) that may cause someone to initiate a complaint against the agency and/or employee.

3.0 Procedures

Any Marion Transit employee can receive a compliment or complaint from a citizen. When a compliment or complaint is being made the employee receiving the information is required to document with as much information including; who, what, when, where, how, and why. Forms are available to document both types of incidents and may be accessed by contacting the Transit Office Assistant.

Once the incident is documented, it should be forwarded to the respective supervisor/manager for further investigation. The supervisor/manager will make the Transportation Director aware of the complaint or compliment and forward the report(s) once the investigation is completed.

In the case of a complaint, the supervisor/manager will propose actions to remedy the situation. Both the supervisor/manager and Transportation Director will determine outcomes.

Once a complaint or compliment is completed, copies of the report will be placed in the respective Marion Transit employee folder and/or Master Index Folder. The person making the complaint should be notified of the outcome if warranted.

Complaints that may warrant severe disciplinary action will be brought to the attention of the Executive Director and Human Resources.

All complaints and/or compliments should be kept in a common index file for easy access by Month/Year.

Note: Copies of forms are attached.

+++ END +++



Complaint Report

MARION TRANSIT

Date:

Bus # & Driver:

Written By:

Complaint made by:

Address / Phone:

Complaint Details: (Who, What, When, Where, How, Why)

Proposed Action Purposes

Supervisor Name & Signature: _____

Director Comments:

Signature & Date: _____

Complaint Report

MARION TRANSIT

Date: 9/8/2020 @ 904 AM

Bus # & Driver: IN GENERAL

Written By: Cyndi

Compliment made by: Lynn Ennis

Address / Phone: 407-760-7902

Complaint Details:

She said that every time a bus comes in the development to pick up the lady across the street at 7318 Cherry Pass (Carol Guinn) she said that the bus blocks her driveway and she has to take her kid to school and her to work. She said that she can't be blocking the street. She said that the bus needs to see if they can pull into the driveway, instead of blocking her.

Supervisor Comments: I spoke w/ Ms. Ennis. Apologized for drivers blocking her driveway. Will put CLIENT Note to not block neighbors driveway across from Ms. Guinns driveway

Supervisor Name & Signature: KEN McKelvey Ken McKelvey

Director Comments:

Concurred

Director Signature & Date:

[Signature] 9/9/20

MARION TRANSIT

SUPERVISOR INCIDENT ANALYSIS REPORT (Attach to Incident Report)

Incident Description – Complaint	Date of Incident 9/8/2020
----------------------------------	------------------------------

Employee Involved – General Complaint	Bus# N/A
---------------------------------------	----------

Details determined by investigation/review – Caller Lynn Ennis called to advise our bus blocks her driveway when picking up a client at 7318 Cherry Pass. She is asking that we not block her driveway, because she takes her kid to school and herself to work.

Corrective Action(s) YES or NO
(If yes, corrective action completed – Date Completed)
Supervisor spoke with Ms. Ennis. Apologized for drivers blocking her driveway.

Changes (if any) to prevent future incidents of this type –
All drivers will
Notes added to client file advising drivers not to block Ms. Ennis driveway.

Supervisor Ken McKelvey	Date 9-8-20
----------------------------	----------------

Director Dan Wilder	Date 9-9-20
------------------------	----------------



February 3, 2021

Florida Department of Transportation, District Five
Attn: Ms. Diane Poitras, Transit Programs Administrator
420 W. Landstreet RD
Orlando, FL 32824

RE: Section 49 Code of Federal Regulations, part 21 and Federal Transit Administration (FTA)
Circular 4702.

To: District Five

This letter provides certification that Marion Senior Services, Inc. d/b/a Marion Transit has not made any changes to the Title VI Plan implemented on July 1, 2016. As of December 31, 2020, Marion Senior Services, Inc. d/b/a Marion Transit does not have any Title VI related investigations, complaints or lawsuits to report to the Department. Below is a list of all public notices located throughout our facility and the active URL where our public notice is located.

1. Front Lobby
2. Transportation Bay
3. All Buses
4. <http://www.marionseniorservices.org/me/marion-senior-services/transit-services-12864.html?navid=1382>

Sincerely,


Tom Wilder, Transportation Director



Florida Department of Transportation

RICK SCOTT
GOVERNOR

133 S. Semoran Blvd
Orlando, FL 32807

MIKE DEW
SECRETARY

August 7, 2018

Tom Wilder
Marion Senior Services
1101 SW 20th Court
Ocala, FL 34471

Re: Marion Senior Services Title VI Plan Review - Letter of Concurrence

Dear Mr. Wilder,

The Department has completed a review of the Marion Senior Services Title VI Plan adopted May 2016, amended June 2018. We find the Title VI Plan to be in compliance with Section 49 Code of Federal Regulations, part 21 and Federal Transit Administration (FTA) Circular 4702.1B as well as the Department's Title VI Plan Guidance. Therefore, the Department is in concurrence with the Marion Senior Services Title VI Plan.

We appreciate the opportunity to review the document and ensure compliance with the federal and state requirements. Please include a copy of this letter in the appendices of your agency's Title VI Plan as outlined in the Title VI requirements. 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 (407) 482-7860 or e-mail diane.poitras@dot.state.fl.us.

Sincerely,

Diane Poitras
Transit Programs Administrator
District 5

DP/kc

**CERTIFIED TO BE A TRUE &
EXACT COPY OF ORIGINAL**

MARION TRANSIT

REASONABLE MODIFICATION POLICY

The Department of Transportation has revised its rules under the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973.

It now specifically provides that transportation agencies are required to make reasonable modifications to policies, practices and procedures to avoid discrimination and ensure that their programs are accessible to individuals with disabilities.

Marion Transit is committed to providing safe, reliable, efficient, and accessible service to all its customers. To ensure equality and fairness, Marion Transit will make reasonable modifications to policies and procedures to ensure that individuals with disabilities have equal access to all services.

Exceptions would include modifications that:

- Cause a direct threat to the health and/or safety of others;
- Result in a fundamental alteration of the nature of the service;
- Are not necessary in order for the individual with a disability to fully utilize Marion Transit.

A request for modification of policy or procedures to participate with Marion Transit program or service should contact:

Tom Wilder, Transportation Director
1101 S.W. 20th Court, Ocala, Florida 34471
352-620-3071 or twilder@marionseniorservices.org

Reasonable Modification Request Determination

For each reasonable modification request, consider each of the questions below. If the request does not provide enough specific information related to a question, consider what additional information is needed and how it would impact your answer to the question. Once each question has been considered, indicate what action you would take related to the request. If the decision would vary based on other factors/information, note the assumptions you made in making your decision.

- ☐ Does the person making the request have a disability? Circle: Yes or No
What change in policy is being requested? _____

- ☐ Because of the person's disability, is the requested change needed to fully benefit from the transportation service? _____

- ☐ Would granting the request create a direct threat to the health or safety of others? _____

- ☐ Would granting the request fundamentally change the nature of the transportation service? _____

Determination -

- ☐ Grant the request
- ☐ Deny the request

If denied, please explain reason: _____

✓ Date and method the requestor was notified of decision: _____

Additional comments: _____

MARIONTRANSIT

American with Disabilities Act Transportation-Related ADA Policies and Procedures

Marion Transit is committed to complying with all applicable provisions of the Americans with Disabilities Act, as amended (ADA), and applicable state and local laws and maintains liability coverage for required services to individuals with disabilities. It is Marion Transit's policy not to discriminate against any participant or employee regarding any terms or conditions of their participation with programs at Marion Senior Services, Inc. and access to services provided within, including transportation, on the basis of such individual's disability.

Consistent with this policy of non-discrimination, Marion Transit, will provide reasonable accommodations to an individual with a disability, as defined in the ADA or applicable law, who has made Marion Transit aware of his or her disability at intake, unless doing so would cause an undue hardship to the agency.

The agency also wishes to participate in a timely, good faith, interactive process with a disabled participant to determine effective reasonable accommodations, if any, which can be made in response to a request for accommodations. Requests should be made to the Transportation Director. By working together in good faith, the Agency hopes to implement any reasonable accommodations that are appropriate and consistent with its legal obligations.

Any participant who has questions regarding this policy or believes that he or she has been discriminated against based on a disability should notify the Transportation Director or Human Services Director. All such inquiries or complaints will be treated as confidential to the greatest extent possible and will only be disclosed on a need-to-know basis.

MARIONTRANSIT

Terms Used in This Policy

As used in this ADA policy, the following terms have the indicated meaning:

- **Disability:** A physical or mental impairment that substantially limits one or more major life activities of the individual, a record of such an impairment, or being regarded as having such an impairment.
- **Major life activities:** Term includes caring for oneself, performing manual tasks, seeing, hearing, eating, sleeping, walking, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating and working.
- **Substantially limiting:** In accordance with the ADA final regulations, the determination of whether an impairment substantially limits a major life activity requires an individualized assessment, and an impairment that is episodic or in remission may also meet the definition of disability if it would substantially limit a major life activity when active. Some examples of these types of impairments may include epilepsy, hypertension, asthma, diabetes, major depressive disorder, bipolar disorder and schizophrenia. An impairment, such as cancer that is in remission but that may possibly return in a substantially limiting form, is also considered a disability under EEOC final ADA regulations.
- **Reasonable accommodation:** Includes any changes or adjustments to the human services transportation program and may include making existing transportation services readily accessible to and usable by individuals with disabilities.
- **Undue hardship:** An action requiring significant difficulty or expense by Marion Transit in determining whether an accommodation would impose an undue hardship on Marion Transit factors to be considered include:
 - The nature and cost of the accommodation.
 - The overall financial resources of the facility or facilities involved in the provision of the reasonable accommodation, the number of persons affected, the effect on expenses and resources, or the impact of such accommodation on the operation of the facility.
 - The type of operations of the agency, including its composition, structure and functions.

Right to Use Marion Transit Transportation Services

Transportation services will not be denied to any participant with a disability, if the individual is capable of using the service and abides by Marion Transit rider rules (see below).

Marion Transit further does not require an individual with a disability to use designated priority seats, if the individual does not choose to use these seats.

Marion Transit does not require that an individual with a disability be accompanied by an attendant.

MARIONTRANSIT

Rules for Rider Conduct

Marion Transit may refuse service to any individual who engages in violent, seriously disruptive, or illegal conduct, or represents a direct threat to the health or safety of others.

The definition of “direct threat” is intended to be interpreted consistently with the parallel definition in the Department of Justice regulations. That is, CFR, Title 49, Part 37 does not require a public entity to permit an individual to participate in or benefit from the services, programs, or activities of that public entity when that individual poses a direct threat to the health or safety of others. In determining whether an individual poses a direct threat to the health or safety of others, a public entity must make an individualized assessment, based on reasonable judgment that relies on current medical knowledge or on the best available objective evidence, to ascertain: the nature, duration, and severity of the risk, the probability that the potential injury will actually occur, and whether reasonable modifications of policies, practices, or procedures or the provision of auxiliary aids or services will mitigate the risk.

Marion Transit strictly prohibits the use of alcohol and/or drugs, and/or the possession of a firearm/weapon by any participant while on board a vehicle. The use of drugs and/or alcohol or the possession of a firearm/weapon will result in immediate discharge.

Marion Transit Drivers will make reasonable attempts resolve issues with riders. If service is denied, the Driver will document the incident or incidents leading to the service denial on the incident Report (see Exhibit A), substantiating how such an incident rises to the level of seriously disruptive behavior or a direct threat.

Boarding and Securement: Policies and Procedures for Wheelchair-Bound Participants

It is the policy of Marion Transit to comply with all the legal requirements of Federal and State laws and regulations as they pertain to individuals with disabilities. Marion Transit transit program provides quality transportation services without discrimination to all persons, including individuals with disabilities. Service is provided in a manner that meets the following goals:

1. Provide safe, accessible and dignified services to all persons.
2. Expedite the safe and efficient boarding, securing, transporting and alighting of all passengers, regardless of mobility status.
3. Accommodate the wide range of mobility aids within the confines of available vehicles and standard equipment.
4. Minimize potential damage to mobility aids and transit system equipment in the process.

MARIONTRANSIT

Marion Transit's transit program has the capacity to carry a wheelchair and occupant. A wheelchair is defined as a mobility aid belonging to any class of three or four-wheeled devices used by individuals with mobility impairments, whether operated manually or powered. A "common wheelchair" does not exceed 30 inches in width and 48 inches in length measured two inches above the ground and does not weight more than 800 or 1000 pounds when occupied based on the capacity of the bus lift.

Marion Transit does not allow Segway personal transportation devices onto transportation vehicles, nor does the agency allow such devices in its offices.

Boarding: Drivers and scheduling practices will provide adequate time for a passenger with a disability to board and/or disembark the vehicle. It is the responsibility of the driver to determine the safest location for passenger boarding based on conditions and individual needs upon arrival at the pick-up site. The passenger will maneuver the mobility aid to the vehicle. Only a properly trained transit employee can operate the lift, secure the wheelchair on the lift and in the securement station.

A person with a disability who is not using a wheelchair or other seated mobility aid may use the lift to board or alight the vehicle upon request.

Drivers will make themselves available for assistance to persons with disabilities and will assist upon request of the passenger. Drivers will leave their seat to assist a passenger with using the vehicle ramp, lift and/or securement systems. Drivers will use the accessibility-related equipment and features on their vehicles.

Securement: Securement of the "common wheelchair" class of mobility device is the responsibility of the driver and drivers will be trained in the proper operation of all securement equipment based on manufacturer specifications. Marion Transit utilizes universal tie-downs to secure mobility devices.

Marion Transit shall respond to requests for reasonable modification to policies and practices consistent with its transportation program, unless the request would fundamentally alter the nature of Marion Transit's services, programs or activities. All requests for modification are to be in writing (any format) with the name of the individual requesting modification and other relevant contact information and shall be delivered to the Transportation Director. Forms are also available on the www.marionseniorservices.org website.

ADA Complaint Procedures

Marion Transit's Transportation Director and leadership staff are responsible for ADA grievances. The ADA Coordinator is Tom Wilder, Transportation Director as the ADA Coordinator's alternate is Donna Tackett, Human Resources Director to address the agency's compliance with ADA regulations as it relates to the transportation program and ADA transportation related concerns and grievances.

Transportation related ADA concerns, grievances or complaints are required to be submitted to Transportation Director at 1101 SW 20th Court, Ocala, Florida 34471 on the agency's Complaint Form (see Exhibit B for complete instructions on the process). This form is also available on the

MARIONTRANSIT

agency website www.marionseniorservices.org

Equipment for Accessible Service

Marion Transit shall ensure that vehicle operators and other personnel are thoroughly trained on the operation and make use of accessibility-related equipment or features required by Part 38 of this title and shall maintain in operative condition those features of facilities and vehicles that are required to make the vehicles and facilities readily accessible to and usable by individuals with disabilities. These features include lifts and other means of access to vehicles, securement devices, signage and systems to facilitate communications with persons with impaired vision or hearing.

Marion Transit shall establish a system of regular and frequent maintenance checks of lifts sufficient to determine if they are operative (this is part of the Daily Pre/Post Trip Inspection conducted on every vehicle). Drivers are required to immediately report to the Transit Manager any failure of a lift or other accessibility feature. Accessibility features shall be repaired promptly if they are damaged or out of order. When an accessibility feature is out of order, Marion Transit shall take reasonable steps to accommodate individuals with disabilities who would otherwise use the feature.

Vehicle accessibility features include:

- Lifts and ramps
- Mobility aid securement areas and systems
- Lighting
- Seatbelts and/or shoulder harnesses (required to be used by all passengers)
- Signage

Facility features include:

- Signage
- Accessible paths to and within facilities
- Ramps

Wheelchairs and Other Mobility Devices

Marion Transit's transit program has the capacity to carry a wheelchair and occupant. Marion Transit does not allow Segway personal transportation devices onto transportation vehicles, nor does the agency allow such devices in its Centers.

Service Animals

Marion Transit allows passengers to bring a service animal. When booking a trip, riders should advise reservations they will have a service animal riding with them.

Effective Communications

Marion Transit will make every accommodation to communicate with persons who have disabilities affecting hearing, speaking, reading, writing or comprehension, as long as the accommodation does not place an undue burden upon the organization.

MARIONTRANSIT

ADA Training for Employees

Marion Transit has designed a training program that provides complete information on accessibility-related equipment and accommodations required by the ADA training is thoroughly define in the agency's Transportation Operating Policies and Procedures (Exhibit C). Employees further acknowledge that they have received and read the agency's transportation-related ADA Policy as documented with Exhibit D and is include in driver training files.

ADA training ensures that employees understand the importance of keeping equipment and accommodations in good working order and that employee provide excellent customer service to people with disabilities. The training program:

- Covers all aspects of service delivery;
- Includes regular updates as necessary on new technologies and refresher in-service training on serving people with disabilities;
- Addresses both technical tasks (operating all accessibility equipment and features) and human relations (providing assistance to individuals with disabilities in boarding, alighting and securement, sensitivity & etiquette in serving persons with disabilities, communicating with individuals with different types of disabilities); and,
- Vehicle mechanics (maintaining all accessibility equipment and keeping maintenance and repair records).

Marion Transit's Transportation Director, reporting to the Marion Senior Services, Inc. Executive Director, is responsible for the oversight of the transportation program, including its policies and procedures, and supervising employees to ensure they provide proper and consistent levels of service to individuals with disabilities.

Description of Services and Scheduling Rides

Transportation services are offered Monday – Friday from 5:00 a.m. to *7:00 p.m. transportation service requests are to be made up to 2 weeks but not less than *72 hours in advance of your appointment time. Transportation requests must be made by calling Reservations at 352-620-3072 Monday through Friday 8:00 a.m. to 5:00 p.m.

(*ADA & Dialysis riders may make special request with Reservations)

Reasonable Modifications Requests

Marion Transit shall respond to requests for reasonable modification to policies and practices consistent with its transportation program, unless the request would fundamentally alter the nature of Marion Transit's services, programs or activities. All requests for modification are to be in writing (any format) with the name of the individual requesting modification and other relevant contact information and shall be delivered to the Transportation Director. Forms are also available on the agency website www.marionseniorservices.org

Use of Cell Phones

Each Driver has read and signed acknowledging the use of cell phone policy which forbids use of cell phones while driving.

MARIONTRANSIT

Ridership by Unaccompanied Minors

Marion Transit provides transportation to unaccompanied minors as long as the minor is accompanied by an adult. Unaccompanied minors (ages 15 and above) are provided transportation services to/from school activities and/or doctor's appointments with prior approval/permission granted by the minor's parent/guardian.

Travel Attendants

Marion Transit allows for participants to be accompanied by travel attendants in the event that it is necessary, and the vehicle is not to capacity. Prior knowledge of ridership by a participant traveling with an attendant is necessary to make sure the vehicle is not to capacity.

Food and/or Beverage Consumption

There is no consumption of food and/or beverages on Marion Transit vehicles.

Bicycles and Strollers

Marion Transit makes all reasonable accommodations for bicycles and strollers as appropriate.

Oxygen and Other Health Aids

Marion Transit does not prohibit an individual with a disability from traveling with a respirator or portable oxygen supply, as long as the health aid is classified as a portable oxygen concentrator as defined in 49 CFR, 177.870(e).

END

INCIDENT REPORT

LOCATION OF INCIDENT: _____

ROUTE: _____ BUS#: _____ DRIVER NAME: _____

4) _____ 5) _____ 6) _____ 7) _____

OTHER: _____

INCIDENT DETAILS

NAME: _____ ADDRESS: _____

NARRATIVE: (Who, What, When, Where, Why?)

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

Driver Signature: _____

Supervisor Approval: _____ Date: _____

Comments: _____

MARIONTRANSIT
A DIVISION OF
Marion Senior Services, Inc.

Title VI Complaint Form

Or

ADA Complaint Form

(Circle One)

Consistent with Title VI of the Civil Rights Act of 1964 and the Americans with Disabilities Act of 1990 (ADA), the Agency has designated an individual as the Title VI/ADA Coordinator. The Coordinator is responsible for accepting complaints of discrimination on the basis of race, color, national origin, sex, age, disability, religion and family status in the provision of services, activities, programs, or benefits provided by the Agency.

A Complaint shall be submitted in writing within the following time frames:

- **Title VI: No later than 180 days from the date** of the alleged discrimination based on race, color, religion, sex or national origin.
- **ADA: No later than 60 days from the date** of the alleged discrimination of a qualified disabled individual shall, solely by reason of such disability, be excluded from the participation in, be denied the benefits of or be subjected to discrimination in programs, services or activities sponsored by Marion Senior Services.

Complaints shall include the name, address, and phone number of the complainant, along with the location, date and description of the problem. Complaints shall be processed in accordance with the applicable law.

Note: Marion Senior Services, Inc. does not discriminate based on race, color, national origin, sex, age, disability, religion or family status in any program or service. Persons with questions about nondiscrimination or those needing special accommodations under the ADA or language services should contact **Tom Wilder (352) 620-3071**.

Please submit this form in person at the address below, or mail this form to:

**Marion Transit Services a Division of Marion Senior Services, Inc.
Tom Wilder, Transportation Director
1101 SW 20th Court
Ocala, FL 34471**

MARIONTRANSIT
A DIVISION OF
Marion Senior Services, Inc.

Submit a Civil Rights Title VI/ADA Complaint:

Section I

Name: _____

Address: _____

Telephone (Home): _____ Work: _____

Electronic Mail Address: _____

Accessible Format Requirements (Circle):

Large Print Audio Tape TDD Other

Section II

Are you filling this complaint on your own behalf? ☐ Yes* ☐ No

*If you answered "yes" to this question, go to Section III

If not, please supply the name and relationship of the person for whom you are complaining for:

Name _____ Relationship _____

Please explain why you have filed for a third party:

Please confirm that you have obtained the permission of the aggrieved party if you are filing on behalf of a third party. ☐ Yes ☐ No

Section III

I believe the discrimination I experienced was based on (check all that applies):

☐ Race ☐ Color ☐ National Origin ☐ Gender ☐ Religion ☐ Disability ☐ Age
☐ Family Status

Date of Alleged Discrimination (Month, Day, Year)

Explain as clearly as possible what happened and why you believe you discriminated against. Describe all persons who were involved. Include the name and contact information of the person(s) who discriminated against you (if known) as well as names and contact information of any witnesses. Please include any other information that would assist us in our investigation of the allegations. Please also provide any other documentation that is relevant to this complaint.

MARIONTRANSIT
A DIVISION OF
Marion Senior Services, Inc.

Section IV

Have you filed this complaint with any other Federal, State, or local agency, or with any Federal or State court?

☐ Yes ☐ No

If yes, check all that apply:

☐ Federal Agency ☐ State Agency
☐ Federal Court ☐ Local Agency
☐ State Court

Please provide information about a contact person at the agency/court where the complaint was filed.

Name: _____

Title: _____

Agency: _____

Address: _____

Telephone: _____

Section V

Name of the agency complaint is against:

Contact Person: _____

Title: _____

Telephone Number: _____

You may attach any written materials or other information that you think is relevant to your complaint.

Signature and date required below.

Signature _____ Date _____

MARIONTRANSIT

Substance Abuse Policy

Zero Tolerance

In accordance with USDOT and FTA Regulations

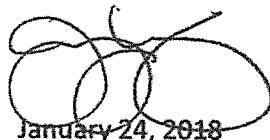
MARIONTRANSIT is dedicated to providing safe, dependable, and economical transportation service to its patrons. *MARIONTRANSIT* employees are a valuable resource and it is our agency's goal to provide a safe, healthy and satisfying working environment, free of the potential dangers posed by a safety-sensitive employee's use of prohibited drugs or misuse of alcohol.

This policy is established to comply with the Federal Transit Administration regulations codified as 49 CFR Part 655, as amended and USDOT regulations codified as 49 CFR Part 40, as amended. ***Policy provisions authorized by MARIONTRANSIT are italicized and bolded throughout this policy.*** All other policy provisions are implemented under the authority of the United States Department of Transportation (USDOT) and the Federal Transit Administration (FTA).

This policy is approved by: Jennifer Martinez

Title of approving official: Executive Director – Marion Senior Services, Inc.

Signature of approving official:



Date signed:

January 24, 2018

Policy effective date: January 24, 2018

MARIONTRANSIT

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1. Testing Program Background

The Omnibus Transportation Employee Testing Act of 1991 (OTETA) directed the United States Department of Transportation (USDOT) to promulgate regulations outlining the procedures for transportation workplace drug and alcohol testing. The USDOT regulations titled, "Procedures for Transportation Workplace Drug and Alcohol Testing" are codified as 49 CFR Part 40. The regulations ensure uniform practices for specimen collections, laboratory analysis, medical review, result reporting and the Return-to-Duty process for violating employees. The regulations are applicable to safety-sensitive employees in transportation workplaces throughout the nation (transit, railroad, aviation, commercial drivers, etc.).

The OTETA also directed each transportation administration to craft industry-specific regulations that define which employees are subject to testing, the testing circumstances, policy statement requirements and training requirements, relevant to that industry. *MARIONTRANSIT* is required to comply with both the USDOT regulations described above, as well as the Federal Transit Administration regulations "Prevention of Prohibited Drug Use and Alcohol Misuse in Transit Operations" which are codified as 49 CFR Part 655.

2. Employee Applicability

This policy and the USDOT/FTA testing program apply to all safety-sensitive *MARIONTRANSIT* employees. The policy also applies to volunteers who are required to hold a Commercial Drivers License (CDL) and volunteers that receive remuneration in excess of actual expenses accrued while carrying out assigned duties. Adherence to this policy and the USDOT/FTA testing program is a condition of employment in a safety-sensitive position with *MARIONTRANSIT*. All employees of *MARIONTRANSIT* who perform, or could be called upon to perform, any of the following duties are defined as safety-sensitive employees:

1. Operate a public transportation vehicle, while in or out of service
2. Control the movement of a public transportation vehicle

The *MARIONTRANSIT* positions classified as safety-sensitive include:

- Transportation Director
- Transit Manager
- Transportation Trip Manager
- Transit Assistant
- Transportation Office Assistant
- Transportation Accounting Clerk
- Transportation Dispatchers
- Transportation Reservation Clerks
- Transportation Scheduler
- Transit Drivers

MARIONTRANSIT

3. USDOT/FTA Prohibited Drug Classes

- Amphetamines
- Cocaine
- Marijuana
- Opioids
- Phencyclidine (PCP)

4. Pre-employment Drug and Alcohol Background Checks

In accordance with 49 CFR Part 40.25, **MARIONTRANSIT** must make and document good faith efforts to perform drug and alcohol background checks for all applicants applying for a safety-sensitive position and all current employees applying for transfer into a safety-sensitive position. Testing information will be requested from each of the applicant's previous DOT covered employers during the two years prior to the date of application. **MARIONTRANSIT** must obtain the applicant's written consent for the release of their drug and alcohol testing information from their previous DOT covered employers to **MARIONTRANSIT**. Applicants refusing to provide written consent are prohibited from performing safety-sensitive functions for **MARIONTRANSIT**.

Safety-sensitive applicants who have previously violated the USDOT testing program must provide documentation that they have successfully completed the USDOT's Return-to-Duty process with a DOT-qualified Substance Abuse Professional (SAP). Failure to provide satisfactory documentation will exclude the applicant from being hired or transferred into a safety-sensitive position with **MARIONTRANSIT**.

5. Pre-Employment Testing

All applicants for safety-sensitive positions shall undergo a pre-employment urine drug test. **MARIONTRANSIT** must receive an MRO-verified negative drug test result prior to the applicant's first performance of any safety sensitive function, including behind-the-wheel training.

*If an applicant's pre-employment urine drug test result is verified as positive, the applicant will be excluded from consideration for employment in a safety-sensitive position with **MARIONTRANSIT**. The applicant will be provided a list of USDOT-qualified Substance Abuse Professionals.*

An employee returning from an extended leave period of 90 consecutive days or more, and whose name was also removed from the random testing pool for 90 days or more, must submit to a pre-employment urine drug test. **MARIONTRANSIT** must be in receipt of a negative drug test result prior to the employee resuming any safety-sensitive function.

6. Random Testing

Safety-sensitive employees will be subject to random, unannounced testing. **MARIONTRANSIT** will perform random testing in a manner that meets or exceeds the FTA minimum annual testing requirements, as amended. The selection of employees for random testing will be made using a scientifically valid method. All safety-sensitive employees will have an equal chance of being selected each time a random draw is performed. Random alcohol tests will be conducted just

MARIONTRANSIT

before, during or just after the employee's performance of a safety-sensitive function. Random drug tests may be conducted anytime an employee is on duty, on call for duty or on standby for duty.

Once an employee is notified that they have been selected for a random test, they must proceed immediately to the testing location. Failure to proceed immediately may be deemed a refusal to test.

7. Reasonable Suspicion Testing

All safety-sensitive employees must submit to reasonable suspicion drug and/or alcohol testing when a supervisor or company official trained in detecting signs and symptoms of drug use and alcohol misuse has made specific, contemporaneous, articulable observations concerning an employee's appearance, speech, behavior and/or body odor. Reasonable suspicion testing for alcohol misuse will occur when observations are made just before, during, or just after the employee's performance of a safety-sensitive function. Reasonable suspicion testing for prohibited drugs may be conducted anytime an employee is on duty or on standby for duty and a trained supervisor has made the observations.

8. Post-Accident Testing

Fatal Accidents: Safety-sensitive employees must submit to post-accident drug and alcohol testing following an accident involving a public transportation vehicle that results in the loss of human life. In addition to a surviving operator of the vehicle, any other surviving, safety-sensitive employee whose performance could have contributed to the accident must also be tested.

Non-Fatal Accidents: All safety-sensitive employees whose actions cannot be completely discounted as a contributing factor must submit to post-accident drug and alcohol testing when a non-fatal accident meets one or more of the following thresholds:

1. An individual suffers bodily injury and immediately receives medical treatment away from the scene
2. One or more vehicles incurs disabling damage that requires the vehicle(s) to be towed away from the accident scene
3. If the public transportation vehicle is a rail car, trolley car, trolley bus or vessel and has been removed from service.

MARIONTRANSIT officials will use the best information available at the scene, to determine if a safety-sensitive employee's performance can be completely discounted as a contributing factor to the accident.

Post-accident drug and alcohol tests will be conducted as soon as practicable following the accident. Any safety-sensitive employee involved in an accident must refrain from alcohol use for eight (8) hours following the accident or until the employee undergoes a post-accident alcohol test. Any safety-sensitive employee who leaves the scene of the accident without a justifiable reason or explanation prior to submitting to drug and alcohol testing will be deemed

MARIONTRANSIT

to have refused the test. However, employees are not prohibited from leaving the scene of an accident to obtain assistance in responding to the accident or to obtain necessary emergency medical care.

9. Urine Specimen Collections

Urine specimen collections will be conducted in accordance with USDOT rule, 49 CFR Part 40, as amended. Collectors will be appropriately trained and qualified to perform urine specimen collections for USDOT covered employers. Urine specimen collectors will use the split-specimen collection method and will afford the donor (employee) the greatest degree of privacy permitted per 49 CFR Part 40, as amended. When an observed collection is required, the observer will be of the same gender as the donor (employee).

10. Refusal to Submit to Urine Drug Testing

The following actions constitute a "refusal to test" in accordance with 49 CFR Part 40, as amended:

- (1) Failure to appear for any test within a reasonable time, as determined by the employer, consistent with applicable DOT agency regulations, after being directed to do so by the employer (pre-employment testing not applicable).
- (2) Failure to remain at the testing site until the testing process is completed (after the process has been started)
- (3) Failure to provide a urine specimen for any drug test required by this part or DOT agency regulations
- (4) In the case of a directly observed or monitored collection in a drug test, fail to permit the observation or monitoring of your provision of a specimen
- (5) Failure to provide a sufficient amount of urine when directed, and it has been determined, through a required medical evaluation, that there was no adequate medical explanation for the failure
- (6) Failure or decline to take an additional drug test the employer or collector has directed you to take
- (7) Failure to undergo a medical examination or evaluation, as directed by the MRO as part of the verification process, or as directed by *MARIONTRANSIT*
- (8) Failure to cooperate with any part of the testing process (e.g., refuse to empty pockets when directed by the collector, behave in a confrontational way that disrupts the collection process, fail to wash hands after being directed to do so by the collector).
- (9) For an observed collection, failure to follow the observer's instructions to raise your clothing above the waist, lower clothing and underpants, and to turn around to permit the observer to determine if you have any type of prosthetic or other device that could be used to interfere with the collection process.
- (10) Possessing or wearing a prosthetic or other device that could be used to interfere with the collection process.
- (11) Admitting to the collector or MRO that you adulterated or substituted the specimen.
- (12) When the MRO verifies your drug test result as adulterated or substituted.

