



**OCALA MARION  
TRANSPORTATION  
PLANNING  
ORGANIZATION**



# **2020 Transportation Disadvantaged Service Plan (TDSP)**

**Adopted June 25, 2020**

## TDSP CERTIFICATION

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

We further certify that the rates constrained herein have been thoroughly reviewed, evaluated, and approved. The Transportation Disadvantaged Service Plan (TDSP) will be reviewed in its entirety and approved by the Board at an official meeting held on \_\_\_\_\_, 2020.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Commissioner Michelle Stone, TDLCB Board Chairperson

Approved by the Commission for the Transportation Disadvantaged:

\_\_\_\_\_  
Date

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

## TDLCB ROLL CALL VOTE

**For Approval of Marion County's TDSP Update**

**Approved Date:** \_\_\_\_\_, 2020

NAME	REPRESENTING	YES	NO	ABSENT
Michelle Stone	Board of County Commissioners (Chair)			
Jeffrey Askew	Marion County Veterans Office (Vice-Chair)			
Tamyika Young	Agency for Healthcare Administration			
Charmaine Anderson	Marion County Public Schools			
Tracey Sapp	Dept. of Health			
Susan Hanley	Dept. of Elder Affairs			
Kathleen Woodring	Career Source Citrus Levy Marion			
Tracey Alesiani	Agency for Persons with Disabilities			
Andrea Melvin	Centers for Independent Living			
Anissa Pieriboni	Florida Center for the Blind			
Carissa Hutchinson	Florida Association for Community Action			
Dennis Yonce	City of Ocala			
Jeff Abourmrads	Department of Education			
James Haynes	Ocala Housing Authority			

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## Section 1: Development Plan

The required components of a Transportation Disadvantaged Service Plan (TDSP) Development Plan include an introduction to the service area; a service area demographic profile; service analysis; goals, objectives, and strategies; and an implementation schedule. These elements are described in the following sections. This section outlines the baseline conditions within Marion County and the strategy to achieve the long-term transportation goals of the County.

### Introduction to the Service Plan

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

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

The CTC is responsible for arranging transportation for TD persons, and the FCTD approves the CTC every five years. With approval from the Local Coordinating Board (LCB), the CTC may subcontract or broker transportation services to private transportation operators. Each year, the CTC reviews all transportation operator contracts before renewal to ensure that the contracts comply with the standards of the FCTD.

This TDSP updates the 2018 TDSP previously completed in 2017 and fulfills the requirements of the FCTD as it relates to the TDSP. The LCB will review and approve the TDSP prior to submission to the FCTD for final action.

This document includes the Development Plan, Service Plan, and Quality Assurance components of the TDSP.

### Background of Transportation Disadvantaged Program

#### Florida Coordinated Transportation System

The Florida Coordinated Transportation System (FCTS) was created in 1979 with the enactment of Chapter 427, Florida Statute (F.S.). Chapter 427 defines transportation disadvantaged persons as:

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

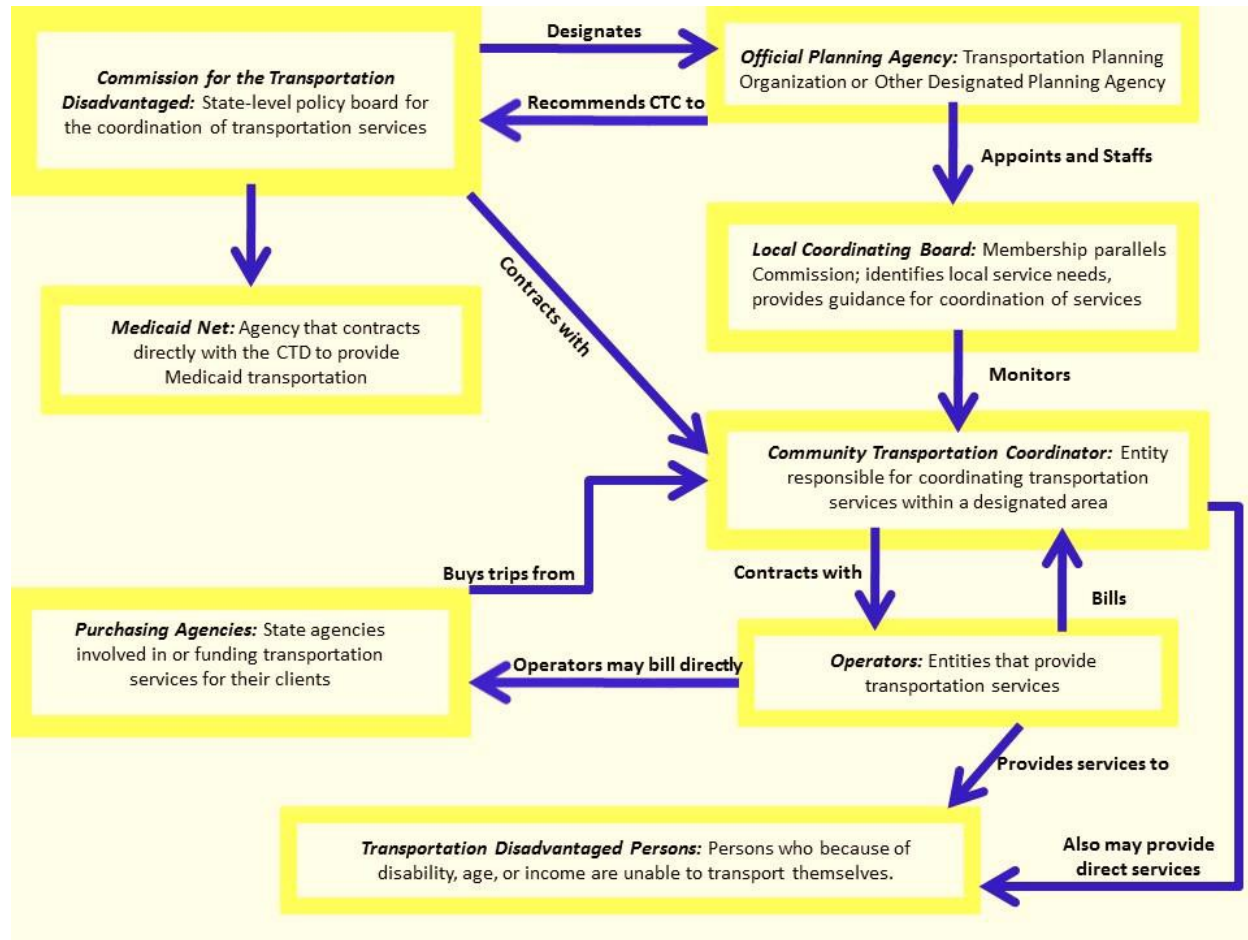
The statewide TD program was developed to improve coordination among TD services sponsored by social and human service agencies. The program's purpose was to address concerns about duplication and fragmentation of transportation services. The initial Chapter 427 legislation created the Coordinating Council for the Transportation Disadvantaged with the Florida Department of Transportation (FDOT) for the purpose of coordinating TD services throughout the state. Chapter 427 was revised in 1989 to replace the Coordinating Council with the CTD, which was established as an independent commission authorized to hire its own staff and allocate funding for specialized transportation services available through the new Transportation Disadvantaged Trust Fund (TDTF). The 1989 legislative revisions also established CTCs and LCBs to administer and monitor the TD program at the local level. The Metropolitan Planning Organization (MPO) or designated official planning agency (DOPA) performs long-range planning and assists the CTD and LCB in implementing the TD program within the designated service area.

Figure 1-1 is an organization chart that identifies the parties involved in the provision of Florida's TD transportation services. Medicaid transportation services are provided through the Statewide Medicaid Managed Care program. Under this program, transportation services, including emergency transportation, are provided to enrollees who have no other means of transportation available to access any covered service. The Managed Care Plan is not obligated to follow the requirements of the CTD or the LCB as set forth in Chapter 427, F.S., unless the Managed Care Plan has chosen to coordinate services with the CTD.

The CTD has used a 1993 methodology to provide county-level demand forecasts for TD populations based on two types of trips (program and general) and two TD population groups (Potential Transportation Disadvantaged—TD Category I and Transportation Disadvantaged—TD Category II). The recent update to the forecasting demand methodology recommended that the CTD revise the terms and methodology. The new methodology, as of June 2013, uses two TD populations: the "General TD" Population and the "Critical Need TD" population. The General TD population includes the estimates of all persons with disabilities, older adults, low-income persons, and children who are "high-risk" or "at-risk," defined by F.S. Chapter 411.202 as preschool children that include but are not limited to those born to underage parents, victims or siblings of victims of abuse, graduates of the perinatal intensive care unit, parents or guardians are migrant workers, institutionalized, or negligent, and those requiring other State assistance for their necessities. The Critical Need TD population includes individuals who due to severe physical limitations or low incomes are unable to transport themselves or purchase transportation and are dependent upon others to obtain access to healthcare, employment, education, shopping, social activities, and other life-sustaining activities. Currently, the CTD is working with the Center for Urban Transportation Research (CUTR) at the University of South Florida to review the TD methodology.



**Figure 1-1: Florida's Coordinated Transportation System**



## History and Background

Marion Transit (MT) began serving the transportation needs of older populations in 1976 under the name Marion Transit (MT), and service has since expanded to include TD and Medicaid clients. Since 1982, MT has been designated as the Marion County CTC for all non-emergency medical transportation and for those needing wheelchairs or other assistance, pursuant to Chapter 427, F.S. and Rule 41-2 of the Florida Administrative Code (FAC). A Memorandum of Agreement (MOA) was executed between MT and FDOT on January 5, 1983. In 1990, the Ocala Marion TPO endorsed the appointment of MT as the CTC for Marion County. As the CTC, MT assumes responsibility for ensuring coordination of local transportation services to the maximum extent possible.

MT provides door-to-door paratransit services to meet numerous transportation needs for medical, life-sustaining, educational, work, business, and recreational activities for Marion County's TD citizens as well as other recipients in the county. MT's existing fleet of 43 small cutaway-type buses serves an area of more than 1,600 square miles. Trip priorities are established by a subcommittee of the MPO, the Local Coordinating Board (LCB).

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

- Medical
- Life-sustaining activities
- Education
- Work
- Business
- Recreational

MT currently has coordination contracts with two entities that provide transportation services to their own residents: Independent Living for Retarded Adults and ARC Marion. MT contracts with one operator, Leopard Transportation, to provide back-up services for overflow during normal business hours, holidays, nights, and weekends. Leopard Transportation provides ambulatory, wheelchair, and stretcher support. The MT fare is \$2.00 - \$5.00 per one-way trip depending on location and eligibility. MT accepts cash or passes for fare payment, and the fare must be paid upon boarding the vehicle; drivers are unable to make change.

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

## Summary of Existing Plans and Documents

This section provides a summary of existing plans, programs, and documents that are or may be relevant to the preparation of the TDSP for Marion County. The purpose of reviewing this information is to ensure consistency, coordination, and understanding of other transportation planning and programming activities that were recently completed or are in the process of being developed. This TDSP is consistent with the list of planning documents listed below; a complete summary is presented in Appendix A:

- MT FCTD Annual Performance Report 2015–2019
- FCTD Annual Performance Report
- SunTran Comprehensive Operations Analysis (COA)
- Ocala/Marion County 2017–2028 Transit Development Plan (TDP) Update
- Ocala/Marion County 2018 TDSP Update
- Ocala/Marion TPO 2040 Long Range Transportation Plan (LRTP)
- Ocala 2035 Vision
- Marion County Comprehensive Plan
- City of Ocala Comprehensive Plan

## Local Coordinating Board Certification

The most recent LCB Certification is included at the beginning of this document.

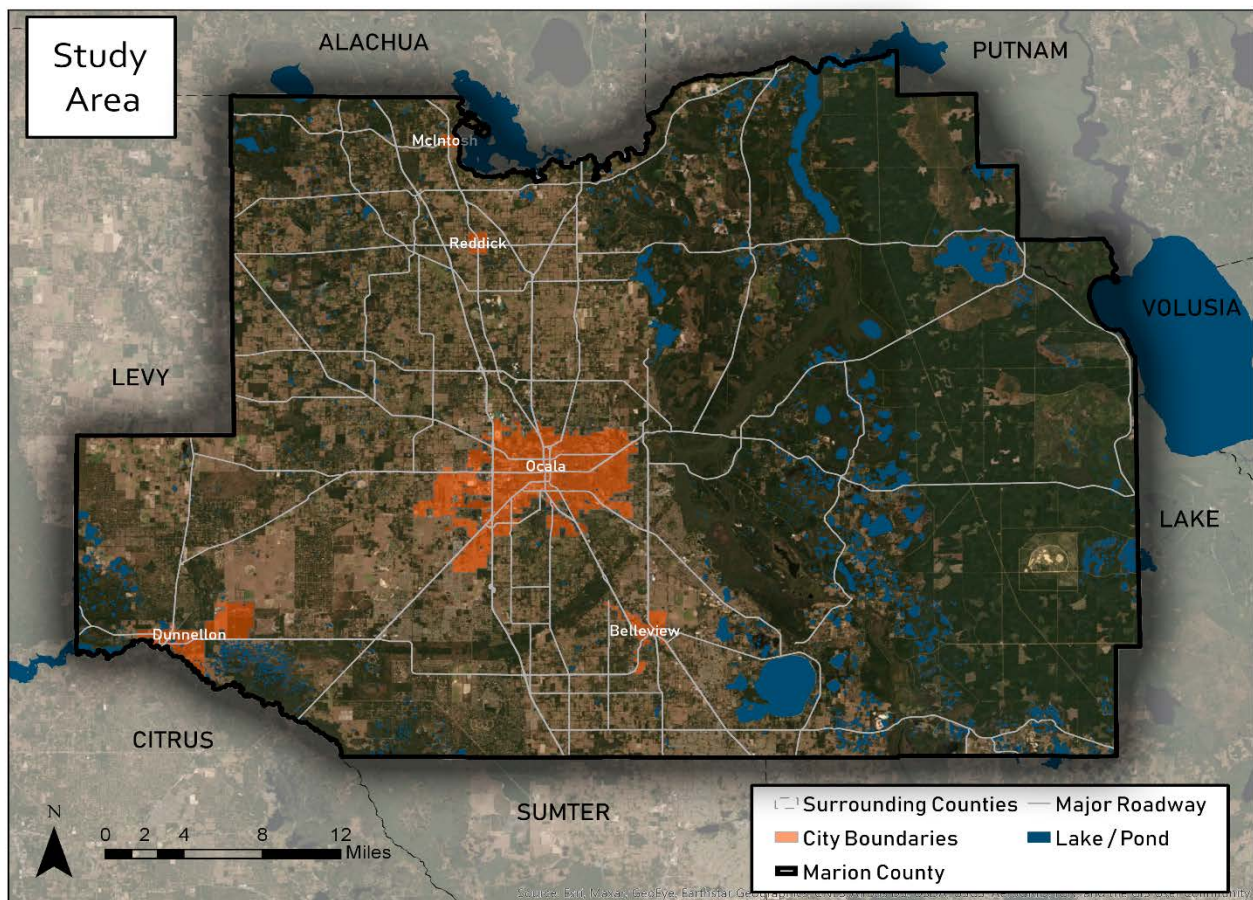
## Service Area Profile and Demographics

This section includes an overview of the Marion County demographics and local operating environment to gain a better understanding of the physical conditions when planning for the provision of transit service.

## Service Area Description

Marion County is located in north central Florida and is bordered by Alachua and Putnam counties on the north, Sumter and Citrus counties on the south, Levy County on the west, and Volusia and Lake Counties on the east. Marion County's population is concentrated in Ocala in central Marion County and, to a lesser extent, in Belleview, located south of Ocala. The service area for TD services and the planning area for the Ocala/Marion County TPO include all of Marion County and trips to neighboring counties that originate within Marion County. The main north-south corridors are I-75, US 301, and US 441; SR 40 is the main east-west corridor through the center of the county. Map 1-1 provides an overview of the study area.

**Map 1-1**



## Demographics

### Population Profile

Marion County's population increased from 336,811 persons in 2015 to 360,421 persons in 2019, an overall increase of 7%. The population continues to increase, as estimated by the 2019 Population report by the Bureau of Economic and Business Research (BEBR) at the University of Florida using population estimates as of April 1, 2019, of 360,421 persons. As of 2019, Marion County was ranked the 18<sup>th</sup> most populous county in Florida.

Using BEBR Florida population projections, the population of Marion County is expected to increase by 28% by 2045. Table 1-1 provides an overview of the population projections for Marion County and Florida from 2020 to 2045.

**Table 1-1: Marion County and Florida Population Growth Projections, 2020–2045**

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

Source: BEBR 2020 - 2045 Population Projections, April 2019

Population estimates from the 2014–2018 American Community Survey (ACS), were used to develop a population profile for the study area. As shown in Table 1-2, the population of Marion County increased 7%, from 326,833 in 2010 to 348,371 in 2018. Marion County is experiencing high residential and business growth, which could require a higher demand for transit service in the future.

**Table 1-2: Population Characteristics, Marion County, 2010, 2015, 2018**

Characteristic	2010	2015	2018	% Change 2010 - 2018
Persons	326,833	336,811	348,371	7%
Households	133,966	132,287	136,514	2%
Number of Workers	137,320	115,259	122,825	-11%
Land Area (sq. miles)	1,585	1,585	1,585	0%
Average Household Size	2.36	2.48	2.42	3%
Persons per Sq. Mile of Land Area	206.20	212.50	219.79	7%
Workers per Sq. Mile of Land Area	87	73	77	-11%

Sources: 2010 Census, 2011 - 2015 & 2014 - 2018 ACS 5-Year Estimates

There are five municipalities and towns in Marion County – Belleview, Dunnellon, McIntosh, Ocala, and Reddick. Population trends were reviewed for three municipalities, and two towns throughout Marion County. Table 1-3 highlights those trends for the mentioned municipalities and towns. As you can see, the majority of the population within Marion County has only increased, including the unincorporated areas as well.



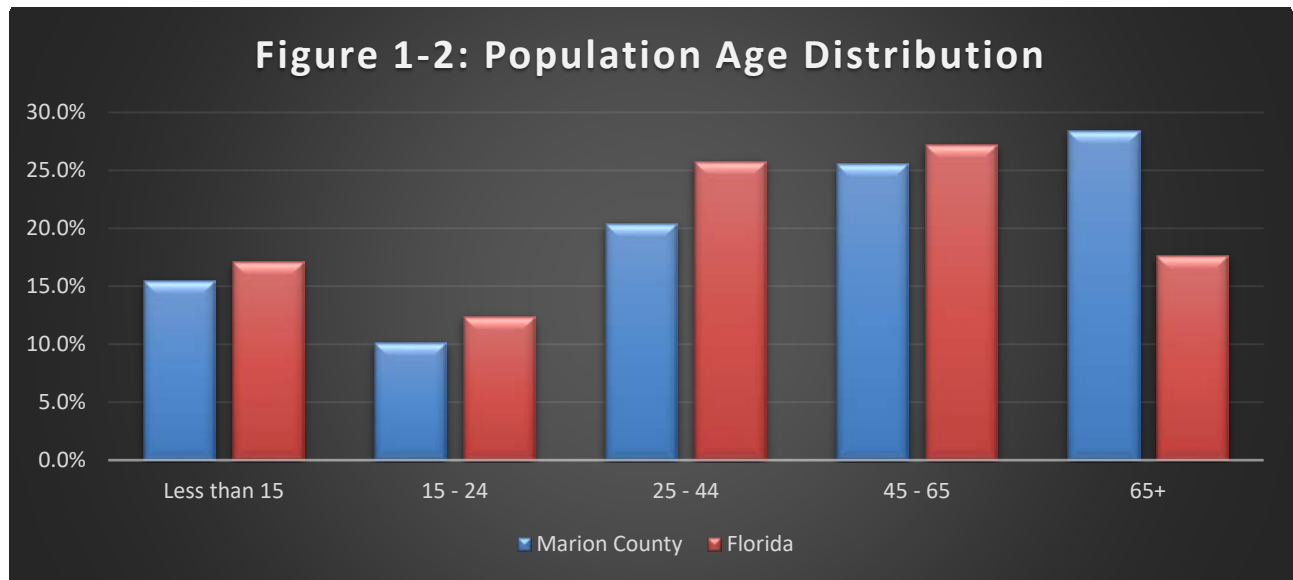
**Table 1-3: Population Characteristics, Marion County, 2018, 2019**

Geographic Area	2018	2019 Estimates	2018 - 2019 Population Change
Marion County	348,371	360,421	12,050
Bellevue	4,844	5,273	429
Dunnellon	2,188	1,810	(378)
McIntosh	376	484	108
Ocala	58,598	61,549	2,951
Reddick	590	558	(32)
UNINCORPORATED	281,775	290,747	8,972

Sources: 2014 - 2018 ACS 5-Year Estimates, BEBR 2019 Report

### Age Distribution

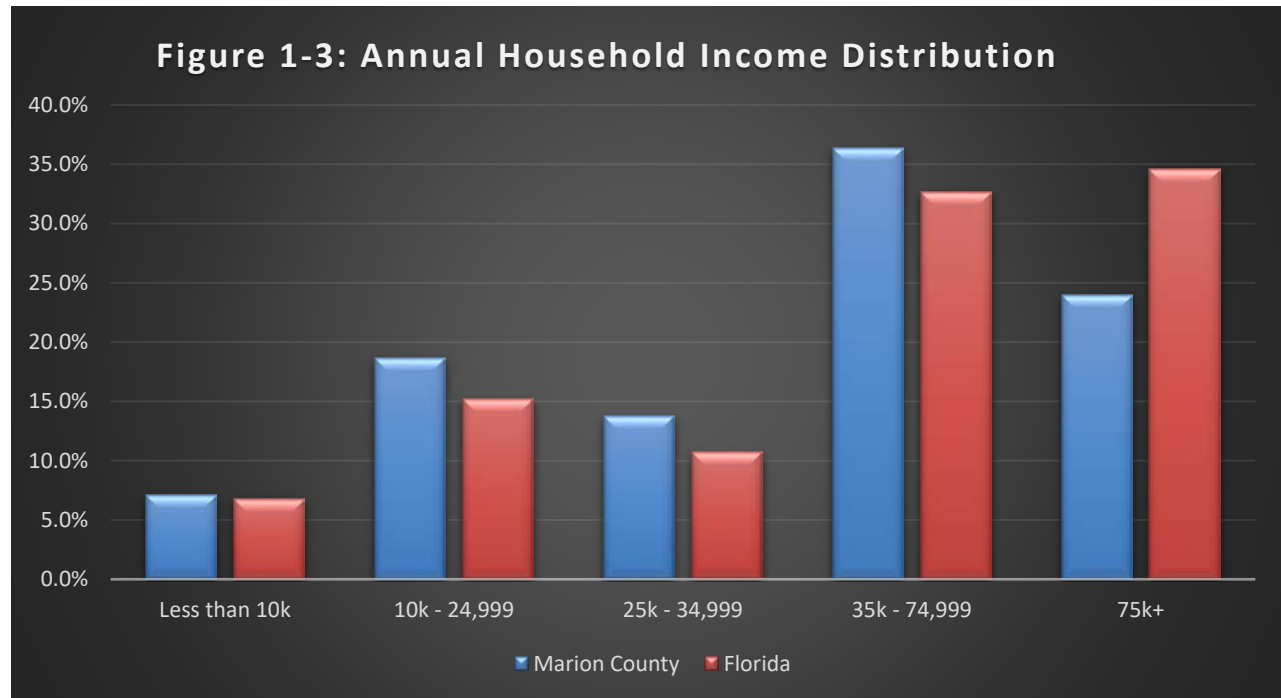
Figure 1-2 shows the Marion County and Florida populations by age distribution. According to the 2014–2018 ACS, more than 27% of Marion County’s population is 65 years of age or older compared to nearly 17% for Florida. The 45-to-65 age group includes the largest percentage of both the Marion County and Florida populations, indicating that the older age group will be increasing significantly in the future, which could lead to increased public transportation demand.



Source: 2014-2018 ACS 5-Year Estimates

## Income Distribution

Figure 1-3 compares the distribution of household income in Marion County and Florida. The distribution in Marion County is similar to that in Florida, with the exception that more Marion County residents earn \$10,000-\$24,999 and fewer Marion County residents earn \$75,000 or more compared to Florida. The Marion County median household income is approximately 10% lower than Florida, with Marion County's median income at \$43,361 and Florida's at \$53,267.



Source: 2014-2018 ACS 5-Year Estimates

## Employment

Table 1-4 includes the current labor force, employment, and unemployment data for Marion County and Florida. The data provided in the table presents a snapshot from the Florida Department of Economic Opportunity Labor Market Statistics for May 2020 data. These figures show that Marion County has a slightly lower unemployment rate than the state as a whole, though the rates are not seasonally adjusted.

**Table 1-4: Employment Characteristics Marion County and Florida 2020 (Not Seasonally Adjusted)**

Geographic Area	Civilian Labor Force	Number Employed	Number Unemployed	Unemployment Rate
Marion County	132,646	117,172	15,474	11.7%*
Florida	9,731,000	8,336,000	1,395,000	14.3%*
* Due to the pandemic, COVID-19, these numbers aren't a true representation of the Unemployment Rate				
Source: Florida Department of Economic Opportunity May 2020 Data				

## Population and Employment Densities

Population density (measured per square mile) is a key factor when assessing potential transit needs, as it reveals whether an area contains sufficient density to support transit. Dwelling unit and employment data obtained from Marion County staff from the 2045 Marion County LRTP were used to conduct the analysis. The data are a forecast of population and employment from 2015 to 2045 to estimate needed improvements in transportation infrastructure by Traffic Analysis Zone (TAZ).

### Population Density

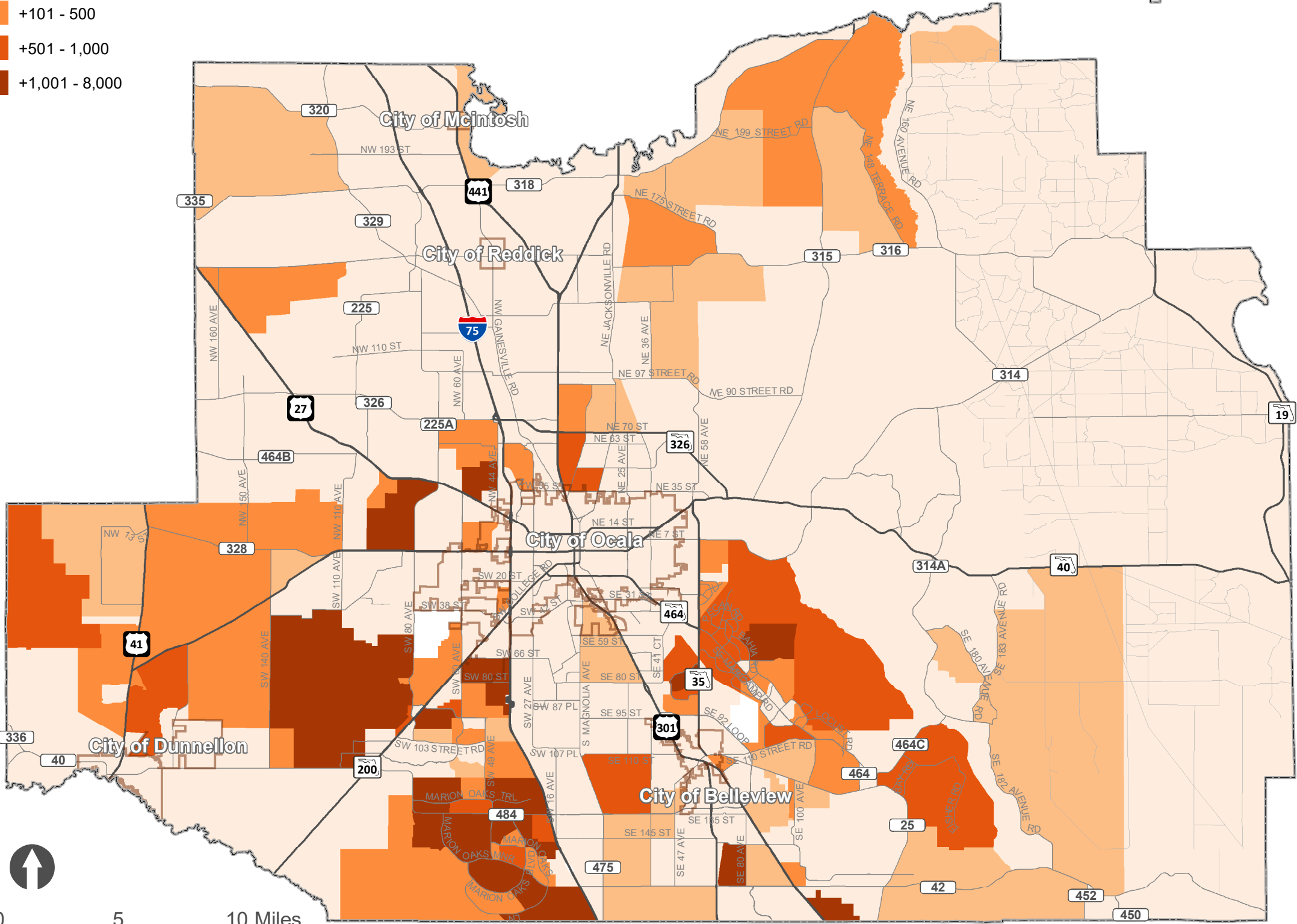
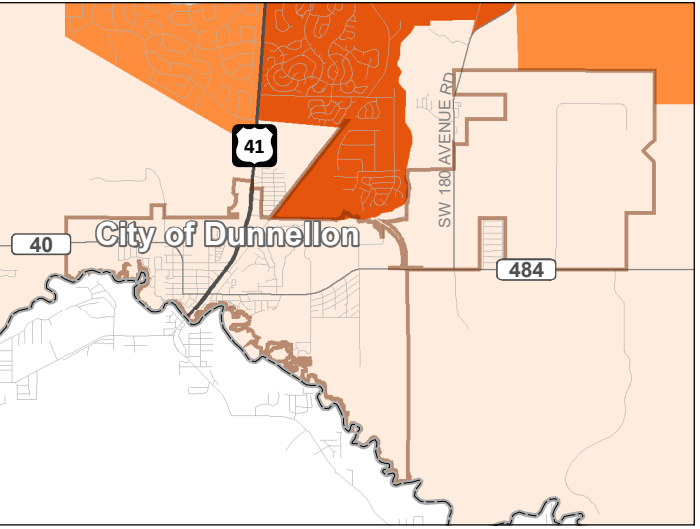
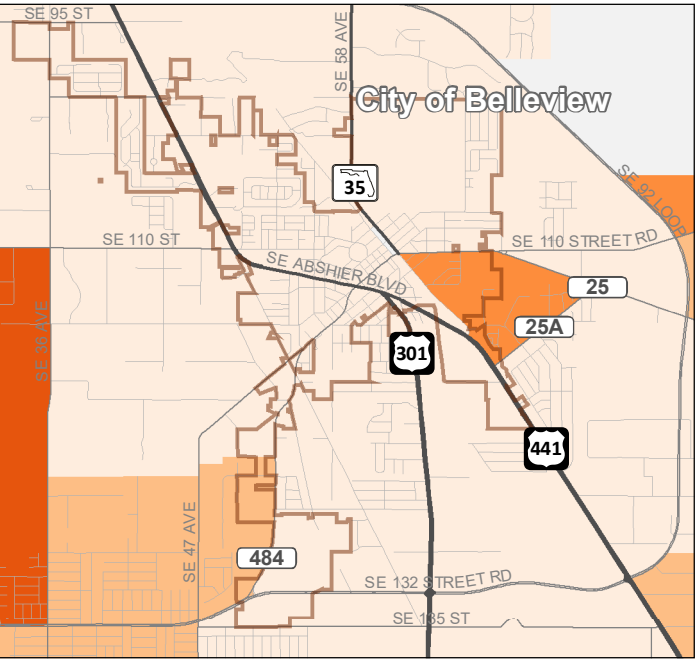
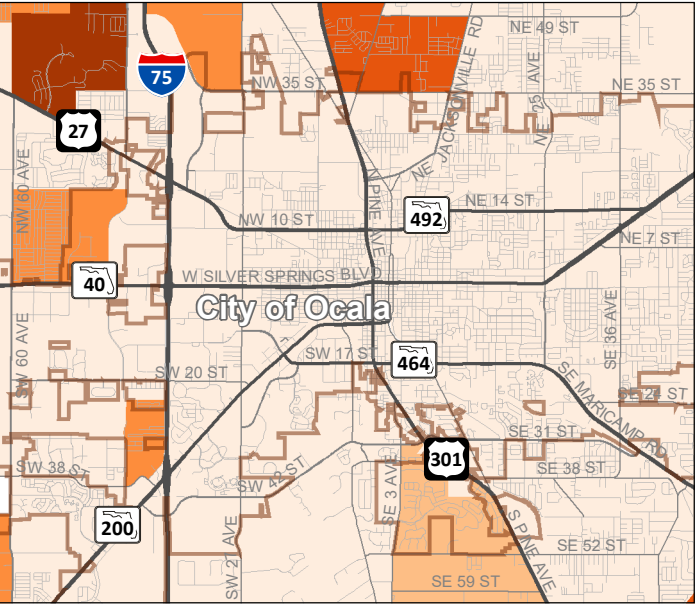
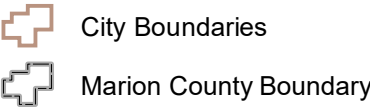
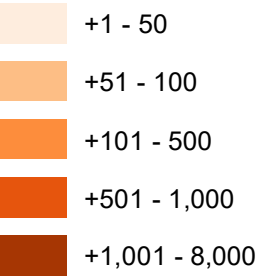
As shown in Map 1-2, the densest areas are projected to be within the Ocala urbanized area, along southwest Marion County along SR-40 and SR-200, and in pockets along McIntosh and Belleview. High population density also will be in The Villages and the sprawling On Top of the World development communities located off SW 99<sup>th</sup> Street Road and south of 103<sup>rd</sup> Street Road.