Refusing to submit to a USDOT/FTA required test is a violation of the USDOT/FTA testing

MARIONTRANSIT

program. Employees are required to be immediately removed from safety-sensitive duty and provided a list of USDOT-qualified Substance Abuse Professionals. *Per MARIONTRANSIT authority, violation of the USDOT/FTA testing program will result in termination of employment.*

11. Urine Specimen Analysis

All specimens will be transported or shipped to a laboratory certified by the Department of Health and Human Services (DHHS). All specimens will be analyzed at the laboratory in accordance with 49 CFR Part 40, as amended. The procedures that will be used to test for the presence of prohibited drugs will protect the employee and the integrity of the drug testing process, safeguard the validity of the test results and ensure that the test results are attributed to the correct employee. Laboratory confirmed drug test results will be released only to a certified Medical Review Officer (MRO) for review and verification.

Negative-Dilute Specimens

Upon receipt of an MRO verified negative-dilute drug test result with creatinine levels greater than 5 mg/dl and less than 20 mg/dl, **MARIONTRANSIT** will require applicants and employees to submit to a second urine collection per 49 CFR Part 40.197. The collection of the second specimen will not be conducted using direct observation procedures. The MRO verified result of the second urine drug test will be accepted by **MARIONTRANSIT** as the final result and the test of record. ***MARIONTRANSIT will apply this policy provision uniformly for all pre-employment and random urine drug tests reported by the Medical Review Officer to have creatinine levels greater than 5mg/dl but less than 20mg/dl (negative-dilute results).*** Once notified that a second collection is required, employees must proceed immediately for testing. An employee's failure to report immediately may be deemed as a refusal to submit to testing, which is a violation of the USDOT/FTA testing program. ***Per MARIONTRANSIT authority, violation of the USDOT/FTA testing program will result in termination of employment.***

12. Role of the Medical Review Officer (MRO)

The role of the Medical Review Officer is to review and verify laboratory confirmed test results obtained through a DOT-covered employer's testing program. When a non-negative drug test result is received, the MRO will communicate with the donor (employee) to determine if a legitimate medical explanation exists. When a legally prescribed medication has produced a non-negative result, the MRO will verify the prescription and report the result as "negative" to **MARIONTRANSIT**. Medical conditions and other information obtained by the MRO during the interview with the donor will be maintained in a confidential manner. However, if the MRO believes that a medication prescribed to the donor may pose a significant safety risk, the MRO will require the donor to contact his/her prescribing physician and request that the physician contact the MRO within 5 business days. The MRO and prescribing physician will consult to determine if the employee's medication use presents a significant safety risk. **MARIONTRANSIT** will be notified by the MRO when the outcome of the consultation results in a determination that the donor's medication use presents a significant safety risk. If the employee's prescribing physician fails to respond, the safety concern will be reported to **MARIONTRANSIT** without consultation. Based on the MRO recommendation, **MARIONTRANSIT** may deem the employee medically disqualified from performing safety-sensitive functions. The MRO assigned to review

MARIONTRANSIT

and verify laboratory drug test results for **MARIONTRANSIT** is:

Dr. Randy Barnett D.D.
First Source Solutions
100 HIGHPOINT DR., STE. 102
CHALFONT, PA 18914
215-396-5500 FAX 215-396-5610

13. Consequence for MRO Verified Positive Drug Test

When **MARIONTRANSIT** is notified of an MRO verified positive drug test, or a test refusal due to adulteration or substitution; the violating employee will be immediately removed from safety-sensitive duty and provided a list of DOT-qualified Substance Abuse Professionals. Applicants will be excluded from hire and provided a list of DOT-qualified Substance Abuse Professionals. *Per MARIONTRANSIT authority, violation of the USDOT/FTA testing program will result in termination of employment.*

14. Split Specimen Testing

As an important employee protection, split specimen collection procedures will be used for all USDOT/FTA urine collections. When an employee challenges an MRO verified result, he/she may request that the split specimen (bottle B) be tested at a different DHHS certified laboratory that conducted the test of the primary specimen (bottle A). Instructions for requesting the split specimen test will be provided by the Medical Review Officer during his/her interview with the donor (employee). In accordance with USDOT rule, **MARIONTRANSIT** will ensure that the fee to process the split specimen test is covered, in order for a timely analysis of the split specimen. *MARIONTRANSIT may seek reimbursement for the cost of the split specimen test.*

15. Alcohol Prohibition

Safety-sensitive employees are prohibited from consuming alcohol while performing safety-sensitive functions, within (4) four hours prior to performing a safety sensitive function, or during the hours that they are on call or standby for duty. No safety-sensitive employee shall report for duty or remain on duty while having an alcohol concentration of 0.02 or greater. Safety-sensitive employees must not consume alcohol within eight (8) hours following an accident or until the employee submits to post-accident testing, whichever occurs first.

16. Alcohol Testing

All alcohol screening tests and confirmation tests will be performed in accordance with USDOT rule, 49 CFR Part 40. The procedures that will be used to test for alcohol misuse will protect the employee and the integrity of the testing process, safeguard the validity of the test results, and ensure the test results are attributed to the correct employee.

When an alcohol-screening test indicates a blood alcohol concentration (BAC) of 0.02 or greater, a confirmation test will be performed using an evidential breath-testing device listed on the USDOT/ODAPC webpage as an "Approved Evidential Breath Measurement Device". The confirmed blood alcohol concentration (BAC) result will be transmitted by the technician to **MARIONTRANSIT** in a confidential manner. A safety-sensitive employee who has a confirmed

MARIONTRANSIT

blood alcohol concentration (BAC) of 0.02 or greater but less than 0.04 will be removed from safety-sensitive duties for a period of at least (8) eight hours or until test results fall below 0.02.

17. **Consequence for a USDOT/FTA Confirmed Alcohol Violation**

A safety-sensitive employee who has a confirmed blood alcohol concentration (BAC) of 0.04 or greater has violated the USDOT/FTA testing program and will be removed from safety-sensitive duty and provided a list of DOT-qualified Substance Abuse Professionals. *Per MARIONTRANSIT authority, violation of the USDOT/FTA testing program will result in termination of employment.*

18. **Refusal to Submit to Alcohol Testing**

The following actions constitute a refusal to submit to an alcohol test:

- (1) Fail to appear for any test within a reasonable time, as determined by the employer, consistent with applicable DOT agency regulations, after being directed to do so by the employer.
- (2) Fail to remain at the testing site until the testing process is complete
- (3) Fail to provide an adequate amount of saliva or breath for any USDOT required alcohol test
- (4) Fail to provide a sufficient breath specimen, and the physician has determined, through a required medical evaluation, that there was no adequate medical explanation for the failure
- (5) Fail to undergo a medical examination or evaluation, as directed by the [Agency]
- (6) Fail to sign the certification at Step 2 of the ATF
- (7) Fail to cooperate with any part of the testing process.

Refusing to submit to a USDOT/FTA required test is a violation of USDOT/FTA testing program. Employees must be immediately removed from safety-sensitive duty and provided a list of USDOT-qualified Substance Abuse Professionals. *Per MARIONTRANSIT authority, violation of the USDOT/FTA testing program will result in termination of employment.*

19. **MARIONTRANSIT Testing Program Contacts**

Designated Employer Representative (Drug & Alcohol Program Manager)

Tom Wilder, Transportation Director
1101 SW 20th Court, Ocala, FL 34471
352-620-3519
twilder@marionseniorservices.org

Alternate (back-up) Program Manager

Donna Tackett, Human Resources Director
1101 SW 20th Court, Ocala, FL 34471
352-620-3501
dtackett@marionseniorservices.org

MARIONTRANSIT

The referenced USDOT and FTA regulations, as well informational material related to this testing program are available for review and/or download from the Florida Department of Transportation's Substance Abuse Management Website: <http://sam.cutr.usf.edu>. Further information may be obtained from the USDOT's Office of Drug and Alcohol Policy and Compliance website: <https://www.transportation.gov/odapc> and the Federal Transit Administration's (FTA) website: <https://transit-safety.fta.dot.gov/DrugAndAlcohol/Default.aspx>

STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION
CERTIFICATE OF COMPLIANCE

725-030-10
TRANSIT
12/01

for a
SECTION 5311 SUBRECIPIENT
(Certifying compliance with 49 CFR Parts 40, 655)
To
Florida Department of Transportation

DATE 2/3/2021

Section 5311 Subrecipient Information:

AGENCY NAME: Marion Senior Services, Inc.

ADDRESS: 1101 SW 20th Court, Ocala, FL 34471

PHONE: 352-620-3071

FDOT District Office Information:

NAME: FDOT District 5, Modal Development Office

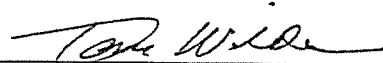
ADDRESS: 420 W. Landstreet, Orlando, FL 32824

PHONE: (321) 319-8174

I, Tom Wilder, Transportation Director
(Name) (Title)

hereby certify that Marion Senior Services, Inc. d/b/a Marion Transit and its applicable
(Name of Subrecipient)
contractor(s) (listing attached hereto) for N/A
(Name of Subrecipient)

has (have) established and implemented an anti-drug and alcohol misuse prevention program in accordance with the provisions of 49 CFR Parts 40 and 655 as amended. I further certify that the employee training conducted under this part meets the requirements of 49 CFR Parts 40 and 655 as amended.


Signature

Attachment: (Applicable Contractor(s) - Name, Address, Phone #, Contact Person)

Calendar Year Covered by this Report: 2020

Form DOT F 1385 (Rev. 4/2019)

Company Name: Marion Senior Services, Inc.

Doing Business As (DBA) Name (if applicable): Marion Transit

Address: 1101 SW 20th Court Ocala Florida 34471

E-mail: twilder@marionseniorservices.org

Name of Certifying Official: Tom Wilder

Signature:

Telephone: (352) 620-3519

Date Certified: 01-14-2021

Prepared by (if different):

Telephone: ____ (____)

C/TPA Name and Telephone (if applicable): FirstLab

(215) 396-5500

Check the DOT agency for which you are reporting MIS data; and complete the information on that same line as appropriate:

FMCSA - Motor Carrier: DOT #: _____ Owner-operator: (circle one) YES or NO Exempt: (circle one) YES or NO

FAA - Aviation: Certificate # (if applicable): _____ Plan/Registration # (if applicable): _____

PHMSA - Pipeline: (Check) Gas Gathering ☐ Gas Transmission ☐ Gas Distribution ☐ Transport Hazardous Liquids ☐ Transport Carbon Dioxide ☐

___ FRA - Railroad: Total Number of observed/documentated Part 219 "Rule G" Observations for covered employees

USCG - Maritime: Vessel ID # (USCG- or State-Issued): _____ (if more than one vessel, list separately.)
 X ETA - Transit

X FTA - Transit

II. Covered Employees: (A) Enter Total Number Safety-Sensitive Employees In All Employee Categories:

50

(B) Enter Total Number of Employee Categories:

2

(C)

Employee Category	Total Number of Employees in this Category
Revenue Vehicle & Equipment Maint.	0

If you have multiple employee categories, complete Sections I and II (A) & (B). Take that filled-in form and make one copy for each employee category and complete Sections II (C), III, and IV for each separate employee category.

Using Testing Data:

[illegible]

1990-1991 $\sigma = 0.001$

[illegible]

Calendar Year Covered by this Report: 2020

Form DOT F 1385 (Rev. 4/2019)

Company Name: Marion Senior Services, Inc.

Doing Business As (DBA) Name (if applicable): Marion Transit

Address: 1101 SW 20th Court Ocala Florida 34471

E-mail: twilder@marionseniorservices.org

Name of Certifying Official: Tom Wilder

Signature:

Telephone: (352) 620-3519

Date Certified: 01-14-2021

Prepared by (if different):

Telephone: ()

C/TPA Name and Telephone (if applicable): FirstLab

(215) 396-5500

Check the DOT agency for which you are reporting MIS data; and complete the information on that same line as appropriate:

— FMCSA - Motor Carrier: DOT #: _____ Owner-operator: (circle one) YES or NO Exempt: (circle one) YES or NO
 — FAA - Aviation: Certificate # (if applicable) _____

FAA - Aviation: Certificate # (if applicable): _____ Plan/Registration # (if applicable): _____

PHMSA - Pipeline: (Check) Gas Gathering ___ Gas Transmission ___ Gas Distribution ___ Transport Hazardous Liquids ___ Transport Carbon Dioxide ___
 ERA - Railroad: Total Number of Cars: _____ Total Number of Cars Carrying Dangerous Materials: _____
 PHMSA - Pipeline: (Check) Gas Gathering ___ Gas Transmission ___ Gas Distribution ___ Transport Hazardous Liquids ___ Transport Carbon Dioxide ___
 ERA - Railroad: Total Number of Cars: _____ Total Number of Cars Carrying Dangerous Materials: _____

USCG - Maritime Vessel ID # (USCG - State ID #)

USCG - Maritime: Vessel ID # (USCG- or State-Issued): _____ (if more than one vessel, list separately.)
 Y ETA - Transit: _____

X FTA - Transit

II. Covered Employees: (A) Enter Total Number Safety-Sensitive Employees In All Employee Categories:

50

(B) Enter Total Number of Employee Categories:

2

(C)

Employee Category	Total Number of Employees in this Category
CDL/Non-Revenue Vehicle	0

If you have multiple employee categories, complete Sections I and II (A) & (B). Take that filled-in form and make one copy for each employee category and complete Sections II (C), III, and IV for each separate employee category.

III. Drug Testing Data:

[illegible]

IV. Alcohol Testing Data:

[illegible]

Calendar Year Covered by this Report: 2020

Form DOT F 1385 (Rev. 4/2019)

Company Name: Marion Senior Services, Inc.

Doing Business As (DBA) Name (if applicable): Marion Transit

Address: 1101 SW 20th Court Ocala Florida 34471

Name of Certifying Official: Tom Wilder

Signature:

Telephone: (352) 620-3519

Date Certified: 01-14-2021

Prepared by (if different):

Telephone: ()

C/TPA Name and Telephone (if applicable): FirstLab

(215) 396-5500

Check the DOT agency for which you are reporting MIS data; and complete the information on that same line as appropriate:

— FMCSA - Motor Carrier: DOT #: _____ Owner-operator: (circle one) YES or NO Exempt: (circle one) YES or NO
 — FAA - Aviation: Certificate # (if applicable): _____

PHMSA - Pipeline: (Check) Gas Gathering _____ Gas Transmission _____ Gas Distribution _____ Plan/Registration # (if applicable): _____

PHMSA - Pipeline: (Check) Gas Gathering ☐ Gas Transmission ☐ Gas Distribution ☐ Transport Hazardous Liquids ☐ Transport Carbon Dioxide ☐

USCG - Maritime: Vessel ID # (USCG- or State-Issued): _____ (if more than one vessel, list separately.)
☒ FTA - Transit

X_FTA - Transit

II. Covered Employees: (A) Enter Total Number Safety-Sensitive Employees In All Employee Categories:

50

(B) Enter Total Number of Employee Categories:

2

(C)

If you have multiple employee categories, complete Sections I and II (A) & (B). Take that filled-in form and make one copy for each employee category and complete Sections II (C), III, and IV for each separate employee category.

	1	2	3	4	5	6	7	8	9	10	11	12	13
--	---	---	---	---	---	---	---	---	---	----	----	----	----

IV. Alcohol Testing Data:

	1	2	3	4	5	6	7	8	9
--	---	---	---	---	---	---	---	---	---

Type of Test	1	2	3	4	5	6	8		9
	Total Number Of Screening Test Results [Should equal the sum of Columns 2, 3, 7, and 8]	Screening Tests With Results Below 0.02	Screening Tests With Results 0.02 Or Greater	Number Of Confirmation Tests Results	Confirmation Tests With Results 0.02 Through 0.039	Confirmation Tests With Results 0.04 Or Greater	Refusal Results		Cancelled Results
							"Shy Lung" ~ With No Medical Explanation	Other Refusals To Submit To Testing	
Pre-Employment	0	0	0	0	0	0	0	0	0
Random	1	1	0	0	0	0	0	0	0
Post-Accident	0	0	0	0	0	0	0	0	0
Reasonable Susp./Cause	0	0	0	0	0	0	0	0	0
Return-to-Duty	0	0	0	0	0	0	0	0	0
Follow-Up	0	0	0	0	0	0	0	0	0
TOTAL	1	1	0	0	0	0	0	0	0

Calendar Year Covered by this Report: 2020

Form DOT F 1385 (Rev. 4/2019)

Company Name: Marion Senior Services, Inc.

Doing Business As (DBA) Name (if applicable): Marion Transit

Address: 1101 SW 20th Court Ocala Florida 34471

E-mail: twilder@unarianiorservices.org

Name of Certifying Official: Tom Wilder

Signature:

Telephone: (352) 620-3519

Date Certified: 01-14-2021

Prepared by (if different):

Telephone: ()

C/TPA Name and Telephone (if applicable): FirstLab
Lab, DCF, 312-353-6000

(215) 396-5500

Check the DOT agency for which you are reporting MIS data; and complete the information on that same line as appropriate:

— FMCSA - Motor Carrier: DOT #: _____ Owner-operator: (circle one) YES or NO Exempt: (circle one) YES or NO
— FAA - Aviation: Certificate # (if applicable): _____

PHMSA - Pipeline: (Check) Gas Gathering ☐ Gas Transmission ☐ Gas Distribution ☐ Gas Distribution ☐ Transport Hazardous Liquids ☐ Transport Carbon Dioxide ☐

_____ FTA - Railroad: Total Number of observed/documentated Part 219 "Rule G" Observations for covered employees: _____
 _____ USCG - Maritime: Vessel ID # (USCG- or State-Issued): _____ (if more than one vessel, list separately.)
☒ FTA - Transit

X_FTA - Transit

II. Covered Employees: (A) Enter Total Number Safety-Sensitive Employees In All Employee Categories:

50

(B) Enter Total Number of Employee Categories:

2

(C)

Employee Category	Total Number of Employees in this Category
Armed Security Personnel	(i)

If you have multiple employee categories, complete Sections I and II (A) & (B). Take that filled-in form and make one copy for each employee category and complete Sections II (C), III, and IV for each separate employee category.

1	2	3	4	5	6	7	8	9	10	11	12	13
---	---	---	---	---	---	---	---	---	----	----	----	----

[illegible]

1 2 3 4 5 6 7 8 9

[illegible]



FSSolutions

Random Compliance Report

Marion Transit Services

For 2020

Created: 1/6/2021 3:26 PM

Selection Period	Emp Pop	Drug Selection Count	Drug Selection Pct	Drug Completed Count	Drug Completed Pct	Emp Pop	Alc Selections Count	Alc Selections Pct	Alc Completed Count	Alc Completed Pct
01/01/2020	47	6	12.77%	6	100.00%	47	2	4.26%	2	100.00%
03/31/2020										
04/01/2020	51	7	13.73%	7	100.00%	51	2	3.92%	2	100.00%
06/30/2020										
07/01/2020	33	6	18.18%	5	83.33%	33	2	6.06%	1	50.00%
09/30/2020										
10/01/2020	31	5	16.13%	5	100.00%	31	2	6.45%	0	0.00%
12/31/2020										
Total	41	24	58.54%	23	95.83%	41	8	19.51%	5	62.50%

Drug

21 - 50% Annual Random Drug Requirement

23 - # of Random Drug Tests Completed

0 - # Random Drug Tests to be Completed by Year End

Alcohol

5 - 10% Annual Random Alcohol Requirement

5 - # of Random Alcohol Tests Completed

0 - # Random Alcohol Tests to be Completed by Year End

Disclaimer: Alcohol results do not have an agency and therefore all Alcohol results will appear regardless of the Agency that was selected.

MARION TRANSIT

Driver Safety Meeting/Training
October 11, 2018 – 5:00 PM till 7:00 PM

- Director Updates
- United Way Drive
- Special Recognitions – Hurricane Michael

1. Training Topic – Pre & Post Trip

2. USDOT/FTA Drug & Alcohol Testing Program – (Handbook)

- NOTES:

ADMINISTRATIVE

Karen –

Herman –

- Odometer – Ford Digital (**IMPORTANT**)
- Bus assignments - changes
- Pre-Trip Importance
- Driver - Bus requirements - inspections
- Time off requests – short notice

Tom –

- On the job injuries, must report.
- Rear end accidents – do's & don'ts
- Incident Reports – Importance of providing “heads up” to Supervisor(s)
- Triannual Review – Letter of Compliance

- FTO Certificates

SAVE THE DATES

- ✓ Annual MSS Christmas Party – Friday, November 30th @ 6PM. Ewers Center CFC

Questions?

MARION TRANSIT

Driver Safety Meeting/Training
September 26, 2019 – 5:00 PM till 7:00 PM

✓ MSS Director Updates

✓ Training Topic #1: Drug & Alcohol Annual

Video: Prescription for Safety – CUTRUSF – YouTube

NOTES:

ADMINISTRATIVE

Karen –

- ✓ No Shows – Cancellations

Herman –

- ✓ Time management
- ✓ Running late – what to do
- ✓ Breaks
- ✓ Teamwork - Helping
- ✓ Video observations –
 - Venting to clients
 - Violations
 - Notify Management (don't wait to see if complaint comes in first)

Tom –

- ✓ Hurricane preparedness – let the clients know
- ✓ On-Time Performance
- ✓ Recent client incident – social media
- ✓ New buses for 2020 – 5310 Grant Award
- ✓ Management

Presentations –

- ✓ FTO Certificates
- ✓ Transit STAR of the Quarter
- ✓ Volunteer Letters

Other - Quiz Safety Questions

SAVE THE DATES

Working Holiday's:

- ✓ Veteran's Day – Monday, November 11th
- ✓ Day after Thanksgiving – Friday, November 29th
- ✓ Day before Christmas – Tuesday, December 24th

MarionTransit


Training Lesson Plan

Topic	FTA Drug & Alcohol Testing Program – Annual
Instructor(s)	Online, Video & Handbook
Methodology	Circle: Video Lecture Other: Online

Length of Training:	2 Hours (60 minutes Drug & 60 minutes Alcohol)
---------------------	--

Objective (As a result of this training what will the student learn/be able to do)
Understand the rules and procedures developed by the US Department of Transportation for the mandated for drug and alcohol testing in the transportation workplace. 49 CFR Part 40 "Procedures for Transportation Workplace Drug and Alcohol Testing Programs.

Assessment (Assignments, projects, exams to show what they have learned)
Each student will receive the USDOT/FTA Drug and Alcohol Testing Program Handbook for Transit Employers and Employees. A certificate of completion will be issued. Quiz Completed in December 2020.

Approval:		Date: 12/1/2020
-----------	---	-----------------

Director:		Date: 12/1/2020
-----------	---	-----------------

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

Rev. 8/2018



February 3, 2021

Florida Department of Transportation, District Five
Attn: Ms. Diane Poitras, Transit Programs Administrator
420 W. Landstreet RD
Orlando, FL 32824


RE: VEHICLE MAINTENANCE PLAN

To: District Five

This letter provides certification that Marion Senior Services, Inc. d/b/a Marion Transit has not made any changes to the Vehicle Maintenance Plan implemented November 2017 to comply and incorporate FDOT Preventative Maintenance Standards Manual Edition 4.1.

The Preventative Maintenance Plan is attached for reference if necessary.

Sincerely,


Tom Wilder, Transportation Director



February 3, 2021

Florida Department of Transportation, District Five
Attn: Ms. Diane Poitras, Transit Programs Administrator
420 W. Landstreet RD
Orlando, FL 32824

Re: ANNUAL CERTIFICATION – 2020
49 U.S.C. 5310 – VEHICLES

To: District Five:

This letter provides certification that Marion Senior Services, Inc. d/b/a Marion Transit is in compliance with the following criteria:

1. The Section 5310 vehicles(s) continue to be used for the purpose for which the grant was approved.
2. The vehicle(s) and equipment do not exceed that which is needed for operations.
3. The vehicle(s) have not been sold, damaged or otherwise taken out of service.
4. There has not been a reduction in local contributions made to the project.

Tom Wilder, Transportation Director

Attachments



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

02/04/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Brown & Brown of Florida, Inc. 1720 SE 16th Avenue, Suite 301 Ocala FL 34471	CONTACT NAME: Sandra Perryman PHONE (A/C, No, Ext): (352) 732-5010 FAX (A/C, No): (352) 732-5344 E-MAIL ADDRESS: Sandra.perryman@bbocala.com																					
INSURED Marion Senior Services Inc 1101 SW 20th Court Ocala FL 34471	<table><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A:</td><td>Philadelphia Indemnity Insurance Company</td><td>18058</td></tr><tr><td>INSURER B:</td><td>Bridgefield Employers Insurance Company</td><td>10701</td></tr><tr><td>INSURER C:</td><td>The Hanover Insurance Company</td><td>22292</td></tr><tr><td>INSURER D:</td><td></td><td></td></tr><tr><td>INSURER E:</td><td></td><td></td></tr><tr><td>INSURER F:</td><td></td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	Philadelphia Indemnity Insurance Company	18058	INSURER B:	Bridgefield Employers Insurance Company	10701	INSURER C:	The Hanover Insurance Company	22292	INSURER D:			INSURER E:			INSURER F:		
INSURER(S) AFFORDING COVERAGE		NAIC #																				
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INSURER C:	The Hanover Insurance Company	22292																				
INSURER D:																						
INSURER E:																						
INSURER F:																						

COVERAGES**CERTIFICATE NUMBER:** 20-21**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			PHPK2078734	01/01/2020	01/01/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/OP AGG \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY			PHPK2078734	01/01/2020	01/01/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			PHUB706046	01/01/2020	01/01/2021	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N Y	N/A	83050566	03/31/2020	03/31/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Directors & Officers Liability			LHJ941015207	01/01/2020	01/01/2021	Limit \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Attn: Diane Poitras, Transit Programs Administrator Diane.Poitras@dot.state.fl.us See attached schedule - certificate holder is listed as loss payee as respects the units on the schedules shown

CERTIFICATE HOLDER**CANCELLATION**

Florida Department of Transportation District 5 420 W Landstreet Rd Orlando FL 32824	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
--	---

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Philadelphia Indemnity Insurance Company

Loss Payee Schedule

Policy Number: PHPK2220717

Loss Payee

First Data Merchant Services Corp
Mail Stop 189
4000 Coral Ridge Dr
Coral Springs, FL 33065-7614

FL - Loc #1 - Bld #1 - BUSINESS PERSONAL PROPERTY (OFFICES (N.O.C.))

Loss Payee

Leaf Capital Funding, LLC ISAOA
c/o Ins Service Center
PO Box 979127
Miami, FL 33197-9127

FL - Loc #1 - Bld #1 - BUSINESS PERSONAL PROPERTY (OFFICES (N.O.C.))
LOAN # 1002648078001
Re: Contents

Loss Payee-Auto

Florida Department of Transportation
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

FL - Veh #2 2012 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG6C1112253
FL - Veh #3 2012 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG2C1113660
FL - Veh #5 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG7D1120637
FL - Veh #6 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG4D1121678
FL - Veh #7 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG5D1121172
FL - Veh #8 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG1D1122030
FL - Veh #9 2013 CHEVROLET EXPRESS G4500 - 1GB6G5BG2D1121971
FL - Veh #11 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG3E1171067
FL - Veh #12 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG9E1170795
FL - Veh #13 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG7E1171119
FL - Veh #16 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG6E1187506
FL - Veh #17 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG6E1188493

Philadelphia Indemnity Insurance Company

Loss Payee Schedule

Policy Number: PHPK2220717

Loss Payee-Auto

Florida Department of Transportation
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

FL - Veh #20 2016 FORD ECONOLINE - 1FD FE4FSXGDC03214
FL - Veh #21 2016 FORD ECONOLINE - 1FD FE4FS6GDC03212
FL - Veh #22 2016 FORD ECONOLINE - 1FD FE4FS8GDC03213
FL - Veh #23 2016 FORD ECONOLINE - 1FD FE4FS4GDC03211
FL - Veh #24 2016 FORD ECONOLINE - 1FD FE4FS1GDC03215
FL - Veh #25 2017 FORD TRANSIT - 1FDVU4XG2HKA67568
FL - Veh #26 2017 FORD TRANSIT - 1FDVU4XG7HKA67565
FL - Veh #27 2017 FORD TRANSIT - 1FDVU4XG4HKA67569
FL - Veh #28 2017 FORD TRANSIT - 1FDVU4XG9HKA67566
FL - Veh #29 2017 FORD TRANSIT - 1FDVU4XG0HKA67567
FL - Veh #30 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG2JN002324
FL - Veh #31 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG1JN002394
FL - Veh #32 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG9JN002336
FL - Veh #33 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG9JN002403
FL - Veh #34 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG5JN002298
FL - Veh #38 2019 FORD ECONOLINE - 1FD FE4FS5KDC27574
FL - Veh #39 2019 FORD ECONOLINE - 1FD FE4FS4KDC29672
FL - Veh #40 2019 FORD ECONOLINE - 1FD FE4FS3KDC66499
FL - Veh #41 2019 FORD ECONOLINE - 1FD FE4FS6KDC66500
FL - Veh #42 2019 FORD ECONOLINE - 1FD FE4FS8KDC66501
FL - Veh #43 2019 FORD ECONOLINE - 1FD FE4FSXKDC66502

Philadelphia Indemnity Insurance Company

Loss Payee Schedule

Policy Number: PHPK2220717

Loss Payee-Auto

Florida Department of Transportation
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

FL - Veh #44 2019 FORD ECONOLINE - 1FD4E4FS1KDC66503

Loss Payee-Auto

The Commission for the Transportation
of the Disadvantaged
605 Suwannee St MS 49
Tallahassee, FL 32399-6509

FL - Veh #4 2012 DODGE GRAND CARAVAN SE - 2C4RDGBG4CR281275

FL - Veh #10 2013 CHEVROLET EXPRESS G4500 - 1GB6G5BG9D1129596

FL - Veh #14 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG8E1171940

FL - Veh #15 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG8E1187734

FL - Veh #18 2015 FORD E450 SUPER DUTY - 1FD4E4FS3FDA30490

FL - Veh #19 2015 FORD E450 SUPER DUTY - 1FD4E4FS5FDA30491

Loss Payee-Auto

Florida Dept of Transportation District
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

FL - Veh #37 2019 FORD ECONOLINE - 1FD4E4FS2KDC29671

FL - Veh #45 2021 FORD ECONOLINE - 1FD4E4FN0MDC14258

FL - Veh #46 2021 FORD ECONOLINE - 1FD4E4FN2MDC14259

FL - Veh #47 2021 FORD ECONOLINE - 1FD4E4FN2MDC14262

Philadelphia Indemnity Insurance Company

Additional Insured Schedule

Policy Number: PHPK2220717

Additional Insured

Florida Department of Transportation
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

CA2001 - FL - Veh #11 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG3E1171067
CA2001 - FL - Veh #12 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG9E1170795
CA2001 - FL - Veh #13 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG7E1171119
CA2001 - FL - Veh #16 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG6E1187506
CA2001 - FL - Veh #17 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG6E1188493
CA2001 - FL - Veh #2 2012 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG6C1112253
CA2001 - FL - Veh #20 2016 FORD ECONOLINE - 1FD4E4FSXGDC03214
CA2001 - FL - Veh #21 2016 FORD ECONOLINE - 1FD4E4FS6GDC03212
CA2001 - FL - Veh #22 2016 FORD ECONOLINE - 1FD4E4FS8GDC03213
CA2001 - FL - Veh #23 2016 FORD ECONOLINE - 1FD4E4FS4GDC03211
CA2001 - FL - Veh #24 2016 FORD ECONOLINE - 1FD4E4FS1GDC03215
CA2001 - FL - Veh #25 2017 FORD TRANSIT - 1FDVU4XG2HKA67568
CA2001 - FL - Veh #26 2017 FORD TRANSIT - 1FDVU4XG7HKA67565
CA2001 - FL - Veh #27 2017 FORD TRANSIT - 1FDVU4XG4HKA67569
CA2001 - FL - Veh #28 2017 FORD TRANSIT - 1FDVU4XG9HKA67566
CA2001 - FL - Veh #29 2017 FORD TRANSIT - 1FDVU4XG0HKA67567
CA2001 - FL - Veh #3 2012 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG2C1113660
CA2001 - FL - Veh #30 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG2JN002324
CA2001 - FL - Veh #31 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG1JN002394
CA2001 - FL - Veh #32 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG9JN002336

Philadelphia Indemnity Insurance Company

Additional Insured Schedule

Policy Number: PHPK2220717

Additional Insured

Florida Department of Transportation
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

CA2001 - FL - Veh #33 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG9JN002403

CA2001 - FL - Veh #34 2018 CHEVROLET EXPRESS G4500 - 1HA6GUBG5JN002298

CA2001 - FL - Veh #5 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG7D1120637

CA2001 - FL - Veh #6 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG4D1121678

CA2001 - FL - Veh #7 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG5D1121172

CA2001 - FL - Veh #8 2013 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG1D1122030

CA2001 - FL - Veh #9 2013 CHEVROLET EXPRESS G4500 - 1GB6G5BG2D1121971

Additional Insured

The Commission for the Transportation
of the Disadvantaged
605 Suwannee St MS 49
Tallahassee, FL 32399-6509

CA2048 - FL - Veh #10 2013 CHEVROLET EXPRESS G4500 - 1GB6G5BG9D1129596

CA2048 - FL - Veh #14 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG8E1171940

CA2048 - FL - Veh #15 2014 CHEVROLET EXPRESS CUTAWAY G450 - 1GB6G5BG8E1187734

CA2048 - FL - Veh #18 2015 FORD E450 SUPER DUTY - 1FDFE4FS3FDA30490

CA2048 - FL - Veh #19 2015 FORD E450 SUPER DUTY - 1FDFE4FS5FDA30491

CA2048 - FL - Veh #4 2012 DODGE GRAND CARAVAN SE - 2C4RDGBG4CR281275

Philadelphia Indemnity Insurance Company

Additional Insured Schedule

Policy Number: PHPK2220717

Additional Insured

EpicMD Technologies, LLC
dba Alivi EpicNEMT Network
8323 NW 12th St Ste 208
Doral, FL 33126-1840

CA2048 - FL - Veh #0 - MANUSCRIPT ENDORSEMENT - AUTO

Additional Insured

Florida Dept of Transportation District
District 5
420 W Landstreet Rd
Orlando, FL 32824-7805

CA2048 - FL - Veh #37 2019 FORD ECONOLINE - 1FDFF4FS2KDC29671

MARION TRANSIT TRAINING POLICY AND PROCEDURES

1.0 Purpose

1.1. This document discusses the Marion Transit policy for providing initial and on-going training. Marion Transit personnel received periodic in-service training conducive to their respective position. Drivers are required to complete quarterly scheduled in-service training as assigned. Driver's initial training consists of 80 hours of Field Training Operators Course that covers all the required training specific to rule 14-90.