### Employment Density

Like population density, employment density is concentrated throughout the central Ocala area, as shown in Map 1-3. Beyond the urbanized Ocala area, pockets of high density are also found along SR 200 southwest of Ocala near the I-75 interchange, the Belleview area along US-301 southeast of Ocala, the Dunnellon area, and west of I-75 adjacent to the Ocala International Airport, where there is a cluster of transportation, distribution, and equine-focused companies. Employment density is more centralized than the general population density along the major arterials and, for the most part, employment is projected to continue growing in the TAZs where high growth is currently observed, with some growth observed just south of Reddick along I-75, as shown in Map 1-4.

Expected Population Growth (2015 to 2045)

Map 1-2



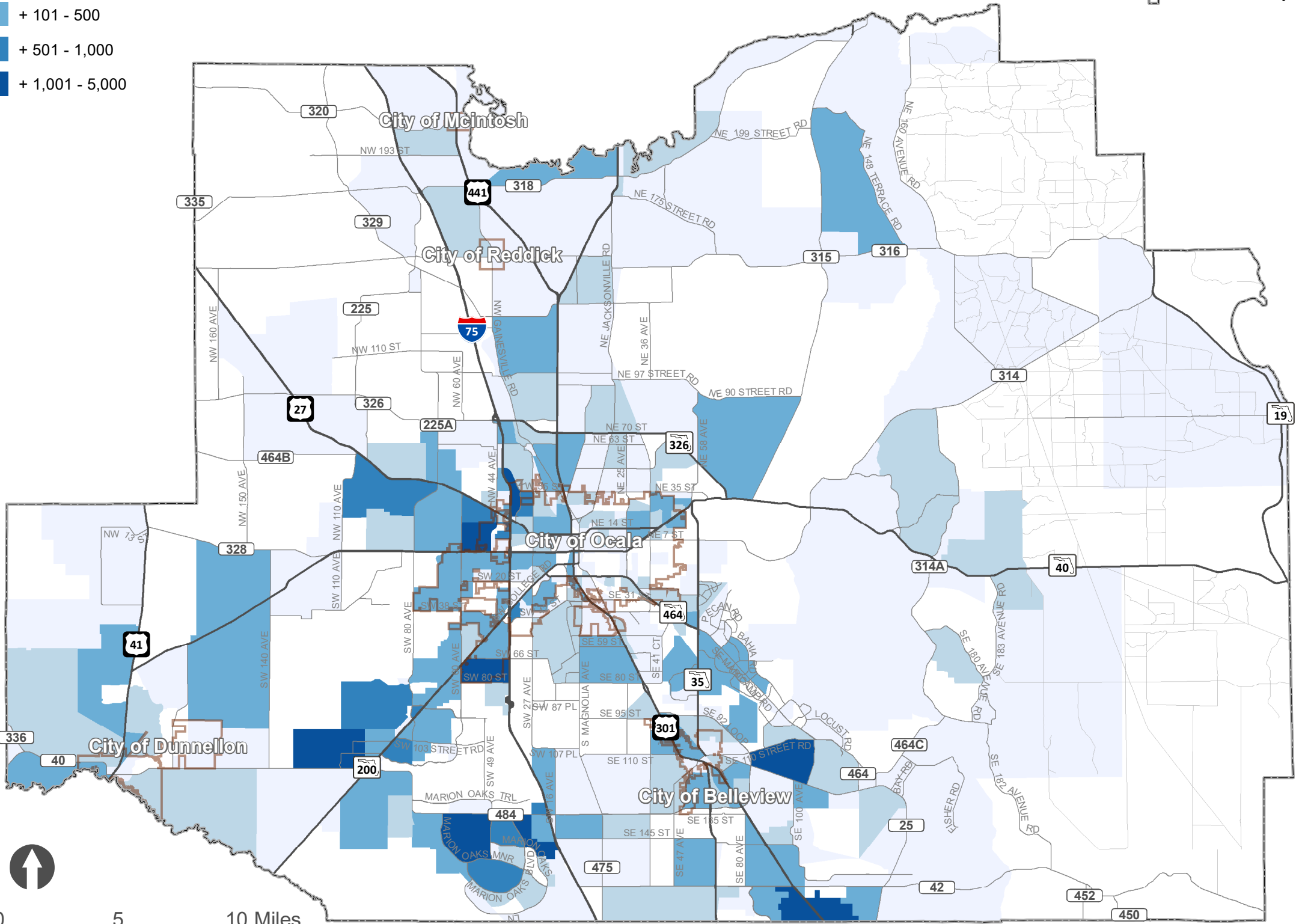
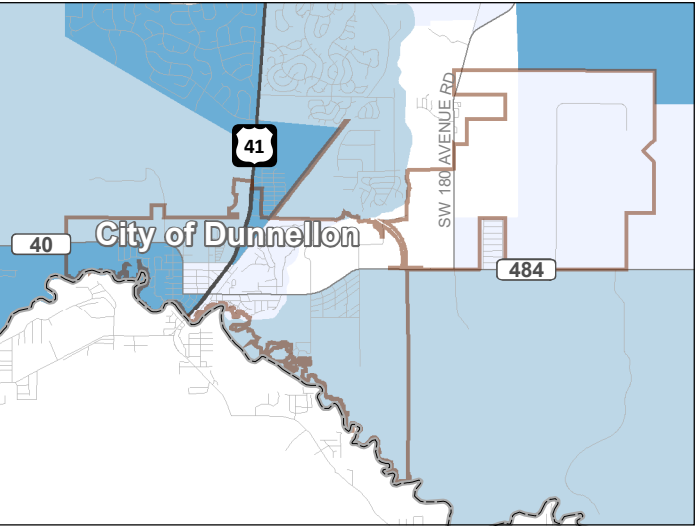
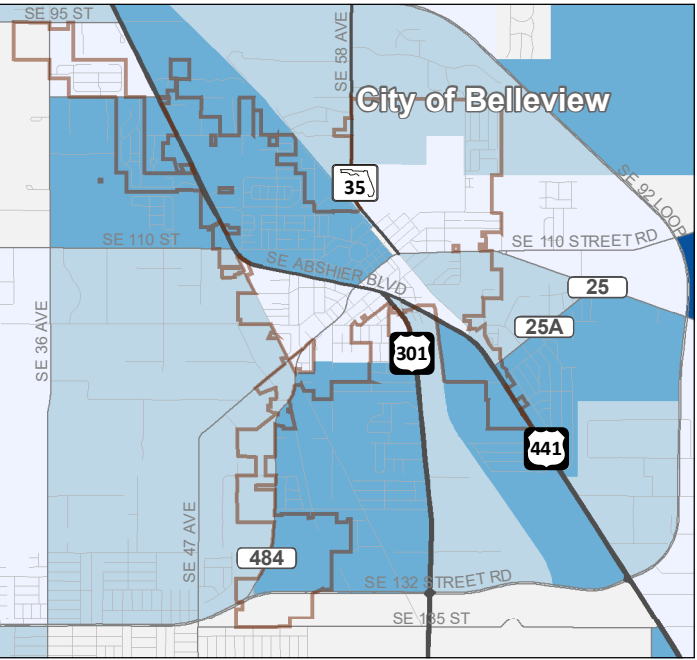
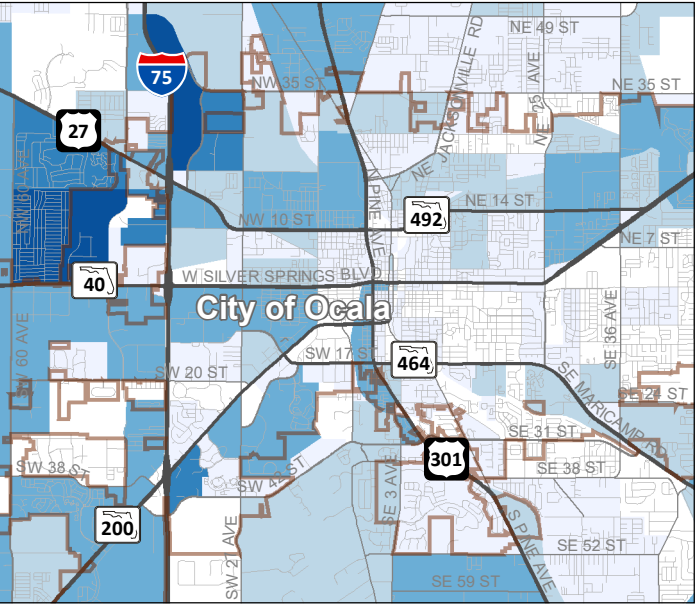
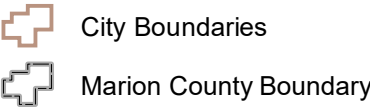
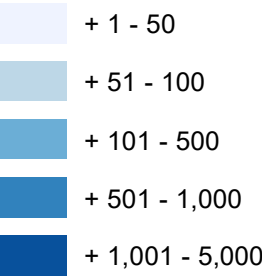
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Expected Employment Growth (2015 to 2045)

Map 1-3



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## Major Employers

Major industries in Marion County include government, education, healthcare, manufacturing, distribution and transportation, and leisure/hospitality. Major employment centers include healthcare centers such as Munroe Regional Medical Center and Ocala Health System and manufacturing factories such as Lockheed-Martin, E-ONE, and ClosetMaid Corporation. In addition, Cheney Brothers, Kmart Corporation, and Cone Distributing are major employers in the distribution and transportation sectors. Retail centers also employ a large percentage of workers in Marion County, including Walmart and Publix. Table 1-5 shows the major public sector and private sector employers in Marion County.

**Table 1-5: Major Public and Private Sector Employers, Marion County**

Employer Name	No. of Employees	Business Type/Sector
Marion County Public Schools	6,070	Education
Munroe Regional Medical Center	2,648	Healthcare
State of Florida (All Departments)	2,600	Government
Wal-Mart (combined)	2,370	Retail Sales
Ocala Health System	2,200	Healthcare
Public Supermarkets (combined)	1,488	Retail Sales
Marion County Board of County Commissioners	1,368	Government
AT&T	1,000	Support Services
City of Ocala (All Depts.)	989	Government
Lockheed Martin	981	Manufacturing
E-ONE, Inc.	800	Manufacturing
Marion County Sheriff's Office	750	Government
Sitel	700	Customer Contact Center
US Government	700	Government
Cheney Brothers, Inc.	645	Distribution
The Centers	568	Healthcare
College of Central Florida	450	Education

Source: Ocala/Marion County Major Employers, 2017

## Major Trip Generators

Major trip generators in Marion County for paratransit trips include medical facilities (hospitals, healthcare clinics, dialysis facilities), parks, libraries, government/social services, religious activities, restaurants, and local shopping centers. TD services are provided county-wide, with service to any location in the county, and ADA service is provided within  $\frac{3}{4}$  mile of SunTran fixed route service.

## Transportation Disadvantaged Population

Table 1-6 shows the trend in the TD population and TD passengers between 2017 and 2019 in Marion County. The potential TD population has risen by nearly 2.7%, from 181,858 in 2017 to 186,913 in 2019.

However, the number of TD passengers served declined, with a 4% decrease, from 3,323 in 2017 to 3,189 in 2019.

**Table 1-6: Marion County TD Population and Passenger Trends, 2017–2019**

Year	Potential TD Population	TD Passengers Served
2017	181,858	3,323
2018	186,913	3,281
2019	186,913*	3,189
% Change (2017-2019)	2.7%	-4.2%
* Data not provided in the 2019 report. Therefore, same numbers used from previous y		
Source: Annual Performance Reports from 2017-2019, FCTD		

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

## Household Vehicle Availability

Table 1-7 shows the number of vehicles available by household in Marion County and Florida and indicates that household vehicle availability is fairly consistent. Marion County has a slightly lower percentage of households with zero vehicles than Florida but has a higher percentage of single-vehicle households. Nearly 49% of households in the county have two or more vehicles.

**Table 1-7: Distribution of Vehicle Availability, Marion County & Florida 2018**

Geographic Area	Number of Vehicles Available			
	0	1	2	3+
Marion County	5.2%	46.0%	35.4%	13.4%
Florida	6.5%	40.2%	38.3%	15.0%
Source: 2014-2018 ACS 5-Year Estimates				

## Service Analysis

### Transportation Disadvantaged Population/Demand Projections

This section details the population forecasts and trip demand projections developed as part of the paratransit market assessment for the TDSP update. The TD population forecasts are broken down by population segment to better understand the composition of the TD population. In addition, this section summarizes forecasts of TD trip demand, supply, and unmet demand for Marion County for 2018–2022.

### Forecasts of TD Population

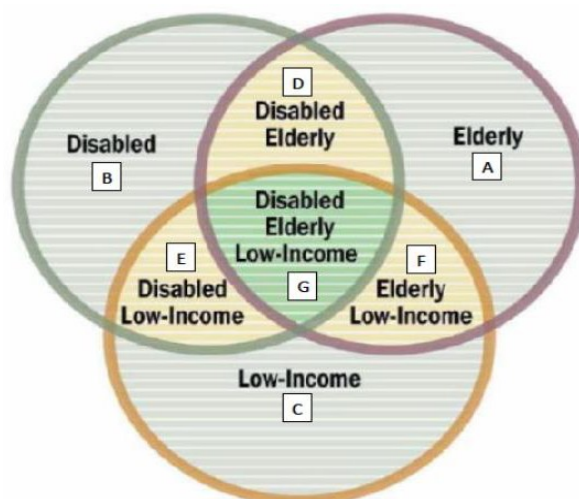
The TD population was estimated using the methodology described in *Forecasting Paratransit Service Demand – Review and Recommendations* (National Center for Transit Research 2013). The travel

demand forecasting methodology was updated effective June 2013 to address some of the changes in policy and demographics that have occurred over the past 20 years since the original methodology was established in 1993.

The TD population and travel demand estimates for Marion County were calculated from a series of automated formulas from the work book using the 2014–2018 ACS data and 2019 socio-economic data from BEBR. The pre-coded data included in the workbook’s automated formulas is derived from the National Household Travel Survey (NHTS) and the US Census Bureau’s Survey of Income and Program Participation (SIPP).

The forecast estimates produced from the workbook include the general TD population, the Critical Need TD population, and the demand for TD trips. The workbook eliminates “double counts” by automatically calculating the overlapping populations that occur when individuals fall into one or more demographic or socio-economic category, as shown in Figure 1-6.

**Figure 1-4: General Transportation Disadvantaged Population Groups**



Source: University of South Florida’s Center for Urban Transportation Research (CUTR),  
Paratransit Service Demand Estimation Tool, 2013

Table 1-8 shows the forecasts of the general TD population for Marion County and references the categories shown in Figure 1-6. As shown, the 2018 TD population in Marion County is estimated to be 158,155, representing approximately 43% of the total population. This population includes all persons with disabilities, older adults, low-income persons, and children who are high-risk or at-risk and is expected to increase by approximately 11% over the five-year period of 2018–2022.

**Table 1-8: Marion County General TD Population Forecast**

General TD Population Forecast	2018	2019	2020	2021	2022
Overlapping Circle Component					
E – Estimated non-older/disabled/low-income	6,355	6,487	6,622	6,760	6,900
B – Estimated non-older/disabled/not low-income	17,216	17,574	17,940	18,313	18,694
G – Estimated older/disabled/low-income	2,027	2,069	2,113	2,156	2,201
D – Estimated older/disabled/not low-income	24,586	25,098	25,620	26,153	26,697
F – Estimated older/non-disabled/ low-income	4,293	4,382	4,473	4,566	4,661



A – Estimated older/non-disabled/not low-income	58,686	59,907	61,153	62,425	63,724
C – Estimated low-income/not older/not disabled	44,991	45,927	46,883	47,858	48,854
Total General TD Population	158,155	161,445	164,803	168,232	171,731
Total Population	365,791	373,400	381,168	389,098	397,192

\*Based on 19% of Marion County population having access within ¼-mile of existing fixed-route system and paratransit service operating service 307 days annually.

Source: CUTR, Paratransit Service Demand Estimation Tool, 2013

Table 1-9 presents the Critical Need TD population forecasts and includes individuals who, due to severe physical limitations or low income, are unable to transport themselves or purchase transportation and are dependent upon others to obtain access to health care, employment, education, shopping, social activities, and other life-sustaining activities. As shown, the Marion County's 2018 Critical Need TD population is estimated to be 21,551, representing nearly 14% of the general TD population. The Critical Need population forecasted for the five-year period indicates that the population will increase by approximately 9% in 2022.

In 2018, the Critical Need TD population is expected to make 15,889 total daily trips and 4.87 million annual trips. The number of Critical Need trips needed is expected to increase to 5.23 million annually in 2022, an increase of 7% over the five-year period.