A Training Manual for on-going and refresher training and testing of employees is kept by the Transit Assistant. 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 Rule 14-90. The drivers are required to attend training and testing in all areas specified by Rule 14-90 at least once every three years.

2.0 Rule 14-90 Specific Driver Training

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 lifts and other special equipment.
7. Defensive driving.
8. Passenger assistance and securement.
9. Handling of emergencies and security threats.
10. Security and threat awareness.
11. Driving conditions.

In addition, drivers will receive training, bulletins, and/or flyers that cover the following topics throughout the year or as necessary:

1. Communication and handling of unsafe conditions, security threats, and emergencies.
2. Familiarization and operation of safety and emergency equipment, wheelchair lift equipment, and restraining devices.
3. Application and compliance with all applicable federal and state laws, rules, and regulations.
4. ADA & Title VI overview and handling of complaints.

3.0 Roles and Responsibilities

3.1 Transit Personnel - responsible for successfully completing required training as assigned.

3.2 Transit Assistant - Custodian of the training files and assists drivers with necessary training material.

3.3 Field Training Operators – FTO's will consist of senior drivers who will work with new drivers and ensure they are trained as outlined in the FTO program course.

3.4 Supervisors – responsible for selecting the training topics and ensuring that personnel complete the training and that records are kept once completed. Each topic will include a lesson plan and sign-up sheet of attendees. Oversee the FTO program and update/revise as necessary.

4.0 Training Records

4.1 Records – proof of training which includes sign-up sheets and lesson plans are kept in the transit assistant office. Certificates that are issued are filed in the driver or employee file with a sample attached to the lesson plan.

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

+++ END +++



February 3, 2021

Florida Department of Transportation, District Five
Attn: Ms. Diane Poitras, Transit Programs Administrator
420 W. Landstreet RD
Orlando, FL 32824

RE: 5311 COST ALLOCATION METHODOLOGY

To: District Five

This letter provides certification that Marion Senior Services, Inc. d/b/a Marion Transit will utilize reports provided by our transit software program (RouteMatch) to provide a methodology based on productivity of the various funding sources for providing public transportation.

Attached is an example of our productivity report broken down by funding source. This was run for the time period of November 1 – November 30. 5311 trips accounted for:

- Service miles reported was 27,309 of the total system 55,215 service miles or 49.45%.
- Service hours reported was 1500.43 of the total system 3588.35 service hours or 39.05%.

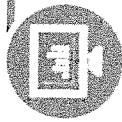
This methodology allows us to bill 49.45% of our total direct costs and 42% of our salaries and benefits to 5311 or non-urbanized transportation service for the time period.

This methodology specifically accounts for the cost(s) of providing non-urbanized transportation service in Marion County.

Sincerely,


Tom Wilder, Transportation Director

Attachment – RouteMatch Report



Productivity by Funding Source - FL_Marion

For Time Period: 11/1/2020 - 11/30/2020

Printed: 2/5/2021 2:39:03PM

Service Miles	Non-Rev Miles	No Show Miles	Revenue Hours	Passenger Hours	Cancels	Attnd Count	AMB	Vehicle Miles	Passengers
Revenue Miles	Passenger Miles	Service Hours	Non-Rev Hours	No Show Hours	No Shows	Guest Count	Wheelchair	Vehicle Hours	One Way Trips
5311									
27,309	6,674	0	1,116.83	1,160.90	110	72	1,064	44,382	1,622
20,635	27,964	1,500.43	383.60	2.00	58	0	486	2,681.67	1,550
ADA									
8,293	1,291	0	559.58	378.50	55	87	455	29,228	1,033
7,002	6,743	678.70	119.12	0.00	34	0	491	2,028.48	946
TD									
19,612	3,477	0	1,154.55	896.95	163	85	1,029	43,838	1,787
16,135	17,218	1,409.72	255.16	1.00	79	0	673	2,937.28	1,702
Unidentifiable									
711	711	0	0.00	0.00	0	0	0	0	0
0	0	57.42	57.42	0.00	0	0	0	0.00	0
Grand Totals									
55,926	12,153	0	2,830.97	2,436.35	328	244	2,548	117,448	4,442
43,773	51,925	3,646.27	815.30	3.00	171	0	1,650	7,647.43	4,198

Reporting year: January 1, 2020 – December 31, 2020 (All awarded projects currently in operation)

SECTION 5310 PROGRAM PERFORMANCE MEASURES ANNUAL REPORT (JAN 1 – DEC 31, 2020)

Agencies that have received funding through the FTA Section 5310 program must collect the following data as part of the annual program performance measure report. For this report, recipients must submit **both quantitative and qualitative** information on each of the following measures as applicable to your agency. Please submit this report with your agency's Annual Certifications package.

There are two (2) versions of the performance report to be completed as applicable to your agency:

(1) **SECTION 5310 CAPITAL AWARD PERFORMANCE REPORT** - Complete this report if your agency has a Section 5310 Capital Award in operation during this reporting period. This means that your agency has acquired a vehicle, equipment, or other item via capital Section 5310 award(s), and is using the vehicle or item to provide Section 5310-eligible transportation service.

(2) **SECTION 5310 OPERATING AWARD PERFORMANCE REPORT** - Complete this report if your agency has a Section 5310 Operating Award in operation during this reporting period. This means that your agency has provided Section 5310-eligible trips **and** either anticipates receiving or has already received reimbursement for these trips through the Section 5310 program.

Complete **both reports** if your agency has both types of Section 5310 awards in operation during the 2020 calendar year, Jan 1 - Dec 31.

Tip: Refer to the Fact Sheet provided with your agency's most recent grant application to obtain baseline performance data. If your agency is a Community Transportation Coordinator (CTC), you may use data from your Annual Operating Report (AOR).

Section 5310 Annual Reporting Period Summary							
Reporting Agency:	Marion Senior Services, Inc. d/b/a Marion Transit						
Address:	1101 SW 20 th Court						
City:	Ocala	County:	Marion	State:	FL	Zip:	34471
Service Area i.e., Palm Bay-Melbourne UZA (Consult FDOT District office if unknown)	Marion County, Florida.						
Contact Person:	Tom Wilder, Transportation Director						
Phone Number:	352-620-3071			Email:	twilder@marionseniorservices.org		
Total Section 5310 capital awarded projects in operation during this reporting period:						1	
Total Section 5310 operating awarded projects in operation during this reporting period:						0	

Reporting year: January 1, 2020 – December 31, 2020 (All awarded projects currently in operation)

SECTION 5310 CAPITAL AWARD PERFORMANCE REPORT

Gaps in Service Filled: Provision of transportation options that would not otherwise be available to seniors and individuals with disabilities, measured by the numbers of seniors and individuals with disabilities afforded mobility resulting from Section 5310 capital projects in operation for the current reporting year.

Number of senior and individuals with disabilities (unduplicated) PER YEAR.	Calculation	TOTAL
	RouteMatch Software Jan 1, 2020 – December 31, 2020	1707

Discuss any impacts to the quality of transportation options provided to seniors and individuals with disabilities not captured above.

COVID19 impacted our unduplicated riders reducing the number.

Ridership: Actual or estimated number of rides (as measured by one-way trips) provided annually for seniors or individuals with disabilities on Section 5310-supported vehicles and services resulting from Section 5310 capital projects in operation during the current reporting year.

Note: See Fact Sheet in 5310 Instruction Manual for instructions

Number of one-way trips provided to seniors and individuals with disabilities PER YEAR:	Calculation	TOTAL
	Report from RouteMatch Software. January 1, 2020 – December 31, 2020.	60,139

One-way passenger trip is the unit of service provided each time a passenger enters the vehicle, is transported, and then exits the vehicle. Each different destination would constitute a passenger trip.

Discuss any impacts to the quality of transportation options provided to seniors and individuals with disabilities not captured above.

This is a reduction in the number of one-way trips is due to COVID19.

Reporting year: January 1, 2020 – December 31, 2020 (All awarded projects currently in operation)

SECTION 5310 OPERATING AWARD PERFORMANCE REPORT – Not Applicable.

Service Improvements: related to geographic coverage, service quality, and/or service times that impact availability of transit services for seniors and individuals with disabilities resulting from Section 5310 operating projects in operation during the current reporting year.

Note: See Fact Sheet in 5310 Instruction Manual for instructions

	Calculations	Results
Total fleet vehicle miles traveled to provide service to seniors and individuals with disabilities.	N/A	
Total square miles of transportation service coverage.	N/A	
Number of days the vehicles are in operation to provide service to seniors and individuals with disabilities PER YEAR .	N/A	
Number of hours of service AVERAGE PER DAY .	N/A	
Posted hours of the normal operating hours the agency provides service to seniors and individuals with disabilities PER WEEK (this does not include non-scheduled emergency availability).		M – F: Saturday: Sunday: Total (WEEK):

Discuss any impacts to the quality of your agency's transportation service not captured above.

N/A

Ridership: Actual or estimated number of rides (as measured by one-way trips) provided annually for seniors or individuals with disabilities on Section 5310-supported vehicles and services because of Section 5310 operating projects in operation during the current reporting year.

Note: See Fact Sheet in 5310 Instruction Manual for instructions

	Calculations	TOTAL
Number of one-way trips provided to seniors and individuals with disabilities PER YEAR	N/A	

Reporting year: January 1, 2020 – December 31, 2020 (All awarded projects currently in operation)

One-way passenger trip is the unit of service provided each time a passenger enters the vehicle, is transported, and then exits the vehicle. Each different destination would constitute a passenger trip.

Discuss any impacts to the quality of trips provided to seniors and individuals with disabilities not captured above.

N/A

Physical Improvements: Please list any additions or changes to environmental infrastructure (e.g., transportation facilities, sidewalks, etc.), technology, and/or vehicles that impact the availability of transportation services to seniors and individuals with disabilities as a result of Section 5310 operating projects in operation during the current reporting year.

N/A

Other Improvements: Please identify any additional transportation program performance enhancements that resulted from Section 5310 operating projects in operation during the current reporting year.

N/A



CTC Organization

County: Marion

Fiscal Year: 7/1/2019 - 6/30/2020

CTC Status: Submitted

CTD Status: Under Review

Date Initiated: 9/8/2020

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

CTC Certification

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

CTC Representative (signature): Tom Wilder

LCB Certification

I, Commissioner Michele Stone, as the Local Coordinating Board Chairperson, hereby, certify in accordance with Rule 41-2.007(7) F.S. that the Local Coordinating Board has reviewed this report and the Planning Agency has received a copy.

LCB Chairperson (signature): Michele Stone



Organization – Coordination Contractor

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 7/1/2019 - 6/30/2020

Upload Date: 9/8/2020

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

Coordination Contractor Certification

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

CTC Representative (signature): _____



Organization – Coordination Contractor

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 7/1/2019 - 6/30/2020

Upload Date: 9/8/2020

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

Coordination Contractor Certification

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

CTC Representative (signature): _____



CTC Trips

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Service Type - One Way						
Fixed Route/Fixed Schedule						
Daily Pass Trips	0	N/A	0	0	N/A	0
Weekly Pass Trips	0	N/A	0	0	N/A	0
Monthly Pass Trips	0	N/A	0	0	N/A	0
Deviated Fixed Route Service	0	N/A	0	0	N/A	0
Complementary ADA Service	0	N/A	0	0	N/A	0
Paratransit						
Ambulatory	44,850	14,308	59,158	55,358	25,486	80,844
Non-Ambulatory	27,158	2,297	29,455	29,282	2,322	31,604
Stretcher	0	0	0	0	0	0
Transportation Network Companies	0	N/A	0	0	N/A	0
Taxi	0	N/A	0	0	N/A	0
School Board (School Bus)	0	N/A	0	0	N/A	0
Volunteers	0	N/A	0	0	N/A	0
Total - Service Type	72,008	16,605	88,613	84,640	27,808	112,448
Contracted Transportation Operator						
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC)	0	N/A	0	0	N/A	0
Total - Contracted Transportation Operator Trips	0	0	0	0	0	0
Revenue Source - One Way						
Agency for Health Care Administration (AHCA)	233	0	233	2,373	0	2,373
Agency for Persons with Disabilities (APD)	0	1,477	1,477	0	26,380	26,380
Comm for the Transportation Disadvantaged (CTD)	30,240	N/A	30,240	33,703	N/A	33,703
Dept of Economic Opportunity (DEO)	0	0	0	0	0	0
Dept of Children and Families (DCF)	0	0	0	0	0	0
Dept of Education (DOE)	0	0	0	0	0	0
Dept of Elder Affairs (DOEA)	0	0	0	0	0	0
Dept of Health (DOH)	0	0	0	0	0	0
Dept of Juvenile Justice (DJJ)	0	0	0	0	0	0
Dept of Transportation (DOT)	24,384	13,704	38,088	31,529	1	31,530
Local Government	16,595	0	16,595	17,034	0	17,034
Local Non-Government	1	1,424	1,425	1	1,427	1,428
Other Federal & State Programs	555	0	555	0	0	0
Total - Revenue Source	72,008	16,605	88,613	84,640	27,808	112,448



Transportation
Disadvantaged

CTC Trips (cont'd)

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Passenger Type - One Way						
Older Adults	7,392	0	7,392	10,381	0	10,381
Children At Risk	1,403	0	1,403	2,325	0	2,325
Persons With Disabilities	57,009	16,605	73,614	64,259	27,808	92,067
Low Income	6,025	0	6,025	6,817	0	6,817
Other	179	0	179	858	0	858
Total - Passenger Type	72,008	16,605	88,613	84,640	27,808	112,448
Trip Purpose - One Way						
Medical	44,193	0	44,193	52,830	0	52,830
Employment	2,092	363	2,455	1,910	0	1,910
Education/Training/Daycare	5,951	16,242	22,193	5,760	27,808	33,568
Nutritional	16,312	0	16,312	18,964	0	18,964
Life-Sustaining/Other	3,460	0	3,460	5,176	0	5,176
Total - Trip Purpose	72,008	16,605	88,613	84,640	27,808	112,448
Unduplicated Passenger Head Count (UDPHC)						
UDPHC	2,052	142	2,194	3,189	91	3,280
Total - UDPHC	2,052	142	2,194	3,189	91	3,280
Unmet & No Shows						
Unmet Trip Requests	5	N/A	5	27	N/A	27
No Shows	3,989	N/A	3,989	3,018	N/A	3,018
Customer Feedback						
Complaints	11	N/A	11	20	N/A	20
Commendations	35	N/A	35	59	N/A	59



Coordination Contractor Trips

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: ARC

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Service Type - One Way		
Fixed Route/Fixed Schedule		
Daily Pass Trips	N/A	N/A
Weekly Pass Trips	N/A	N/A
Monthly Pass Trips	N/A	N/A
Deviated Fixed Route Service	N/A	N/A
Complementary ADA Service	N/A	N/A
Paratransit		
Ambulatory	13,541	0
Non-Ambulatory	2,297	0
Stretcher	0	0
Transportation Network Companies	N/A	N/A
Taxi	N/A	N/A
School Board (School Bus)	N/A	N/A
Volunteers	N/A	N/A
Total - Service Type	15,838	0
Contracted Transportation Operator		
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC)	N/A	N/A
Total - Contracted Transportation Operator Trips	0	0
Revenue Source - One Way		
Agency for Health Care Administration (AHCA)	0	0
Agency for Persons with Disabilities (APD)	1,477	0
Comm for the Transportation Disadvantaged (CTD)	N/A	N/A
Dept of Economic Opportunity (DEO)	0	0
Dept of Children and Families (DCF)	0	0
Dept of Education (DOE)	0	0
Dept of Elder Affairs (DOEA)	0	0
Dept of Health (DOH)	0	0
Dept of Juvenile Justice (DJJ)	0	0
Dept of Transportation (DOT)	13,541	0
Local Government	0	0
Local Non-Government	820	0
Other Federal & State Programs	0	0
Total - Revenue Source	15,838	0



Transportation
Disadvantaged

Coordination Contractor Trips (cont'd)

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: ARC

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Passenger Type - One Way		
Older Adults	0	0
Children At Risk	0	0
Persons With Disabilities	15,838	0
Low Income	0	0
Other	0	0
Total - Passenger Type	15,838	0
Trip Purpose - One Way		
Medical	0	0
Employment	0	0
Education/Training/Daycare	15,838	0
Nutritional	0	0
Life-Sustaining/Other	0	0
Total - Trip Purpose	15,838	0
Unduplicated Passenger Head Count (UDPHC)		
UDPHC	92	0
Total - UDPHC	92	0
Unmet & No Shows		
Unmet Trip Requests	N/A	N/A
No Shows	N/A	N/A
Customer Feedback		
Complaints	N/A	N/A
Commendations	N/A	N/A



Transportation
Disadvantaged

Coordination Contractor Trips

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: Florida Center for
the Blind, Inc

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Service Type - One Way		
Fixed Route/Fixed Schedule		
Daily Pass Trips	N/A	N/A
Weekly Pass Trips	N/A	N/A
Monthly Pass Trips	N/A	N/A
Deviated Fixed Route Service	N/A	N/A
Complementary ADA Service	N/A	N/A
Paratransit		
Ambulatory	767	0
Non-Ambulatory	0	0
Stretcher	0	0
Transportation Network Companies	N/A	N/A
Taxi	N/A	N/A
School Board (School Bus)	N/A	N/A
Volunteers	N/A	N/A
Total - Service Type	767	0
Contracted Transportation Operator		
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC)	N/A	N/A
Total - Contracted Transportation Operator Trips	0	0
Revenue Source - One Way		
Agency for Health Care Administration (AHCA)	0	0
Agency for Persons with Disabilities (APD)	0	0
Comm for the Transportation Disadvantaged (CTD)	N/A	N/A
Dept of Economic Opportunity (DEO)	0	0
Dept of Children and Families (DCF)	0	0
Dept of Education (DOE)	0	0
Dept of Elder Affairs (DOEA)	0	0
Dept of Health (DOH)	0	0
Dept of Juvenile Justice (DJJ)	0	0
Dept of Transportation (DOT)	163	0
Local Government	0	0
Local Non-Government	604	0
Other Federal & State Programs	0	0
Total - Revenue Source	767	0



Transportation
Disadvantaged

Coordination Contractor Trips (cont'd)

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: Florida Center for
the Blind, Inc

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Passenger Type - One Way		
Older Adults	0	0
Children At Risk	0	0
Persons With Disabilities	767	0
Low Income	0	0
Other	0	0
Total - Passenger Type	767	0
Trip Purpose - One Way		
Medical	0	0
Employment	363	0
Education/Training/Daycare	404	0
Nutritional	0	0
Life-Sustaining/Other	0	0
Total - Trip Purpose	767	0
Unduplicated Passenger Head Count (UDPHC)		
UDPHC	50	0
Total - UDPHC	50	0
Unmet & No Shows		
Unmet Trip Requests	N/A	N/A
No Shows	N/A	N/A
Customer Feedback		
Complaints	N/A	N/A
Commendations	N/A	N/A



Transportation
Disadvantaged

CTC Vehicles & Drivers

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Vehicle Miles						
Deviated Fixed Route Miles	24,038	N/A	24,038	0	N/A	0
Complementary ADA Service Miles	86,946	N/A	86,946	0	N/A	0
Paratransit Miles	776,153	116,541	892,694	823,124	159,569	982,693
Transportation Network Companies (TNC) Miles	0	N/A	0	0	N/A	0
Taxi Miles	0	N/A	0	0	N/A	0
School Board (School Bus) Miles	0	N/A	0	0	N/A	0
Volunteers Miles	0	N/A	0	0	N/A	0
Total - Vehicle Miles	887,137	116,541	1,003,678	823,124	159,569	982,693
Roadcalls & Accidents						
Roadcalls	18	3	21	13	1	14
Chargeable Accidents	5	0	5	3	0	3
Vehicle Inventory						
Total Number of Vehicles	43	18	61	41	14	55
Number of Wheelchair Accessible Vehicles	43	5	48	41	4	45
Drivers						
Number of Full Time & Part Time Drivers	39	31	70	38	20	58
Number of Volunteer Drivers	0	0	0	0	0	0



Coordination Contractor Vehicles & Drivers

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: ARC

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Vehicle Miles		
Deviated Fixed Route Miles	N/A	N/A
Complementary ADA Service Miles	N/A	N/A
Paratransit Miles	106,839	0
Transportation Network Companies (TNC) Miles	N/A	N/A
Taxi Miles	N/A	N/A
School Board (School Bus) Miles	N/A	N/A
Volunteers Miles	N/A	N/A
Total - Vehicle Miles	106,839	0
Roadcalls & Accidents		
Roadcalls	3	0
Chargeable Accidents	0	0
Vehicle Inventory		
Total Number of Vehicles	14	0
Number of Wheelchair Accessible Vehicles	4	0
Drivers		
Number of Full Time & Part Time Drivers	20	0
Number of Volunteer Drivers	0	0



Coordination Contractor Vehicles & Drivers

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: Florida Center for the Blind, Inc

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Vehicle Miles		
Deviated Fixed Route Miles	N/A	N/A
Complementary ADA Service Miles	N/A	N/A
Paratransit Miles	9,702	0
Transportation Network Companies (TNC) Miles	N/A	N/A
Taxi Miles	N/A	N/A
School Board (School Bus) Miles	N/A	N/A
Volunteers Miles	N/A	N/A
Total - Vehicle Miles	9,702	0
Roadcalls & Accidents		
Roadcalls	0	0
Chargeable Accidents	0	0
Vehicle Inventory		
Total Number of Vehicles	4	0
Number of Wheelchair Accessible Vehicles	1	0
Drivers		
Number of Full Time & Part Time Drivers	11	0
Number of Volunteer Drivers	0	0



CTC Revenue Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

CTD Status: Under Review

Revenue Sources	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Revenue Sources						
Agency for Health Care Administration (AHCA)	\$ 19,640	\$ 0	\$ 19,640	\$ 35,179	\$ 0	\$ 35,179
Agency for Persons with Disabilities (APD)	\$ 0	\$ 151,928	\$ 151,928	\$ 0	\$ 221,643	\$ 221,643
Dept of Economic Opportunity (DEO)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Children and Families (DCF)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Education (DOE)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Elder Affairs (DOEA)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Health (DOH)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Juvenile Justice (DJJ)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Commission for the Transportation Disadvantaged (CTD)						
Non-Sponsored Trip Program	\$ 843,668	N/A	\$ 843,668	\$ 782,845	N/A	\$ 782,845
Non-Sponsored Capital Equipment	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Rural Capital Equipment	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
TD Other	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Department of Transportation (DOT)						
49 USC 5307	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
49 USC 5310	\$ 360,833	\$ 136,023	\$ 496,856	\$ 384,043	\$ 0	\$ 384,043
49 USC 5311	\$ 617,253	\$ 0	\$ 617,253	\$ 645,639	\$ 0	\$ 645,639
49 USC 5311 (f)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Block Grant	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Service Development	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Commuter Assistance Program	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other DOT	\$ 292,446	\$ 0	\$ 292,446	\$ 0	\$ 13,742	\$ 13,742
Local Government						
School Board (School Bus)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
County Cash	\$ 703,181	\$ 0	\$ 703,181	\$ 817,540	\$ 0	\$ 817,540
County In-Kind	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
City Cash	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
City In-Kind	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Cash	\$ 322,889	\$ 0	\$ 322,889	\$ 318,601	\$ 0	\$ 318,601
Other In-Kind	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Local/Non-Government						
Farebox	\$ 68,285	\$ 9,325	\$ 77,610	\$ 112,700	\$ 12,639	\$ 125,339
Donations/Contributions	\$ 4,000	\$ 0	\$ 4,000	\$ 0	\$ 0	\$ 0
In-Kind Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Non-Government	\$ 12,024	\$ 28,692	\$ 40,716	\$ 45,100	\$ 3,000	\$ 48,100
Other Federal & State Programs						
Other Federal Programs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other State Programs	\$ 21,015	\$ 0	\$ 21,015	\$ 0	\$ 0	\$ 0
Total - Revenue Sources	\$ 3,265,234	\$ 325,968	\$ 3,591,202	\$ 3,141,647	\$ 251,024	\$ 3,392,671



Coordination Contractor Revenue Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: ARC

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Revenue Sources		
Agency for Health Care Administration (AHCA)	\$ 0	\$ 0
Agency for Persons with Disabilities (APD)	\$ 151,928	\$ 0
Dept of Economic Opportunity (DEO)	\$ 0	\$ 0
Dept of Children and Families (DCF)	\$ 0	\$ 0
Dept of Education (DOE)	\$ 0	\$ 0
Dept of Elder Affairs (DOEA)	\$ 0	\$ 0
Dept of Health (DOH)	\$ 0	\$ 0
Dept of Juvenile Justice (DJJ)	\$ 0	\$ 0
Commission for the Transportation Disadvantaged (CTD)		
Non-Sponsored Trip Program	N/A	N/A
Non-Sponsored Capital Equipment	N/A	N/A
Rural Capital Equipment	N/A	N/A
TD Other	N/A	N/A
Department of Transportation (DOT)		
49 USC 5307	\$ 0	\$ 0
49 USC 5310	\$ 132,465	\$ 0
49 USC 5311	\$ 0	\$ 0
49 USC 5311 (f)	\$ 0	\$ 0
Block Grant	\$ 0	\$ 0
Service Development	\$ 0	\$ 0
Commuter Assistance Program	\$ 0	\$ 0
Other DOT	\$ 0	\$ 0
Local Government		
School Board (School Bus)	N/A	N/A
County Cash	\$ 0	\$ 0
County In-Kind	\$ 0	\$ 0
City Cash	\$ 0	\$ 0
City In-Kind	\$ 0	\$ 0
Other Cash	\$ 0	\$ 0
Other In-Kind	\$ 0	\$ 0
Local Non-Government		
Farebox	\$ 9,325	\$ 0
Donations/Contributions	\$ 0	\$ 0
In-Kind Services	\$ 0	\$ 0
Other Non-Government	\$ 15,922	\$ 0
Other Federal & State Programs		
Other Federal Programs	\$ 0	\$ 0
Other State Programs	\$ 0	\$ 0
Total - Revenue Sources	\$ 309,640	\$ 0



Transportation
Disadvantaged

Coordination Contractor Revenue Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: Florida Center for
the Blind, Inc

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Revenue Sources		
Agency for Health Care Administration (AHCA)	\$ 0	\$ 0
Agency for Persons with Disabilities (APD)	\$ 0	\$ 0
Dept of Economic Opportunity (DEO)	\$ 0	\$ 0
Dept of Children and Families (DCF)	\$ 0	\$ 0
Dept of Education (DOE)	\$ 0	\$ 0
Dept of Elder Affairs (DOEA)	\$ 0	\$ 0
Dept of Health (DOH)	\$ 0	\$ 0
Dept of Juvenile Justice (DJJ)	\$ 0	\$ 0
Commission for the Transportation Disadvantaged (CTD)		
Non-Sponsored Trip Program	N/A	N/A
Non-Sponsored Capital Equipment	N/A	N/A
Rural Capital Equipment	N/A	N/A
TD Other	N/A	N/A
Department of Transportation (DOT)		
49 USC 5307	\$ 0	\$ 0
49 USC 5310	\$ 3,558	\$ 0
49 USC 5311	\$ 0	\$ 0
49 USC 5311 (f)	\$ 0	\$ 0
Block Grant	\$ 0	\$ 0
Service Development	\$ 0	\$ 0
Commuter Assistance Program	\$ 0	\$ 0
Other DOT	\$ 0	\$ 0
Local Government		
School Board (School Bus)	N/A	N/A
County Cash	\$ 0	\$ 0
County In-Kind	\$ 0	\$ 0
City Cash	\$ 0	\$ 0
City In-Kind	\$ 0	\$ 0
Other Cash	\$ 0	\$ 0
Other In-Kind	\$ 0	\$ 0
Local Non-Government		
Farebox	\$ 0	\$ 0
Donations/Contributions	\$ 0	\$ 0
In-Kind Services	\$ 0	\$ 0
Other Non-Government	\$ 12,770	\$ 0
Other Federal & State Programs		
Other Federal Programs	\$ 0	\$ 0
Other State Programs	\$ 0	\$ 0
Total - Revenue Sources	\$ 16,328	\$ 0



CTC Expense Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior
Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Expense Sources						
Labor	\$ 1,532,431	\$ 205,352	\$ 1,737,783	\$ 1,532,769	\$ 168,211	\$ 1,700,980
Fringe Benefits	\$ 443,602	\$ 37,198	\$ 480,800	\$ 424,742	\$ 34,418	\$ 459,160
Services	\$ 257,859	\$ 0	\$ 257,859	\$ 289,071	\$ 0	\$ 289,071
Materials & Supplies Consumed	\$ 378,170	\$ 78,666	\$ 456,836	\$ 421,427	\$ 91,402	\$ 512,829
Utilities	\$ 32,428	\$ 12,477	\$ 44,905	\$ 29,813	\$ 6,654	\$ 36,467
Casualty & Liability	\$ 144,655	\$ 33,471	\$ 178,126	\$ 88,767	\$ 27,960	\$ 116,727
Taxes	\$ 854	\$ 0	\$ 854	\$ 782	\$ 0	\$ 782
Miscellaneous	\$ 17,186	\$ 0	\$ 17,186	\$ 13,450	\$ 0	\$ 13,450
Interest	\$ 994	\$ 0	\$ 994	\$ 504	\$ 0	\$ 504
Leases & Rentals	\$ 10,621	\$ 0	\$ 10,621	\$ 14,683	\$ 0	\$ 14,683
Capital Purchases	\$ 389,179	\$ 58,930	\$ 448,109	\$ 0	\$ 50,000	\$ 50,000
Contributed Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 0	\$ 0	\$ 0	\$ 328,059	\$ 0	\$ 328,059
Purchased Transportation Services						
Bus Pass	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
School Board (School Bus)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Transportation Network Companies (TNC)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Taxi	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Contracted Operator	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Total - Expense Sources	\$ 3,207,979	\$ 426,094	\$ 3,634,073	\$ 3,144,067	\$ 378,645	\$ 3,522,712



Coordination Contractor Expense Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: ARC

Expense Sources	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Labor	\$ 196,867	\$ 0
Fringe Benefits	\$ 37,198	\$ 0
Services	\$ 0	\$ 0
Materials & Supplies Consumed	\$ 76,951	\$ 0
Utilities	\$ 12,477	\$ 0
Casualty & Liability	\$ 31,273	\$ 0
Taxes	\$ 0	\$ 0
Miscellaneous	\$ 0	\$ 0
Interest	\$ 0	\$ 0
Leases & Rentals	\$ 0	\$ 0
Capital Purchases	\$ 55,000	\$ 0
Contributed Services	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 0	\$ 0
Purchased Transportation Services		
Bus Pass	N/A	N/A
School Board (School Bus)	N/A	N/A
Transportation Network Companies (TNC)	N/A	N/A
Taxi	N/A	N/A
Contracted Operator	N/A	N/A
Total - Expense Sources	\$ 409,766	\$ 0



Coordination Contractor Expense Sources

County: Marion

CTC Status: Submitted

CTC Organization: Marion Senior Services, Inc.