**Table 1-9: Marion County Forecasted Annual Trip Demand, 2018–2022**

Critical Need TD Population Forecast	2018	2019	2020	2021	2022
Total Critical Need TD Population					
Disabled	13,374	13,652	13,936	14,226	14,522
Low-Income, Not Disabled, No Auto/Transit	8,177	8,347	8,521	8,698	8,879
Total Critical Need TD Population	<b>21,551</b>	<b>22,000</b>	<b>22,457</b>	<b>22,924</b>	<b>23,401</b>
Daily Trips Critical Need TD Population					
Severely Disabled	655	669	683	697	712
Low Income, Not Disabled, No Access	15,529	15,852	16,181	16,518	16,862
Total Daily Trips Critical Need TD Population	15,889	16,171	16,457	16,748	17,045
Total Annual Trips	4,878,038	4,964,379	5,052,248	5,141,673	5,232,681

\*Based on 19% of Marion County population having access within ¼-mile of existing fixed-route system and paratransit service operating service 307 days annually.

Source: CUTR, Paratransit Service Demand Estimation Tool, 2013

## CTC Trend Analysis

A review of service trends for MT was completed to examine the performance of the paratransit service, including effectiveness and efficiency. A trend analysis was completed using Annual Performance Report (APR) data from FY 2015 through FY 2019, compiled by the FCTD. The APR is a compilation of information submitted to the FCTD by each county's CTC in an Annual Operating Report (AOR). The Ocala/Marion TPO is responsible for evaluating the MT under a Planning Grant from the FCTD. Table 1-10 lists the measures used in this analysis to measure performance, effectiveness, and efficiency. The measures selected are known to provide a good representation of overall paratransit system performance.

**Table 1-10: MT Paratransit Performance Review Measures**

Performance Measures	Effectiveness Measures	Efficiency Measures
<ul style="list-style-type: none"><li>• Passenger Trips</li><li>• Vehicle Miles</li><li>• Revenue Miles</li><li>• Operating Expense</li><li>• Operating Expense</li><li>• Operating Revenue</li><li>• Operating Revenue</li><li>• Total Fleet</li></ul>	<ul style="list-style-type: none"><li>• Vehicle Miles per TD Capita</li><li>• Passenger Trips per TD Capita</li><li>• Passenger Trips per Vehicle Mile</li><li>• Accidents per 100,000 Vehicle Miles</li><li>• Vehicle Miles between Roadcalls/ Failures</li></ul>	<ul style="list-style-type: none"><li>• Operating Expense per Passenger Trip</li><li>• Operating Expense per Passenger Trip</li><li>• Operating Expense per Vehicle Mile</li><li>• Operating Expense per Vehicle Mile</li><li>• Operating Expense per Driver Hour</li><li>• Operating Expense per Driver Hour</li></ul>

A trend analysis from FY 2015 through FY 2019 was conducted to examine the performance of the Ocala/Marion County paratransit over time. The tables and figures provided throughout the trend analysis present selected performance, effectiveness, and efficiency measures available from the APRs. Results of the paratransit trend analysis are provided below.

### Performance Indicators

Paratransit performance measures are used to present the data reported directly in the APRs and measure overall system performance through level of service and service cost. The performance measures are shown in Table 1-11.

- Total annual passenger trips have been declining over the five-year period, aside from a small uptick in 2019, from 129,011 in FY 2015 to 112,448 in FY 2019, representing an overall decrease of nearly 15%.
- Vehicle miles have steadily decreased by more than 20%, from 1,181,030 in FY 2015 to 982,693 in FY 2019.
- Overall, vehicle revenue miles decreased by nearly 15% from FY 2015 to FY 2019. One note worth mentioning, is that the way in which reporting occurred in 2019, total revenue miles wasn't available. It appears this may be the case move forwarding as well.
- Operating expenses remained steady over the four year period from FY 2015 to FY 2019.
- The total fleet size declined from 77 in 2015 to 55 in 2019, a decrease of more than 40%.

**Table 1-11: MT Paratransit Trend Analysis General Performance Indicators, 2015–2019**

Performance Measure	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	% Change 2015 - 2019
Passenger Trips	129,011	119,367	110,494	106,024	112,448	-14.7%
Vehicle Miles	1,181,030	1,149,596	1,126,786	1,117,564	982,693	-20.2%
Revenue Miles	1,096,984	1,067,670	981,948	954,320	N/A	-14.9%
Total Fleet	77	66	57	41	55	-40.0%
Operating Expense	\$ 3,532,738.00	\$ 3,359,264.00	\$ 3,400,073.00	\$ 3,628,916.00	\$ 3,522,712.00	-0.3%
Operating Revenue	\$ 4,307,538.00	\$ 4,296,109.00	\$ 3,294,525.00	\$ 3,674,940.00	\$ 3,392,671.00	-27.0%
Source: Annual Performance Reports from 2015 - 2019, FCTD						

### Effectiveness Measures

Effectiveness measures indicate the extent to which various service-related goals are being achieved in relation to transit customers. For this analysis, MT paratransit service was analyzed using measures that illustrate service supply, service availability, service consumption, and quality of service between FY 2015 and FY 2019. The effectiveness measures are shown in Table 1-12.

- Vehicle miles per TD capita decreased from 6.86 in 2015 to 5.26 in 2019, a decrease of 30.5%.
- From FY 2015 to FY 2019, vehicle miles per passenger trip declined by nearly 5%, from 9.15 miles per trip to 8.74 miles per trip.
- Over the five-year period, passenger trips per capita declined by nearly 24.5%, from 0.75 trips in FY 2015 to 0.60 trips in FY 2019
- Passenger trips per vehicle mile remained around 0.1 throughout the five-year period.
- Paratransit accidents per 100,000 vehicle miles decreased by 35.5% over the five-year period, from 0.42 to 0.31.
- Roadcalls increased significantly from FY 2015 to FY 2019, from 8 to 14 roadcalls. This is roughly a 43% increase. However, it's worth noting that FY 2019 saw a drastic reduction from the following year(s).
- The vehicle miles between roadcalls decreased significantly, from 147,629 miles in FY 2015, to 70,192 in FY 2019, a 110% decrease.

**Table 1-12: MT Paratransit Trend Analysis Effectiveness Measures, 2015–2019**

Effectiveness Measure	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	% Change 2015 - 2019
Vehicle Miles per TD Capita	6.86	6.50	6.20	5.98	5.26	-30.5%
Vehicle Miles per Passenger Trip	9.15	9.63	10.20	10.54	8.74	-4.8%
Passenger Trips per TD Capita	0.75	0.67	0.61	0.57	0.60	-24.5%
Passenger Trips per Vehicle Miles	0.11	0.10	0.10	0.09	0.11	4.5%
Accidents per 100,000 Vehicle Miles	0.42	0.35	0.35	1.16	0.31	-35.5%
Roadcalls	8	51	36	33	14	42.9%
Vehicle Miles between Roadcalls	147,629	22,541	31,300	33,866	70,192	-110.3%
Source: Annual Performance Reports from 2015 - 2019, FCTD						

## Efficiency Measures

Efficiency measures are designed to measure the cost of resources provided by the transit agency, and details the extent to which cost efficiency is achieved. For example, operating expense per passenger trip measures the cost of achieving a given level of ridership within the system. MT efficiency measures are presented in Table 1-13 to illustrate performance of the system between FY 2015 and FY 2019.

- Over the five-year period, the operating expense per passenger trip increased by 12.6%, from \$27.38 in FY 2015 to \$31.33 in FY 2019.
- From FY 2015 to FY 2019, the operating expense per vehicle increased by nearly 17%, from \$2.99 per vehicle mile to \$3.58 per vehicle mile.
- Operating expense per driver hour increased slightly from \$30.06 in FY 2015 to \$36.25 in FY 2018, an increase of 17%. It's worth noting that the data for FY 2019 in this category wasn't available in the 2019 Reports. This category may not be required to be documented by TD agencies moving forward.

**Table 1-13: MT Paratransit Trend Analysis Efficiency Measure, 2015–2019**

Efficiency Measure	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	% Change 2015 - 2019
Operating Expense per Passenger Trip	\$ 27.38	\$ 28.14	\$ 30.77	\$ 34.23	\$ 31.33	12.6%
Operating Expense per Vehicle Mile	\$ 2.99	\$ 2.92	\$ 3.02	\$ 3.25	\$ 3.58	16.6%
Operating Expense per Driver Hour	\$ 30.06	\$ 35.19	\$ 44.97	\$ 36.25	N/A	17.1%

Source: Annual Performance Reports from 2015 - 2019, FCTD

## Summary Results of Trend Analysis

A trend analysis is an aspect of transit performance evaluation that provides a starting point for understanding the strengths and weaknesses of a transit system's performance over time.

- Total passenger trips, vehicle miles, and revenue miles decreased over the five-year period by 14.7%, 20.2%, and 14.9%, respectively.
- Operating expenses remained pretty consistent over the five year period from FY 2015 to FY 2019.
- Passenger trips per TD capita experienced a decline of 24.5%.
- Operating expense per passenger trip and mile increased by 12.6% and 16.6%, respectively.
- Reduction in vehicle miles per TD capita could be attributable to MT's focus on improving transit service efficiency and service operations.
- Although the potential TD population grew 11.4%, total passenger trips per TD capita decreased by 24.5%.

- Longer trip lengths for passengers to access their destinations will continue to increase burdens on the MT system, as shown by the increased growth in passenger trips per vehicle miles of 4.5%, and indicates that passengers are located farther away from the locations they would like to access.

Table 1-14 provides a summary of the trend analysis for TD services provided by MT from 2015 to 2019.

**Table 1-14: MT Paratransit Trend Analysis Summary, 2015–2019**

Performance Indicators/Measures	% Change 2015 - 2019
<b>Performance Measures</b>	
Passenger Trips	-14.7%
Vehicle Miles	-20.2%
Revenue Miles	-14.9%
Total Fleet	-40.0%
Operating Expense	-0.3%
Operating Revenue	-27.0%
<b>Effectiveness Measure</b>	
Vehicle Miles per TD Capita	-30.5%
Vehicle Miles per Passenger Trip	-4.8%
Passenger Trips per TD Capita	-24.5%
Passenger Trips per Vehicle Miles	4.5%
Accidents per 100,000 Vehicle Miles	-35.5%
Roadcalls	42.9%
Vehicle Miles between Roadcalls	-110.3%
<b>Efficiency Measure</b>	
Operating Expense per Passenger Trip	12.6%
Operating Expense per Vehicle Mile	16.6%
Operating Expense per Driver Hour	17.1%
Source: Annual Performance Reports from 2015 - 2019, FCTD	

## Needs Assessment

This section includes the assessment of existing and unmet needs for public transportation for low-income and older adult persons and persons with disabilities. An inventory of existing transportation providers and identification of redundancies and gaps in service were used to identify unmet needs or duplications of public transportation services. It is assumed that there will be a growing need for public transit in the higher-density areas in Marion County.

### Older Adults Profile

Older persons may be more likely to use public transportation as the aging process begins to limit their ability or preference to drive. Marion County has a larger proportion of older adults compared to the statewide average. Map 1-4 depicts the total population age 65 and older in Marion County, as provided by 2018 ACS five-year estimates. Areas with higher percentages of the population age 65 and older are generally found in unincorporated Marion County, southwest along SR-200, southwest along SR-40, northeast of Summerfield, and a portion of the Silver Springs Shores CDP.

### Traditional Market Assessment

A Transit Orientation Index (TOI) is a traditional transit market assessment that evaluates population segments that historically have a higher propensity to use transit and/or are dependent on public transit for their transportation needs. The TOI includes the older adults, youths, and households that are low income and/or have zero vehicles.

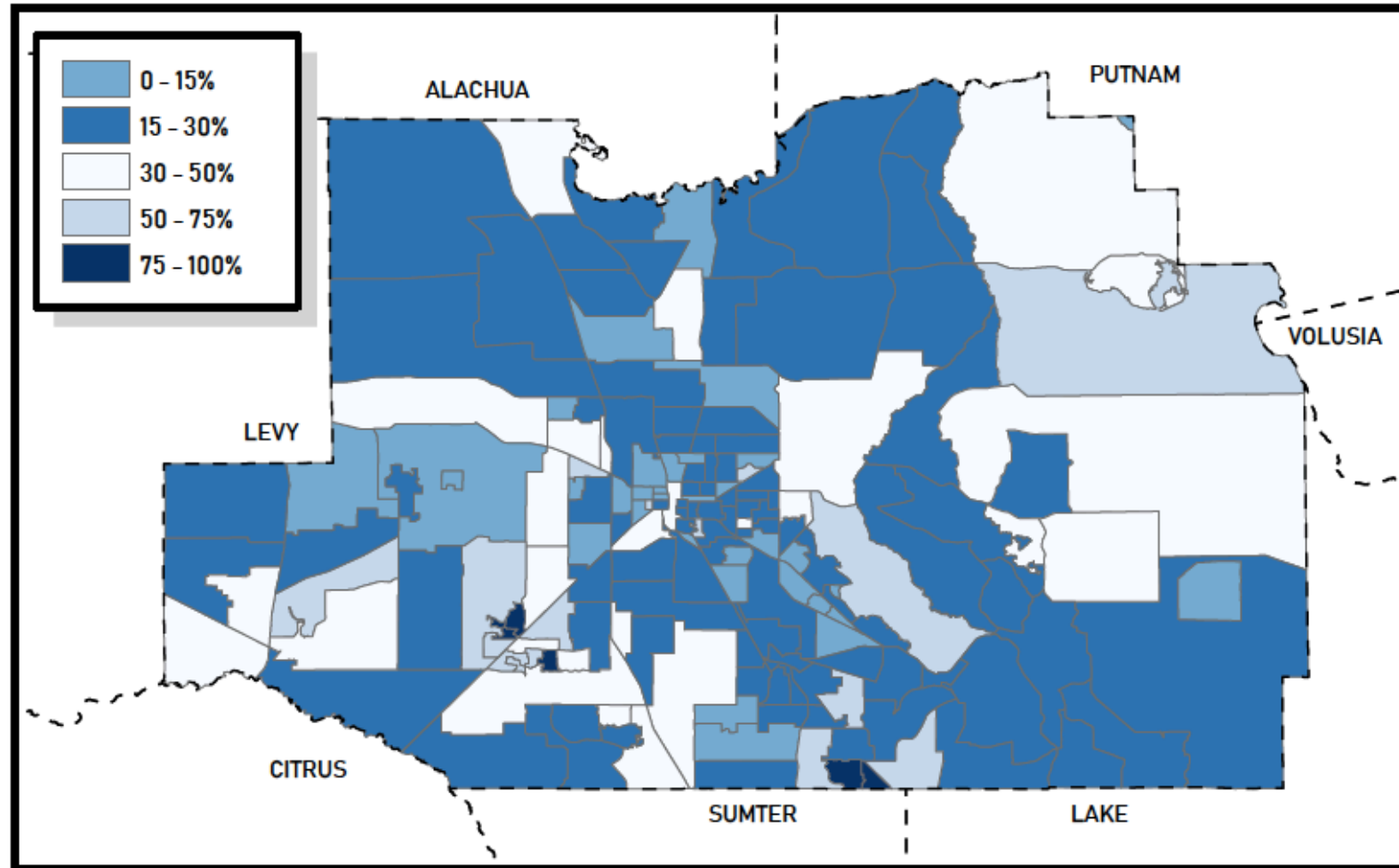
To create the TOI, 2014–2018 ACS five-year estimate demographic data were compiled at the block group level and categorized according to each block group’s relative ability to support transit based on the prevalence of specific demographic characteristics. For this analysis, five population and demographic characteristics were used to develop the TOI, as shown on Map 1-5. Each characteristic is traditionally associated with the propensity to use transit. The characteristics that were used to produce the index include the following:

- Population density (persons per square mile)
- Proportion of population age 65 and over (older adults)
- Proportion of population ages 10–14 (youth)
- Proportion of population below poverty level (\$25,000/family of 4)
- Proportion of households with no vehicles (zero-vehicle households)

Using data for these characteristics and developing a composite ranking for each census tract, each area was ranked as “Very High,” “High,” “Medium,” “Low,” or “Very Low” in their respective levels of transit orientation. Map 1-6 illustrates the 2019 TOI, reflecting areas throughout the county with varying levels of traditional market potential.