Fiscal Year: 07/01/2019 - 06/30/2020

Upload Date: 9/8/2020

Coordination Contractor: Florida Center for the Blind, Inc

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Expense Sources		
Labor	\$ 8,485	\$ 0
Fringe Benefits	\$ 0	\$ 0
Services	\$ 0	\$ 0
Materials & Supplies Consumed	\$ 1,715	\$ 0
Utilities	\$ 0	\$ 0
Casualty & Liability	\$ 2,198	\$ 0
Taxes	\$ 0	\$ 0
Miscellaneous	\$ 0	\$ 0
Interest	\$ 0	\$ 0
Leases & Rentals	\$ 0	\$ 0
Capital Purchases	\$ 3,930	\$ 0
Contributed Services	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 0	\$ 0
Purchased Transportation Services		
Bus Pass	N/A	N/A
School Board (School Bus)	N/A	N/A
Transportation Network Companies (TNC)	N/A	N/A
Taxi	N/A	N/A
Contracted Operator	N/A	N/A
Total - Expense Sources	\$ 16,328	\$ 0

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

Demographics

Florida Commission for the



Total County Population 0
 Unduplicated Head Count 2,194

Transportation Disadvantaged

Trips By Type of Service	2018	2019	2020	Vehicle Data			
Fixed Route (FR)	0	0	0	Vehicle Miles	1,117,564	982,693	1,003,678
Deviated FR	0	0	0	Roadcalls	33	14	21
Complementary ADA	0	0	0	Accidents	0	3	5
Paratransit	106,024	112,448	88,613	Vehicles	41	55	61
TNC	0	0	0	Drivers	57	58	70
Taxi	0	0	0				
School Board (School Bus)	0	0	0				
Volunteers	0	0	0				
TOTAL TRIPS	106,024	112,448	88,613				

Passenger Trips By Trip Purpose

Medical	56,417	52,830	44,193
Employment	854	1,910	2,455
Ed/Train/DayCare	27,619	33,568	22,193
Nutritional	15,188	18,964	16,312
Life-Sustaining/Other	5,946	5,176	3,460
TOTAL TRIPS	106,024	112,448	88,613

Financial and General Data

Expenses	\$3,628,916	\$3,522,712	\$3,634,073
Revenues	\$3,674,940	\$3,392,671	\$3,591,202
Commendations	66	59	35
Complaints	16	20	11
Passenger No-Shows	3,364	3,018	3,989
Unmet Trip Requests	50	27	5

Passenger Trips By Revenue Source

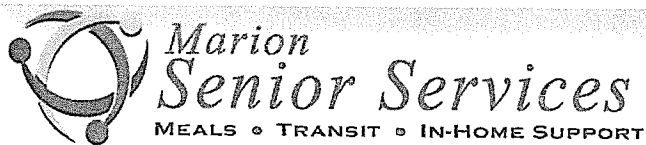
CTD	30,772	33,703	30,240
AHCA	5,164	2,373	233
APD	22,414	26,380	1,477
DOEA	0	0	0
DOE	0	0	0
Other	47,674	49,992	56,663
TOTAL TRIPS	106,024	112,448	88,613

Performance Measures

Accidents per 100,000 Miles	0	0.31	0.50
Miles between Roadcalls	33,866	70,192	47,794
Avg. Trips per Passenger	32.31	34.28	40.39
Cost per Trip	\$34.23	\$31.33	\$41.01
Cost per Paratransit Trip	\$34.23	\$31.33	\$41.01
Cost per Total Mile	\$3.25	\$3.58	\$3.62
Cost per Paratransit Mile	\$3.25	\$3.58	\$3.62

Trips by Provider Type

CTC	83,610	84,640	72,008
Transportation Operator	0	0	0
Coordination Contractor	22,414	27,808	16,605
TOTAL TRIPS	106,024	112,448	88,613



February 3, 2021

Florida Department of Transportation, District Five
Attn: Ms. Diane Poitras, Transit Programs Administrator
420 W. Landstreet RD
Orlando, FL 32824

RE: SYSTEM SAFETY PROGRAM PLAN

To: District Five

This letter provides certification that Marion Senior Services, Inc. d/b/a Marion Transit has not made any major changes to the System Safety Program Plan (SSPP) implemented and adopted in July 2016 and it is currently in effect.

Sincerely,

Tom Wilder, Transportation Director

**BUS TRANSIT SYSTEM
ANNUAL SAFETY CERTIFICATION**

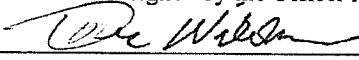
DATE: February 3, 2021

BUS TRANSIT SYSTEM: Marion Senior Services, Inc. d/b/a Marion Transit

ADDRESS: 1101 S.W. 20th Court
Ocala, Florida 34471

**IN ACCORDANCE WITH FLORIDA STATUTE 341.061
THE BUS TRANSIT SYSTEM NAMED ABOVE HEREBY CERTIFIES TO THE FOLLOWING:**

1. The adoption of a System Safety Program Plan (SSPP) and the Security Program Plan (SPP) pursuant to Florida Department of Transportation safety standards set for in Rule Chapter 14-90, Florida Administrative Code (F.A.C.).
Current date of Adopted SSPP: July 29, 2016
Current date of Adopted SPP: August 1, 2016
2. Compliance with adopted safety standards in the SSPP and the SPP.
3. Performance of annual safety inspections on all operational buses in accordance with Rule 14-90.009, F.A.C. (This should be signed by the Officer responsible for management of the bus transit system to certify compliance.)



Signature
Tom Wilder

Name (Printed or Typed):
Transportation Director

Title

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

Advanced Tire & Service

Name
2199 NW 10th Street

Address (Street Number)
Ocala, FL 34475

Address (City, State, Zip Code)
January – December 2020.

Date(s) of Inspection

Advanced Vehicle Modifications (Wheelchair Lifts)

Name
7265 SW 62nd Avenue, Unit #1

Address (Street Number)
Ocala, FL 34476

Address (City, State, Zip Code)
January – December 2020

Date(s) of Inspection

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

AAMCO
Name

661 S.W. 17th Loop
Address (Street Number)

Ocala, FL 34471
Address (City, State, Zip Code)

January – December 2018.
Date(s) of Inspection

Fisher's Auto Care
Name

2021 SW 27th Ave
Address (Street Number)

Ocala, FL 34471
Address (City, State, Zip Code)

January – December 2020
Date(s) of Inspection

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

u	FDOT CONTROL NUMBER	AGENCY'S CONTROL NUMBER	Title Holder	VIN #	YEAR/MAKE	Model	VEHICLE LENGTH (FEET)		WHEELCHAIR (Seats)		ADA Accessory (ramp, lift, etc.)		Current Use	Current Condition	Location of Property	Year of Grant Award and Program Number	Acquisition Date	Cost of Property	% of Federal participant on In the cost of the property	Expected Retirement Date
							H	E	AMBULATORY (Seats)	WHEELCHAIR (Seats)	Lift	Accessories								
Marion	N/A	1202 (32)	Marion Transit	1GB8G5BG2C1113660	2012/Chevy	Glaval	23	23	4	4	Lift	Spare	Good	In-house	2012; Sec. 5310	3/16/2012	\$74,758	90	2021	
Marion	91589	1204 (41)	FDOT	1GB8G5BG6C1112253	2012/Chevy	Glaval	23	23	12	4	Lift	Spare	Good	In-house	2012; Sec. 5310	3/16/2012	\$74,758	90	2021	
Marion	TD	1205 (50)	TD	2C4RDGBG4CR281275	2012/Dodge	Caravan	12	6	1	1	Ramp	Spare	Good	In-house	N/A	6/28/2012	\$45,752	0	2021	
Marion	N/A	1301 (04)	Marion Transit	1GB8G5BG8D1129598	2013/Chevy	Glaval	23	10	6	6	Lift	Spare	Good	In-house	N/A	6/26/2013	\$75,635	0	2022	
Marion	94517	1302 (07)	FDOT	1GB8G5BG7D1122030	2013/Chevy	Glaval	23	10	6	6	Lift	Spare	Good	In-house	2013; Sec. 5310	5/17/2013	\$76,491	90	2022	
Marion	N/A	1303 (24)	Marion Transit	1GB8G5BG2D1121871	2013/Chevy	Glaval	23	10	2	2	Lift	Spare	Good	In-house	2013; Sec. 5310	5/17/2013	\$76,491	90	2022	
Marion	94513	1304 (26)	FDOT	1GB8G5BG7D1120637	2013/Chevy	Glaval	23	10	4	4	Lift	Daily Use	Good	In-house	2013; Sec. 5310	5/17/2013	\$76,491	90	2022	
Marion	94514	1305 (31)	FDOT	1GB8G5BG4D1121678	2013/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Good	In-house	2013; Sec. 5310	5/17/2013	\$76,491	90	2022	
Marion	N/A	1306 (42)	Marion Transit	1GB8G5BG5D1121712	2013/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Good	In-house	2013; Sec. 5310	5/17/2013	\$76,491	90	2021	
Marion	94556	1401 (08)	FDOT	1GB8G5BG7E1171119	2014/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2014; Sec. 5310	6/30/2014	\$76,760	86	2022	
Marion	TD	1402 (10)	TD	1GB8G5BG8E1187734	2014/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	N/A	6/30/2014	\$76,760	0	2022	
Marion	94557	1403 (17)	FDOT	1GB8G5BG6E1187506	2014/Chevy	Glaval	23	10	4	4	Lift	Daily Use	Excellent	In-house	2014; Sec. 5310	8/20/2014	\$76,760	86	2022	
Marion	TD	1404 (16)	TD	1GB8G5BG8E1171940	2014/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	N/A	6/30/2014	\$76,760	0	2022	
Marion	94558	1405 (29)	FDOT	1GB8G5BG6E1188493	2014/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2014; Sec. 5310	8/20/2014	\$76,760	86	2022	
Marion	94555	1406 (34)	FDOT	1GB8G5BG9E1170795	2014/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2014; Sec. 5310	6/30/2014	\$76,760	86	2022	
Marion	94549	1407 (37)	FDOT	1GB8G5BG3E1171067	2014/Chevy	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2014; Sec. 5310	6/30/2014	\$76,760	86	2022	
Marion	TD	1501 (15)	TD	1FDFE4F53FDA30490	2015/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	N/A	6/29/2015	\$77,150	0	2022	
Marion	TD	1502 (40)	TD	1FDFE4F53FDA30491	2015/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	N/A	6/29/2015	\$77,150	0	2022	
Marion	94583	1601 (05)	FDOT	1FDFE4F58GDC03211	2016/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	
Marion	94585	1602 (08)	FDOT	1FDFE4F58GDC03213	2016/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	
Marion	94581	1603 (11)	FDOT	1FDFE4F57GDC03215	2016/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	
Marion	94586	1604 (20)	FDOT	1FDFE4F5XGDC03214	2016/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	
Marion	94584	1605 (21)	FDOT	1FDFE4F5SGDC03212	2016/Ford E-450	Glaval	23	10	6	6	Lift	Daily Use	Excellent	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	
Marion	95526	1701	FDOT	1FDVU4XG7HKA67565	2017/Ford/Tran	Nations	22	9	2	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	
Marion	95527	1702	FDOT	1FDVU4XG9HKA67566	2017/Ford/Tran	Nations	22	9	2	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	
Marion	95528	1703	FDOT	1FDVU4XG0HKA67567	2017/Ford/Tran	Nations	22	9	2	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	
Marion	95525	1704	FDOT	1FDVU4XG2HKA67568	2017/Ford/Tran	Nations	22	9	2	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	
Marion	95529	1705	FDOT	1FDVU4XG4HKA67569	2017/Ford/Tran	Nations	22	9	2	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	
Marion	95556	1801	FDOT	1HA6GUBG2JN002324	2018/Chev	Nations	24	11	4	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	
Marion	50016	1802	FDOT	1HA6GUBG5JN002398	2018/Chev	Nations	24	11	4	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	
Marion	50014	1803	FDOT	1HA6GUBG9JN002394	2018/Chev	Nations	24	11	4	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	
Marion	50013	1804	FDOT	1HA6GUBG9JN002336	2018/Chev	Nations	24	11	4	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	
Marion	50015	1805	FDOT	1HA6GUBG9JN002403	2018/Chev	Nations	24	11	4	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	
Marion	50038	1900	FDOT	1FDFE4F3KDC14093	2019/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	
Marion	50041	1901	FDOT	1FDFE4F55KDC27574	2019/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	
Marion	50039	1902	FDOT	1FDFE4F52KDC39671	2019/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	
Marion	50040	1903	FDOT	1FDFE4F54KDC39672	2019/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	
Marion	50042	1904	FDOT	1FDFE4F50KDC38264	2019/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	
Marion	50093	2001	FDOT	1FDFE4F53KDC66499	2020/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	
Marion	50086	2002	FDOT	1FDFE4F56KDC66500	2020/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	
Marion	50091	2003	FDOT	1FDFE4F58KDC66501	2020/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	
Marion	50090	2004	FDOT	1FDFE4F53KDC66502	2020/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	
Marion	50094	2005	FDOT	1FDFE4F51KDC66503	2020/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	
Marion	50122	2101	FDOT	1FDFE4F50KDC14258	2021/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	12/1/2020	\$83,010	90	2028	
Marion	50123	2102	FDOT	1FDFE4F52KDC14259	2021/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	12/1/2020	\$83,010	90	2028	
Marion	50124	2105	FDOT	1FDFE4F51KDC14262	2021/Ford E-450	Goshen	23	12	4	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	12/1/2020	\$83,010	90	2028	

**COORDINATION AGREEMENT
BETWEEN
COMMUNITY TRANSPORTATION COORDINATOR
AND
THE FLORIDA CENTER FOR THE BLIND, INC.**

WHEREAS, Marion Senior Services in its role as the Community Transportation Coordinator (CTC) for Marion County, hereafter known as the CTC, and;

WHEREAS, in this capacity, the CTC has initiated a program to provide community transportation service clients, agencies, and organizations, provided such service complies with Chapter 427, Florida Statutes and Chapters 41-2 and 19-90, Florida Administrative Code, and;

WHEREAS, the Florida Center for the Blind, Inc., (hereafter referred to as AGENCY) is considered to be a bonafide (X private-not-for-profit agency or private-for-profit enterprise) operating in Marion Senior Services, Inc. and is eligible for the services of the CTC. The transportation services described herein are deemed to comply with all applicable with all applicable state laws and regulations, and;

WHEREAS, the AGENCY currently provides services using its own vehicles in the provision of transportation to transportation disadvantaged clients that are unique in nature, and will provide the CTC the opportunity to develop a proposal for any new transportation services needed,

NOW THEREFORE, the CTC and AGENCY, in consideration of the mutual covenants hereinafter set forth, agree as follows:

1. AGENCY shall maintain daily records of ridership and provide such to CTC quarterly.
2. AGENCY shall act as a transportation provider based on the availability of AGENCY vehicles.
3. AGENCY, when acting as provider, shall furnish all vehicles which conform to the laws of the State of Florida as provided in Florida Statutes 427, and shall maintain same in good mechanical and clean condition.
4. AGENCY has developed and implemented a System Safety Program Plan (SSPP) and agrees to abide by said policy.
5. AGENCY shall maintain a minimum liability insurance rate of \$100,000 per person, and \$300,000 per incident in effect at all times.
6. AGENCY shall conduct a criminal background screening for all drivers. Should the AGENCY acquire vehicles that require a CDL license to operate, AGENCY shall conduct pre-employment drug screening and pre-employment physicals for all drivers at said time. However, the AGENCY shall conduct drug and/or alcohol testing when any of the following conditions exist:
 - a. In the event a qualified supervisor/company official has reasonable suspicion to believe that a covered employee has engaged in prohibited drug use and/or alcohol misuse;
 - b. In the event of a fatal accident; or
 - c. In the event of a non-fatal accident if an individual suffers bodily injury and immediately received medical treatment away from the scene of the accident, any vehicle incurs disabling damage as the result of the occurrence and a vehicle is transported away from the scene by a tow truck, or the transit vehicle is removed from operation.

7. AGENCY will provide training to include safety, vehicle operations, and passenger sensitivity in accordance with Florida Statutes 427.
8. AGENCY agrees to submit an Annual Operating Report, Certifications of Compliance, Federal Transit Administration Drug and Alcohol Reports and quality assurance report to the CTC annually.
9. INDEMNIFICATION – The AGENCY shall pay on behalf of or indemnify and hold harmless Marion Senior Services, Inc., its employees, officers, agents and volunteers from and against all claims, actions,, damages, fees, fines, penalties, defense costs (including attorney fees and court costs, whether such fees and costs are incurred in negotiations, collection of attorneys' fees or at the trial level or on appeal), suits or liabilities which may arise out of any actual alleged negligent act, error, omission, or any default of the AGENCY (or AGENCY's officers, employees, agent, volunteers and subcontractors, if any) performance or failure to perform under terms of this contract. This indemnification and hold harmless agreement shall survive the termination of expiration of this agreement.
10. No changes to this Agreement or the Performance contemplated hereunder shall be made unless the same are in writing and signed by both parties hereto.
11. This Agreement may be terminated by either party by providing five (5) day written notice to the other party. This Agreement shall be for a period beginning 12-04-2019 and expires on 12-31-2020, unless terminated at an earlier date as described above.
12. AGENCY shall not be allowed to assign its rights, duties, and obligations pursuant to the Agreement to any entity (i) with AGENCY is affiliated, (ii) into which AGENCY may be merged or reorganized, or (iii) to which all or a portion of AGENCY's capital, stock, or assets may e sold without the prior written consent of CTC Marion County which shall not be unreasonably withheld. If approval for assignment is obtained, is shall not release the AGENCY from any liability or obligation under this Agreement.
13. Any notices, invoices, reports or any other type of documentation required by this Agreement shall be sufficient if sent by the parties postage paid in the United States mail, postage paid to the addresses listed below.
14. Due to safety concerns and issues presented in the past, the AGENCY and CTC have agreed that all transportation services provided by the CTC for the AGENCY's clients seeking training services at the AGENCY's location will be coordinated between the AGENCY and CTC directly. Clients of the AGENCY will not be allowed to coordinate their own transportation to and from the AGENCY.

AGENCY'S Authorized Representative:Name: Anissa PieriboniTitle: President/CEO

Address: _____

1411 NE 22nd AvenueOcala, Florida 34470Telephone: (352)873-4700Fax: (352)873-4751

Electronic mail address: _____

apieriboni@flblind.org**COUNTY'S Authorized Representative:**Name: Jennifer MartinezTitle: Executive Director

Address: _____

1101 SW 20th CourtOcala, Florida 34471Telephone: (352)620-3501Fax: (352)629-3501

Electronic mail address: _____

JMartinez@marionseniorservices.org

15. The rights and obligations of the parties under this Agreement shall be governed by the laws of the State of Florida and the venue for any legal or judicial proceedings in connection with the enforcement or interpretation of this Agreement shall be in Marion County, Florida.

IN WITNESS THEREOF, the parties have executed the Agreement of the date first above written.

COUNTY/CTC:

Marion Senior Services

(Name of COUNTY/county/CTC)

Jennifer Martinez

(Printed or Typed Name)

Executive Director

(Printed or Typed Title)



(Signature)

December 4, 2019

(Date)

AGENCY:

Florida Center for the Blind, Inc.

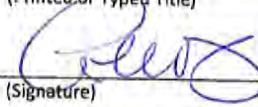
(Name of Agency)

Anissa Pieriboni

(Printed or Typed Name)

President/CEO

(Printed or Typed Title)



(Signature)

December 4, 2019

(Date)

STATE OF FLORIDA
COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

AGENCY CONTRACT

Effective: January 1, 2020 to December 31, 2020

THIS CONTRACT is entered into between the COMMUNITY TRANSPORTATION COORDINATOR, **MARION SENIOR SERVICES, INC.** designated pursuant to Chapter 427, F.S., to serve the transportation disadvantaged for the community that includes

the entire area of Marion County, and hereinafter referred to as the “Coordinator” and **ADVOCACY RESOURCE CENTER MARION, INC.** hereinafter referred to as the “Agency”.

WHEREAS, the Coordinator is required, under Rule 41-2.011, F.A.C., when cost effective and efficient, to enter into contract with a transportation Agency to provide transportation services; and

WHEREAS, transportation disadvantaged funds includes any local government, state or federal funds that are for the transportation of transportation disadvantaged; and

WHEREAS, the Coordinator desires to contract with the Agency for the provision of transportation services for the transportation disadvantaged; and

WHEREAS, the Coordinator believes it to be in the public interest to provide such transportation services through the Agency for the residents of the service area who are clients of the Agency; and

WHEREAS, the Agency will provide the Coordinator the opportunity to develop a proposal for any new transportation services needed; and

WHEREAS, the Agency, in an effort to coordinate available resources, will make available transportation services to the Coordinator,

WHEREAS, this Contract allows for the provisions of transportation services be provided by the Agency, in accordance with Chapter 427, F.S., Rule 41-2, F.A.C., and the most current Community Transportation Coordinator policies.

NOW, THEREFORE, in consideration of the mutual covenants, promises and representations herein, the parties agree as follows:

THE AGENCY SHALL:

- A. Provide services and vehicles according to the conditions specified in Attachment I.
- B. Coordinate available resources and make available transportation services to the Coordinator. Such services shall be provided in accordance with Attachment I.
- C. Annually, submit to the Coordinator a Year to Date Operating Report (from the Annual Operating Report) detailing demographic, operational and financial data regarding coordination activities in the designated service area period covering July 1, through June 30 and due by August 1 every year. The report shall be prepared on forms provided by the Commission for the Transportation Disadvantaged, hereinafter Commission, and according to the instructions for the forms.
- D. Comply with audit and record keeping requirements by:
 - 1. Utilizing the Commission recognized Chart of Accounts defined in the Transportation Accounting Consortium Model Uniform Accounting System for Rural and Specialized Transportation Providers (uniform accounting system) for all transportation disadvantaged accounting and reporting purposes. Agencies with existing and equivalent accounting systems are not required to adopt the Chart of Accounts in lieu of their existing Chart of Accounts but shall prepare all reports, invoices, and fiscal documents relating to the transportation disadvantaged functions and activities using the chart of accounts and accounting definitions as outlined in the above referenced manual.
 - 2. Maintaining and filing with the Coordinator such progress, fiscal, inventory and other reports as the Coordinator may require during the period of this contract.
 - 3. By reserving to the Coordinator, the right to conduct finance and compliance audits at any time. Such audits conducted by the Coordinator will be at the expense of the Coordinator.

- E. Retain all financial records, supporting documents, statistical records, and any other documents pertinent to this Agreement for a period of five (5) years after termination of this Agreement. If an audit has been initiated and audit findings have not been resolved at the end of the five (5) years, the records shall be retained until resolution of the audit findings. The Agency shall assure that these records shall be subject to inspection, review, or audit at all reasonable times by persons duly authorized by the Coordinator or Commission or this Agreement. The Commission and the Coordinator shall have full access to and the right to examine any of the records and documents during the retention period.
- F. Comply with Safety Requirements by:
1. Complying with Section 341 .061, F.S., and Rule 14-90, F.A.C., concerning System Safety or complying with Chapter 234.051, F.S., regarding school bus safety requirements for those services provided through a school board;
 2. Assuring compliance with local, state, and federal laws, and Commission policies relating to drug testing, and;
 3. Complying with Coordinator's System Safety Program Plan (SSPP) for designated service area.
- G. Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of \$100,000 for any one person and \$200,000 per occurrence at all times during the existence of this Contract along with Workers Comp. Upon the execution of this Contract, the Agency shall add the Coordinator as an additional named insured to all insurance policies covering vehicles transporting the transportation disadvantaged. In the event of any cancellation or changes in the limits of liability in the insurance policy, the insurance agent or broker shall notify the Coordinator. The Agency shall furnish the Coordinator written verification of the existence of such insurance coverage prior to the execution of this Contract. School board vehicle insurance coverage shall be in accordance with Section 234.03, F.S. and 234.211, F.S. Insurance coverage in excess of \$1 million per occurrence must be approved by the Coordinator and/or the local Coordinating Board before inclusion in this contract or in the justification of rates and fare structures, s. 41- 2.006(1), FAC.
- H. Safeguard information by not using or disclosing any information concerning a user

of services under this Agreement for any purpose not in conformity with the local, state and federal regulations, including but not limited to 45 CFR, Part 205.50, except upon order of a court of competent jurisdiction, written consent of the recipient, or his/her responsible parent or guardian when authorized by law.

I. Protect Civil Rights by:

1. Complying with Title VI of the Civil Rights Act of 1964 and Section 504 of the Rehabilitation Act of 1973, as amended. The Agency gives this assurance in consideration of and for the purpose of obtaining federal grants, loans, contracts (except contracts of insurance or guaranty), property, discounts, or other federal financial assistance to programs or activities receiving or benefiting from federal financial assistance and agreeing to complete a Civil Rights Compliance Questionnaire if so required by the Coordinator. Agency shall also assure compliance with:
 - a. Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. 2000d et seq., which prohibits discrimination on the basis of race, color, or national origin in programs and activities receiving or benefiting from federal financial assistance.
 - b. Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 794, which prohibits discrimination on the basis of disability in programs and activities receiving or benefiting from federal financial assistance.
 - c. Title IX of the Education Amendments of 1972, as amended, 20 U.S.C. 1681 et seq., which prohibits discrimination on the basis of sex in education programs and activities receiving or benefiting from federal financial assistance.
 - d. The Age Discrimination Act of 1975, as amended, 42 U.S.C. 6101 et seq., which prohibits discrimination on the basis of age in programs or activities receiving or benefiting from federal financial assistance.
 - e. The Omnibus Budget Reconciliation Act of 1981, P.L. 97-35, which prohibits discrimination on the basis of sex and religion in programs and activities receiving or benefiting from federal financial assistance.
 - f. All regulations, guidelines, and standards lawfully adopted under the above statutes.

- g The Americans with Disabilities Act of 1990, as it may be amended from time to time.

HIPAA: Agency agrees to enter into an agreement with Coordinator to comply with requirements of the federal Health Insurance Portability and Accountability Act of 1996 (HIPPA) and the associated regulations, 45 C.F.R. parts 160-164, as may be amended (the Privacy Rule) and 45 C.F.R. 142.308 (a) as may be finalized and amended (Chain of Trust requirement) establishing required safeguards to ensure the security and confidentiality of protected client information. See Attachment IV

2. Agreeing that compliance with this assurance constitutes a condition of continued receipt of or benefit from federal financial assistance, and that it is binding upon the Agency, its successors, subcontractors, transferees, and assignees for the period during which such assistance is provided. Assuring that agency's, subcontractors, subgrantees, or others with whom the Coordinator arranges to provide services or benefits to participants or employees in connection with any of its programs and activities are not discriminating against those participants or employees in violation of the above statutes, regulations, guidelines, and standards. In the event of failure to comply, the Agency agrees that the Coordinator may, at its discretion, seek a court order requiring compliance with the terms of this assurance or seek other appropriate judicial or administrative relief, to include assistance being terminated and further assistance being denied.

- J. Agency's obligation to indemnify, defend, and pay for the defense or at the Coordinator's option, to participate and associate with the Coordinator in the defense and trial of any claim and any related settlement negotiations, shall be triggered by the Coordinator's notice of claim for indemnification to the Agency. Agency's inability to evaluate liability or its evaluation of liability shall not excuse the Agency's duty to defend and indemnify within seven days after such notice by the Coordinator is given by registered mail. Only an adjudication or judgement after the highest appeal is exhausted specifically finding the Coordinator solely negligent shall excuse performance of this provision by the Agency. Agency shall pay all costs and fees related to this obligation and its enforcement by the Coordinator. The Coordinator's failure to notify Agency of a claim shall not release Agency of the above duty to defend.

- K. Comply with all standards and performance requirements of the:
1. The Commission for the Transportation Disadvantaged (Attachment II);
 2. The local Coordinating Board approved Transportation Disadvantaged Service Plan and;
 - 3 Any entities that purchase service.

Failure to meet the requirements or obligations set forth in this Contract, and performance requirements established and monitored by the Coordinating Board in the approved Transportation Disadvantaged Service Plan shall be due cause for non-payment of reimbursement invoices until such deficiencies have been addressed or corrected to the satisfaction of the Coordinator.

- L. Provide Corrective Action. A corrective action notice is a written notice to the Agency that the Agency is in breach of certain provisions of this Contract and that correction is required. Any corrective action notice will specify a reasonable time for corrective action to be completed. Agency agrees to implement the Corrective Action specified in the notice and provide written documentation to substantiate the implementation of the Corrective Action.
- M. All contracts, subcontracts, coordination contracts will be reviewed annually by the Coordinator and local Coordinating Board for conformance with the requirements of this Contract.
- N Return to the Coordinator any overpayments due to unearned funds or funds disallowed pursuant to the terms of this Contract that were disbursed to the Agency by the Coordinator. The Agency shall return any overpayment within thirty (30) calendar days after either discovery by the Agency, or notification of the Agency by the Coordinator or entity purchasing transportation, whichever is earlier. In the event that the Coordinator first discovers an overpayment has been made, the Coordinator will notify the Agency by letter of such a finding. Should repayment not be made in a timely manner, the Coordinator or purchasing entity will charge interest after thirty (30) calendar days after the date of notification or discovery, or the Coordinator will deduct said amount from future invoices.

0. In performing this Contract, the Agency shall not discriminate against any employee or applicant for employment because of race, age, disability, creed, color, sex or national origin. Such action shall include, but not be limited to, the following: employment upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Agency shall insert the foregoing provision modified only to show the particular contractual relationship in all its contracts in connection with the development of operation of the Contract, except contracts for the standard commercial supplies or raw materials, and shall require all such contractors to insert a similar provision in subcontracts relating to the performance of this Contract, except subcontracts for standard commercial supplies or raw materials. The Agency shall post, in conspicuous places available to employees and applicants for employment for Project work, notices setting forth the provisions of the nondiscrimination clause.
- P. By execution of this Contract, the Agency represents that it has not paid and, also, agrees not to pay, any bonus or commission for the purpose of obtaining an approval of its application for the financing hereunder. Funds disbursed to the Agency under this Contract shall not be expended for the purpose of lobbying the Legislature, the judicial branch, or a state agency.

THE COORDINATOR SHALL:

- A. Recognize the Agency as described in Chapter 427, F.S., and Rule 41-2, F.A.C.
- B. Insure that entities with transportation disadvantaged funds will purchase transportation disadvantaged services through the coordinated system.
- C. At a minimum, annually monitor the Agency for insurance, safety and reporting requirements, pursuant to Chapter 427, F.S., and Rule 41-2, F.A.C. The information contained in the Annual Operating Report must be collected, at a minimum, quarterly from the Agency.

THE AGENCY AND COORDINATOR FURTHER AGREE:

- A. Nothing in the Contract shall require the Coordinator to observe or enforce compliance with any provision thereof, perform any other act or do any other thing in contravention of any applicable state law. If any provision of the Contract is found by a court of law to violate any applicable state law, the purchasing entity will

at once notify the Coordinator in writing in order that appropriate changes and modification may be made by the Coordinator and the Agency to the end that the Agency may proceed as soon as possible with the provision of transportation services.

B. If any part or provision of this Contract is held invalid, the remainder of this Contract shall be binding on the parties hereto.

C. Termination Conditions:

1. Termination at Will - This Contract may be terminated by either party upon no less than thirty (30) days' notice, without cause. Said notice shall be delivered by certified mail, return receipt required, or in person with proof of delivery.
2. Termination due to Lack of Designation - In the event that the Coordinator so designated by the local Coordinating Board and approved by the Commission, loses its designation, this contract is terminated immediately upon notification to the Agency. Notice shall be delivered by certified mail, return receipt requested, or in person, with proof of delivery. Notice shall be effective upon receipt.
3. Termination due to Disapproval of Memorandum of Agreement - In the event that the Commission does not accept and approve any contracted transportation rates listed within the Memorandum of Agreement, this Contract is terminated immediately upon notification to the Agency. Notice shall be delivered by certified mail, return receipt requested, or in person, with proof of delivery. Notice shall be effective upon receipt.
4. Termination due to Lack of Funds - In the event funds to finance this contract become unavailable, the Coordinator may terminate the contract with no less than twenty-four (24) hours written notice to the Agency. Notice shall be delivered by certified mail, return receipt requested, or in person, with proof of delivery. Notice shall be effective upon receipt. The Coordinator shall be the final authority as to the availability of funds.
5. Termination for Breach - Unless the Agency's breach is waived by the Coordinator in writing, the Coordinator may, by written notice to the Agency,

terminate this Contract upon no less than twenty-four (24) hours' notice. Notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery. Waiver by the Coordinator of breach of any provision of this Contract shall not be deemed to be a waiver of any other breach and shall not be construed to be a modification of the terms of this Contract, and shall not act as a waiver or estoppel to enforcement of any provision of this Contract. The provisions herein do not limit the Coordinator's right to remedies at law or to damages.