Map 1-4: 2018 Older Adult Population, Marion County

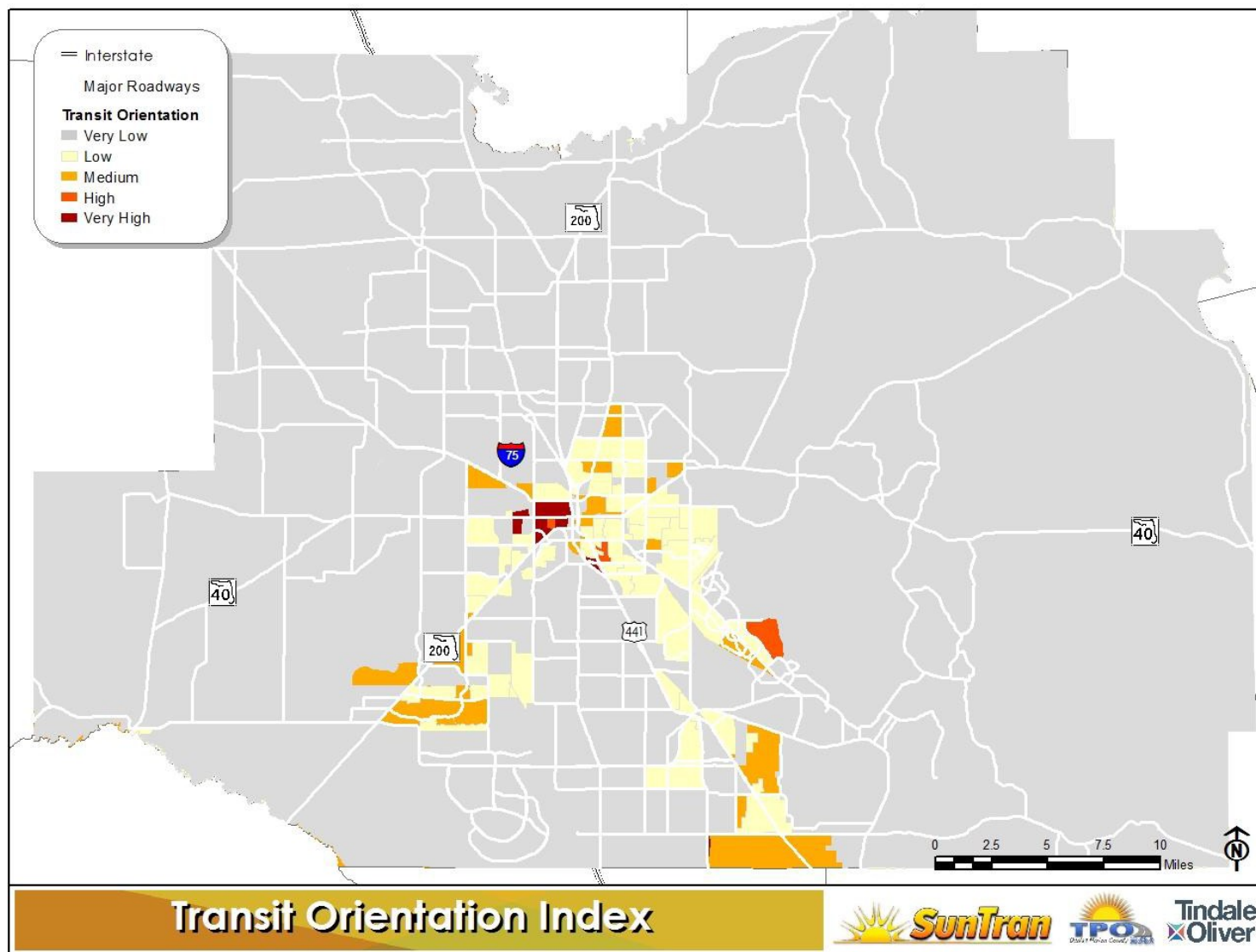
## Percent of Population 65 Years or Older - 2018



Source: 2014 – 2018 ACS 5-Year Estimates



Map 1-5: Marion County Transit Orientation Index



Based on the existing transit services and concentrations of targeted populations, the following needs were identified as priority areas for increased mobility options:

- The block groups containing the highest proportions of transit-dependent populations are found in the areas between the Ocala Central Business District (CBD) and I-75. These areas are characterized as areas with a high index of households living under the poverty level and zero-vehicle households. The area northwest of NW 110th Ave/SR 40 and the southernmost area of the county between US 301 and I-75 with a very high transit orientation index are low density residential areas outside of the urbanized area with a high presence of households living under the poverty level. The very high transit-oriented area between SE Lake Weir Avenue and US 301 near Camp Roosevelt has a combination of youth, older adult households living under the poverty level, and zero-vehicle households.
- The Silver Springs Shores CDP area that lies south of SE Maricamp Road has areas of high transit orientation due to the high presence of youth and zero-vehicle households. The high transit orientation area that lies in the eastern side of Silver Springs Shores CDP is characterized by a high presence of youth and older adults. The high transit orientation index in the Belleview area is characterized by a high presence of youth and zero-vehicle households.
- The existing bus routes align fairly well with the highest transit orientation areas west of the Ocala CBD except for the northwestern portion of this area and the small area of high transit orientation SE Lake Weir Avenue and US 27 that are currently not directly served by the existing transit network.
- Block groups with existing employment densities of more than 1,000 people per square mile are located primarily within the urbanized Ocala core, west of I-75 adjacent to the Ocala International Airport, and portions of Belleview and Dunnellon.
- In total, 81% of the county population lives in unincorporated areas.
- The fastest growing area of population in Marion County is The Villages CDP.

## Public Involvement

The public involvement activities undertaken as part of the TDSP update are described in this section. The goal of public involvement activities was to increase the likelihood of active participation from citizens and stakeholder agencies during the plan update process. Public outreach activities completed included MT distribution of a flyer to all paratransit users in January and February 2017 notifying them of a robodial call in which they could complete a satisfaction survey.

Common themes noted from survey responses included the following:

- The most common reason for using MT was for medical purposes, and the second most common reason was for grocery store visits.
- Most respondents indicated they use MT services 3–4 days per month.
- Respondents indicated a significantly large reliance on MT, with most indicating they would not be able to make the trip without the service and do not use SunTran fixed-route service.

- Common reasons why participants did not use fixed-route service included that SunTran was not available where they live and difficulty in accessing the bus stop without assistance.
- Nearly all respondents indicated a favorable review of service dependability, rating the service as good or very good (88%).
- All respondents indicated that the trip fare was reasonable, rating the fare payment as good or very good (100%).
- Overall satisfaction with services was rated highly, with all respondents rating services as good or very good (100%).

## Goals, Objectives, and Strategies

Developing a vision for transit services is a fundamental component of the TDSP. Goals, objectives, and strategies are critical for implementation of the public transit's vision in the community. The vision identifies what the CTC is, who it serves, and how best to provide service. This section includes the long-range goals of MT, specific measurable objectives that identify actions that can be taken to achieve the goals, and strategies to achieve the objectives. Marion County's TDSP vision and mission statements, goals, and objectives were updated and developed based on the review and assessment of local conditions and feedback obtained during public involvement. The goals and objectives are consistent with local and State transportation planning documents and policies, past Ocala/Marion County TDSP goals and objectives, the Ocala/Marion County 10-year TDP, and the Ocala/Marion County LRTP.

## Vision Statement

The Marion County TDSP vision statement was developed based on the overall vision for transportation services in the county. The vision statement for the Ocala/Marion County region governing transit is:

*To meet the mobility needs of the elderly, disabled,  
and transportation disadvantaged residents of Marion County.*

## Mission Statement

The mission statement is consistent with the legislative intent of the governing transit:

*To ensure the operation of a safe, efficient, and cost-effective transportation system  
that meets the needs of Marion County's general public, including its  
transportation disadvantaged, while providing a system that is integrated with  
other modes of travel, including pedestrian, bicycle, and automobiles,  
as well as with the county's existing and future land uses.*

## Goals, Objectives, and Strategies

The goals included are long-term, toward which programs or activities are ultimately directed. Many of the objectives established in the 2018 TDSP Update were modified in this update to ensure that MT continues its provision of quality service.

Table 1-15 presents both the completion status of the previous goals and objectives and the updated goals, objectives, and initiatives identified for this TDSP update.

**Table 1-15: Marion County 2018–2022 TDSP Goals and Objectives**

<b>Goal 1: Provide increased mobility and ridership using Marion Transit, contract providers, to meet the demand and mobility needs of transportation disadvantaged services in Marion County.</b>				
<b>Objectives</b>		<b>Completion Status for 2019–2020</b>		<b>Activities for 2020–2022</b>
Objective 1.1:	Provide transit or demand-response services to 10% of TD population by 2020.	TD services vary, such as non-sponsored, ADA, or 5311 services.		Continue working on provision of transit or demand-response services to 10% of TD population by 2022.
Objective 1.2:	Provide ADA-eligible population with paratransit service comparable to service provided by fixed-route system.	Ongoing – In accordance with ADA, SunTran contracts with MT is to provide required ADA service within ¾ mile of its fixed routes.		Continue to provide ADA-eligible population with paratransit service comparable to service provided by fixed-route system.
Objective 1.3:	Comply with all applicable ADA requirements.	Ongoing-All MT vehicles are ADA approved in accordance with ADA regulations.		Continue to maintain vehicles that comply with all applicable ADA requirements.
Objective 1.4:	Never decline service to TD individual due to lack of availability of ADA-accessible vehicles.		TD trips were provided based on funding and priority level. Medical trips receive highest priority.	
	Initiative 1.1	Post SunTran information regarding paratransit services on MT and TPO websites.	Information has been posted on SunTran fixed-route services, MT and TPO websites and Facebook pages.	Maintain and update on a continual basis information regarding paratransit services on MT and TPO websites and social media platforms.
	Initiative 1.2	Provide rider training for TD users of MT.	Developed a brochure to expand on the Rider rules and regulations.	Will continue to provide literature and information on website to educate TD users.
	Initiative 1.3	Maintain reliable and adequate fleet of ADA-accessible vehicles for demand-response services to meet demand.	Ongoing-Vehicles are maintained until the end of recommended useful life per FDOT standards.	Continue to maintain reliable and adequate fleet of ADA-accessible vehicles for demand-response services to meet demand.
	Initiative 1.4	Maintain existing coordination contracts and execute new ones, where feasible, needed, and cost-effective.	Ongoing-Coordination contracts with Advocacy Resource Center, Goodwill, Center for the Blind have been instituted	Continued to maintain existing coordination contracts and though outreach attempt to execute new ones.



**Goal 2: Maximize coordination and efficiency of transportation disadvantaged services with SunTran fixed-route services and private transportation providers to better serve the entire population of Marion County.**

Objectives		Completion Status for 2019–2020	Activities for 2020–2022
Objective 2.1	Comply with 2010 ADA Standards for Accessible Design.	Ongoing- ADA Standards are a part of the annual CTC evaluation and the TDSP updates.	Continue to address ADA compliance as these standards are critical in assisting the TD population
Objective 2.2	Identify/address actual or perceived barriers to coordination in Marion County.	Ongoing- financial considerations, distance, county size, prioritizing trips, inter-county agreements are some of the barriers and are all closely monitored.	Continue coordination between Counties and monitor trips, distances and financial outcomes on a regular basis.
	Initiative 2.1	Advertise SunTran fixed-route system to MT users who potentially are able to use the program.	Ongoing-There is continual education of the SunTran system and their routes and hours on the MT website.
	Initiative 2.2	Work with area employers, schools, hospitals, and other organizations to offer organization-sponsored tickets.	Continue to educate those that are able to utilize the SunTran system. This is a continual dialogue and education process.
		Ongoing – Partnered with medical facilities, school board and other organizations to purchase tickets for riders.	MT attends events with area employers, schools, hospitals, and other organizations to educate and emphasize the purchase tickets for riders.

**Goal 3: Secure additional funding to meet the transportation disadvantaged demand and mobility needs in Marion County.**

Objective		Completion Status for 2019–2020	Activities for 2020–2022
Objective 3.1	Identify and secure necessary federal, state, local, private funding to support coordinated system required to meet demand and identified needs.	Ongoing-Continually identify funding through the 5310, 5311 and TD and locally through the County Commission.	Continue to identify and secure necessary federal, state, local, and private funding to support the coordinated system to meet demand and maintain the TD program.
Objective 3.2	Educate general public and local decision makers on importance of public transportation and the need for local financial support.	Ongoing-MT makes presentations at medical facilities, school boards, faith based groups, and community business leaders to bring awareness of the program and attempt to secure private financial support.	Continue to present and educate the general public and local decision makers on importance of public transportation and need for local/private financial support.
	Initiative 3.1	Participate in school and community events to increase public awareness of TD services.	Partnered with Church of Hope, Community Business Leaders, Dunnellon Health Fair, Rainbow Lakes Estates Advisory Committee, Marion Oaks Community meeting.
			Continue outreach with community, and school events in order to raise public awareness of TD services.

Goal 4: Provide for the most cost-effective transportation services possible.				
Objectives			Completion Status for 2019–2020	Activities for 2020–2022
Objective 4.1:	Maintain annual operating cost per passenger trip under \$30.00 for ambulatory and under \$50.00 for wheelchair.		Currently annual operating costs per passenger trip for ambulatory is \$28.13 and for wheelchair trip is \$48.23.	Continue to maintain trip costs down while assuring the system continues to be efficient, effective and safe.
Objective 4.2	Assess effectiveness and efficiency of transit service delivery every five years.		Ongoing-Annually through the CTC Evaluation and the TDSP updates, the system is looked at as a whole.	This is continual through varying ways, annually at the CTC evaluation and TDSP updates, and every 5 years through the CTC renewal.
Objective 4.3	Reduce duplication of TD services provided in county.		Ongoing-annually and periodic internal processes are analyzed for duplication and efficiency.	Annual reviews along with random and periodic reviews analyzed.
	Initiative 4.1	Maximize multi-loading of vehicle trips on ADA services to reduce cost per trip and maximize efficiency.	Ongoing-MT has instituted a pickup time window of up to 2 hours in advance to maximize efficiency.	Continue to utilize the pickup window and allow the rider to call when ready for return gives the system a more effective process.
	Initiative 4.2	Annually review trip rates to ensure program is sustainable.	Ongoing- Trip rates are reviewed on continual basis and adjusted for accuracy.	Continue to review trip rates periodically, annually, and ensure the program continues to provide the most effective service.
	Initiative 4.3	Encourage Section 5310 grant recipients to participate in coordination of TD services and maximize use of their vehicles.	Ongoing-5310 grant is allocated for purchase of vehicles. Annually there are 5 vehicles purchased to replace older models.	Continue to replace vehicles with no recommended life left and maintain a fleet of vehicles ready to meet demand.

Goal 5: Provide for the most comprehensive transportation services possible to serve all transportation disadvantaged residents of Marion County.				
Objectives			Completion Status for 2019–2020	Activities for 2020–2022
Objective 5.1	Reevaluate transit services for the transportation disadvantaged annually.		Services provided to the transportation disadvantaged are evaluated annually through the TDLCB CTC evaluation process and annual updates to the TDSP.	Annual evaluations will continue along with the processes and procedures to ensure TD services meets demand.
	Initiative 5.1	Maintain a reliable and adequate fleet of vehicles for demand-responsive services	MT maintains and replaces 5 vehicles annually in an effort to maintain an up to date fleet.	Continue to update the fleet with new vehicles replacing older models to remain up to date, able to meet demand and accessibility.
	Initiative 5.2	Provide needed personnel to operate, maintain, administer coordinated system to meet demand and identified needs.	Ongoing-A staff of professionals is maintained in accordance with demand.	Continue to provide needed personnel to operate, maintain, administer coordinated system to meet demand and identified needs.
Objective 5.2	Design, implement, maintain comprehensive survey program to assess community need for transit services.		Surveys are conducted periodically with the riders, annually with the CTC evaluation. Also, there are rider comment cards on MT and TPO website and social media platforms.	Continue to provide availability for consumer input in order to assess and fine tune the TD program to meet community needs.

**Goal 6: Deliver a safe and high quality transit experience to the customer.**

Objectives			Completion Status for 2019–2020	Activities for 2020–2022
Objective 6.1	Monitor service quality to meet or exceed 90% on-time performance goal for paratransit service.		Ongoing-MT has a software system that ensures performance standard is maintained.	Continue to monitor service quality and meet or exceed 90% on-time performance goals.
Objective 6.2	Maintain no-show/same day cancellation standard.		There is a strictly adhered to no-show policy in place. Repeat offenders are sent a letter and/or phone call.	Continue work to maintain no-show policy and adhere to parameters of the policy in order to reduce no-show/same day cancellations.
Objective 6.3	Ensure that services provided in safe and secure manner in accordance with CTD and FDOT standards and/or recommendations.		Ongoing-MT has safety parameters and safety measures in place as well as periodic safety checks.	Continue to maintain all safety measures and checks in order to ensure that services are provided in a safe and secure fashion.
	Initiative 6.1	Make customer comment cards available to patrons.	Ongoing-comments can be made on MT website, social media platforms and during rider surveys.	Continual effort will be made to allow patrons, to input their comments through every possible avenue available.
	Initiative 6.2	Perform scheduled maintenance activities for all transit vehicles.	Ongoing-MT adheres to FDOT's 6000 mile preventative maintenance policy, or any issues arising from the daily inspection forms.	Continue daily inspections in order to extract issues that may be lurking and adherence to FDOT's maintenance policy.