6. Upon receipt of a notice of termination of this Contract for any reason, the Agency shall cease service and prepare all final reports and documents required by the terms of this Contract. A final invoice shall be sent to the Coordinator within thirty (30) days after the termination of this Contract.
- D. Renegotiations or Modifications of this Contract shall only be valid when they have been reduced to writing, duly approved by the Coordinator, and signed by both parties hereto.
- E. Agency shall assign no portion of this Contract without the prior written consent of the Coordinator.
- F. This Contract is the entire agreement between the parties.
- G. Attachments I and II are an integral part of the Contract and are hereby incorporated by reference into this Contract. All subsequent attachments are of an optional nature.
- H. Notice and Contact:

The name and address of the contract manager for the Coordinator for this Contract is:

Name: Frank Sofia
Title: CEO

Address: 2800 SE Mancamp Rd Ocala, FL
Telephone: 352-387-2210

The representative/position of the Agency responsible for administration of the program under this contract is: Frank Sofia,
telephone: 352-387-2210.

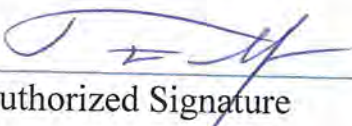
In the event that different representatives are designated by either party after execution of this Contract, notice of the name and address of the new representative will be rendered in writing to the other party and said notification attached to originals of this Contract.

This contract and its attachments contain all the terms and conditions agreed upon by the parties hereto.

WITNESS WHEREOF, the parties hereto have caused these presents to be executed

Agency:
Advocacy Resource Center Marion, Inc.

Community Transportation Coordinator
Marion Senior Services



Authorized Signature



Authorized Signature

Frank Sofia, CEO

Name & Title of authorized individual

Jennifer Martinez, Executive Director

Name & Title of authorized individual

1/8/2020

Date:

1/8/2020

Date:

Attachments that are part of this contract:

I - Service Description

II - Standards & Performance Requirements

IV - HIPPA Assurance

ATTACHMENT I
SERVICE DESCRIPTION

ADVOCACY RESOURCE CENTER MARION, INC.

1. The agency will be able to provide: (Type of service - ambulatory, non-ambulatory, stretcher, population, purpose)

Transportation for our 14 developmentally disabled adults to doctor & dental appointments, banks, grocery shopping, employment and volunteer jobs, weekly activities, church bowling, all Special Olympics events, outings (picnics, field trips, movies, etc.). All our residents are ambulatory.

2. The agency will be available to provide transportation: (Days & hours of availability).
24 hours a day, 7 days a week for our 14 residents.

Days agency will not be able to provide services: (Holidays & other days not available).
We provide services 365 days a year.

3. Vehicles agency will use to transport all passengers: (Vehicle inventory attached)

4. Vehicle/equipment standards, if any: (Identify standards such as functioning air conditions/heating, grab rails, stanchions, first aid kits, fire extinguishers, adequate communication equipment).

<ul style="list-style-type: none">• All vehicles must display the agency's name, phone number and vehicle number unless confidentiality of client is required.
<ul style="list-style-type: none">• Vehicles used to fulfill non-emergency medical transportation services needs must comply with provisions of Rule 10C-7-45, FL Administrative Code and be issued a wheelchair permit if vehicle is equipped and used for transportation of wheelchairs.
<ul style="list-style-type: none">• Vehicles must be equipped with properly functioning heating and air conditioning units.
<ul style="list-style-type: none">• Stanchions and grab rails shall be functionally located throughout appropriate vehicles.
<ul style="list-style-type: none">• Vehicles shall be properly maintained within reasonable limits which prevent hazardous conditions from occurring. Vehicles purchased with federal, state or local government funds must be maintained according to grant conditions. Vehicles may be subject to inspection by the FL Dept. of Transportation and/or the Coordinator.
<ul style="list-style-type: none">• Vehicles must have a first aid kit and fire extinguisher.
<ul style="list-style-type: none">• Vehicles must be equipped with two-way radio or equivalent

communication device.

- Toll free number for complaints shall be posted in each vehicle. In Marion County: 352-620-3071. (MSS Transportation)

5. Driver requirements, if any: (Identify requirements of drivers such as current license, vision, dress, specialized training, relationship with riders - provide assistance, physical contact, communication)

Drivers employed by the Agency shall:

- a) Perform their duties in due regard for the safety, comfort, and convenience of users and their property.
- b) Have a current valid Florida Chauffeurs/Class D License or commercial driver license.
- c) All drivers must pass a pre-employment and annual DOT physical examination and drug screen for public section bus driver and have vision which is correctable to 20/50.
- d) Dress appropriately and wear a photo identification.
- e) Announce him/herself at the address in an attempt to locate the user. If the user does not appear for pick up at the scheduled time, the driver must obtain clearance from the dispatcher before leaving the location without picking up the user.
- f) Open and close vehicle door when user enters and exits vehicle, and provide additional assistance to user if required or requested.

6. Training: (Identify required training of all personnel, including drivers, reservations, etc. Also provide how often this training is required and how it will be provided to agency's employees)

Driver and Agency personnel shall be trained by the Proposer to accommodate the special transportation needs of the elderly, disabled and/or socially disadvantaged users. The program developed should include a minimum of the following:

a.	Defensive driving technique.
b.	Instruction on minor, daily maintenance procedures, such as checking oil, and battery, fan belts, tire pressure, coolant level, etc.
c.	Training on the proper manipulation of wheelchair passengers.
d.	CPR
e.	First Aid
f.	Training in required forms and procedures.
g.	Sensitivity and awareness toward others.

7. Agency fare structure: (Identify fare structure and what services are eligible and ineligible) n/a

8. Billing/invoicing and reimbursement procedure for agency: (When, how often, what reports if any should be submitted) n/a

Reporting requirements: (Include all Requirements of Commission, Coordinator, Local Coordinating Board and any entities purchasing transportation)

Quarterly - Annual Operating Report cumulative data using approved TD Commission forms (previously distributed).

Other reports as may be required from time to time by CTC or funding entities.

ATTACHMENT II
The Commission for the Transportation Disadvantaged
Standards and Performance Requirements

Pursuant to Rule 41-2.006, Florida Administrative Code, the Community Transportation Coordinator and any Transportation Agency from whom service is purchased or arranged by the Community Transportation Coordinator shall adhere to Commission approved standards. These standards shall include:

- (a) Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration;
- (b) An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the local Transportation Disadvantaged Service Plan;
- (c) Child restraint devices shall be determined locally as to their use, responsibility, and cost of such device in the local Transportation Disadvantaged Service Plan;
- (d) Passenger property that can be carried by the passenger and/or driver in one trip and can be safely stowed on the vehicle, shall be allowed to be transported with the passenger at no additional charge. Additional requirements may be negotiated for carrying and loading rider property beyond this amount. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices;
- (e) Vehicle transfer points shall provide shelter, security, and safety of passengers;
- (f) A local toll free phone number for complaints or grievances shall be posted inside the vehicle. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including, advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board;
- (g) Out of service area trips shall be provided when determined locally and approved by the local Coordinating Board, except in instances where local ordinances prohibit such trips;
- (h) Interior of all vehicles shall be free from dirt, grime, oil, trash, torn upholstery, damaged or broken seats, protruding metal or other objects or materials which

could soil items placed in the vehicle or provide discomfort for the passenger;

- (i) Billing requirements of the Community Transportation Coordinator to subcontractors shall be determined locally by the local Coordinating Board and provided in the local Transportation Disadvantaged Service Plan. All bills shall be paid within 15 calendar days to subcontractors, after receipt of said payment by the Community Transportation Coordinator, except in instances where the Community Transportation Coordinator is a non-governmental entity;
- (j) Passenger/trip data base must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system;
- (k) Adequate seating for paratransit services shall be provided to each rider and escort, child, or personal care attendant, and no more passengers than the registered passenger seating capacity shall be scheduled or transported in a vehicle at any time. For transit services provided by transit vehicles, adequate seating or standing space will be provided to each rider and escort, child, or personal care attendant, and no more passengers than the registered passenger seating or standing capacity shall be scheduled or transported in a vehicle at any time;
- (l) Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders, or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle;
- (m) The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or utilization of wheel chair securement devices, storage of mobility assistive devices, and closing the vehicle door. In certain paratransit service categories, the driver may also be required to open and close doors to buildings, except in situations in which assistance in opening/closing building doors would not be safe for passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian, and driver;

- (n) All vehicles ordered or put into service after adoption of this section of the Rule, and providing service within the coordinated system, shall be equipped with two- way communications in good working order and be audible to the driver at all times to the base. All vehicles that are not equipped with two-way communications shall have two years to be in compliance after the adoption date of this section of the Rule;
- (o) All vehicles ordered or put into service after the adoption of this section of the Rule, and providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible. All vehicles that are not equipped with an air conditioner and/or heater shall have two years to be in compliance after the adoption date of this section of the Rule;
- (p) First Aid shall be determined locally and provided in the local Transportation Disadvantaged Service Plan; and
- (q) Cardiopulmonary Resuscitation shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

HIPAA CONFIDENTIALITY AGREEMENT between
Advocacy Resource Center Marion, Inc.. (Vendor)
and
Marion Senior Services, Inc.

PURPOSE:

This agreement is made and entered into in order to ensure that clients' Protected Health Information (PHI) is appropriately safeguarded and that exchange of information as a Vendor of MSS be made with integrity and confidentiality.

The Vendor agrees to maintain the confidentiality of any information provided to them by MSS in accordance with the Health Portability and Accountability Act of 1996 (HIPAA) and associated regulations as set forth in Title 45 Code of Federal Regulations, Part 160 and 164, as may be amended (the Privacy Rule) and 45 Code of Federal Regulations 142.308 (a) (2) as may be finalized and amended (Chain of Trust requirement)

Vendor may use and/or disclose PHI only as permitted or required by this agreement or as otherwise required by law. Vendor may disclose PHI to, and permit the use of PHI by its employees only to the extent directly related to and necessary for the performance of the services and will be no more than the minimum PHI necessary to perform the services. Vendor will not use or disclose PHI in a manner inconsistent with obligations under the Privacy Rule, or that would violate the Privacy Rule if disclosed or used in such a manner.

Security measures maintained by Vendor shall include administrative safeguards, physical safeguards, technical security services and technical security mechanisms as necessary to protect such PHI. Upon request by MSS, Vendor shall provide a written description of such safeguards.

The Vendor agrees to amend this agreement from time to time, as necessary, for MSS to comply with requirements of the Privacy Rule.

Vendor agrees that it will immediately report to MSS any use or disclosure of PHI received from MSS that is not authorized by or otherwise constitutes a violation of this agreement.

Vendor agrees that upon termination of this agreement, it shall contact MSS with regard to any information currently in its possession that was received from or created on behalf of MSS, to determine whether MSS wishes to have said information returned to them or for Vendor to provide certification that information was destroyed.

Authorized signature:  Title: CEO Date: 1/8/2020

Ridership Criteria

TRANSPORTATION DISADVANTAGED PROGRAM:

427.011 Definitions.—For the purposes of ss. [427.011-427.017](#):

(1) “Transportation disadvantaged” means those persons 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 health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk as defined in s. [411.202](#).

- Age – 60+ or -16 years old.
- Physical or Mental Disability
- Income level – 150% Federal Poverty = Less than \$18,084 annually.

SECTION 5311 PROGRAM:

Marion Transit as a sub-recipient of Section 5311 Program, 49 U.S.C. 5311 is to provide transportation to help meet needs of the community as a whole. While our priority is to maximize usage by *transportation disadvantaged* persons in general, we are open to the public during all operating hours. While the 5311 program focuses on residents within “rural” areas of our community, SunTran is the fixed route transportation provider within the City of Ocala and Marion Transit is the Paratransit provider.

Note: Riders in the 5311 Program must still follow the Reservation guidelines when scheduling a trip. (Details are in our brochure.)

Please call our Reservations and Information line if you have any questions:

352-620-3071

Mission Statement - “Is to provide Public Transportation that offers riders a high-quality safe, reliable, and efficient paratransit experience.”

**MARION TRANSIT
CLIENT INTAKE FORM**

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: Burns FIRST NAME: Margaret MI: _____
ADDRESS: 8705-B SW 95th St CITY: Ocala STATE: FL ZIP: 34481
COUNTY: Marion TELEPHONE #: (352) 237-8786 CELL #: (____) _____
DOB: [REDACTED] / [REDACTED] / [REDACTED] SS#: [REDACTED] - [REDACTED] - [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: None RELATIONSHIP: _____ AGE: _____ PHONE: _____
EMERGENCY CONTACT: _____ RELATIONSHIP: _____ AGE: _____ PHONE: _____

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

_____ Mental or Physical Disability _____ Poor* X Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

- YES / NO
- N DO YOU OWN A CAR?
 - N DO YOU HAVE A VALID DRIVER'S LICENSE?
 - N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? _____
 - N DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR? IF NOT, WHY? _____
 - N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? _____
 - N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
 - N DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Popeil</u>	<u>Primary Care</u>	<u>Every Month</u>
_____	_____	_____

SECTION III -

- YES / NO
- N DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
 - N DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
 - N ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR _____, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____

PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____ / _____ / _____

SIGNATURE OF PREPARER: Brenda Stewart DATE: 11 / 07 / 17
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: Brenda Stewart RELATIONSHIP OR MARION TRANSIT: (Signature)

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 11 / 07 / 17 Updated/Approved 5/19

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++

MARION TRANSIT
CLIENT AFFIDAVIT

I hereby AFFIRM that MARGARET BURNS the information provided to Marion Transit
PRINT NAME
to complete the **Client Intake Form** determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 5/17/19

Margaret Burns
Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504

**MARION TRANSIT
CLIENT INTAKE FORM**

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: CASTELLANETA FIRST NAME: ^{AKA} ROSE - ROSINA MI: M.
ADDRESS: 6302 SW 84th ST CITY: Ocala STATE: FL ZIP: 34474
COUNTY: Marion TELEPHONE #: (352) 854-3232 CELL #: ()
DOB: [REDACTED] SS#: [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: Mary Castellaneta RELATIONSHIP: daughter AGE: 60 PHONE: 5AA
EMERGENCY CONTACT: Mary Castellaneta RELATIONSHIP: " AGE: " PHONE: "

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

 Mental or Physical Disability Poor* X Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

- YES/NO
- N DO YOU OWN A CAR? IF NOT, WHY? No car no lic
 - N DO YOU HAVE A VALID DRIVER'S LICENSE?
 - N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS?
 - A DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR? IF NOT, WHY?
 - N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS?
 - N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
 - A DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>DANIEL RITZ</u>	<u>EYE</u>	<u>3 to 4 months</u>
<u>HUG</u> <u>Grocery shopping</u>	<u>PCP</u>	<u>3 to 4 months</u>

SECTION III -

- YES/NO
- N DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP?
 - N DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE:
 - N ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST:

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR _____, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: (Amb)

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____ / _____ / _____

SIGNATURE OF PREPARER: [Signature] DATE: 11 / 7 / 2017
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: YVONNE ROSARIO RELATIONSHIP OR MARION TRANSIT: [Circled]

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 11 / 07 / 17 Updated/Approved 5/19

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++

MARION TRANSIT
CLIENT AFFIDAVIT

I hereby AFFIRM that ROSINA CASTELLANETA the information provided to Marion Transit
PRINT NAME
to complete the Client Intake Form determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: MAY 16, 2019

Rosina Castellaneta

Signature

Contact Information: MARY CASTELLANETA

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504

**MARION TRANSIT
CLIENT INTAKE FORM**

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: Edwards FIRST NAME: Dennis MI: _____
ADDRESS: 11062 SW 73rd Cir CITY: Ocala STATE: FL ZIP: 34476
COUNTY: Marion TELEPHONE #: (352) 854-5537 CELL #: () _____
DOB: [REDACTED] / [REDACTED] / [REDACTED] SS#: [REDACTED] - [REDACTED] - [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: Jasmine Edwards RELATIONSHIP: Sister AGE: _____ PHONE: 352-854-5537
EMERGENCY CONTACT: Jasmine Edwards RELATIONSHIP: Sister AGE: _____ PHONE: 352-854-5537

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☒ Mental or Physical Disability ☐ Poor* ☒ Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

- YES / NO
- N DO YOU OWN A CAR?
 - N DO YOU HAVE A VALID DRIVER'S LICENSE?
 - N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? _____
 - N DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR? IF NOT, WHY? _____
 - N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? _____
 - N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
 - N DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Quick Primary Care</u>	<u>Primary</u>	<u>Every 3 months</u>
<u>Ocala Kidney Group</u>	<u>Nephrology</u>	<u>Every 3 months</u>
<u>Shopping</u>		

SECTION III -

- YES / NO
- N DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
 - N DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
 - N ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR _____, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____ / _____ / _____

SIGNATURE OF PREPARER: Brenda Shenskeirt DATE: 11 / 17 / 16
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: Brenda Shenskeirt RELATIONSHIP OR MARION TRANSIT: _____

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 11 / 17 / 16 Updated / Apprd 5/19

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++



MARION TRANSIT
CLIENT AFFIDAVIT

I hereby AFFIRM that DENNIS EDWARDS the information provided to Marion Transit
PRINT NAME

to complete the **Client Intake Form** determining qualification for transportation is true and accurate to the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 5/16/2019

Dennis Edwards
Signature

Contact Information:

352-854-5537

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504

**MARION TRANSIT
CLIENT INTAKE FORM**

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: HUNTER KENNEDY FIRST NAME: VALARIE MI: L
ADDRESS: 5170 SE 112th ST Rd CITY: Belleview STATE: FL ZIP: 34420
COUNTY: MARION TELEPHONE #: () - - CELL #: (352) 470-1321
DOB: [REDACTED] SS#: [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)
NAME: LADERRI Hunter RELATIONSHIP: daughter AGE: 38 PHONE: 352-470-1509
EMERGENCY CONTACT: " RELATIONSHIP: " AGE: " PHONE: "

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☒ Mental or Physical Disability ☒ Poor* Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

YES / NO
1. N DO YOU OWN A CAR?
2. N DO YOU HAVE A VALID DRIVER'S LICENSE?
3. N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? Blind.
4. N DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR?
5. N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY?
6. N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
7. N DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Heart of Florida</u>	<u>pop</u>	<u>6 month</u>
<u>Randall</u>	<u>eye</u>	<u>6 months</u>
<u>Grocery Shopping</u>		

SECTION III -

YES / NO
1. DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP?
2. DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE:
3. ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: Pending copy of ID Rec'd
" Med AFF " Rec'd 1/29/18

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR ☒, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____/_____/_____

SIGNATURE OF PREPARER: Yvonne Rosario DATE: 01/23/2018
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: YVONNE ROSARIO RELATIONSHIP OR MARION TRANSIT: _____

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 01/23/18 Updated / Appvd 10/19

DENIED DATE: _____/_____/_____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____/_____/_____

COMMENTS: _____

+++ END +++



MARION TRANSIT

Hunter-Kennedy

CLIENT AFFIDAVIT

I hereby AFFIRM that Valaine Kennedy the information provided to Marion Transit
PRINT NAME
to complete the **Client Intake Form** determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date:

08.4-2019

Valaine Kennedy

Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504

Gate 1863th

**MARION TRANSIT
CLIENT INTAKE FORM**

11

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: PRUETT FIRST NAME: PATRICIA MI: _____
ADDRESS: 5327 SW 96th PI CITY: DEAL STATE: FL ZIP: 34476
COUNTY: MARION TELEPHONE # () - - CELL #: (305) 793-8858
DOB: [REDACTED] SS#: [REDACTED]

OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: RICHARD PIER RELATIONSHIP: FIANCEE AGE: _____ PHONE: 305-283-6011
EMERGENCY CONTACT: RICHARD PIER RELATIONSHIP: FIANCEE AGE: _____ PHONE: 305-283-6011

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☒ Mental or Physical Disability ☐ Poor* ☒ Age**

(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

- YES / NO
- ☒ DO YOU OWN A CAR?
 - ☒ DO YOU HAVE A VALID DRIVER'S LICENSE?
 - ☒ COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? 7/6/21 - open heart surgery
 - ☒ DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR?
 - ☒ COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? CANNOT GET IN OR OUT
 - ☒ DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS? OF CAR - AS PER DR.
 - ☒ DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Urban</u>	<u>Cardiologist</u>	<u>New patient</u>
<u>Home Health Ser.</u>	<u>PCP</u>	<u>New patient</u>

SECTION III -

- YES / NO
- ☒ DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
 - ☒ DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
 - ☒ ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

GE SCREENSHOT

Copy DL + AFF

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR ☒, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER:

needs to get a w/c -

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____

DATE: _____ / _____ / _____

SIGNATURE OF PREPARER:
(IF OTHER THAN APPLICANT)

[Signature]
YVONNE ROSARIO

DATE: *12* / *8* / *2021*

PREPARER - PRINT NAME: _____

RELATIONSHIP OR MARION TRANSIT: _____

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: *02* / *08* / *21*

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++



MARION TRANSIT

CLIENT AFFIDAVIT

I hereby AFFIRM that PATRICIA PRUETT the information provided to Marion Transit
PRINT NAME
to complete the Client Intake Form determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 02-16-2021

Patricia Pruett
Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504

**MARION TRANSIT
CLIENT INTAKE FORM**

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: Roikes FIRST NAME: Gerald MI: _____
ADDRESS: 10960 SE 129th Ln CITY: Belleview STATE: FL ZIP: 34420
COUNTY: Marion TELEPHONE #: (352) 288-0578 CELL #: () _____
DOB: [REDACTED] / [REDACTED] / [REDACTED] SS#: [REDACTED] - [REDACTED] - [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: none RELATIONSHIP: _____ AGE: _____ PHONE: _____
EMERGENCY CONTACT: none RELATIONSHIP: _____ AGE: _____ PHONE: _____

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☒ Mental or Physical Disability ☒ Poor* ☒ Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

YES / NO

1. N DO YOU OWN A CAR?
2. N DO YOU HAVE A VALID DRIVER'S LICENSE?
3. N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? _____
4. N DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR? IF NOT, WHY? _____
5. N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? _____
6. N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
7. N DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Shopping</u>		

SECTION III -

YES / NO

1. N DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
2. N DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
3. Y ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: Used Medicaid for doctor visits

P- copy of ID and Client aff 7-19-19

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR _____, POWER WHEELCHAIR X, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____ / _____ / _____

SIGNATURE OF PREPARER:
(IF OTHER THAN APPLICANT)

Brenda Sheubert DATE: 2 / 11 / 16

PREPARER - PRINT NAME:

Brenda Sheubert RELATIONSHIP OR MARION TRANSIT:

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 11 / 11 / 16

Updated / Approval 9/19

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++



Marion
Senior Services
MEALS • TRANSIT • IN-HOME SUPPORT

MARION TRANSIT

CLIENT AFFIDAVIT

I hereby AFFIRM that SEALY ROIKES the information provided to Marion Transit
PRINT NAME
to complete the **Client Intake Form** determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 9-27-19

Sealy Roikes
Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

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OTOW
UNIT F

**MARION TRANSIT
CLIENT INTAKE FORM**

MARION TRANSIT SERVICE IS PROVIDED ACCORDING TO THE FOLLOWING NEEDS AS SPACE IS AVAILABLE:
MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: Slocum FIRST NAME: David MI: _____
ADDRESS: 9370 SW 85th TER. Unit F CITY: Ocala STATE: FL ZIP: 34451
COUNTY: MARION TELEPHONE #: (352) 854-2503 CELL #: _____
DOB: [REDACTED] SS#: [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: me RELATIONSHIP: _____ AGE: _____ PHONE: _____
EMERGENCY CONTACT: Ken RELATIONSHIP: friend AGE: _____ PHONE: 732-915-2183

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☒ Mental or Physical Disability ☐ Poor* ☒ Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

YES / NO

1. ☒ DO YOU OWN A CAR?
2. ☒ DO YOU HAVE A VALID DRIVER'S LICENSE?
3. ☒ COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? Cannot anymore
4. ☒ DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR?
5. ☒ COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? Friends or family
6. ☒ DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS? are either too old or have passed away
7. ☒ DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Florida Cancer Spcs</u>	<u>Cancer</u>	<u>every day</u>

SECTION III -

YES / NO

1. ☒ DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
2. ☒ DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
3. ☒ ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

BE SCREENED HOT

COPY of DL + AFF

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR ☒, POWER WHEELCHAIR _____, CANE ☒, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____/_____/_____

SIGNATURE OF PREPARER: Yvonne Rosario DATE: 2 / 9 / 2021
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: YVONNE ROSARIO RELATIONSHIP OR MARION TRANSIT: (Circled)

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 2 / 9 / 21

DENIED DATE: _____/_____/_____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____/_____/_____

COMMENTS: _____

+++ END +++



DAVID Slocum

MARION TRANSIT
CLIENT AFFIDAVIT

I hereby AFFIRM that DAVID SLOCUM the information provided to Marion Transit
PRINT NAME
to complete the **Client Intake Form** determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 12/10/21

DAVID SLOCUM
Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

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**MARION TRANSIT
CLIENT INTAKE FORM**

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MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: Souza FIRST NAME: Victor MI: _____
ADDRESS: 17345 SE 115th Terr Rd CITY: Summerfield STATE: FL ZIP: 34491
COUNTY: Marion TELEPHONE #: (914) 720-0090 CELL #: () _____
DOB: _____ SS#: _____
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: none RELATIONSHIP: _____ AGE: _____ PHONE: _____
EMERGENCY CONTACT: none RELATIONSHIP: _____ AGE: _____ PHONE: _____

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☒ Mental or Physical Disability _____ Poor* _____ Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

YES / NO

1. N DO YOU OWN A CAR?
2. N DO YOU HAVE A VALID DRIVER'S LICENSE?
3. N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS?
4. N DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR? IF NOT, WHY? _____
5. N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? _____
6. N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
7. N DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Davinci Surgical</u>	<u>Urology</u>	<u>Monthly</u>
_____	_____	_____

SECTION III -

YES / NO

1. N DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
2. N DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
3. N ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:



WHEELCHAIR _____, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____


OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____ / _____ / _____

SIGNATURE OF PREPARER:  DATE:  / 12 / 02 / 16
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: Brenda Shewhuit RELATIONSHIP OR MARION TRANSIT: 

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 12 / 02 / 16 updated / Appvd 5/19

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

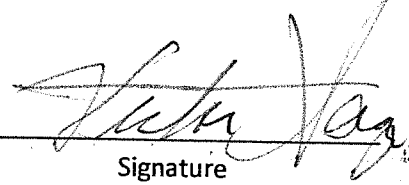
COMMENTS: _____

+++ END +++

MARION TRANSIT
CLIENT AFFIDAVIT

I hereby AFFIRM that VICTOR SOUZA the information provided to Marion Transit
PRINT NAME
to complete the **Client Intake Form** determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 5-17-2019


Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

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**MARION TRANSIT
CLIENT INTAKE FORM**

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SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: WALKER FIRST NAME: DOROTHY MI: T
ADDRESS: 13791 SE 85TH CIRCLE CITY: SUMMERFIELD STATE: FL ZIP: 34491
COUNTY: MARION TELEPHONE #: (352) 347-9953 CELL #: ()
DOB: [REDACTED] SS#: [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: ROBERT WALKER RELATIONSHIP: HUSBAND AGE: 87 PHONE: 352-347-9953
EMERGENCY CONTACT: JIM WALKER RELATIONSHIP: SON AGE: 52 PHONE: 403-566-2135

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

☐ Mental or Physical Disability ☐ Poor* ☒ Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

YES/NO

1. YES DO YOU OWN A CAR? SHARED OWNERSHIP
2. YES DO YOU HAVE A VALID DRIVER'S LICENSE?
3. NO COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? HAVEN'T DRIVEN IN YEARS
4. YES DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR?
5. NO COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? SEIZURE/STROKE HISTORY
6. NO DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
7. YES DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS? ON OCCASION

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
_____	_____	_____
_____	_____	_____

SECTION III -

YES/NO

1. NO DO YOU LIVE ON A SUNTRAN ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
2. NO DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
3. NO ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR _____, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: *Deborah Walker* DATE: 2 / 16 / 2021

SIGNATURE OF PREPARER: *Bonnie Zakas* DATE: 2 / 16 / 2021
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: BONNIE ZAKAS RELATIONSHIP OR MARION TRANSIT: DAUGHTER

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 2 / 16 / 21

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++



MARION TRANSIT

CLIENT AFFIDAVIT

I hereby AFFIRM that Deborah Walker the information provided to Marion Transit
PRINT NAME
to complete the **Client Intake Form** determining qualification for transportation is true and accurate to
the best of my knowledge and I will immediately notify Marion Transit of any changes to my status.

Date: 2-16-21

Deborah Walker
Signature

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504

**MARION TRANSIT
CLIENT INTAKE FORM**

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MEDICAL • LIFE SUSTAINING ACTIVITIES • EDUCATION • WORK • BUSINESS • RECREATIONAL

SECTION I - DETERMINATION OF ELIGIBILITY

LAST NAME: Wylie FIRST NAME: Leo MI: _____
ADDRESS: 5347 SW 103rd Loop CITY: Ocala STATE: FL ZIP: 34476
COUNTY: Marion TELEPHONE #: (352) 873-1381 CELL #: () _____
DOB: [REDACTED] / [REDACTED] / [REDACTED] SS#: [REDACTED] - [REDACTED] - [REDACTED]
OTHER HOUSEHOLD MEMBERS (LIST EACH MEMBER)

NAME: none RELATIONSHIP: _____ AGE: _____ PHONE: _____
EMERGENCY CONTACT: none RELATIONSHIP: _____ AGE: _____ PHONE: _____

Transportation Disadvantaged (eligibility criteria) – Attach any documentation for eligibility claimed:

_____ Mental or Physical Disability _____ Poor* X Age**
(*Poor = Income level at or below 150% of the Federal Poverty Guideline / Age** = 60+ or <16 years old.)

SECTION II - AVAILABILITY OF TRANSPORTATION

YES / NO

1. N DO YOU OWN A CAR? IF NOT, WHY? _____
2. N DO YOU HAVE A VALID DRIVER'S LICENSE?
3. N COULD YOU DRIVE YOUR CAR TO MEDICAL APPTS? IF NOT, WHY? _____
4. N DOES ANYONE IN YOUR HOUSEHOLD HAVE A CAR? IF NOT, WHY? _____
5. N COULD THEY DRIVE YOU TO YOUR APPOINTMENTS? IF NOT, WHY? _____
6. N DO YOU HAVE FAMILY MEMBERS WHO CAN TRANSPORT YOU TO APPOINTMENTS?
7. N DO YOU HAVE FRIENDS WHO CAN TRANSPORT YOU TO YOUR APPOINTMENTS?

LIST ALL HOSPITALS, DOCTORS, AND MEDICAL FACILITIES THAT YOU VISIT ON A REGULAR BASIS:

NAME OF HOSPITAL/DOCTOR/FACILITIES:	TYPE OF TREATMENT?	# MONTHLY VISITS?
<u>Ocala Eye Surgeons</u>	<u>injections</u>	<u>1x monthly</u>
_____	_____	_____

SECTION III -

YES / NO

1. N DO YOU LIVE ON A **SUNTRAN** ROUTE? WHAT IS THE DISTANCE TO THE NEAREST BUS STOP? _____
2. N DO YOU HAVE ANY LIMITATIONS THAT WOULD PREVENT YOU FROM RIDING THE BUS?
PLEASE DESCRIBE: _____
3. N ARE YOU ENROLLED IN ANY OTHER PROGRAM(S) THAT WILL PAY FOR OR PROVIDE TRANSPORTATION?
PLEASE LIST: _____

SECTION IV -

PLEASE CHECK OR LIST ANY SPECIAL NEEDS, SERVICES OR MODES OF TRANSPORTATION YOU REQUIRE DURING TRANSPORTATION:

WHEELCHAIR _____, POWER WHEELCHAIR _____, CANE _____, WALKER _____, SERVICE ANIMAL _____, OXYGEN _____
PERSONAL CARE ATTENDANT _____, LIFT TO LOAD _____, SCOOTER _____

OTHER: _____

SECTION V -

I ATTEST ALL INFORMATION IS CORRECT TO MY KNOWLEDGE AND ANY CHANGES WILL BE REPORTED TO MARION TRANSIT IMMEDIATELY:

SIGNATURE OF APPLICANT: _____ DATE: _____ / _____ / _____

SIGNATURE OF PREPARER: Brenda Shewburt DATE: 12 / 06 / 16
(IF OTHER THAN APPLICANT)

PREPARER - PRINT NAME: Brenda Shewburt RELATIONSHIP OR MARION TRANSIT: _____

=====

OFFICE USE ONLY

LAST NAME: _____ FIRST NAME: _____

SECTION VI -

AUTHORIZATION

APPROVAL DATE: 12 / 06 / 16 Updated 8/20

DENIED DATE: _____ / _____ / _____ REASON: _____

MANAGER REVIEW - IF DENIED

BY: _____ TITLE: _____ DATE: _____ / _____ / _____

COMMENTS: _____

+++ END +++



Marion
Senior Services
MEALS • TRANSIT • IN-HOME SUPPORT

MARION TRANSIT

Client Affidavit

I hereby AFFIRM that X Della Sylvia Wy is unable to drive himself/herself to
PRINT NAME
appointments and therefore meets the definition of being TRANSPORTATION DISADVANTAGED.