## Implementation Plan

### Five-Year Transportation Disadvantaged Program

The five-year Implementation Plan for the Marion County TDSP was developed from the goals, objectives, and strategies outlined in the prior section. The implementation scheduled will be reviewed and updated on an annual basis. Table 1-16 presents the strategies, responsible party(ies) for accomplishment, the anticipated source of action, and any known costs associated with the Implementation Plan.

The Implementation Plan, focuses on highlighting the ongoing and potential new strategies that would need to be deployed to meet some of the transportation and coordination needs identified through the TDSP planning process. Recurrent strategies that are considered routine operational planning efforts for the coordinated system have been included in the Goals and Objectives section of this TDSP.



**Table 1-16: Implementation Schedule**

Service Improvement	Measures	Responsible Entity
Year 5		
Maintain adequate personnel to staff administration and operations of demand-response services.	Maintain minimum number of staff required to maintain levels of service	MT
Work toward increasing number of passenger trips per vehicle.	Multi-load and continue to maintain and adhere to the parameters of the no-show policy.	MT
Identify and address any actual or perceived barriers to coordination in Marion County.	Develop summary of barriers to using fixed-route, with potential solutions. Continue coordination between Counties and monitor trips, distances and financial outcomes	MT, Ocala Marion TPO
Bring appropriate social service organizations into coordinated system.	Increase number of coordinated Contractors and organizations through social networking.	Ocala Marion TPO
Maximize multi-loading of vehicle trips on ADA services to reduce cost per trip and maximize efficiency.	Work to decrease in cost per trip and number of trip denials and/or no-shows.	MT
Perform scheduled maintenance activities for all transit vehicles.	Maintenance activities to be completed in accordance with FDOT preventive maintenance requirements	MT
Identify and secure necessary federal, state, local, private funding to support coordinated system required to meet demand and identified needs.	System to Identify new grants or other funding sources that can be applied to coordinated system	MT
Purchase and use more advanced scheduling software to facilitate multi-loading of trips on demand-responsive service and train schedulers/dispatchers to use software.	Purchase new and innovative IT/Software equipment	MT
Use volunteers to provide travel training, educate and assist older adults with use of services.	Seek participants in volunteer program	MT
Maintain existing coordination contracts and execute new ones, where feasible, needed, and cost-effective.	Increase in number of coordination contractors	MT
Annually review trip rates to ensure program is sustainable.	Complete annual FCTD rate justification worksheets and periodic analyzation	MT
Assess effectiveness and efficiency of transit service delivery in coordination with TDSP updates.	Complete trend and peer analysis annually	MT, Ocala Marion TPO
Educate paratransit riders about policies and continue to inform riders of program choices.	Work towards continued education, provide brochures with policy and procedures regularly, continue to provide information on website and social media platforms	MT

## Section 2: Service Plan

This section of the TDSP addresses the operational elements of Marion Transit (MT) of how, when, and what services are available to TD eligible persons and the manner in which they use them. Although services are subject to change, the information contained in this section is based on the current operational policies and procedures that guide service delivery.

### Operations Element

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

### Types, Hours, and Days of Service

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

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

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

Office hours are 8:00 am – 5:00 pm Monday through Friday, excluding holidays. Passengers are requested to make appointments with pick-up times between 9:00 am and 2:00 pm so they can be picked up and delivered prior to their scheduled appointment time and returned home prior to the end of MT service hours. This may require they are ready up to 2 hours before their scheduled appointment time for pick up. Appointments for persons residing in outlying areas should be made between 10:00 am and 1:00 pm due to travel time needed to make appointments. Note: Those residents in outlying areas may need to be ready for pick up 3 hours in advance due to travel distances.

Trips may be scheduled as early as 2 weeks in advance, but not later than \*72 hours before their appointment time. Recurring trips, such as dialysis or therapy, scheduled on an ongoing basis may be granted. Reservations will work with the rider to set this type of schedule up. \*Approved ADA Complementary Paratransit riders are able to reserve trips by 5:00 pm the day before their appointment.

In total, 43 paratransit cutaway buses (100%) are all ADA equipped for ambulatory and wheelchair riders

set up in various configurations. MT does not have the ability to accommodate stretchers.

## Accessing Services

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

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

## Trip Eligibility

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

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

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

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

## Trip Prioritization

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

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

## Other Accessibility Policies/Procedures

MT service is origin to destination (door to door). It is MT policy that the driver will assist riders requiring

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

Driver's will not assist a wheelchair rider down more than one step and, in many cases will not/cannot push a wheelchair through loose sand, gravel or mud. The minimum clear width for single wheelchair passage shall be 32 inches (815 mm) at a point for a maximum length of 24 inches and 36 inches (915 mm) continuously. Lift capacity (chair & rider combined) may not exceed the lift maximum limits usually 800 or 1000 pounds depending on the bus. Note: Riders may be required to provide documentation they do not exceed the limits prior to riding AND must let reservations know if the weight exceeds 800 pounds so they are scheduled on a bus with a 1000-pound capacity lift.

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

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

To cancel an appointment, riders must call the office and advise a reservationist of their name and date of travel as soon as they know the trip is no longer needed. After hours riders may leave a recorded message on the reservation line to notify us of their decision to cancel. MT also has an automated notification system that calls the riders the day before their scheduled trip to remind them. This system also allows for the rider to cancel by pressing a designated digit on their phone. Riders are encouraged to cancel as soon as possible so that others can ride. Last minute cancellations keep others from using the system.

MT has a "no-show" policy in place. If a rider is not available for transportation within five minutes after the bus arrives, including no response at the door or refusal of service at the door, the rider is considered a no-show. In the event of a no-show, the driver radio's dispatch and every effort is made to contact the rider. If they cannot be contacted, the driver leaves a no-show notification notice on the doorknob. This notice reminds the rider that repeated no-shows may result in the rider being suspended from using MT. Note: Review of cancellations for a pattern or practice of late cancellations and/or no-shows by the rider will be clearly identified before sanctions are imposed. If any sanctions are imposed the rider may appeal them.

Escorts are limited to one per passenger, as deemed medically necessary. Escorts must be at least age 16. Dependent children may be transported if the medical appointment is for the child. Children under age 5 or weighing less than 40 pounds must be in an approved car seat either provided by the rider or pre-arranged with reservations. The driver is responsible for properly securing the child seat on the bus and ensuring the child is properly secured for the trip.

The scheduler determines how many buses may be required to perform the trips scheduled as well as capacity and number of wheelchairs vs. ambulatory passengers onboard at one time while considering the most efficient use of vehicles for getting riders to their appointments.

Return trips are monitored by dispatch depending on when clients come ready by calling in to dispatch

after their appointment is complete. Available bus is then dispatched to return the rider to their return destination location to complete the round trip.

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

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

## Transportation Operators and Coordination Contractors

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

Table 2-1: Agreements with Outside Transportation Agencies

NAME	CONTACT	ADDRESS	PHONE	AGREEMENT TYPE
Advocacy Resource Center Marion, Inc.	Frank Sofia, CEO	2800 SE Maricamp Rd., Ocala, FL	352-387-2210	Coordination Agreement
Florida Center for the Blind, Inc.	Anissa Pierboni, CEO	1411 NE 22 <sup>nd</sup> Avenue, Ocala, FL	352-873-4700	Coordination Agreement
Goodwill Industries Suncoast, Inc.	Kris Rawson, VP	10596 Gandy Blvd., St. Petersburg, FL	727-481-3944	Coordination Agreement

## Public Transit Utilization

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

Note: All requests for MT transportation services with trip origins and destinations within the  $\frac{3}{4}$  mile from a SunTran fixed bus route are directed to use the fixed-route bus system. All SunTran vehicles are ADA accessible. To ensure that all citizens of Marion County are provided with equal access to public transportation, SunTran undergoes ADA certification; contracts with the Center for Independent Living of North Central Florida to assist with the rider certification/eligibility process.

## Vehicle Inventory

To properly operate Transportation Disadvantaged (TD) services, MT maintains a fleet of approximately 43 cutaway buses in various seating configurations of less than 15 passengers each for ambulatory and wheelchair riders. All of our fleet is ADA accessible equipped some with wheelchair lifts having a capacity of up to 1000 pounds. Several "spare" vehicles are included within this fleet for when vehicles are out of service for repairs or inspections. Each in-service bus is inspected following a mandatory pre and post-trip inspection by drivers. Safety issues found can immediately place a bus out-of-service until repaired.

Buses have a camera system capable of providing live feed and recording both outside and inside each



bus. This live feed/recording camera system provides another level of passenger safety. They are also equipped with tablets to communicate with dispatch as well as tracking trips, passengers and any special needs. Driver's have two-way communications with dispatch with the capability of calling 911 for emergencies. Inventory of MT vehicles is provided in Table 2-2.

**Table 2-2: MT Vehicle Inventory (2016)**

MT#	Year	Make	Length	Lift-or Ramp-Equipped	Capacity (seats/wheelchair spaces)	Current Use
1	2009	Chevrolet	24' bus	Yes	14	Daily use
2	2009	Chevrolet	24' bus	Yes, lift	12	Daily use
3	2009	Chevrolet	24' bus	Yes, lift	12	Daily use
4	2011	Chevrolet	24' bus	Yes, lift	12	Daily use
5	2011	Chevrolet	24' bus	Yes, lift	10	Daily use
6	2011	Chevrolet	24' bus	Yes, lift	12	Daily use
7	2011	Chevrolet	24' bus	Yes, lift	12	Daily use
8	2011	Chevrolet	24' bus	Yes, lift	10	Daily use
9	2011	Chevrolet	24' bus	Yes, lift	10	Daily use
10	2011	Chevrolet	24' bus	Yes, lift	8	Daily use
11	2012	Chevrolet	23' bus	Yes, lift	12	Daily use
12	2012	Chevrolet	23' bus	Yes, lift	13	Daily use
13	2012	Chevrolet	23' bus	Yes, lift	12	Daily use
14	2012	Chevrolet	23' bus	Yes, lift	12	Daily use
15	2013	Chevrolet	23' bus	Yes, lift	10	Daily use
16	2013	Chevrolet	23' bus	Yes, lift	10	Daily use
17	2013	Chevrolet	23' bus	Yes, lift	10	Daily use
18	2013	Chevrolet	23' bus	Yes, lift	10	Daily use
19	2013	Chevrolet	23' bus	Yes, lift	10	Daily use
20	2013	Chevrolet	23' bus	Yes, lift	10	Daily use
21	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
22	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
23	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
24	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
25	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
26	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
27	2014	Chevrolet	23' bus	Yes, lift	10	Daily use
28	2015	Ford E-450	23' bus	Yes, lift	10	Daily use
29	2015	Ford E-450	23' bus	Yes, lift	10	Daily use
30	2016	Ford E-450	23' bus	Yes, lift	10	Daily use
31	2016	Ford E-450	23' bus	Yes, lift	10	Daily use
32	2016	Ford E-450	23' bus	Yes, lift	10	Daily use
33	2016	Ford E-450	23' bus	Yes, lift	10	Daily use
34	2016	Ford E-450	23' bus	Yes, lift	10	Daily use
35	2006	Chevrolet	24' bus	Yes, lift	14	Spare
36	2006	Chevrolet	24' bus	Yes, lift	14	Spare
37	2006	Chevrolet	24' bus	Yes, lift	12	Spare
38	2007	Chevrolet	24' bus	Yes, lift	14	Spare
39	2007	Chevrolet	24' bus	Yes, lift	14	Spare
40	2007	Chevrolet	24' bus	Yes, lift	12	Spare
41	2007	Chevrolet	24' bus	Yes, lift	14	Spare
42	2009	Chevrolet	24' bus	Yes, lift	12	Spare
43	2012	Dodge	N/A	Yes, ramp	6	Spare

## System Safety Program Plan (SSPP) Certification

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

## Inter-County Services

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

## Emergency Preparedness and Response

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

## Marketing

Marketing is focused on getting public transportation to those who require the service that MT provides and is done using brochures, local newspapers, presenting at community meetings and on our website ([www.mariontransit.org](http://www.mariontransit.org)). All our buses are marked with our name and phone number. Our newer fleet include the words: “Call – Connect – Ride” and phone number 352-620-3071 in bold letters.

## Service Standards

MT Service Standards established to provide oversight of the coordinated system are shown in Table 2-3.

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

## Local Complaint and Grievance Procedures/Process

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

## Section 3: Quality Assurance

### Monitoring and Evaluation Process

#### CTC Monitoring Procedures for Operators and Coordination Contractors

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

#### CTC Evaluation

In accordance with the FCTD *CTC Evaluation Workbook*, TDLCB conducts an annual evaluation of the Marion County CTC to evaluate CTC performance over the previous year. In addition, the FCTD conducts triennial Quality Assurance and Program Evaluation (QAPE) reviews as part of its monitoring process. The QAPE review is conducted by an independent auditor on behalf of the FCTD and in compliance with the detailed tasks listed in the FCTD's monitoring tool. Using a series of interviews and system record inspections, the QAPE auditor evaluates the system based on FCTD standards, local standards, and ADA requirements.

### Cost/Revenue Allocation and Rate Structure Justification

The rate structure is the same for all TD trips within Marion County. The TD rates presented in Table 3-1 were determined using FCTD standardized rate model spreadsheets, which consider past and projected costs and revenues associated with MT transportation services. The rate model is updated annually by MT to reflect changes in revenues and expenditures. The rates calculated using the FCTD model were approved by the TDLCB and the FCTD. The TDLCB will continue to monitor the rates on an ongoing basis to determine when (and if) these rates need to be modified due to changes in the cost of delivery of trips.

The rate model worksheets are presented in Appendix C, and the existing MT fare structure is shown in Table 3-2.

**Table 3-1: FCTD Calculated Rates**

<b>FCTD Calculated Rates</b>
<i>Ambulatory (and Escort)</i>
Trip Charge: \$ 29.08
<i>Wheelchair</i>
Trip Charge: \$49.85
<i>Stretcher (Contracted)*</i>
*Senior Services does not offer stretcher services.

**Table 3-2: Marion County Fare Structure**

<b>Fare Description</b>	<b>Fare Amount</b>
<b>SunTran One-Way Fares</b>	
Adult Regular Fare	\$1.50
Youth/Student Fare	\$1.10
Older Adult/Person with Disability Fare	\$0.75
Medicare Card Holder Fare	\$0.75
Veteran Fare	\$0.75
Children under Age 5 (when accompanied by paying adult)	Free
<b>SunTran Monthly Pass Cost</b>	
Regular Monthly Pass	\$45.00
Youth/Student Monthly Pass	\$34.00
Older Adult/Person with Disability Monthly Pass	\$23.00
<b>MT One-Way Fares</b>	
Depends on Locations and Eligibility	\$2.00



## Appendix A: Summary of Existing Plans and Documents

## Review of Plans and Documents

The following local plans were reviewed to understand current transit policies and plans with potential implications for MT services and to help the TDSP become a plan that will guide local transportation decisionmaking:

- MT FCTD Annual Performance Report 2011–2015
- FCTD Annual Performance Report
- SunTran Comprehensive Operations Analysis (COA)
- Ocala/Marion County 2013–2022 Transit Development Plan (TDP) Update
- Ocala/Marion County 2018 Transportation Disadvantaged Service Plan (TDSP) Update
- Ocala/Marion TPO 2040 Long Range Transportation Plan
- Ocala/Marion TPO 2035 Long Range Transportation Plan
- Ocala 2035 Vision
- Marion County Comprehensive Plan
- City of Ocala Comprehensive Plan

### MT FCTD Annual Performance Report for Marion County (2011-2015)

The annual TD performance report prepared by the FCTD was reviewed for Marion County. This report provides an overview of the operating environment, the CTC, and other information related to the TD program in Marion County. Statistics reported by MT in its Annual Operations Report are also provided in the FCTD Annual Performance Report, including service statistics, passenger trip information, a financial summary, and a graphical summary of performance indicators. This information was used to complete the trend analysis presented in the Development Plan.

### Annual Operations Report for Marion County

An Annual Operations Report (AOR) is submitted to the FCTD. The AOR for fiscal year 2019 were reviewed for this TDSP update effort and was compiled by MT. Information submitted in the AOR is used to develop the Marion County section of the Annual Performance Report produced by the FCTD, as discussed previously.

### SunTran Comprehensive Operations Analysis (COA) (2016)

An assessment of SunTran service was necessary to ensure that it continues to meet the needs of the community as the city grows and changes. A COA identifies opportunities for improving the productivity and efficiency of a transit agency's public transportation services. For a COA, a detailed analysis of specific operating characteristics of the transit service is conducted, including ridership by stop and time of day, among others. The 2016 COA established and evaluated a set of system alternatives. In addition to route alignment changes, recommendations to improve the service in the form of short-term and long-term implementation plans were also presented. These recommendations are listed below.