Date: X 8/6/2020

X Della Sylvia Wy
Signature/Title

Contact Information:

The "Transportation Disadvantaged" are persons who are defined as having a mental or physical disability, the poor (income level at or below 150% of the Federal Poverty Guidelines) by age (Age = 60+ or <16 years old) unable to transport themselves.

Marion Transit, 1101 S.W. 20th Court, Ocala, Florida 34471 (352)620-3071 Fax (352)620-3504



TO: TPO Board Members

FROM: Rob Balmes, Director

RE: Proposed Mission and Vision Statements

In January 2021, TPO staff engaged in a process to develop organizational mission and vision statements. Presently, the TPO does not have a mission or vision statement. Based on a staff-level brainstorming activity, a set of three mission and vision statement options were developed. These options were then shared with the TPO Board, TDLCB and Technical and Citizens Advisory Committee members via an online survey. Board and committee members were asked to rank the options based on preference, provide comments and editorial suggestion or additional options. A total of 16 responses were provided, which included modifications to the three original options.

Based on the substantial constructive feedback received, TPO staff is recommending the following mission and vision statements. Attached to this memo are the recommendations, along with additional options, including the original three mission and vision statement options used in the survey.

Mission Statement

To plan for a future transportation system that is safe and accessible for the residents and visitors of our community.

Vision Statement

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

If you have any questions or concerns, please contact me at 438-2631.



Ocala Marion Transportation Planning Organization (TPO)
Mission and Vision Statements

MISSION STATEMENT 1: TPO STAFF RECOMMENDATION

To plan for a future transportation system that is safe and accessible for the residents and visitors of our community.

MISSION STATEMENT OPTION 2

To serve our community by establishing a safe foundation for our future transportation system through originality, innovation and planning.

VISION STATEMENT 1: TPO STAFF RECOMMENDATION

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

VISION STATEMENT OPTION 2

Transportation planning to meet the safety and mobility needs of our community.

Ocala Marion Transportation Planning Organization (TPO)
Mission and Vision Statement Selections

Mission Statement 1

To serve our community establishing a safe foundation for our future transportation system through originality, innovation and planning expertise.

Mission Statement 2

Collaborate with our community to establish a safe and equitable transportation system through originality, innovation and planning expertise.

Mission Statement 3

To plan for an inclusive and equitable multimodal transportation system that is safe and accessible for the residents and visitors of our community.

Vision Statement 1

A transportation system that accommodates growth, stability and safety through leadership and planning.

Vision Statement 2

Leadership in transportation planning to meet the safety and mobility needs of our community.

Vision Statement 3

Successfully plan for transportation improvements and future growth.



TO: TPO Board Members

FROM: Rob Balmes, Director

RE: Office of Inspector General (OIG) Audit Report

The Florida Department of Transportation (FDOT) Office of Inspector General (OIG) has completed their audit of the TPO. Included with this memo are the findings outlined in the audit report. Also included is the official response by TPO Board Chair Commissioner Stone.

In response to some of the findings outlined in the audit report, the TPO has been working with the FDOT Central and District 5 offices. The issues have been resolved and the TPO will continue to build upon our working relationship with FDOT in all our activities. Once the final audit report is made available, the TPO Board will be furnished an electronic copy.

If you have any questions or concerns about the audit report and findings, please contact me at 438-2631.



Florida Department of TRANSPORTATION

Office of Inspector General Kristofer B. Sullivan, Inspector General

Audit Report No. 20I-002
Ocala/Marion Transportation Planning Organization

March 19, 2021

What We Did

The Florida Department of Transportation's (Department) Office of Inspector General (OIG) conducted an audit of the Ocala/Marion Transportation Planning Organization (TPO), a District Five subrecipient of the Department, to evaluate the governance structure and associated fiscal financial management processes. This audit was conducted as a result of our annual risk assessment and work plan. The scope of this audit was from January 1, 2019 through December 31, 2019.

What We Found

We determined that while Ocala/Marion TPO is generally implementing Department financial management requirements, we found minor issues related to the TPO's invoice packages, caused by guidance provided by the District. **We also determined** that TPO Board governance is in accordance with Section 112.061, Florida Statutes, Ocala/Marion TPO Travel Policy, TPO Staff Services Agreement, TPO Bylaws, and the Department's Metropolitan Planning Organization Program Management Handbook. **We also determined** that previous issues regarding TPO Board governance brought to our attention by the District have been resolved.

What We Recommend

We recommend that the Office of Policy Planning (OPP) Metropolitan Planning Administrator ensure the District Five Liaison provide proper guidance concerning invoice packages. In particular, the Department District Five Liaison must ensure:

- amounts billed to the invoice tie to the submitted itemized expenditure detail report (billing worksheet) and are correlated with appropriate backup documentation;
- backup documentation provided by the TPO confirms the cost allocation method used and calculated rate for all allocated services;
- the TPO develops progress reports that directly outline activities billed to individual invoices; and
- the TPO is supporting their activities for each invoice with separate progress reports.

**Office of Inspector General
Florida Department of Transportation**

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BACKGROUND AND INTRODUCTION

Metropolitan Planning Organizations

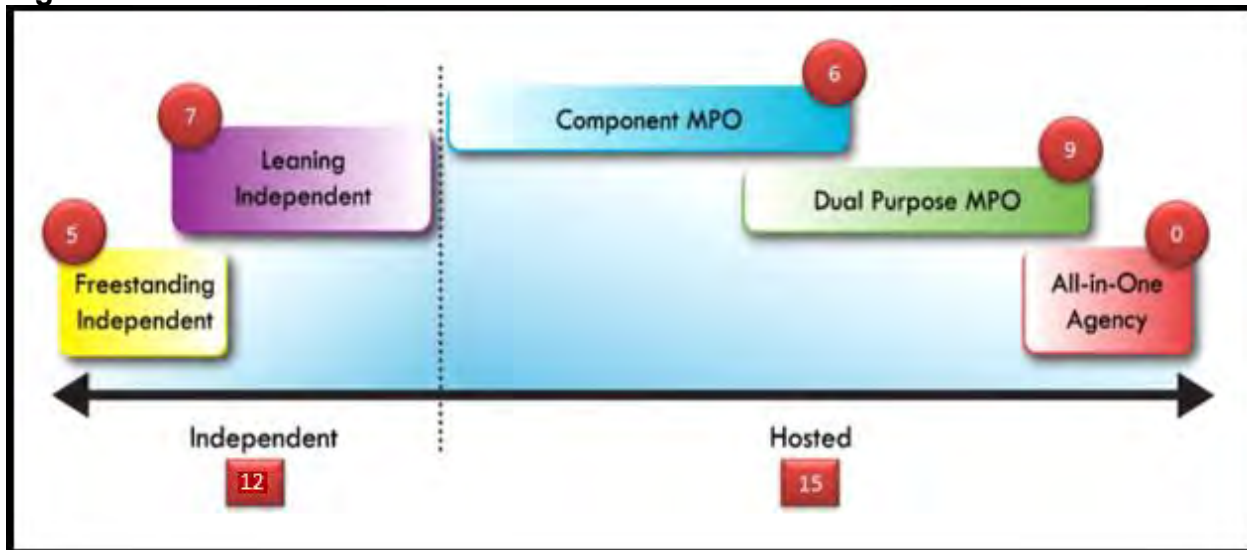
In 1973, the Federal-Aid Highway Act mandated the creation or designation of Metropolitan Planning Organizations (MPOs) for urbanized areas with populations greater than 50,000 people. MPOs are federally mandated Transportation Planning Organizations (TPOs), comprised of representatives from local governments and transportation authorities, which help ensure federally funded transportation projects support local priorities. In Florida, MPOs may be referred to interchangeably as MPOs, TPOs, or Transportation Planning Agencies (TPAs).

There are 27 MPOs, TPOs, and TPAs¹ across the state of Florida. Typically, each MPO has been founded by an Interlocal Agreement, executed under Title XI, Chapter 163 of Florida Statutes (F.S.), among the various county, city, and other local governments in the area to be served. Many MPOs also execute a separate service agreement with a participating local government to obtain administrative services or other support (e.g., office space), often at below-market rates. The terms of these arrangements vary widely.

In 2011, the Florida MPO Advisory Council (MPOAC) commissioned the Center for Urban Transportation Research (CUTR) at the University of South Florida to analyze the different organizational structures employed by Florida's MPOs. CUTR classified the MPOs into two categories, hosted and independent, and five subcategories, ranging from being fully independent (freestanding) to being so thoroughly integrated with the host agency that they are nearly indistinguishable from the host (all-in-one agency). Figure 1 illustrates the CUTR classification model, as applied to Florida's MPOs.

¹ In this report, we refer to these organizations as MPOs, unless discussing the Ocala Marion TPO specifically.

Figure 1: MPO Structures



Source: MPOAC: A Snapshot of Florida MPOs (prepared by the Center for Urban Transportation Research (CUTR), April 2011); modified by the Office of Inspector General (OIG) to include the newest MPO, Heartland Regional TPO.

OPP uses the CUTR model to classify MPO governance structures.²

Ocala/Marion TPO

The Ocala/Marion TPO serves an urbanized area with a population under 200,000. The Ocala/Marion County TPO is classified as a Component MPO and is responsible for the planning and implementation of all modes of transportation. The Ocala/Marion TPO works with the public, planning organizations, government agencies, elected officials, and community groups to develop transportation plans. The purpose of the TPO is to provide a forum for a coordinated, comprehensive, and continual transportation planning process.

Membership of the TPO is apportioned by the Governor of the State of Florida among the governmental entities which constitute the TPO, based on equitable population ratio and geographic factors. At least every five years the membership is reapportioned by the Governor. The governmental body of each governmental entity appoints the appropriate number of members to the TPO from eligible officials. The TPO consists of the following apportioned members:

² The MPO Program Management Handbook published by OPP includes a discussion of the model.

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Table 1: Ocala/Marion TPO Board Voting Representation

Area	Seats
Marion County	5
City of Ocala	5
City of Belleview	1
City of Dunnellon	1
Total	12

Source: Ocala/Marion TPO Bylaws

Effective July 1, 2019, the host entity was transferred from the City of Ocala to Marion County.

Ocala/Marion TPO's Relationship with the Department

The TPO's planning grants are Federal Highway Administration (FHWA) funds that are passed through the Department. The TPO also handles Federal Transit Administration (FTA) funds that are used in Modal grants. Ocala/Marion TPO, located in the Department's District Five (District), is assigned a grant manager who is responsible for oversight of the TPO funds to ensure compliance with both State and Federal statutes and regulations. The Department's role in the MPO Program is to support and oversee MPOs in their planning process. The Department provides both technical support via District MPO liaisons and financial support as a pass-through entity for federal funds. Ocala/Marion TPO and the Department have executed an agreement, "Metropolitan Planning Organization Agreement" (Agreement), for each grant. This agreement states the terms and conditions upon which the FHWA and FTA funds will be provided and sets forth the manner in which work tasks and subtasks within the Unified Planning Work Program (UPWP), the TPO's budget, will be undertaken and completed.

Annual Joint Certification

Each year, the District and the TPO must jointly certify the metropolitan transportation planning process, as described in 23 Code of Federal Regulations (C.F.R.) 450.336, to ensure the planning requirements of 23 United States Code (U.S.C.) 134 and 49 U.S.C. 5303 are being satisfactorily implemented. The Ocala/Marion TPO was assigned a level of high risk for the 2018 Certification year (January 1, 2017 – December 31, 2017) due to on-going invoicing issues of submission timeliness and verification of eligible expenditures. The continued assignment of high-risk status resulted in the TPO remaining on specific conditions³ consistent with 2 C.F.R. 200.207. According to the March 26, 2019 TPO Board meeting minutes, the Ocala/Marion TPO remained on high-

³ Per Title 2 C.F.R. 200.207 Specific Conditions, paragraph (a), subparagraphs 4-6, upon written notice the department may require the MPO to (among other things) prepare more detailed financial reports, submit to additional monitoring, obtain additional approvals, or seek technical or management assistance.

risk status and specific conditions⁴ for the following year based on the 2018 Joint Certification results.

Once the TPO has billed at a timely manner without rejection for three consecutive invoice cycles, the Department may remove the additional requirements imposed, per Specific Condition requirements.

The TPO was notified that their high-risk status was being reduced to low-risk in an in-person meeting with the District on February 25, 2020. Per the District's Liaison to the TPO, the meeting was held at the TPO office between District planning staff and TPO staff to conduct the joint certification and review before finalizing and sending for board approval and signature.

The District's standard process is to report results directly to the Board and provide copies of the complete package to the following:

- Department's Office of Policy Planning;
- District Five's Government Liaison Administrator and Planning & Environmental Management Administrator;
- the Florida Division of FHWA; and
- the Federal Transportation Authority.

After the results are presented to the TPO Board, the Board then presents and relays next steps to the TPO Director.

District Concerns Regarding Ex-Director

The Ocala/Marion TPO was initially placed on high risk status due to issues with the previous director. The District brought to our attention previous issues such as timely TPO Board response, potential timesheet falsification, allowability of costs, director car allowance, and invoice submission timeliness.

⁴ The TPO had been on specific conditions since November 2018, when the TPO Board elected to continue invoice review by the District in the form of technical support.

RESULTS OF REVIEW

Objective 1 of this audit was to determine if the Ocala/Marion TPO is implementing Department financial management requirements. We determined that while Ocala/Marion TPO is generally implementing Department financial management requirements, we found minor issues related to the TPO's invoice packages, which are noted in Finding 1.

Objective 2 of this audit was to determine the operating effectiveness of governance under the new direction of the TPO, pre- and post-transfer of host entity to Marion County. We determined that the previous issues regarding TPO Board governance brought to our attention by the District have been resolved, as described in Finding 2.

Finding 1 – Financial Management Requirements

We determined that while Ocala/Marion TPO is generally implementing Department financial management requirements, we found minor issues related to the TPO's invoice packages, caused by guidance provided by the District.

Criteria:

We tested using the following criteria for the financial management requirements applicable to the Ocala/Marion TPO.

G0W40 MPO Agreement, Paragraph 9, Section E states that “all costs charged...shall be supported by properly executed payrolls, time records, invoices, contracts, vouchers evidencing in proper detail the nature propriety of the charges.”

G0W40 MPO Agreement, Paragraph 8, Section C (iii) - Records that identify adequately the source and application of funds for federally-funded activities. These records must contain information pertaining to Federal awards, authorizations, obligations, unobligated balances, assets, expenditures, invoice and interest and be supported by source documentation.

G0W40 MPO Agreement, Paragraph 9, Section E - Supporting documentation must establish that the deliverables were received and accepted in writing by the MPO and must also establish that the required minimum level of service to be performed based on the criteria for evaluating successful completion as specified in the UPWP, Exhibit "A", was met. All costs charged to the Project, including any approved services contributed by the MPO or others, shall be supported by properly executed payrolls, time records, invoices, contracts, vouchers evidencing in proper detail the nature propriety of the charges.

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2 C.F.R. 200.62 (a)(b)(c) - Internal control over compliance requirements for Federal awards means a process implemented by a non-Federal entity designed to provide reasonable assurance regarding the achievement of the following objectives for Federal awards:

- a) Transactions are properly recorded and accounted for, in order to:
 - 1) Permit the preparation of reliable financial statements and Federal reports;
 - 2) Maintain accountability over assets; and
 - 3) Demonstrate compliance with Federal statutes, regulations, and the terms and conditions of the Federal award;
- b) Transactions are executed in compliance with:
 - 1) Federal statutes, regulations, and the terms and conditions of the Federal award that could have a direct and material effect on a Federal program;
 - 2) Any other Federal statutes and regulations that are identified in the Compliance Supplement; and
- c) Funds, property, and other assets are safeguarded against loss from unauthorized use or disposition.

2 C.F.R. 200.302(b)(3) - Records that identify adequately the source and application of funds for federally-funded activities. These records must contain information pertaining to Federal awards, authorizations, obligations, unobligated balances, assets, expenditures, income and interest and be supported by source documentation.

2 C.F.R. 200.303(a) - Establish and maintain effective internal control over the Federal award that provides reasonable assurance that the non-Federal entity is managing the Federal award in compliance with Federal statutes, regulations, and the terms and conditions of the Federal award. These internal controls should be in compliance with guidance in "Standards for Internal Control in the Federal Government" issued by the Comptroller General of the United States or the "Internal Control Integrated Framework", issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO).

MPO Program Management Handbook Section 3.10.3 - The progress report must show a clear tie between the tasks reflected in the UPWP, the activities expressed in the Progress Report, and the costs included in the Itemized Expenditure Detail Report.

Invoice Sampling and Reconciliation

Condition:

We selected invoices for sampling from FHWA contract G0W40 and FTA contract G0V18 from January 1, 2019 through December 31, 2019 and reviewed for salary and expense backup documentation to ensure all amounts properly reconciled to submitted invoice packages.

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From the FTA contract, we selected Invoices 4 and 5, the only two invoices submitted during the audit period. Both invoices for FTA contract G0V18 accurately reconciled to the UPWP and submitted backup documentation.

From the FHWA contract, we selected three invoices judgmentally, Invoices 12, 15, and 16, based on large irregular charges and progress report activity flagged for additional review. Invoice 15 was reconciled except for a small, immaterial amount within the submitted salary records. Invoices 12 and 16 did not have complete backup documentation. As stated in the background of the report, the TPO, at the time, was on specific conditions which required them to provide supporting documentation for the charges billed on each invoice.

Contract G0W40, Invoices 12 and 16

The host entity (Marion County) allocated the following indirect costs to the TPO, as outlined in the Marion County Cost Allocation Plan. The TPO then invoiced the Department for reimbursement. See Figure 2.

Figure 2: Invoice Reconciliation Schedule

Invoice 12				
Backup documentation for the following charges were found to be unsupported.				
IT Allocation	6/30/2019	\$	1,771.75	Task 1
Ocala Fiber Network Allocation	6/30/2019	\$	618.60	Task 1
Insurance Services Allocation	6/30/2019	\$	987.00	Task 1
Invoice 16				
MARION COUNTY COST ALLOCATION	\$	-	\$ 4,114.83	\$ 4,114.83

Source: OIG analysis and District provided invoice package

In our review of Invoices 12 and 16, we found that the TPO does not provide the rate or calculation method of allocated indirect costs from Marion County. The County has a cost allocation plan, but the supporting documentation showing the calculation of individual charges is not provided in the invoice packages. The total unsupported charges in Invoice 12 were \$3,377 of \$135,678 in the invoice. The total unsupported charges in Invoice 16 were \$4,115 of \$50,707 in the invoice.

Progress Reports

Each invoice package is required to contain a progress report which clearly outlines the activities that were performed for each billed task. The same reports are currently being submitted for invoice packages with overlapping dates of service. Therefore, because they are duplicate and do not clearly outline the activities performed for tasks, the progress reports cannot be tied to the tasks.

Cause:

Contract G0W40, Invoices 12 and 16

In our review of Invoices 12 and 16, we found that the TPO did not provide sufficient backup documentation to support the allocation charges. As previously mentioned, the TPO was required to provide all backup documentation due to being on special conditions.

We reached out to the District Liaison who was unaware of reconciliation issues correlating billed amounts with invoices and could not supply the requested information or documentation regarding the allocated costs. The District does not review or request backup documentation for cost allocation amounts or calculation methods as part of their review and therefore did not identify the discrepancies once invoice packages were submitted to them.

Progress Reports

The District has instructed the TPO to submit the same progress report for separate invoices with overlapping dates. The District Liaison could not provide a clear reason as to why the District gave the TPO such guidance.

The District should have provided instruction in accordance with OPP guidance. Section 3.10.3 of the Department's MPO Program Management Handbook states that the District MPO Liaison shall review each progress report that is submitted for evidence that the minimum performance standards in the MPO Agreement and UPWP were met, as well as to support the costs incurred and being requested for reimbursement.

Further, the MPO FHWA Funds Invoice Review Checklist, required by the Department for submission with an invoice package, requires the District Liaison to check for a progress report that "aligns with the tasks charged within the invoice."

Effect:

The District is not currently reviewing cost allocation procedures or allocated costs in the invoice packages, which may result in a lack of oversight over potential misstatements of calculated amounts. Without proper reconciliation, future billing errors may occur.

Progress reports included in invoice packages are an internal control to document work completed for the billed amounts. There is an inability to accurately tie billed tasks to work performed for each invoice without unique progress reports for each invoice package. This may lead to improper oversight of activities and improper activities billed.

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We recommend that OPP's Metropolitan Planning Administrator ensure the District Five Liaison provide proper guidance concerning invoice packages. In particular, the Department District Five Liaison must ensure:

- amounts billed to the invoice tie to the submitted itemized expenditure detail report (billing worksheet) and are correlated with appropriate backup documentation;
- backup documentation provided by the TPO confirms the cost allocation method used and calculated rate for all allocated services;
- the TPO develops progress reports that directly outline activities billed to individual invoices; and
- the TPO is supporting their activities for each invoice with separate progress reports.

Through a working conference with the OIG, OPP stated that they are currently preparing a training program for MPO liaisons, which will include guidance on supporting documentation and invoice review.

Finding 2 – TPO Board Governance

We determined that TPO Board governance is in accordance with Section 112.061, F.S., Ocala/Marion TPO Travel Policy, TPO Staff Services Agreement, TPO Bylaws, and the Department's MPO Program Management Handbook. **We also determined** that the previous issues regarding TPO Board governance brought to our attention by the District have been resolved.

TPO Bylaws states the purpose and functions of the TPO Board as follows:

“Representatives of Marion County, the cities of Belleview, Dunnellon, and Ocala, the Florida Department of Transportation and the United States Department of Transportation shall be involved in the transportation planning process by the establishment of a TPO. Its purpose shall be to provide effective leadership in the initiation and development of transportation plans, programs and strategies. As such, it shall set transportation policy for the designated planning area as identified in 2003 Apportionment Plan, provide guidance for the area's transportation planning process, and review, approve and adopt all plans and programs which are developed by the process. As the body directly responsible for the guidance of the transportation planning process, the TPO shall insure that the recommendations made therein are consistent with the goals and standards of the Federal Government, the State, the counties and the jurisdictions within the counties.”

Section 112.061, F.S. allows mileage reimbursement only when an employee uses a private vehicle.

Section 2.3(3)(h) of the Ocala/Marion TPO Travel Policy states that employees receiving a vehicle allowance as part of their salary package are entitled to

reimbursement for mileage only when using their personal vehicle outside of Marion County.

MPO Handbook Section 3.10 requires the MPO submit invoices to FDOT on a quarterly or monthly basis.

The Joint Participation Agreement G0V18 and MPO Agreement G0W40 state all costs charged to project must supported by properly executed invoices executing in proper detail the nature and propriety of the charges.

Prior Board Oversight Issues

The District observed, under the leadership of a prior Executive Director, the TPO had the following governance issues:

- Car allowance rates: Car allowance rate discrepancies were a recurring issue as a prior director claimed mileage reimbursement while using the TPO vehicle.
 - Resolution: The TPO vehicle allowance has since been removed from the Director's contract.
- Timesheet falsification: There were suspicions that the previous TPO Director was doing work for the City of Ocala but charging and being reimbursed by the MPO grant, in violation with the Joint Participation Agreement G0V18 and MPO Agreement G0W40. The TPO Board had responsibility for ensuring the Director's timesheets are true and accurate and in accordance with the TPO's agreements.
 - Resolution: The Board requested the City of Ocala perform a limited scope audit of timesheets from the period of when the previous Director left and when the District MPO Liaison called the City of Ocala to report the timesheet suspicions. Audit results did not specifically find where timesheets were falsified, nor did they have the proper mechanisms (computers, cameras, etc.) to check, per the MPO Liaison/Administrator. OPP issued Technical Memorandum 19-05-REV⁵ as a result.
- Invoice submission timeliness and expense allowability: Previously, invoice submissions were untimely, and allowability of expenses were called into question resulting in continuous high and elevated risk statuses for annual Joint Certifications.
 - Resolution: Additional requirements (specific conditions) were imposed on the TPO to ensure proper documentation was submitted. The recent reduction of Ocala/Marion's elevated risk status, discussed in the background, has been credited to improved invoicing performance.

The previous Director did not communicate to the Board what the District had observed, which limited the Board's ability to address and resolve these issues. Since the

⁵ Technical Memorandum 19-05-REV requires review of MPO Executive Director timesheets and expense reimbursements by the MPO Board Chair or Treasurer.

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instatement of the new Executive Director, communication between the Board, the TPO, and the District have improved, and these prior issues have not reoccurred. When the District has concerns, they can bring them up to the Board's attention. Further, the current Director now meets regularly with the Board Chair, improving the Chair's understanding of TPO activities.

DRAFT

APPENDIX A – Purpose, Scope, and Methodology

Section 20.055, Florida Statutes, requires the OIG to conduct audits, examinations, investigations, and management reviews related to programs and operations of the Department. This audit was performed as part of the OIG’s mission to promote accountability, integrity, and efficiency for the citizens of Florida by providing objective and timely audit and investigative services.

The purpose of this engagement was to determine if:

- the Ocala/Marion TPO is implementing Department financial management processes; and to
- determine the operating effectiveness of governance under the new direction of the TPO, pre- and post-transfer of host entity.

The scope of our audit reviewed data and processes from January 1, 2019 through December 31, 2019, pre- and post-transfer of host entity.

The methodology included:

- reviewing relevant laws, rules, regulations, Department policies, and procedures;
- interviewing OPP personnel at Central Office, District Five staff, Ocala/Marion TPO staff, and TPO Board staff; and
- examining performance standards along with financial management processes, procedures, and documentation.

APPENDIX B – Affected Entity Response

Section 20.055(6)(e), Florida Statutes (2019), provides you an opportunity to submit a written response within 20 working days after receipt of the draft report. Your response will be included in our final report.

DRAFT

APPENDIX C – Management Response

Section 20.055(6)(d), Florida Statutes (2019), provides you an opportunity to submit a written response within 20 working days after receipt of the Preliminary and Tentative (P&T) report. Your response will be included in our final report.

DRAFT

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DISTRIBUTION

Affected Entity:

Rob Balmes, Ocala/Marion TPO Director

[Final distribution will include the following]:

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Alison Stettner, Director, Office of Policy Planning

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Erika Thompson, MPO Statewide Program Coordinator

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Rob Balmes, Ocala/Marion TPO Director

Jeff Gold, Ocala/Marion TPO Board Chair

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PROJECT TEAM

Engagement was conducted by:
Keyonis Shack, Auditor-in-Charge

Under the supervision of:
Michael Dean, Senior Audit Supervisor
Tim Crellin, Deputy Audit Director for Intermodal
Joseph W. Gilboy, Director of Audit

Approved by:
Kristofer B. Sullivan, Inspector General

STATEMENT OF ACCORDANCE

The Department's mission is to provide a safe transportation system that ensures the mobility of people and goods, enhances economic prosperity, and preserves the quality of our environment and communities.

The Office of Inspector General's mission is to provide independent and objective investigative and audit services that promote accountability, integrity, and efficiency within the Florida Department of Transportation and its partners.

This work product was prepared pursuant to section 20.055, Florida Statutes, in accordance with the Association of Inspectors General *Principles and Standards for Offices of Inspector General*, and conforms with The Institute of Internal Auditors' *International Standards for the Professional Practice of Internal Auditing*.

Please address inquiries regarding this report to the Department's Office of Inspector General at (850) 410-5800.



April 15, 2021

Tim Crellin, MPA, CIA, CIGA, FCCM
Deputy Audit Director for Intermodal
Office of Inspector General
Florida Department of Transportation
605 Suwannee Street, MS 44
Tallahassee, FL 32399-0450

Dear Mr. Crellin:

On behalf of the Ocala/Marion County Transportation Planning Organization (TPO), thank you for providing an in-depth summary of the findings in the audit report (No. 201-002) and the opportunity to submit a response. The findings are highly informative to the TPO Board and staff, and will serve as a resource in strengthening our great working relationship with the Florida Department of Transportation (FDOT).

The TPO has worked closely with both the District and Central offices to resolve the issues. If you have any questions or would like to discuss the audit report further with the TPO, please contact me at 352-438-2323.

Sincerely,

Michelle Stone, Marion County Board of County Commissioners
TPO Board Chair, Ocala/Marion County Transportation Planning Organization

Cooperative and comprehensive planning for our transportation future.

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Telephone: (352) 438-2630 • www.ocalamariontpo.org



TO: TPO Board Members

FROM: Rob Balmes, Director

RE: Congestion Management Plan (CMP) – Public Survey Results

As outlined in a presentation at the February TPO Board meeting, the TPO is conducting a major update to the Congestion Management Process (CMP) with its consultant team Kimley-Horn. The last significant development of the CMP was in 2011, which included CMP Policy and Procedures and State of the System reports. In 2021, the TPO plans to develop one revised comprehensive Congestion Management Plan (CMP).

In March, the TPO conducted a 30-day online **Public Survey** soliciting feedback from the community regarding congestion, including areas of concerns and solutions. A total of 255 responses were submitted via the survey instrument on the TPO website. Additionally, three responses were sent to the TPO by email for a total of 258 participants. Included with this memo is a survey results summary for your information and awareness. The survey results will be used to supplement and better inform the upcoming technical analysis and development of improvement strategies.

In June, the TPO Board will be provided a CMP project update presentation from TPO staff and Kimley-Horn.

If you have any questions or concerns about the survey or CMP project, please contact me at 438-2631.

Congestion Management Plan (CMP) Public Survey

Results Summary

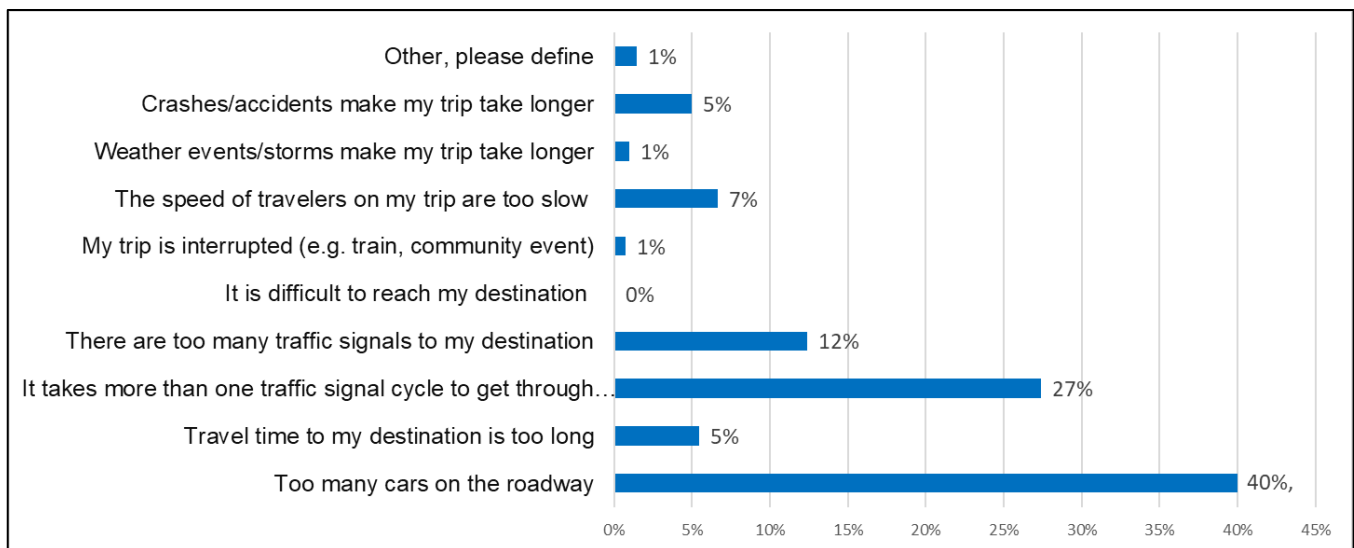
The TPO conducted an online public survey from March 1 to March 31, 2021 to gather input from the public in support of the update to the Congestion Management Plan (CMP). The survey results will be used to supplement and inform the technical analysis and improvement strategies. A total of 255 responses were submitted via the survey instrument on the TPO website. Additionally, 3 responses were sent to the TPO by email for a total of 258 survey participants. The following summarizes the results of the survey.

1. What does the term 'congestion' mean to you? (select up to 3)

A total of 254 responses were received. The top three most frequent selections were **'Too many cars on the roadway'** with 168 responses or 40%; followed by **'It takes more than one traffic signal'** with 115 responses or 27%; and **'There are too many traffic signals to my destination'** with 52 responses or 12%.

420 selections

- 168 Too many cars on the roadway
- 23 Travel time to my destination is too long
- 115 It takes more than one traffic signal cycle to get through intersection
- 52 There are too many traffic signals to my destination
- 0 It is difficult to reach my destination
- 3 My trip is interrupted (e.g. train, community event)
- 28 The speed of travelers on my trip are too slow
- 4 Weather events/storms make my trip take longer
- 21 Crashes/accidents make my trip take longer
- 6 Other, please define

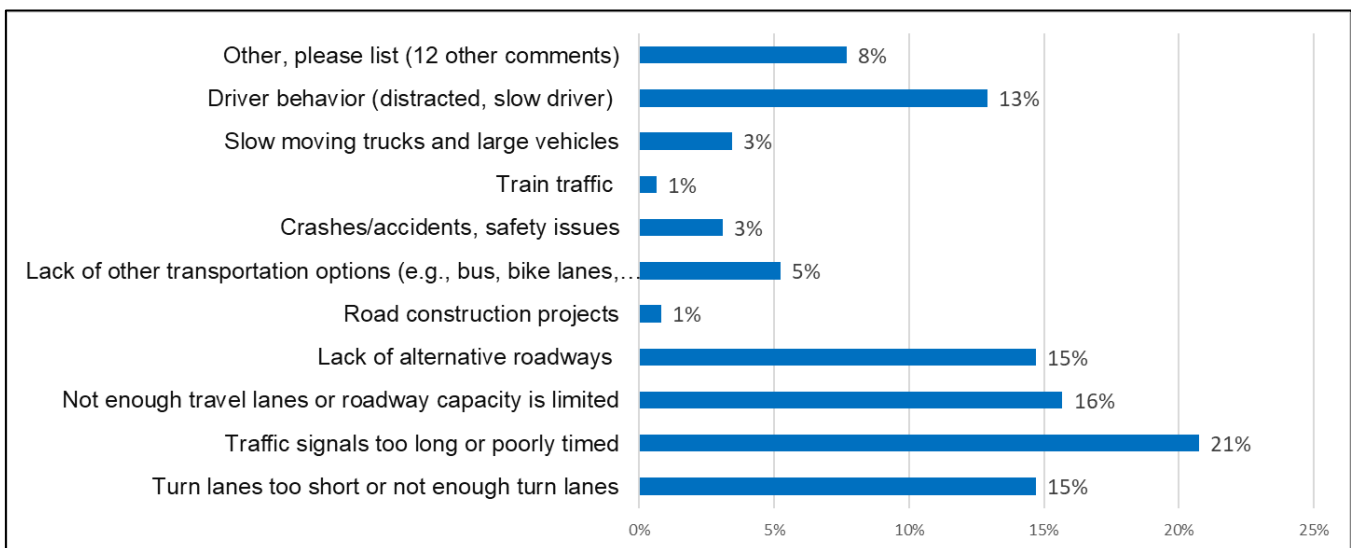


2. What do you think are the main causes of congestion in Marion County? (select up to 3)

A total of 218 responses were received. The top three most frequent causes identified were '**Traffic signals too long or poorly timed**' with 127 responses or 21%; followed by '**Not enough travel lanes or roadway capacity is limited**' with 96 responses or 16%; and '**Turn lanes too short or not enough turn lanes**' and '**Lack of alternative roadways**' both with 90 responses or 15%.

612 selections

90	Turn lanes too short or not enough turn lanes
127	Traffic signals too long or poorly timed
96	Not enough travel lanes or roadway capacity is limited
90	Lack of alternative roadways
5	Road construction projects
32	Lack of other transportation options (e.g., bus, bike lanes, sidewalks)
2	School zones
0	Weather events/storms
19	Crashes/accidents, safety issues
4	Train traffic
21	Slow moving trucks and large vehicles
79	Driver behavior (distracted, slow driver)
47	Other, please list (12 comments, 35 no response provided)



Other Comments include:

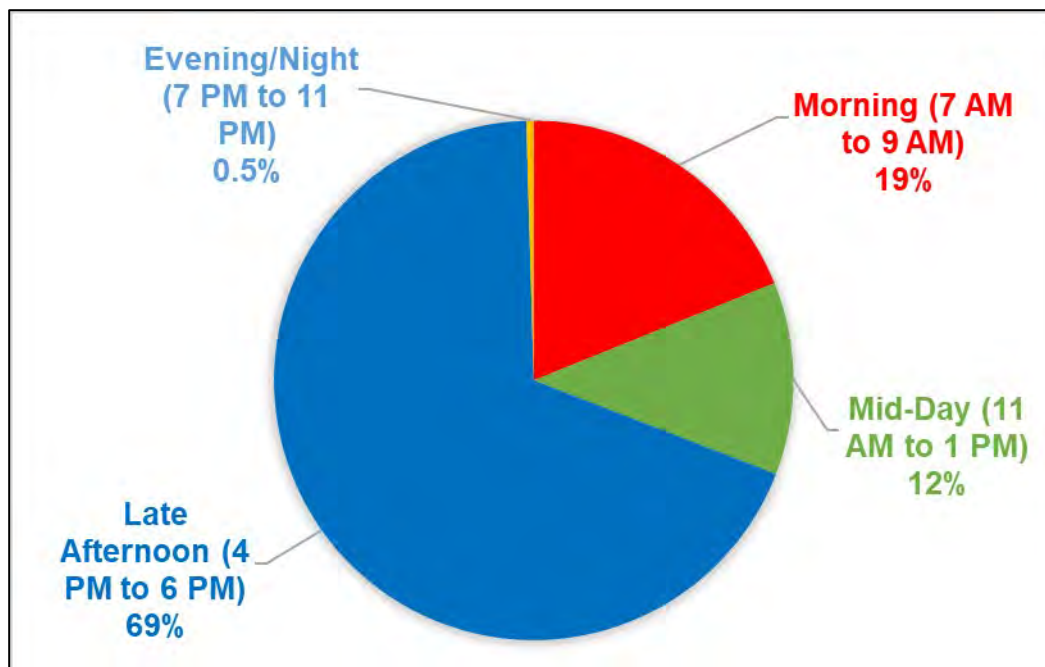
- A lot of growth in Marion County
- More people moving to the area than can be supported
- No right turn lanes or enough ROW to make a turn turn at red light
- Poorly maintained roads

- Stop permitting major housing developments
- Speed limits reassessed
- Too many cars for available roadway capacity
- Too many homes/businesses in same area
- Too many people moving to Marion County; infrastructure not kept pace
- Too many vehicles on roads
- Traffic lights not synched in Dunnellon

3. What time of day do you experience congestion the most in Marion County? (select 1)

A total of 217 responses were received. The most frequent time of day participants overwhelmingly selected was late afternoon between 4 pm to 6 pm with 149 responses or 69%.

41	Morning (7 AM to 9 AM)
26	Mid-Day (11 AM to 1 PM)
149	Late Afternoon (4 PM to 6 PM)
1	Evening/Night (7 PM to 11 PM)



4. Please list the top 3 roadway or intersection locations in Marion County where you think congestion is the worst? (list up to 3)

A total of 239 responses were received and 398 roadway or intersection/interchange locations identified. The following summarizes a list of the top 10 specific locations identified by survey participants, and the overall top 10 corridors mentioned most frequently either individually or part of an intersection or interchange.

Top 10 Locations

1. SR 200 at I-75 (34 responses)
2. SR 200 (30 responses)
3. SR 40 at U.S. 301/441/Pine Avenue (23 responses)
4. CR 484 at I-75 (17 responses)
5. SE 17th Avenue (SR 464) at U.S. 301/U.S. 441/Pine Ave (15 responses)
6. SE 17th Avenue (SR 464) at SE 25th (11 responses)
7. Maricamp Road (SR 464) at Baseline Road (SR 35) (10 responses)
8. SR 200 at 38th Court (9 responses)
9. SR 200 at SW 27th Avenue (8 responses)
10. Downtown Ocala (8 responses)

Top 10 Corridors Mentioned

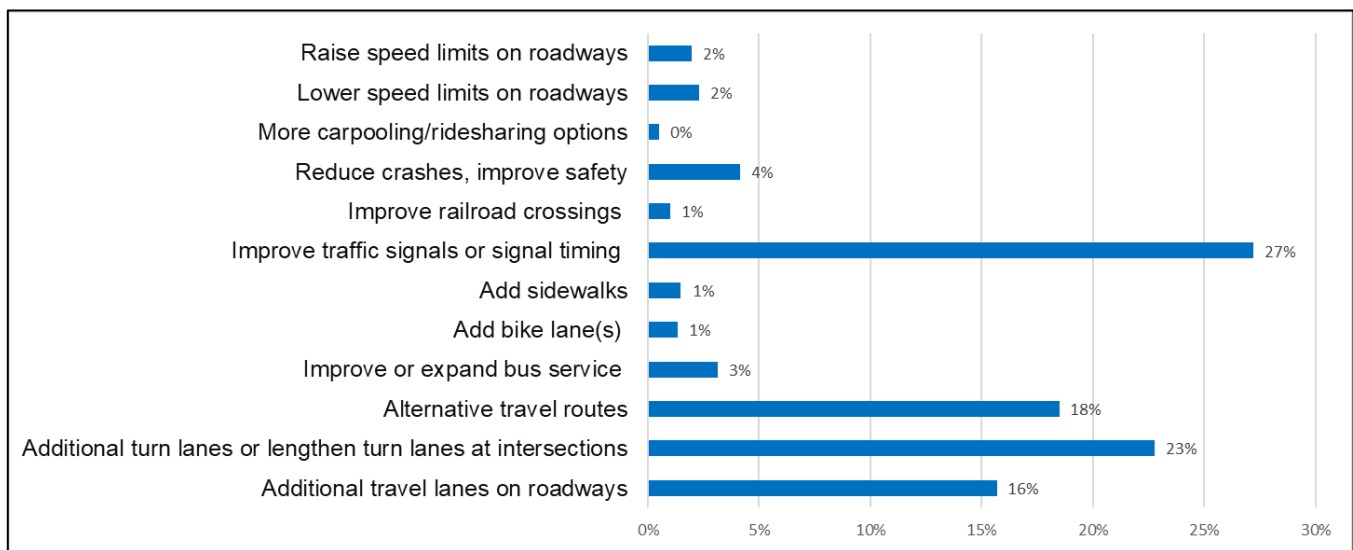
1. SR 200 (117)
2. U.S. 301/U.S. 441/Pine Avenue (61)
3. SR 40 (58)
4. SE 17th Avenue/Maricamp Road (SR 464) (47)
5. CR 484 (27)
6. U.S. 27 (23)
7. U.S. 441 (15)
8. Maricamp Road (10)
9. CR 475 (8)
10. I-75 (7)

5. What improvements should be made to improve congestion at your top 3 locations, along with other congested areas in Marion County? (select up to 3)

A total of 250 responses were received. The top three improvements recommended were '**Improve traffic signals or signal timing**' with 165 responses or 27%; followed by '**Additional turn lanes or lengthen turn lanes at intersections**' with 138 responses or 23%; and '**Alternative travel routes**' with 112 responses or 18%.

606 selections

- 95 Additional travel lanes on roadways
- 138 Additional turn lanes or lengthen turn lanes at intersections
- 112 Alternative travel routes
- 19 Improve or expand bus service
- 8 Add bike lane(s)
- 9 Add sidewalks
- 165 Improve traffic signals or signal timing
- 6 Improve railroad crossings
- 25 Reduce crashes, improve safety
- 3 More carpooling/ridesharing options
- 14 Lower speed limits on roadways
- 12 Raise speed limits on roadways



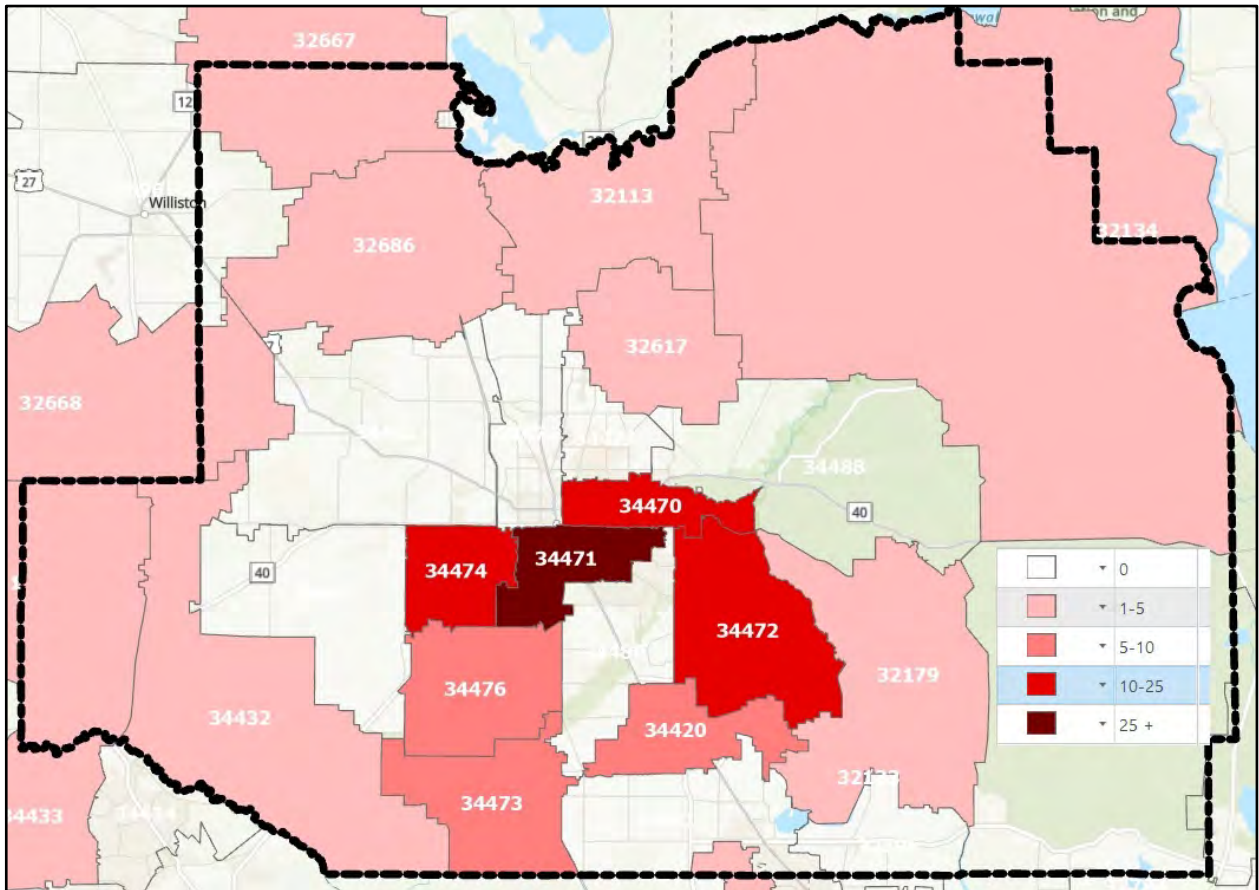
6. What mode of transportation do you use most often (select 1)

A total of 252 responses were received. The most frequent primary mode of transportation used by almost all participants is the personal automobile/truck. The three participants that selected 'other' use Marion Transit as their primary mode of transportation.

245	Personal automobile/truck
1	Bicycle
1	Walk
2	Bus
0	Wheelchair
0	Golf cart
0	Scooter
0	Electric bike/other electric transportation
0	Carpool/Rideshare
3	Other, please list
	(3) Marion Transit

7. Please provide the zip code of where you live in Marion County

A total of 158 responses were received. As displayed in the zip code map, the majority of the participants responding to this question reside in the most urbanized areas of the county, including zip codes 34471 (37), 34470 (23) and 34472 (25) and 34474 (21).

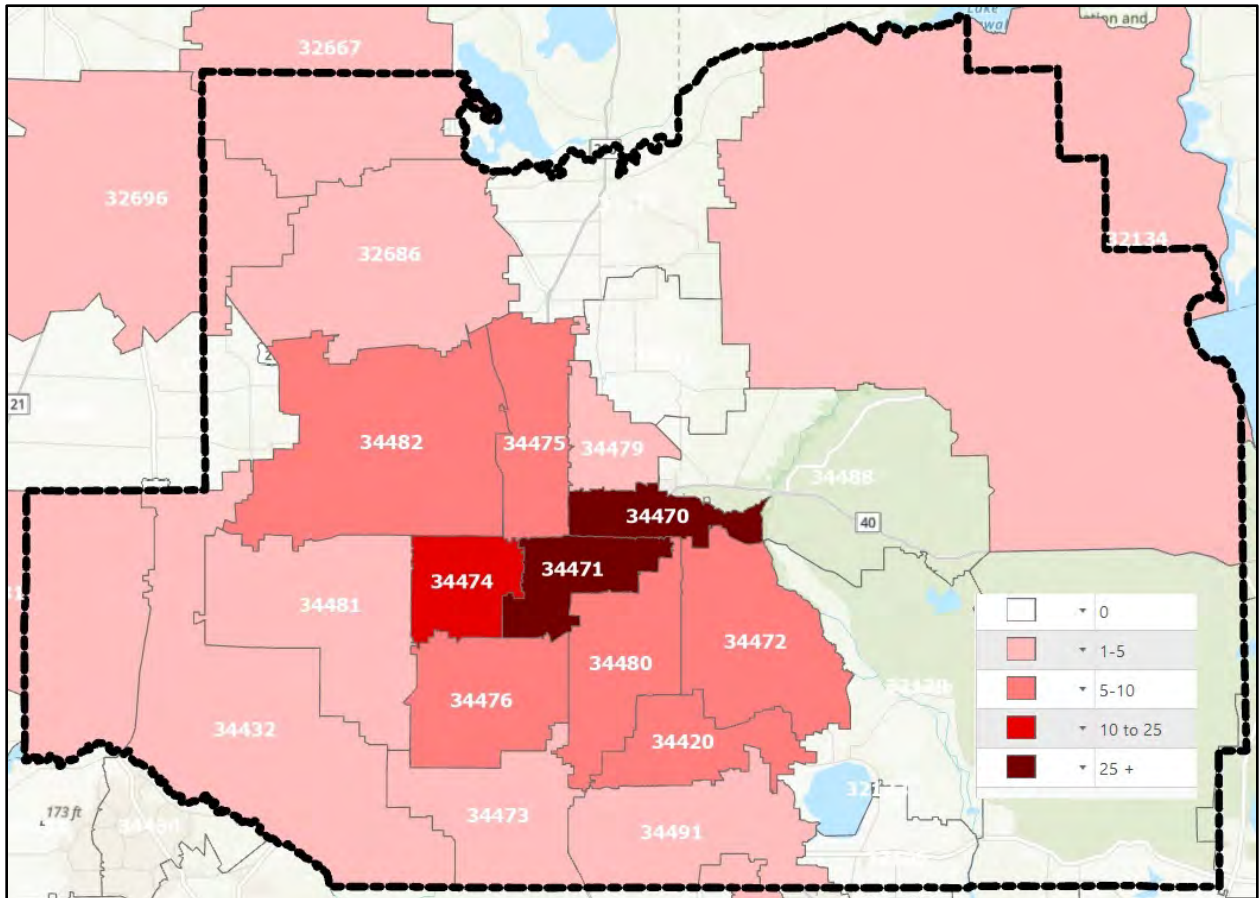


Participants by Zip Code:

2	32113	2	34431
4	32134	5	34432
1	32162	1	34433
2	32179	23	34470
1	32617	37	34471
1	32664	25	34472
1	32667	9	34473
2	32668	21	34474
5	32686	9	34476
7	34420		

8. Please provide the zip code of where you work in Marion County

A total of 213 responses were received. As displayed in the zip code map, the majority of the participants responding to this question work in the urbanized areas of the county, with the largest number in zip codes 34471 (74) and 34470 (49).



Participants by Zip Code

		49	34470
1	32134	75	34471
2	32162	6	34472
1	32611	5	34473
1	32664	11	34474
1	32667	8	34475
3	32686	10	34476
1	32696	3	34479
1	33474	6	34480
8	34420	5	34481
1	34431	7	34482
5	34432	3	34491

9. Please share any comments or opinions that were not covered in this survey

A total of 111 with additional comments were shared by the participants. The following summarizes the main topics or themes derived from the comments.

- Alternate corridors to I-75 and other major arterials
- Addition of more rail overpasses
- Addition of protected bike lanes
- Addition of turn lanes/longer turn lanes at intersections
- Back-ups on SR 200 caused by no driveways/turn lanes
- Better access management on SR 200
- Better connectivity of the roadway network
- Careless driving/speeding
- Congestion is throughout the day
- Confusing street naming
- Distracted driving
- Do not reduce travel lanes
- Driver behavior
- Growth and development in community
- Impacts of major development to roads
- Improve lighting on street network
- More golf cart access
- More law enforcement
- More maintenance of existing roads
- More sidewalks
- More transportation options
- Planned development more distributed in community
- Safety improvements at intersections
- School congestion
- Speeding and aggressive drivers
- Speed limits on major roads need to be studied
- Traffic signal timing improvements
- Widen major roadways



TO: TPO Board Members

FROM: Shakayla Irby, Admin Specialist/ Social Media Coordinator

RE: National Bike Month

As part of celebrating National Bike Month, the TPO will be celebrating a Bike Week with a focus on bicycle safety! Whether you're riding for fun, fitness or with family, or taking essential trips to work or shop, you are part of our movement for safer biking.

The week of May 17 to 23, we are encouraging everyone to Bike Safe wherever that may be. Any bike, anywhere, it all counts. During the week we will be hosting a virtual Bicycle Safety Course taught by ReThink Your Commute, highlighting some beautiful trails in Marion County, and sharing lots of bike safety information via our social media platforms.

Be sure to follow us for upcoming dates and more information @Ocalamariontpo on both Facebook and Twitter. We will also be sending out emails to our committees.

Make sure you look out for the hashtag #BikeSafeOcalaMarion and feel free to share photos of your solo or family rides on social media using our hashtag and share the joy biking brings you!

If you have any questions, please contact me at 352-438-2630.

BIKE WEEK 2021

**YOU'RE INVITED TO TAKE
PART VIRTUALLY VIA**



MAY 17 - 21

Follow us

@OcalaMarionTPO



**MONDAY: CYCLING SAVVY LITE COURSE FROM 10A - 11A
REGISTER FOR THE COURSE AT
[HTTPS://WWW.EVENTBRITE.COM/E/150765851721](https://www.eventbrite.com/e/150765851721)**

**TUESDAY: WE ARE SHOW CASING SOME OF THE
BEAUTIFUL TRAILS OF MARION COUNTY, LEARN HOW TO USE TRAIL
CROSSINGS SAFELY, AND SOME BIKE SAFETY Q&A**

**WEDNESDAY: LEARN HOW TO BIKE
ON BUS WITH SUNTRAN**

**THURSDAY: LEARN ABOUT
UPCOMING TRAIL ENHANCEMENTS AND TRAIL CONNECTIONS
PROGRAMMED IN THE TRANSPORTATION IMPROVEMENT PLAN (TIP)**

**FRIDAY: FIND OUT WHAT THE BRICK CITY AND SANTOS
BICYCLE SHOPS HAVE TO OFFER FOR YOUR
BICYCLING NEEDS AND ENJOY DISCOUNTS ALL WEEK LONG!!!**

Brick City Bicycle
Shop

10% off New In-Stock
Non-Electric Bicycles!
\$200 Off E-Bikes!

20% Off Parts, Clothing,
& Accessories!
10% Off Car Racks!

Santos Bike
Shop

Buy one get one free Rental (\$30 value only)

Share photos of your solo or family rides on social media using our
hashtag #BikeSafeOcalaMarion and share the joy biking brings you!

BIKE *safe* OcalaMarion

OCALA MARION
TPO

reThink >>>
your commute

BRICK CITY
BICYCLES
OCALA, FL

SANTOS
BIKE SHOP

Ocala/Marion County Project Status Update as of April 5, 2021

The following is a brief status update on major FDOT road construction projects in Marion County. Information is also available on www.cflroads.com. For questions, please contact Anna Taylor at 386-943-5499 or via email at Anna.Taylor@dot.state.fl.us.

Current Projects:

Resurface U.S. 441 from State Road 35 (SE Baseline Road) to State Road 200 (FDOT Financial Information Number 439238-1)

The purpose of this project is to resurface U.S. 301/441 from State Road 35 (Baseline Road) in Belleview to State Road 200 in Ocala. Additional improvements include modifications to extend left and right turn lanes at various locations, removal of some of the existing on street parking in the downtown area, addition of bicycle lanes within the right of way where possible, updating and providing pedestrian features to meet current standards, and making other drainage and safety improvements as needed.

- Contract: T5675
- Contractor: D.A.B. Constructors, Inc.
- Estimated Start: January 2021
- Estimated Completion: Fall 2021
- Cost: \$15.7 million
- Update: The contractor has been working mostly along the shoulders of U.S. 441 and in the right of way to prepare the roadway for paving work in the coming weeks. There have been some lane closures in the Santos area north of Belleview for work to lengthen and widen turning lanes.

Reconstruction of northbound and southbound Wildwood weigh stations (FDOT Financial Information Number 440311-1)

- Contract: E5Z67
- Contractor: Anderson Columbia Co., Inc.
- Estimated Start: Spring 2019
- Estimated Completion: Early 2021
- Cost: \$12.3 million
- Update: **This project was completed in March.**

ITS Florida Regional Advanced Mobility Elements (FRAME) (FDOT Financial Information Number 440900-1)

- Contract: T5662
- Contractor: Contract Network LLC
- Estimated Start: Summer 2019

- Estimated Completion: Spring 2021
- Cost: \$5.5 million
- Update: The contractor has been working along U.S. 441 and along a number of streets in the City of Ocala to install vehicle detection loops in the roadway approaching various intersections. These loops provide instantaneous feedback to Traffic Centers about the volume and flow of traffic. These installations have necessitated brief nighttime lane closures in various locations in the city.

Widen Northeast 36th Avenue to four lanes and construction of bridges over CSX rail line (FDOT Financial Information Number 431798-3)

- Contract: E5Z71
- Contractor: SEMA Construction, Inc.
- Estimated Start: Summer 2019
- Estimated Completion: Summer 2021
- Cost: \$16.4 million
- Update: The four-lane bridge over the CSX rail line is being constructed in two phases. The eastern two lanes is open to traffic, while the western two lanes are under construction. There are currently detours on Northeast 21st and Northeast 24th streets.

Upcoming Projects:

This is an access management project along West Silver Springs Boulevard, between SW 27th Avenue and Martin Luther King Jr. Boulevard in the City of Ocala. Work will include converting full median openings to directional medians, closing three of the existing full median openings, and extending some of the turn lanes. These modifications reduce traffic conflict points and separate turning movements along this section of S.R. 40. (FDOT Financial Information Number 441366-1)

- Contract: T5710
- Contractor: CW Roberts Contracting
- Estimated Start: Spring, 2021
- Estimated Completion: Summer, 2021
- Cost: \$627,000
- Update: Work is tentatively scheduled to begin in May

Mill and resurface U.S. 441 from County Road 25A in Ocala north 8.8 miles to the U.S. 441/301 split (FDOT Financial Information Number 441136-1)

- Contract:
- Contractor: TBD
- Estimated Start: Summer, 2021
- Estimated Completion: Spring, 2022
- Cost: \$17.8 million
- Update: The contract for this project is expected to be executed in late May and construction is tentatively scheduled to begin in July.



Florida Transportation Legislative Newsletter

04/19/2021

Overview

Greetings readers! Welcome to the newest edition of the Florida Transportation Legislative Newsletter. Session ends in 11 days and tomorrow is officially the last day for committee meetings! The budget is being produced and members of both chambers are meeting to hammer out those final details. The budget has to be published for 72 hours before a final vote can be taken on it so there is about one week left to finish the budget. This 72 hour “cooling off” period allows the members and the public the opportunity to see what is in the budget before a vote is taken. Some details that are out there so far related to the spending priorities are a pause on the effort by Florida DOT to update their software system they use to develop the work program. The work program is the 5-year list of projects and all of the funding that goes on each project. There is a lot of money that goes through FDOT and the current system is, well rather old, not that I am criticizing being old. I am older than their system so who am I to speak loudly? In terms of software though, their system is in need of an update. With the new system envisioned by the Florida DOT, staff will be able to do more analysis with a new system and more easily meet the requirements of the federal government that have come about since the current system was designed. We will see how that goes.

In other financial news, we reported that Florida was due to receive about \$10B in federal aid a few weeks ago and some of that money could/should come to transportation. We received word over the weekend that we should not expect to see a list of projects coming from that funding until next week.

Noteable events in the past week that are newsworthy include House Bill 1 was signed by the Governor. This is called the anti-riot bill and it has been very controversial. The repeal of M-CORES has passed it's one and only House Committee after passing through the Senate and is awaiting a full House Floor vote. The ports pre-emption bill passed the House and a bill prohibiting businesses from requiring customers to show proof of vaccination passed. This last bill attached a \$5K fine for requiring a “vaccine passport”. I sure hope this doesn't send the cruise industry over to Alabama to load their passengers onto their boats when cruises resume. Money has been set aside for the replacement of the windows in the capitol building and it comes with the removal of the metal grates that cover the windows. The grates help keep out the sun so the building doesn't heat up but they also make the building look like it could be a prison facility. It will be a good look to lose the grates. Other improvements to the capitol grounds are planned as well. To wrap this up, it looks like the unemployment benefits will not change this year. A proposal to increase from \$275 a week to \$375 a week and to extend benefits by another two weeks was suggested. The answer is no.

Key dates for the 2021 Florida Legislative Session are shown immediately below. All updates to bills shown in the last section of the newsletter are in **RED** so you can quickly distinguish between updates and old news. Your MPOAC Legislative Update will keep you apprised of changes to existing bills.

Grab a cup of coffee and enjoy this edition of the Florida MPOs Legislative Update.

Important Dates for the 2021 Legislative Session

- August 1, 2020 - Deadline for filing claim bills (Rule 4.81(2))
- January 29, 2021 5:00 p.m. - Deadline for submitting requests for drafts of general bills and joint resolutions, including requests for companion bills.
- February 26, 2021 5:00 p.m. - Deadline for approving final drafts of general bills and joint resolutions, including companion bills.
- March 2, 2021 - Regular Session convenes (Article III, section 3(b), State Constitution) 12:00 noon, deadline for filing bills for introduction (Rule 3.7(1))
- April 17, 2021 - Motion to reconsider made and considered the same day (Rule 6.4.(4)) All bills are immediately certified (Rule 6.8)
- April 20, 2021 50th day – last day for regularly scheduled committee meetings (Rule 2.9(2))
- April 30, 2021 60th day – last day of Regular Session (Article III, section 3(d), State Constitution)

Legislation of interest

This is a summary of transportation related bills filed and published on the legislature's website as of April 19, 2021. The bills are listed in numerical order for your convenience. As the session progresses and the number of bills tracked in this newsletter grows, this ordering of bills will make it easier to follow the status of any bill you are tracking. All new bills and any updates to bills shown below are in **RED** so you can quickly distinguish between updates and old news.

HB 35: Legal Notices – (Fine; Co-Introducer: Grieco) – Comparable bill SB 402 by Rodrigues. Provides for website publication of legal notices; provides criteria for such publication; authorizes fiscally constrained county to use publicly accessible website to publish legally required advertisements & public notices; requires government agency to provide specified notice to residents concerning alternative methods of receiving legal notices. Filed in the House. Referred to Civil Justice and Property Rights Subcommittee; Judiciary Committee. On Committee agenda-- Civil Justice and Property Rights Subcommittee, 02/03/21, 4:30 pm, Webster Hall. Passed Civil Justice and Property Rights Subcommittee, now in Judiciary Committee. Passed Judiciary, Now on House Floor, 1st Reading. Passed the House YEAS 85, NAYS 34. Sent to the Senate.