### **Short-Term Implementation**

- Increase Green Route and Orange Route frequencies to 2 buses per hour
- Adjust current/proposed Purple Route alignment for one-way loop
- Focus on ADA connections between stops and medical uses
- Discontinue last Red Route trip

### **Long-Term Implementation**

- Convert Red Route to Flex Zone

## **Ocala/Marion TPO 2040 Long Range Transportation Plan**

The 2040 Long Range Transportation Plan (LRTP) is the fundamental planning document for the long-range transportation system development in Marion County. The project included in the LRTP will use federal and State funds and may be pursued by the TPO over the next 25 years. The plan must be “cost feasible”; therefore, financial resources that will cover the cost of the projects must be identified. The TPO has assumed local gas tax collections and transportation impact fees as a portion of the projected revenues included in the LRTP Cost Feasible Plan. Service improvements were considered for all existing SunTran routes that would reduce the headway to 30 minutes. However, due to limited funding, service improvements included in the Cost Feasible Plan are limited to reducing the frequency to 45 minutes on the Blue, Green, Orange, and Purple routes. The plan also includes continued operation of the existing fixed route and ADA service and \$2.41 million for ADA bus shelter accessibility improvements.

## **Ocala/Marion County 2013–2022 TDP Update**

As part of the system’s transit planning process, the TPO is required to complete a major update of its TDP every five years. The most recent major update of the TDP was completed in 2012, providing a strategic guide for public transportation in Marion County for a 10-year period, FY 2013–FY 2022. This TDP assessed the performance of existing services, reviewed demographic and travel behavior characteristics of the service area, summarized local transit policies, developed proposed transit enhancements, and prepared a 10-year implementation plan for fixed-route transit services. The TDP concluded a 10-year financial plan (projected costs and revenue through FY 2016) that provided guidance for SunTran during and beyond the 10-year planning horizon, along with the capital and operating costs and revenues required to successfully execute the implementation plan. The TDP was developed to meet the TDP requirements and plan for Marion County’s 10-year vision for transit. The goals and objectives that were developed to guide transit service in Marion County over the 10-year planning period are presented below.

### **Goal 1: Increase ridership and accessibility for current and potential transit users.**

- Objective 1.1: Increase the fixed-route service by 25% by 2017.
- Objective 1.2: Decrease passenger fixed-route access time by 25% by 2017.
- Objective 1.3: Increase bus pass sales by 100% by 2020.
- Objective 1.4: Increase ridership by 50% by 2020.

**Goal 2: Maximize coordination and efficiency of transportation services to better serve the entire population of Marion County, including the transportation-disadvantaged, social service organizations, Medicaid-sponsored transportation service, and inter-county commuters.**

- Objective 2.1: Assess Marion Transit ridership every five years for areas of possible transfers to fixed-route services.
- Objective 2.2: Ensure seamless coordination between SunTran services and private transportation systems by 2017.
- Objective 2.3: Ensure coordination with land use policies and local jurisdictions.
- Objective 2.4: Provide connections to neighboring counties by 2019. Work with Lake and Sumter counties to coordinate inter-county service.

**Goal 3: Provide for the most cost-effective transportation services possible.**

- Objective 3.1: Hold maintenance costs at FY 2011 levels, or reduce costs over time. Minimize any increase in maintenance costs. Minimize costs required to operate and administer transportation services.
- Objective 3.2: Reduce annual operating costs per revenue mile by 15%.
- Objective 3.3: Maintain an operation ratio (farebox/total operating expense) of at least 15% for fixed-route and demand response service.
- Objective 3.4: Maintain financial support of transit services consistent with the financial plan in the Major Update for the TDP (2013–2022).
- Objective 3.5: Assess the effectiveness and efficiency of transit service delivery every five years.

**Goal 4: Promote and provide for the necessary expansion of the coordinated transportation system necessary to meet the future needs of the general public, including the transportation disadvantaged.**

- Objective 4.1: Annually review the opportunities for additional services for future implementation including the following:
  - Explore opportunities for implementing express bus service along high-density corridors in suburban areas.
  - Study the demand for inter-county transit.
  - Determine the feasibility of implementing a park-and-ride program in Marion County.
  - Study the feasibility of growth in transit services to meet the needs of the general public, including:
    - Identify transit needs for the general public.
    - Identify potential transit demand.
    - Compare needs, demand, service costs, and potential funding to determine feasibility.
- Objective 4.2: Meet the future needs and demand of users for both services and amenities described in the Major Update to the TDP (2013–2022).

## Ocala/Marion County 2020 TDSP Update

The Ocala/Marion 2018 TDSP update was completed previously in 2013. The TDSP is used by the CTC and the LCB to maintain and/or improve transportation services for TD persons and to serve as a framework for performance evaluation. The TDSP is updated annually and submitted to the FCTD for final approval. Marion County services under the TD program are provided funding from State TD funds, local revenues, and private sources. MT has been designated as the Marion County CTC for all non-emergency medical transportation and for those needing wheelchairs or other assistance. MT operates transportation services under the name Marion Transit (MT). MT provides door-to-door paratransit services to meet numerous transportation needs for medical, life sustaining, educational, work, business, and recreational activities for Marion County's TD citizens as well as members of other program recipients in Marion County. The goals and objectives that were developed as part of the TDSP are described below.

### **Goal 1: Provide increased mobility and ridership using Marion Transit, contract providers, and SunTran to meet the demand and mobility needs of the transportation disadvantaged in Marion County.**

- Objective 1.1: Provide transit or demand-response services to 10% of TD population by 2020.
- Objective 1.2: Provide ADA-eligible population with paratransit service comparable to service provided by fixed- route system.
- Objective 1.3: Comply with all applicable ADA requirements.
- Objective 1.4: Never decline service to any transportation disadvantaged individual due to lack of availability of ADA-accessible vehicles.

### **Goal 2: Maximize coordination and efficiency of transportation disadvantaged services with SunTran fixed-route services and private transportation providers to better serve the entire population of Marion County.**

- Objective 2.1: Comply with 2010 ADA Standards for Accessible Design.
- Objective 2.2: Identify/address actual or perceived barriers to coordination in Marion County.

### **Goal 3: Secure additional funding to meet the transportation disadvantaged demand and mobility needs in Marion County**

- Objective 3.1: Identify and secure necessary federal, state, local, private funding to support coordinated system required to meet demand and identified needs.
- Objective 3.2: Educate general public and local decision makers on importance of public transportation and the need for local financial support.

**Goal 4: Provide for the most cost-effective transportation services possible.**

- Objective 4.1: Maintain annual operating cost per passenger trip under \$30.00 for ambulatory and under \$50.00 for wheelchair.
- Objective 4.2: Assess effectiveness and efficiency of transit service delivery every five years.
- Objective 4.3: Reduce duplication of TD services provided in county.

**Goal 5: Provide for the most comprehensive transportation services possible to serve all transportation disadvantaged residents of Marion County.**

- Objective 5.1: Reevaluate transit services for the transportation disadvantaged annually
- Objective 5.2: Design, implement, maintain comprehensive survey program to assess community need for transit services.

**Goal 6: Deliver a safe and high quality transit experience to the customer.**

- Objective 6.1: Monitor service quality to meet or exceed 90% on-time performance goal for paratransit service.
- Objective 6.2: Maintain no-show/same day cancellation standard.
- Objective 6.3: Ensure that services provided in safe and secure manner in accordance with CTD and FDOT standards and/or recommendations.

An implementation plan was also developed to phase potential service improvements.

**Ocala/Marion County 2035 LRTP Update**

The 2035 LRTP is the fundamental planning document for long-range transportation system development in Marion County. The projects included in the LRTP will use federal and state funds and may be pursued by the TPO over the next 25 years. The plan must be “cost feasible”; therefore, financial resources that will cover the cost of the projects must be identified. The TPO has assumed local gas tax collections and impact fees as a portion of the projected revenues included in the LRTP Cost Feasible Plan. The LRTP update included an extensive public involvement process, including a Strings and Ribbons program that offered citizens an opportunity to learn about the transportation planning process and how projects are developed and funded. The process included interactive, hands-on activities in which participants purchase transportation improvements that they think are important to the overall transportation system over the next 25 years. Transit projects that are included in the 2035 LRTP Needs Assessment are listed below and depicted on Map A-1:



- Expanded bus service to west of Ocala to CR 484 and SR 200 intersection and south to Sumter County line.
- Expanded bus service to east of Ocala past SR 35 and south to Belleview and Sumter County line.
- Dedicated bus lane along US 27/US 441.
- Dedicated bus lane along CR 464.
- Passenger rail from Ocala to Sumter County line.
- Light rail from Ocala to CR 464 (east of Belleview).

## Ocala 2035 Vision

The Ocala 2035 Vision was developed to describe how the community wants the city to look and function in the future. As part of the development process and to achieve greater public participation, the City of Ocala formed the Community Form & Design Visioning Leadership Group, comprising a diverse group of citizens who were responsible for actively encouraging other citizens to participate in the vision process. The group also evaluated all public comments and feedback received during the public meetings and prepared the final Ocala 2035 Vision recommendations and implementation strategies. The Ocala 2035 Vision provides a roadmap for the future, built upon community consensus to promote continued support and implementation over time. The recommendations of the Ocala 2035 Vision will be used to establish priorities for future decision making. Transit and mobility-related strategies from the Ocala 2035 Vision are listed below by design topic.

## General Strategies

- Conduct a study to evaluate redevelopment potential of West Ocala area (Downtown to I-75, SR 200 north to City limits).
  - Create Community Redevelopment Areas (CRAs) and/or other programs to promote revitalization of sub-areas within West Ocala. (Year 2011)
- Redevelop the west side of Pine Avenue as High Intensity to visually, physically, socially, and economically connect east and west. (Years 2012 and ongoing)
- Conduct a study to evaluate redevelopment potential of the Tusawilla Park area.
  - Create CRAs and/or other programs to promote revitalization. (Year 2011)
- Establish joint planning areas with Marion County to promote the Vision as it relates to areas adjacent to the City limits and implementation of regional mobility efforts. (Year 2011)

## Urban Form & Open Space Strategies

- Implement recommendations of the Recreation and Parks Master Plan to identify, acquire, and program new parks, trails, and open spaces in the city. Identify, reserve, and/or acquire right-of-way needed to create a connected park system. (Year 2011 and ongoing)
- Maintain an inventory of vacant or underutilized properties with existing zoning or future land use classifications that will support mixed use development. (Year 2012 and ongoing)

- Maintain an inventory of vacant or underutilized properties with development potential adjacent to or within one-quarter mile of a transit corridor depicted on the vision plan. (Year 2012 and ongoing)

### Building & Site Design Strategies

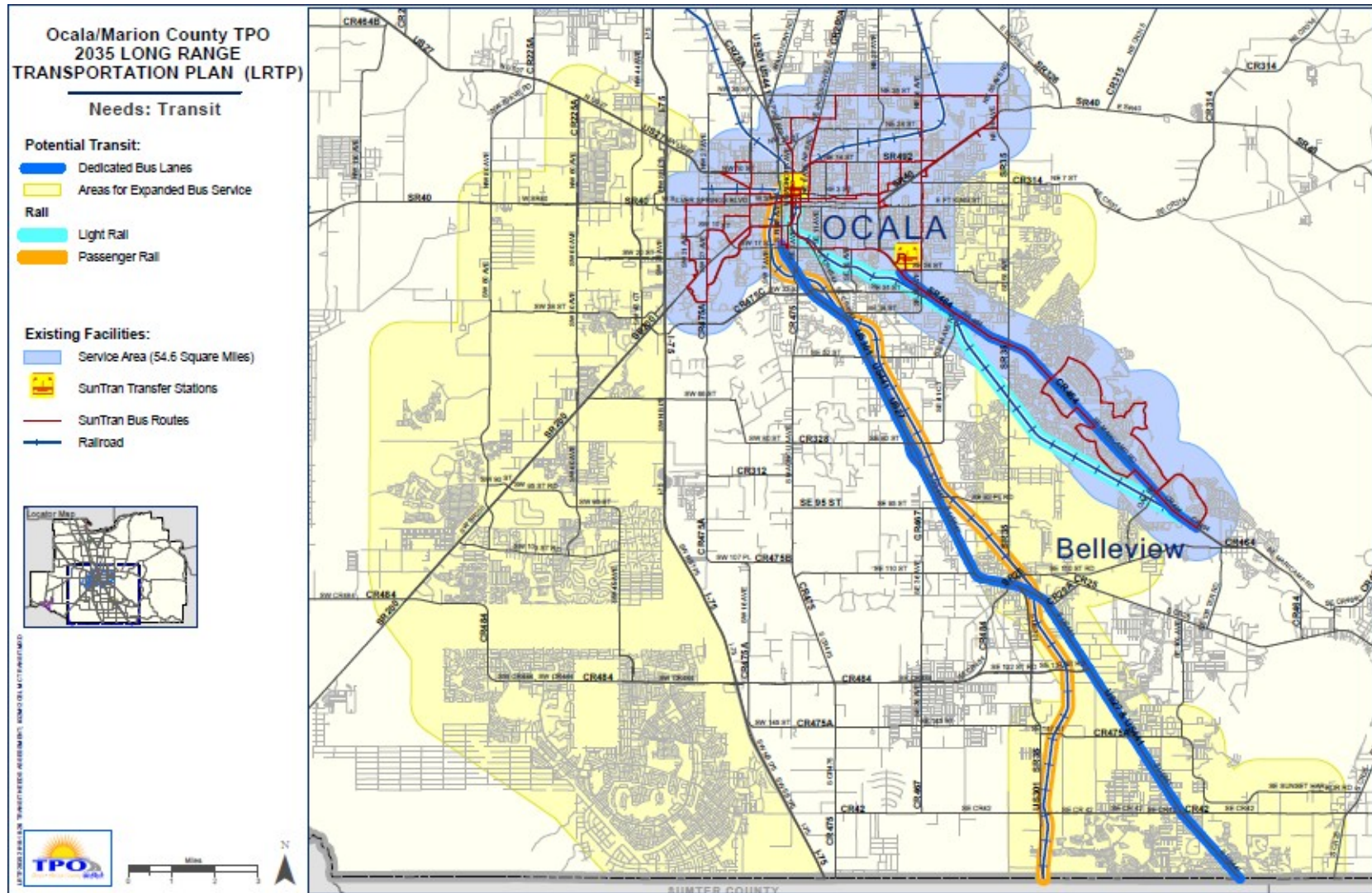
- Create an incentive program to encourage infill, development, or redevelopment. (Years 2011–2015)

### Mobility & Connectivity Strategies

- Develop Streetscape Master Plans, including landscape and hardscape details, to improve visual aesthetics of city gateway corridors, including SR 200, SR 40, US 27, and US 441. Coordinate with FDOT and Marion County to ensure that all applicable transportation design criteria are met. (Years 2012–2015)
- Provide for an interconnected street system to relieve and distribute traffic volumes as an alternative to roadway widening. (Year 2011 and ongoing)
- Require Complete Street evaluations for the viability of multimodal transportation and desirable visual aesthetics. (Year 2011)
- Establish a citywide sidewalk improvement program to provide the pedestrian connectivity desired in the vision.
  - Identify areas of the city that do not have sidewalks or have disconnected sidewalk links. (Years 2011–2015)
  - Prioritize sidewalk program to maximize connectivity and support neighborhood sub-area plans and Parks Master Plan. (Years 2011–2015)
  - Acquire easements for sidewalks where they do not exist. (Years 2011–2015)
  - Include sidewalk improvements in the annual Capital Improvement Program. (Years 2011–2015)
- Identify, reserve, and/or acquire transit corridor right-of-way for regional transit system connections to Belleview, Silver Springs Shores, Dunnellon, the Villages, Gainesville, Orlando, and Jacksonville. (Years 2011–2035)
- Identify, reserve, and/or acquire transit corridor right-of-way for transit system connections in the urban core. (Years 2011–2015)
- Provide trolley service that connects the North Magnolia area, Downtown, and the hospital district. (Years 2016–2035)
- Provide trolley service that connects West Ocala to downtown. (Years 2016–2035)
- Establish minimum residential densities and commercial intensities to support the use of public transportation along Complete Streets and Transit Corridors depicted on the Vision map. Incorporate with future mobility plans. (Year 2011)
- Evaluate opportunities to reestablish passenger rail service connected to the national Amtrak rail network. (Years 2011–2016)