HB 53: Public Works Projects – (DiCeglie) – Revises definition of term "public works project"; prohibits state or any political subdivision that contracts for public works project from requiring specified acts by certain persons engaged in such project or prohibiting certain persons from receiving information about public works opportunities. Referred to Government Operations Subcommittee; Public Integrity and Elections Committee; State Affairs Committee. Added to Government Operations Subcommittee agenda. Passed Government Operations Subcommittee. Laid on the table and Committee Substitute filed. Referred to Public Integrity & Elections; State Affairs. Now in Public Integrity & Elections. Passed Public Integrity & Elections. Laid on the table, Amended version filed and referred to State Affairs Committee. **Passed State Affairs Committee. This was the final committee so it can head to a full floor vote.**

SB 54: Motor Vehicle Insurance – (Burgess; Co-Introducers: Rouson) – Related Bill HB 273 by Plakon, SB 420 by Hooper and HB 719 by Grall. Repealing provisions which comprise the Florida Motor Vehicle No-Fault Law; revising the motor vehicle insurance coverages that an applicant must show to register certain vehicles with the Department of Highway Safety and Motor Vehicles; revising financial responsibility requirements for owners or lessees of for-hire passenger transportation vehicles; providing an exception to the circumstances under which a person who is damaged may bring a civil action against an insurer; revising coverages subject to premium discounts for specified motor vehicle equipment; specifying persons whom medical payments coverage must protect, etc. APPROPRIATION: \$83,651. Referred to Banking and Insurance; Judiciary; Rules. Passed Banking and Insurance; YEAS 10 NAYS 2. Now in Judiciary. On Committee agenda-- Judiciary, 02/15/21, 2:30 pm, 412 Knott Building. Passed Judiciary; 7 YEAS, 2 NAYS. Now in Rules. Passed Rules, 12 YEAS, 3 NAYS. On the full Senate Floor, on 2nd reading. On Special Order Calendar. Seems stuck on Special Order.

HB 57: Transportation – (Andrade) – Similar Bill SB 1194 by Hooper. Similar to SB 1500 by Harrell (this bill seems to be moving). Revises provisions relating to motor vehicle sales tax, competitive solicitations, vehicles displaying flashing lights, annual cap on project contracts, airport restrictions, arbitration of contracts by & membership of State Arbitration Board, borrow pit operation, & performance standards for certain extraction locations. Filed in the House. Referred to Tourism, Infrastructure and Energy Subcommittee; Ways and Means Committee; Infrastructure and Tourism Appropriations Subcommittee; Commerce Committee. Added to Tourism, Infrastructure & Energy Subcommittee agenda. Passed Tourism, Infrastructure & Energy Subcommittee. Original reference to Ways and Means Committee; Infrastructure and Tourism Appropriations Subcommittee removed. Now in Commerce Committee. **Passed Commerce Committee.**

HB 59: Growth Management – (McClain; Co-Introducer Sabatini) – Similar Bill SB 496 by Perry. Requires local governments to include property rights element in their comprehensive plans; provides statement of rights that local government may use; requires local government to adopt property rights element by specified date; prohibits local government's property rights element from conflicting with statutorily provided statement of rights; provides that certain property owners are not required to consent to development agreement changes; prohibits municipality from annexing specified areas; requires DOT to afford right of first refusal to certain individuals; provides requirements & procedures for right of first refusal; authorizes certain developments of regional impact agreements to be amended. Filed in the House. Referred to Local Administration and Veterans Affairs Subcommittee; Civil Justice and Property Rights Subcommittee; State Affairs Committee. On Committee agenda-- Local Administration and

Veterans Affairs Subcommittee, 02/04/21, 12:00 pm, Sumner Hall. Passed Local Administration and Veterans Affairs Subcommittee 12 YEAS, 6 NAYS. Added to Civil Justice & Property Rights Subcommittee agenda. Passed Civil Justice & Property Rights Subcommittee. Passed out of State Affairs. Now on the House Floor for a full House vote, on 1st reading. On 2nd reading. Passed the House, YEAS 82, NAYS 32. Passed the Senate 38 YEAS, Zero Nays.

SB 62: Regional Planning Councils – (Bradley) – Revising a requirement for the Executive Office of the Governor to review and consider certain reports, data, and analyses relating to the revision of the state comprehensive plan; eliminating the advisory role of regional planning councils in state comprehensive plan preparation and revision; repealing provisions relating to the Florida Regional Planning Council Act; authorizing local governments to recommend areas of critical state concern to the state land planning agency, etc. RPCs would be able to host MPOs under the bill as currently written. Referred to Community Affairs; Judiciary; Rules. On Committee agenda-- Community Affairs, 01/26/21, 3:30 pm, 37 Senate Building. CS by Community Affairs; YEAS 6 NAYS 3. Now in Judiciary. Watch this bill to see if it becomes the subject of an amendment to a bill that is moving while on the Senate and/or House Floor.

SB 100: Highway Projects – (General Bill by Appropriations - Harrell) – Repealing provisions relating to applications for funding for technical assistance relating to areas in and around a proposed multiuse corridor interchange; requiring that \$35 million transferred to Florida's Turnpike Enterprise be used for a specified purpose beginning in a specified fiscal year and annually for up to 30 years thereafter; requiring that certain increased revenues be used to fund specified projects beginning in a specified fiscal year and annually thereafter; requiring the department, in coordination with the Florida Turnpike Enterprise, to evaluate certain roadways for development of specific controlled access facilities and to include such projects in the work program, etc. Referred to Transportation; Appropriations. Favorable by Transportation; YEAS 5 NAYS 3, Now in Appropriations. CS by- Appropriations; YEAS 17 NAYS 2. Passed the full Senate; YEAS 39 NAYS 1. To be sent to the House. **In the House the bill was referred to Appropriations Committee, passed Appropriations Committee and is now on 2nd reading on the House Floor.**

SB 138: Electric Vehicles – (Brandes) – Related Bill SB 140 by Brandes. Identical Bill HB817 by Toledo. Revising the Department of Transportation's goals relating to mobility; requiring the department to establish the Electric Vehicle Infrastructure Grant Program; providing for the distribution of grants to certain entities to install electric vehicle charging infrastructure; specifying that certain rules adopted by the Department of Agriculture and Consumer Services may not require specific methods of sale for electric vehicle charging equipment used in, and services provided in, this state, etc. APPROPRIATION: \$5,000,000. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. Passed Transportation, 8 YEAS, Zero NAYS. Now in Appropriations Subcommittee on Transportation, Tourism, and Economic Development. On Committee agenda-- Appropriations Subcommittee on Transportation, Tourism, and Economic Development, 03/23/21, 8:30 am, 110 Senate Building. Passed Appropriations Subcommittee on Transportation, Tourism, and Economic Development; YEAS 11 NAYS 0. Now in Appropriations.

SB 140: Fees/Electric Vehicles – (Brandes) – Related Bill SB 138 by Brandes. Identical Bill HB819 by Learned. Creating additional fees for electric vehicles; creating a license tax and an additional fee for plug-in hybrid electric vehicles; requiring, on specified dates, the Department of Highway Safety and Motor Vehicles to increase the additional fees, subject to certain requirements; providing that certain vehicles are exempt from specified fees, etc. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. Passed Transportation, 7 YEAS, 1 NAYS. Now in Appropriations Subcommittee on Transportation, Tourism, and Economic Development. On Committee agenda-- Appropriations Subcommittee on Transportation, Tourism, and Economic Development, 03/23/21, 8:30 am, 110 Senate Building. Passed Appropriations Subcommittee on Transportation, Tourism, and Economic Development; YEAS 11 NAYS 0. Now in Appropriations.

HB 139: Electronic Transactions for Title Certificates and Registrations – (Fernandez-Barquin) – Authorizes tax collectors to accept applications for motor vehicle & vessel certificates of title by electronic or telephonic means, to collect electronic mail addresses for use as method of notification, & to contract with vendors to provide electronic & telephonic transactions; provides that electronic signature that meets certain requirements satisfies signature required for application for certificate of title; specifies tax collection systems for which certain fees may be used for integration with Florida Real Time Vehicle Information System; requires DHSMV to provide tax collectors & approved vendors with certain data access & interface functionality; specifies authorized uses; requires DHSMV to ensure approved vendors protect customer privacy & data collection. Filed in the House. Referred to Tourism, Infrastructure and Energy Subcommittee; Infrastructure and Tourism Appropriations Subcommittee; Commerce Committee. Added to Tourism, Infrastructure & Energy Subcommittee agenda. Passed Tourism, Infrastructure & Energy Subcommittee. Laid on the table, Committee Substitute filed. Referred to Infrastructure & Tourism Appropriations Subcommittee; Commerce Committee. Now in Infrastructure & Tourism Appropriations Subcommittee. Added to Infrastructure & Tourism Appropriations Subcommittee agenda. Passed Infrastructure & Tourism Appropriations Subcommittee. Added to Commerce agenda. **Passed Commerce and completed 2nd reading on House Floor. Set for full House Floor vote on 04/20/2021.**

HB 229: Hazardous Walking Conditions for K-12 Students – (Salzman) – Comparable Bill SB 178 by Cruz. Requires DOT to develop & adopt standards & criteria to identify hazardous walking conditions; Revises provisions relating to the transportation of students subjected to hazardous walking conditions & funding for such students. Filed in the House. Referred to Early Learning and Elementary Education Subcommittee; Tourism, Infrastructure and Energy Subcommittee; Appropriations Committee; Education and Employment Committee. Passed Early Learning & Elementary Education Subcommittee and was amended. Amended version was laid on the table and a substitute version was sent forward. **Referred to Education & Employment Committee, passed Education & Employment Committee and sent to the House Floor. On 2nd reading.**

HB 267: State Preemption of Seaport Regulations – (Roach; Sirois) – Identical Bill SB 426 by Boyd. Preempts to state regulation of commerce in state seaports; provides exceptions; provides construction. Referred to Tourism, Infrastructure & Energy Subcommittee; Local Administration & Veterans Affairs Subcommittee; Commerce Committee. Now in Tourism,

Infrastructure & Energy Subcommittee. Passed Tourism, Infrastructure & Energy Subcommittee, Laid on Table and Committee Substitute taken up. Referred to Referred to Local Administration & Veterans Affairs Subcommittee; Commerce Committee. Now in Local Administration & Veterans Affairs Subcommittee. Passed Local Administration & Veterans Affairs Subcommittee with an amendment. **Passed Commerce Committee, headed to House Floor for a full House vote.**

HB 273: Motor Vehicle Insurance Coverage Exclusions – (Plakon) – Similar to SB54 by Burgess, SB 420 by Hooper and HB 719 by Grall. Provides private passenger motor vehicle policies may exclude identified individuals from specified coverages; provides exceptions. Filed in the House. Referred to Insurance & Banking Subcommittee; Commerce Committee. Now in Insurance & Banking Subcommittee. Favorable by Insurance & Banking Subcommittee. Added to Commerce Committee agenda. **Passed Commerce Committee, headed to House Floor for a full House vote.**

HB 337: Impact Fees – (DeCeglie) – Identical to S750 by Gruters - Specifying instances when a local government or special district may collect an impact fee; requiring local governments and special districts to credit against the collection of impact fees any contribution related to public facilities; providing annual limitations on impact fee rate increases; requiring school districts to report specified items regarding impact fees, etc. Referred to Local Administration & Veterans Affairs Subcommittee; Referred to Ways & Means Committee; Referred to State Affairs Committee. On committee agenda of Local Administration & Veterans Affairs Subcommittee. Passed Local Administration & Veterans Affairs Subcommittee. Now in Ways & Means Committee. Added to Ways & Means Committee agenda. Passed Ways & Means Committee with an amendment. **Passed State Affairs Committee, now on House Floor and has been amended on the floor.**

SB 342: Vehicle and Vessel Registration – (Diaz) – Requiring tax collectors to determine service charges collected by privately owned license plate agents for motor vehicle titles; requiring that additional service charges be itemized and disclosed to the person paying them; requiring a license plate agent to enter into a contract with the tax collector for a certain purpose; requiring tax collectors and approved license plate agents to enter into a memorandum of understanding with the department for a certain purpose, etc. Filed in the Senate. Referred to Transportation; Finance and Tax; Rules. Passed Transportation 7 YEAS, Zero NAYS. Passed Finance and Tax; YEAS 8 NAYS 0. Now in Rules. On Committee agenda-- Rules, 04/06/21, 9:30 am, 412 Knott Building. Passed Rules 16 YEAS, Zero NAYS. Next stop is a full Floor vote, placed on Special Order. **Passed the Senate on a floor vote of 40 YEAS, Zero NAYS. Sent to the House.**

HB 353: Bicycle Operations Regulations – (Hage) – Identical to SB738 by Baxley - Providing an exception to the requirement that a person operating a bicycle ride upon or astride a seat attached thereto, etc. Filed in the House. Referred to Tourism, Infrastructure & Energy Subcommittee; Commerce Committee. Now in Tourism, Infrastructure & Energy Subcommittee. Added to Tourism, Infrastructure & Energy Subcommittee agenda. Passed Tourism, Infrastructure & Energy Subcommittee. Now in Commerce Committee. Passed Commerce Committee. On the House Floor for a full House vote, on 2nd reading. Passed the House; YEAS 115, NAYS 0. Sent to the Senate, substituted for SB 738. Passed Senate 39 YEAS, Zero NAYS.

HB 357: Photographic Enforcement of School Zone Speed Limits – (Duran and

Rodriguez) – Authorizes county or municipality to contract with vendor to install cameras in school speed zones to enforce speed limits; provides civil penalty for violation found through recording of photographic images; provides for disposition & use of funds; provides for determination of liability; provides nonapplication of violation to driver license points assessment, conviction, driving record, or provision of motor vehicle insurance coverage; requires referral to DHSMV resulting in prohibition of motor vehicle registration renewal & transfer of title; provides for removal of penalties. Filed in the House. Referred to Criminal Justice & Public Safety Subcommittee; Tourism, Infrastructure & Energy Subcommittee; Justice Appropriations Subcommittee; Judiciary Committee. Now in Criminal Justice & Public Safety Subcommittee. Passed Criminal Justice & Public Safety Subcommittee. Now in Tourism, Infrastructure & Energy Subcommittee.

HB 365: Motor Vehicle Rentals – (Caruso) – Similar to SB 566 by Perry and S 708 By Brandes - Provides requirements for sales taxes & surcharges on motor vehicle leases & rentals by motor vehicle rental companies & peer-to-peer car-sharing programs; specifies insurance requirements for shared vehicle owners & shared vehicle drivers; provides for liability; provides for exclusions; provides right of contribution to shared vehicle owner's insurer for certain claims; requires provision of certain information regarding liens; specifies recordkeeping, record-sharing, disclosure, & driver license verification & data retention requirements; provides for consumer protections. Filed in the House. Referred to Tourism, Infrastructure & Energy Subcommittee; Ways & Means Committee; Commerce Committee. Now in Tourism, Infrastructure & Energy Subcommittee. On the agenda for Tourism, Infrastructure & Energy Subcommittee. Passed Tourism, Infrastructure & Energy Subcommittee. Now in Ways and Means. Passed Ways and Means with an amendment. **Passed Commerce Committee, now on House Floor and on 2nd reading.**

SB 376: Jacksonville Transportation Authority Leases – (Gibson) – Related Bill HB 6015 by Duggan. Removing a limitation on the term of a lease into which the authority may enter, etc. Filed in the Senate. Referred to Transportation; Community Affairs; Rules. Favorable by Transportation; YEAS 8 NAYS 0. Now in Community Affairs. Passed Community Affairs, now in Rules.

SB 380: Child Restraint Requirements – (Perry) – Identical Bill HB297 by Hinson - Increasing the age of children for whom operators of motor vehicles must provide protection by using a crash-tested, federally approved child restraint device; increasing the age of children for whom a separate carrier, an integrated child seat, or a child booster seat may be used, etc. Referred to Children, Families, and Elder Affairs; Transportation; Rules. On Committee agenda- Children, Families, and Elder Affairs, 02/03/21, 9:00 am, 37 Senate Building. Favorable by Children, Families, and Elder Affairs; YEAS 8 NAYS 0. Now in Transportation. On Committee agenda-- Transportation, 02/16/21, 3:30 pm, 110 Senate Building. Passed Transportation; 8 YEAS, Zero NAYS. Now in Rules. Passed Rules, next stop is a full Senate Floor vote. Passed Senate YEAS 38 NAYS 0. Now being sent to the House.

HB 389: Tampa Bay Area Regional Transit Authority – (Mariano) – Identical to SB 422 By Rouson - Renames Tampa Bay Area Regional Transit Authority Metropolitan Planning Organization Chairs Coordinating Committee as Chairs Coordinating Committee; removes requirement that authority provide administrative support & direction; authorizes mayor's

designated alternate to be member of governing board of authority; requires that alternate be elected member of & approved by city council; requires alternate to attend meetings in mayor's absence & have full voting rights; revises quorum requirements; requires simple majority of members present for action to be taken; deletes requirements for authority to present regional transit development plan & updates to TBARTA Metropolitan Planning Organization Chairs Coordinating Committee, coordinate plans & projects with committee, & participate in regional M.P.O. planning process. Referred to Tourism, Infrastructure & Energy Subcommittee; Local Administration & Veterans Affairs Subcommittee; Commerce Committee. Now in Tourism, Infrastructure & Energy Subcommittee. Passed Tourism, Infrastructure & Energy Subcommittee. Now in Local Administration & Veterans Affairs Subcommittee.

SB 420: Motor Vehicle Insurance Coverage Exclusions – (Hooper) – Similar to SB54 by Burgess, HB273 by Plakon and HB 719 by Grall - Providing that private passenger motor vehicle policies may exclude certain identified individuals from specified coverages under certain circumstances; providing that such policies may not exclude coverage under certain circumstances, etc. Referred to Banking and Insurance; Judiciary; Rules. Passed Banking and Insurance. Passed Judiciary. Now in Rules. **Passed Rules and will be on a full Senate Floor vote on 04/21/2021.**

SB 422: Tampa Bay Area Regional Transit Authority – (Rouson) – Identical to HB 389 by Mariano - Renaming the Tampa Bay Area Regional Transit Authority Metropolitan Planning Organization Chairs Coordinating Committee as the Chairs Coordinating Committee; providing that a mayor's designated alternate may be a member of the governing board of the authority; revising a provision requiring the authority to present the regional transit development plan and updates to specified entities, etc. Filed in the Senate. Referred to Transportation; Community Affairs; Rules. On Committee agenda-- Transportation, 02/16/21, 3:30 pm, 110 Senate Building. Passed Transportation; 8 YEAS, Zero NAYS. Now in Community Affairs.

SB 426: State Preemption of Seaport Regulations – (Boyd) – Identical Bill HB 267 by Roach. Preempting to the state the regulation of commerce in state seaports; providing exceptions, etc. Referred to Transportation; Community Affairs; Rules. Passed Transportation, Now in Community Affairs. On Committee agenda-- Community Affairs, 03/24/21, 8:30 am, 37 Senate Building. Passed Community Affairs; YEAS 5 NAYS 3. Now in Rules. On Committee agenda-- Rules, 04/14/21, 9:00 am, 412 Knott Building. **Passed Rules and will be on a full Senate Floor vote on 04/21/2021.**

SB 496: Growth Management – (Perry) - Similar to HB 59 by McClain. Specifying requirements for certain comprehensive plans effective, rather than adopted, after a specified date and for associated land development regulations; requiring local governments to include a property rights element in their comprehensive plans; prohibiting a local government's property rights element from conflicting with the statement of rights contained in the act; providing that the consent of certain property owners is not required for development agreement changes under certain circumstances; requiring the Department of Transportation to afford a right of first refusal to certain individuals under specified circumstances, etc. Filed in the Senate. Referred to Community Affairs; Judiciary; Rules. Passed Community Affairs, On Committee agenda-- Judiciary, 03/15/21, 3:30 pm, 412 Knott Building. Passed Judiciary; YEAS 11 NAYS 0. Now in Rules. Passed Rules; YEAS 17 NAYS 0. On the Senate Floor, on 2nd reading. HB 59 was substituted for SB 496 on the Senate Floor.

SB 566: Motor Vehicle Rentals – (Perry) – Similar to HB365 by Caruso and SB708 by Brandes - Specifying the applicable sales tax rate on motor vehicle leases and rentals by motor vehicle rental companies and peer-to-peer car-sharing programs; specifying the applicable rental car surcharge on motor vehicle leases and rentals by motor vehicle rental companies and peer-to-peer car-sharing programs; specifying insurance requirements for shared vehicle owners and shared vehicle drivers under peer-to-peer car-sharing programs; providing an exemption from vicarious liability for peer-to-peer car-sharing programs and shared vehicle owners, etc. Filed in the Senate. Referred to Banking and Insurance; Transportation; Appropriations. On Committee agenda-- Banking and Insurance, 03/16/21, 9:30 am, 412 Knott Building. On Committee agenda-- Banking and Insurance, 03/24/21, 8:30 am, 412 Knott Building. Passed Banking and Insurance; YEAS 11 NAYS 1. Now in Transportation. On Committee agenda-- Transportation, 03/30/21, 3:30 pm, 110 Senate Building. Passed Transportation, 8 YEAS Zero NAYS. Now in Appropriations. **Passed Appropriations, will see a full Senate Floor vote on 04/22/2021.**

HB 605: Bicycle and Pedestrian Safety – (Hunschofsky) – Identical to SB950 by Book - Revising and providing requirements for the driver of a motor vehicle overtaking a bicycle or other nonmotorized vehicle, an electric bicycle, or a pedestrian; requiring the Department of Highway Safety and Motor Vehicles to provide an awareness campaign, and include information in certain educational materials, regarding certain safety precautions; exempting a motor vehicle driver from certain provisions relating to no-passing zones when overtaking a bicycle or other nonmotorized vehicle, an electric bicycle, or a pedestrian; revising requirements for vehicles turning at intersections; prohibiting persons riding bicycles in a bicycle lane from riding more than two abreast, etc. Filed in the House. Referred to Tourism, Infrastructure & Energy Subcommittee, Infrastructure & Tourism Appropriations Subcommittee, Commerce Committee. Now in Tourism, Infrastructure & Energy Subcommittee. Added to Tourism, Infrastructure & Energy Subcommittee agenda. Passed Tourism, Infrastructure & Energy Subcommittee. Laid on the table and Committee Substitute adopted. Referred to Infrastructure & Tourism Appropriations Subcommittee; Commerce Committee. Now in Infrastructure & Tourism Appropriations Subcommittee. Added to Infrastructure & Tourism Appropriations Subcommittee agenda. Passed Infrastructure & Tourism Appropriations Subcommittee. Now in Commerce Committee. **Passed Commerce Committee.**

SB 684: Department of Transportation – (Brandes) – Identical to HB 707 by Chaney - Requiring the Department of Transportation to allow persons to purchase certain commuter passes for their motor vehicles; requiring that funds collected from the sale of the commuter passes be deposited in specified trust funds and used for the operation and maintenance of the Pinellas Bayway System; requiring the department or the enterprise, as appropriate, to use a specified portion of funds collected from the sale of commuter passes during a specified period of time for landscaping and beautification, etc. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. Passed Transportation. Now in Appropriations Subcommittee on Transportation, Tourism, and Economic Development.

HB 719: Motor Vehicle Insurance – (Grall) – Similar to SB54 by Burgess, HB 273 by Plakon and SB 420 by Hooper - Repeals provisions relating Florida Motor Vehicle No-Fault Law; revises garage liability insurance requirements; revises minimum coverage requirements for proof of financial responsibility for motor vehicles; revises amount of certificate of deposit

required to elect certain method of proof of financial responsibility; revises excess liability coverage requirements; revises financial responsibility requirements for owners or lessees of for-hire passenger transportation vehicles; revises coverages of motor vehicle policy which are subject to stacking prohibition; revises insurance requirements for transportation network companies or TNC drivers or vehicle owners. APPROPRIATION: \$83,651. Filed in the House. Referred to Civil Justice & Property Rights Subcommittee, Insurance & Banking Subcommittee, Judiciary Committee. Now in Civil Justice & Property Rights Subcommittee. Passed Civil Justice & Property Rights Subcommittee. **Original reference removed: Insurance & Banking Subcommittee. Referred to Judiciary Committee, Passed Judiciary Committee. Headed to a full House Floor vote.**

SB 738: Bicycle Operations Regulations – (Baxley) – Identical to HB353 by Hage - Providing an exception to the requirement that a person operating a bicycle ride upon or astride a seat attached thereto, etc. Referred to Transportation; Community Affairs; Rules. On Committee agenda-- Transportation, 02/16/21, 3:30 pm, 110 Senate Building. Passed Transportation; 8 YEAS, Zero NAYS. Now in Community Affairs. Passed Community Affairs. Now in Rules. On Committee agenda-- Rules, 03/18/21, 9:00 am, 412 Knott Building --Not Considered (Note: This usually means that the committee ran out of time before this bill could be considered). Passed Rules; YEAS 17 NAYS 0. On the Senate Floor for a full vote, Placed on Special Order Calendar, 04/01/21. Laid on the table, refer to HB 353. HB 353 Passed both chambers.

SB 750: Impact Fees – (Gruters) – Identical to HB337 by DiCeglie - Specifying instances when a local government or special district may collect an impact fee; requiring local governments and special districts to credit against the collection of impact fees any contribution related to public facilities; providing annual limitations on impact fee rate increases; requiring school districts to report specified items regarding impact fees, etc. Referred to Community Affairs; Finance and Tax; Appropriations. On Committee agenda-- Community Affairs, 03/24/21, 8:30 am, 37 Senate Building. Passed Community Affairs; YEAS 5 NAYS 3. On Committee agenda-- Finance and Tax, 03/31/21, 11:00 am, 110 Senate Building. Passed Finance and Tax; 6 YEAS, 2 NAYS. Now in Appropriations. On Committee agenda-- Appropriations, 04/15/21, 9:00 am, 412 Knott Building. **Passed Appropriations Committee. Headed to a full Senate Floor vote on 04/21/2021.**

SB 950: Bicycle and Pedestrian Safety – (Book) – Identical to HB605 by Hunschofsky - Revising and providing requirements for the driver of a motor vehicle overtaking a bicycle or other nonmotorized vehicle, an electric bicycle, or a pedestrian; requiring the Department of Highway Safety and Motor Vehicles to provide an awareness campaign, and include information in certain educational materials, regarding certain safety precautions; exempting a motor vehicle driver from certain provisions relating to no-passing zones when overtaking a bicycle or other nonmotorized vehicle, an electric bicycle, or a pedestrian; revising requirements for vehicles turning at intersections; prohibiting persons riding bicycles in a bicycle lane from riding more than two abreast, etc. Filed in the Senate. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. On Committee agenda-- Transportation, 03/30/21, 3:30 pm, 110 Senate Building. Passed Transportation; 8 YEAS, Zero NAYS. Original reference(s) removed: Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations.

Remaining references corrected to Rules. Now in Rules. **Passed Rules. Headed to a full Senate Floor vote on 04/21/2021.**

HB 1113: Traffic and Pedestrian Safety – (Fine) – Similar to SB 1412 by Perry - Requires study to be conducted which recommends installation of specified pedestrian crosswalk before installation occurs; requires pedestrian crosswalk on public highway, street, or road which is located at point other than at intersection with another public highway, street, or road to conform to specified requirements; provides coordination requirements for such devices & signals; requires entity with jurisdiction over public highway, street, or road with certain pedestrian crosswalk to ensure that crosswalk conforms to specified requirements or authorizes entity to remove any such crosswalk; requires DOT to submit certain request for authorization to Federal Government; requires applicable entities to replace or remove specified traffic control devices within specified timeframe after date of federal authorization or denial, as applicable; authorizes retrofitting. Filed in the House. Added to Tourism, Infrastructure & Energy Subcommittee agenda. Passed Tourism, Infrastructure & Energy Subcommittee. Now in Infrastructure & Tourism Appropriations Subcommittee. Added to Infrastructure & Tourism Appropriations Subcommittee agenda. Passed Infrastructure & Tourism Appropriations Subcommittee. Now in Commerce Committee. Added to Commerce Committee agenda. **Passed Commerce Committee. Headed to a full House Floor vote, on 2nd reading.**

SB 1126: Department of Transportation – (Harrell) – Clarifying that the Department of Revenue is responsible for a certain transfer from the State Treasury to the General Revenue Fund of a portion of documentary stamp tax distributions credited to the State Transportation Trust Fund; deleting a requirement that the department provide space and video conference capability at each of the department's district offices as an alternative to physical appearance by a person requesting a hearing before the Commercial Motor Vehicle Review Board within the department; requiring the department, when proposing any project on the State Highway System which will close or modify an existing access to an abutting property owner, to provide notice to affected property owners, municipalities, and counties at least 180 days before the design phase of the project is completed, etc. Filed in the Senate. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. Passed Transportation. Now in Appropriations Subcommittee on Transportation, Tourism, and Economic Development. On Committee agenda-- Appropriations Subcommittee on Transportation, Tourism, and Economic Development, 03/24/21, 2:30 pm, 110 Senate Building. Passed Appropriations Subcommittee on Transportation, Tourism, and Economic Development; YEAS 10 NAYS 0 with a committee substitute (meaning amended). Now in Appropriations. On Committee agenda-- Appropriations, 04/15/21, 9:00 am, 412 Knott Building. **Passed Appropriations Committee. Headed to a full Senate Floor vote on 04/21/2021.**

SB 1194: Transportation – (Hooper) – This bill is becoming the catch-all bill, the train. Similar to HB57 by Andrade - Providing that certain governmental entities may not prohibit certain vendors from responding to competitive solicitations of certain contractual services; requiring contractors wishing to bid on certain contracts to first be certified by the Department of Transportation as qualified; exempting airports from certain restrictions regarding entities performing engineering and inspection services; revising and providing definitions; revising requirements for arbitration of certain contracts by the State Arbitration Board, etc. Filed in the Senate. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. On Committee agenda-- Transportation, 03/24/21,

8:30 am, 110 Senate Building. Passed Transportation; YEAS 7 NAYS 0. Original reference(s) removed: Appropriations Subcommittee on Transportation, Tourism, and Economic Development. Remaining references corrected to Appropriations. Now in Appropriations. On Committee agenda-- Appropriations, 04/15/21, 9:00 am, 412 Knott Building. **Passed Appropriations. On Committee agenda-- Rules, 04/20/21, 8:30 am, 412 Knott Building.**

SB 1412: Traffic and Pedestrian Safety – (Perry) – Similar Bill HB 1113 by Fine. Citing this act as the "Sophia Nelson Pedestrian Safety Act"; requiring a traffic engineering study to be conducted which recommends installation of a specified pedestrian crosswalk before such installation occurs; requiring a pedestrian crosswalk on a public highway, street, or road which is located at any point other than at an intersection with another public highway, street, or road to conform to specified requirements; providing coordination requirements for certain devices and signals; requiring that traffic control signal devices at adjacent intersections be taken into consideration, etc. Filed in the Senate. On Committee agenda-- Transportation, 03/24/21, 8:30 am, 110 Senate Building. Favorable by Transportation; YEAS 7 NAYS 0. Now in Appropriations Subcommittee on Transportation, Tourism, and Economic Development. On Committee agenda-- Appropriations Subcommittee on Transportation, Tourism, and Economic Development, 04/08/21, 9:00 am, 110 Senate Building. Passed Appropriations Subcommittee on Transportation, Tourism, and Economic Development 8 YEAS, 3 NAYS. Now in Appropriations.

SB 1500: General Bill by Transportation – (Harrell) – Requiring drivers to change lanes when approaching a road and bridge maintenance or construction vehicle displaying warning lights on the roadside; authorizing the Department of Highway Safety and Motor Vehicles to conduct compliance reviews for a specified purpose; authorizing the department to conduct investigations and examinations relating to violations of provisions relating to title certificates; prohibiting the Central Florida Expressway Authority from constructing any extensions, additions, or improvements to the Central Florida Expressway System in Lake County without prior consultation with, rather than consent of, the Secretary of Transportation, etc. Referred to Transportation; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; Appropriations. Passed Transportation; YEAS 7 NAYS 0. Now in Appropriations Subcommittee on Transportation, Tourism, and Economic Development.



TO: TPO Board Members

FROM: Rob Balmes, Director

RE: FY 2021/22 to 2025/26 Transportation Improvement Program (TIP) and List of Priority Projects (LOPP) Schedule

On an annual basis, the TPO develops an update to the Transportation Improvement Program (TIP) and List of Priority Projects (LOPP). The TPO is required to submit both an adopted TIP and LOPP to the Florida Department of Transportation (FDOT) by June 30, 2020.

The following summary outlines the upcoming schedule for both the TIP and LOPP as a general reminder. Your input and guidance will be instrumental to the adoption of both program documents at the May and June meetings.

2021 List of Priority Projects (LOPP) Schedule

- May 25: TPO Board review of draft LOPP
- June 8: TAC and CAC final review
- June 22: TPO Board final review and adoption
- June 30: TPO staff submission of adopted 2021 LOPP to FDOT

Fiscal Years 2021/22 to 2025/26 TIP Schedule

- May 11: Minimum 30-day public notice of draft TIP
- May 25: TPO Board presentation of draft TIP and public comment
- June 8: TAC and CAC final review
- June 22: TPO Board final review and adoption; close of public comment period
- June 30: TPO staff submission of adopted TIP to FDOT

If you have any questions or concerns, please contact me at 438-2631.