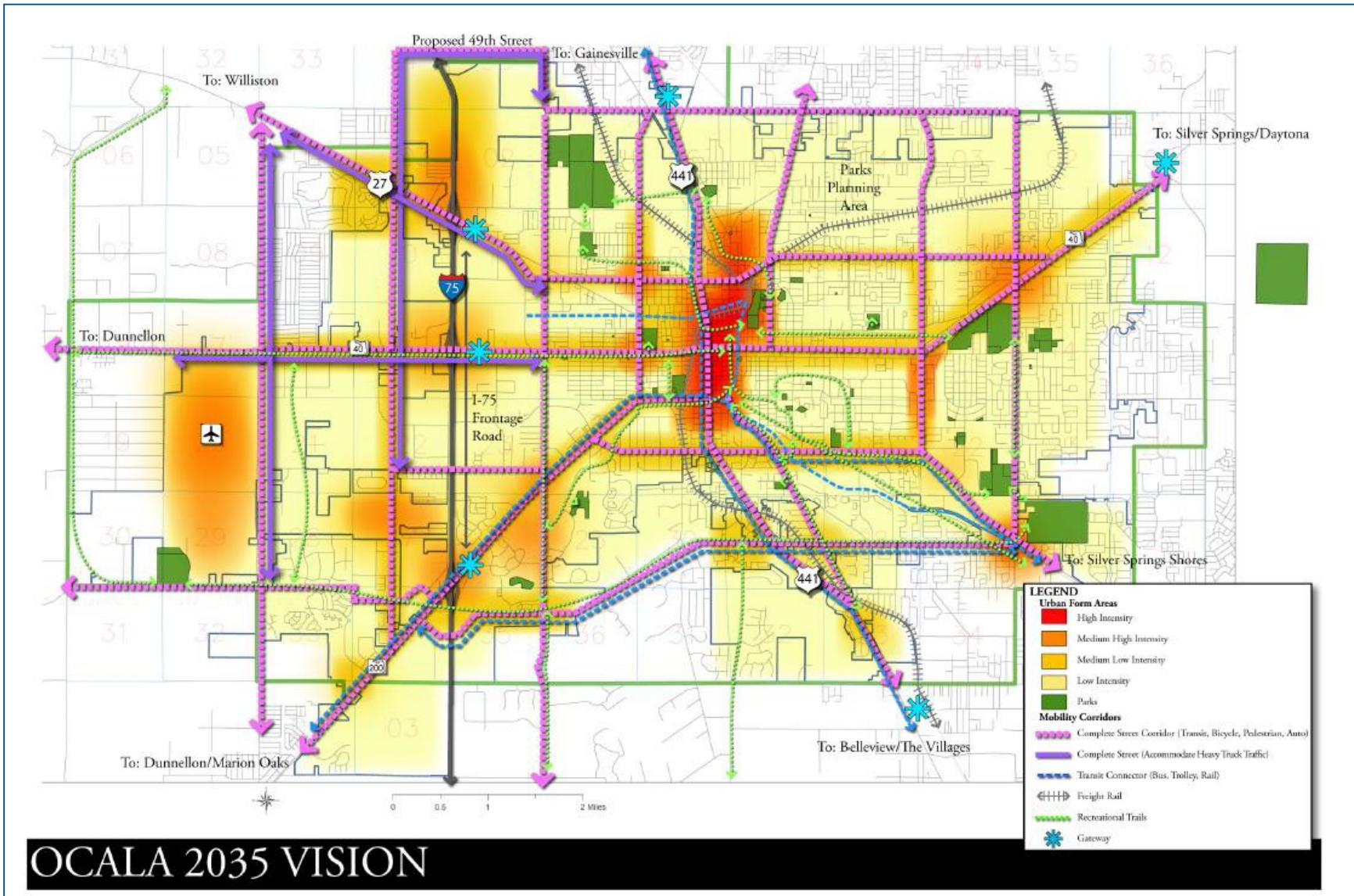
The 2035 Vision Plan provides a map with an overview of the ideas presented by public input and the Leadership Group. Map A-2 shows Urban Form Areas and Mobility Corridors.

Map A-1: Ocala/Marion County TPO 2035 Long Range Transportation Plan (LRTP) – Needs: Transit





Map A-2: Ocala 2035 Vision



## Marion County Comprehensive Plan

Marion County has goals, objectives, and policies within its Transportation and Land Use Elements of the County comprehensive plan relative to the promotion and support of transit use. The goals of the Transportation Element is to develop a balanced and sustainable transportation system improving access and travel choices through enhancement of roads, public transit, bicycle, and pedestrian systems, aviation and multimodal facilities. Mixed-use projects and development patterns that promote shorter trip lengths and generate fewer vehicle miles traveled must be encouraged and promoted by the County through the Future Land Use Element and Capital Improvements Element (Policy 1A.1.7).

All new development and redevelopment within the Urban Growth Boundary (UGB) will require greenhouse gas (GHG) reduction measures. Pursuant to Policy 1A.1.8, the following strategies will be implemented to ensure compatible uses that promote shorter trip lengths and generate fewer vehicle miles per capita by February 10, 2012.

- Require interconnected developments for vehicular and pedestrian connection between developments.
- Use access management standards to reduce Vehicle Miles Traveled (VMT).
- Allow innovative site designs and roadway configurations to minimize the number of lane-miles needed while maximizing access.
- Minimize gated communities, which prevent existing or future roadway interconnections.
- Promote use of public transit by requiring development along transit corridors and routes to accommodate mass transit and provide for park-n-ride areas, sheltered bus/rail stops, and bus turnouts, as appropriate.
- Discourage the use of single-occupancy vehicles by adopting reduced parking requirements and by limiting roadway capacity on key roads, as appropriate, as a disincentive to automobile travel.
- Protect existing railroad corridors and facilitate the location of industrial and commercial employment centers along those corridors, and encourage increased use of rail transport by industrial and commercial enterprises.
- Encourage walking and bicycle use by requiring bikeways, trails, and pedestrian paths for development with the UGB.

The County also has an objective to ensure adequate rights-of-way for roadway, mass transit, bicycle and pedestrian pathways, and protect existing and future rights-of-way from building encroachment. To meet this objective, the County has developed policies for minimum right-of-way requirements in the Land Development Code (LCD) and rights-of-way acquisition (Policies 1A.2.1 through 1A.2.7). Where site and location analysis determines that there is a need, the County may provide or require the provision of bicycle and/or pedestrian ways and/or other alternative modes of transportation through the LDC to connect residential, recreational, schools, and commercial areas internally and to adjacent properties unless such facilities would create a safety hazard.

Policy 1A.3.3 requires new residential and non-residential development and redevelopment projects generating more than 1,000 net new trips accessing arterial or collector roadways to enhance community health, reduce GHG emissions, increase connectivity, and minimize trips on major roadways through the provision of the following facilities,

### Residential Development

- Deeding of land or conveyance of required easements generally parallel to a property's frontage of residential development located on arterial or collector roadways to the county, as needed, for the construction of public sidewalks, bus turn-out facilities, and/or bus shelters.
- Interconnected local streets, drive accesses, pedestrian networks and bicycle networks that provide access between land uses (including non-residential uses) and direct routes to transit to reduce congestion. These projects include, but are not limited to State and County arterials and collectors. Developers may deed land for right-of-way and/or construct roadway extensions to County specifications.

### Non-Residential Development

- Deeding of land or conveyance of required easements generally parallel to a property's frontage of non-residential development located on arterial or collector roadways to the county, as needed, for the construction of public sidewalks, bus turn-out facilities, and/or bus shelters.
- Development of, or participation in, a transportation demand management (TDM) program that provides funding or incentives for transportation modes other than single occupant vehicle to reduce VMT. Such TDM programs shall utilize a methodology approved by the County and may require performance monitoring and reporting.

Marion County's Mass Transit Sub-Element goal is to coordinate with the TPO to undertake action to serve TD persons with an efficient mass transit system; provide for the development of a rational and integrated multi-modal transportation system; provide management support to coordinate all components of the mass transit service system and relevant comprehensive plan elements; and preserve options to promote the development of long-range transit alternatives.

In Objective 1b.7 and its implementing policies, the County's objective is to have all areas within an UGB identified in the Future Transportation Corridor Map served by transit. Within an UGB availability of transit facilities must be one of the criteria used to evaluate proposed Comprehensive Plan amendments. In addition, Marion County must require that transit facilities, such as turn-out bays, preemptive signals, high-occupancy vehicle lanes, bus-only lanes, and transit shelter locations identified within future transit corridors and existing routes lacking adequate facilities, be included in roadway design proposals for the expansion of arterials or collectors. For Developments of Regional Impact, and for new developments, Marion County may require site and building design to be coordinated with public transit, bicycle, and pedestrian facilities.



The County must provide connections between and within land uses to increase pedestrian mobility and transit accessibility where opportunities and resources permit. A list of transit-related short-term (5-year) and long-term (2035) strategies for implementation of this policy are listed below (Policy 1b.8.7).

#### **Short Term**

- Improvements to existing transit routes including increased service levels.
- Connections of established transit stops to the sidewalk network.

#### **Long Term**

- New transit fixed facilities such as Bus Rapid Transit (BRT).

In addition, Policy 1b.9.1 includes parking strategies to enhance multimodal opportunities, including locating bus stops at existing, major parking facilities (i.e., malls and shopping centers).

The County's comprehensive plan focuses on the provision of future transit service for new development and redevelopment through the LDC to develop a balanced and sustainable transportation system. Strategies have also been included to encourage multimodal opportunities and the availability of transit services within the UGB.

### **City of Ocala Comprehensive Plan**

The City of Ocala's adopted Comprehensive Plan was last updated in Winter 2009 and has several goals, objectives, and policies that may impact transit services and/or planning. In the Transportation Element, the following goals, objectives, and policies are specific to transit and are therefore pertinent to SunTran and transportation disadvantaged services.

#### **Goal 1: To create and maintain a safe, efficient, and aesthetic transportation system that encourages multi-modal transportation.**

- Objective 8: Incorporate Transportation Demand Management (TDM) strategies into the land use and transportation planning process to reduce travel demand.
  - *Policy 8.1:* Develop a Commuter Assistance Program through coordination with FDOT, TPO, and the TDM clearinghouse at the Center for Urban Transportation Research (CUTR).
  - *Policy 8.2:* Encourage new development and existing businesses to participate in TDM strategies such as carpooling, vanpooling, parking management, telecommuting, flexible work hours, bicycle, and mass transit provisions.
- Objective 9: Design roads to accommodate alternative transportation modes, aesthetics and safety.
- Objective 10: Develop and maintain adequate access routes to the airport and rail service that is properly integrated with the transportation system shown on the transportation map series.
  - *Policy 10.3:* Coordinate intermodal management of surface transportation within airports, rail service, and related facilities.

- Objective 11: Preserve the potential expansion of the airport to accommodate future growth in quantitative and qualitative terms.
  - *Policy 11.6:* Establish a transit stop at the airport at such time that commercial service becomes available.
  - *Policy 11.9:* As an integral component of the airport master planning process, the City shall make provisions for regional transportation facilities for the efficient use and operation of the Airport.
- Objective 12: Provide Intelligent Transportation Systems (ITS) for the city service area that will increase mobility while increasing safety.

**Goal 3: Provide an efficient and safe public transit system that is accessible to all citizens.**

- Objective 1: Provide safe and efficient public transit services based upon existing and proposed major trip generators and attractors.
  - *Policy 1.1:* All development and redevelopment projects will be required to address transit amenities such as bus stops and accessibility, where appropriate.
  - *Policy 1.2:* Identify future transit needs by participating in the Ocala/Marion County TPO TDP updates.
  - *Policy 1.3:* By the year 2003, the City will determine the feasibility of implementing a park and ride program in conjunction with the SunTran bus system through coordination with the Ocala/Marion TPO.
  - *Policy 1.4:* Construct sidewalks, wheelchair ramps, and improve access to bus stops at appropriate locations.

**Goal 4: Direct growth to the Transportation Concurrency Exception Area/Urban Redevelopment Area, as shown on Map 5 of the Future Land Use Map Series, in order to discourage urban sprawl; reduce development pressures on rural lands; maximize the use of existing public facilities; and centralize commercial, governmental, retail, residential, and cultural activities.**

- *Policy 1.2.3:* The City shall adopt the following development standards as a means of encouraging alternative modes of transportation within the TCEA:
  - a) Construction of bus shelters or bus lighting using solar technology, built to City specifications.
  - b) Construction of bus turn-out facilities.
  - c) Payments to SunTran bus system, which either increase service frequency or add additional bus services.
- *Policy 2.3:* All new developments within the TCEA that meet or exceed 200 linear feet of property frontage shall include sidewalks with benches. All new developments within the TCEA shall provide lighting either by way of solar powered lighting on covered benches or street lamps and shade trees, if applicable. If shade trees are not applicable to that area, covered benches with solar lighting are required. These covered benches can be used as bus transportation stops promoting multi-modal transportation.

The review of transit planning documents was conducted to enhance the understanding of existing plans and programs that are relevant to public transportation in Marion County. In addition to providing guidance for the goals and objectives, the background review also helped identify relevant data and information available from existing sources. The guidance and information were used to support the development of this TDP.

## Appendix B:

### MT Grievance Procedure

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

**Article 1: Preamble**

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

**Article II: Name and Purpose**

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

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

**Article III: Definitions**

1. Community Transportation Coordinator (CTC): An entity and or person appointed to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.
2. A Grievance is defined as any ongoing service problem that interferes with accessing a major life activity, such as work, healthcare, employment, education, shopping, social activities, or other life sustaining activities.
3. Service Complaint- any routine incidents and/or dissatisfaction that occur, are reported to the driver, dispatcher, or other individuals involved with the daily operations, and are resolved within the course of a reasonable time period suitable to the complainant. Service complaints may include but are not limited to:

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

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

1. Members of the Grievance Subcommittee shall serve on a voluntary basis and shall consist of at least five (5) voting members.
2. Each member of the Grievance Subcommittee shall serve at the discretion of the TDLCB.
3. The CTC shall not serve on the Grievance Subcommittee.
4. Grievance Subcommittee members will meet if a grievance is brought before the committee.
5. When a meeting of the Grievance Subcommittee is necessary, staff to the TPO shall schedule the meeting. Meetings shall be held at the time and place as the Grievance Subcommittee may determine.

6. The Members shall serve a term of one year, with allowances for multiple terms.
7. The Grievance Subcommittee shall elect a Chairperson and Vice-Chairperson.
8. A simple majority shall be present in any official action.
9. No voting member will have a vote on an issue that is deemed a conflict of interest.

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

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

All written complaints can be sent to:

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

A complaint form has been created (see page 7) indicating all of the above mentioned items.

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



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

#### **Article VI: Appeal Process – STEP 2**

1. If the complainant is dissatisfied with the CTC's response and/or recommendation they may file an appeal with the Grievance Subcommittee.
2. The complainant may only file after they have sought satisfaction directly from the CTC and received a response. Complainant must demonstrate that they have unsuccessfully attempted to resolve the issue with the CTC. Every effort will be made by the CTC to resolve service problems. However, if unable to resolve the problem and/or the complainant wishes to take further action, then the CTC will provide the complainant with assistance in following the Grievance Procedures.
3. The appeal must be filed within ten (10) days from the date of notification of final decision from the CTC.

The appeal must be in writing and addressed to:

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

4. Once an appeal has been received, the Grievance Subcommittee shall meet and render its recommendation within thirty (30) working days of the date the appeal was filed.
5. The complainant shall be notified in writing of the mutually agreed upon date, time and place where the appeal shall be heard. This written notice shall be mailed at least ten (10) working days in advance of the meeting.
6. A written recommendation will be rendered to all parties involved within ten (10) working days from the date of the recommendation and will include the following, in writing:

- a. Statement that a meeting was held and the involved parties were given an opportunity to present their position(s).
  - b. The issues discussed and clearly defined
  - c. Reason(s) for the recommendation based on the information provided
- 7. Grievance Subcommittee must report all grievances and recommendations to the full Transportation Disadvantaged Local Coordinating Board.

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

- 1. If the complainant is dissatisfied with the recommendation of the Grievance Subcommittee he/she may continue the appeal process with the TDLCB as follows.
- 2. The appeal must be in writing and filed within ten (10) working days from the date of final recommendation from the Grievance Subcommittee.
- 3. Appeal to the TDLCB can only be filed after the complainant has sought satisfaction directly from the Grievance Subcommittee.
- 4. The appeal should demonstrate a clear violation of a specific law, regulation, contractual agreement, or circumstance.

Address all appeals to:

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

- 5. Once an appeal has been received, the TDLCB shall meet and render its recommendation within sixty (60) working days of the date the appeal was filed.
- 6. The complainant shall be notified in writing of the mutually agreed upon date, time and place where the appeal shall be heard. This written notice shall be mailed at least ten (10) working days in advance of the meeting.
- 7. A written recommendation will be rendered to all parties involved within ten (10) working days from the date of the recommendation and will include the following, in writing:
  - a. Statement that a meeting was held and the involved parties were given an opportunity to present their position(s).

- b. The issues discussed and clearly defined
- c. Reason(s) for the recommendation based on the information provided

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

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

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

#### **Article IX: General**

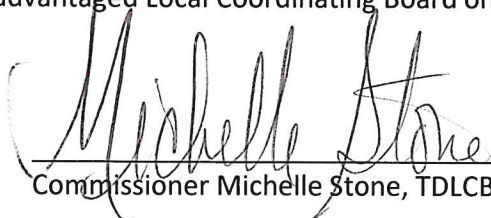
The Transportation Disadvantaged Local Coordinating Board Grievance Procedures may be amended by a two-thirds (2/3) vote of members present, if a quorum exists, and all Members have been notified of proposed changes at least seven (7) working days in advance of the meeting.

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

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

#### **CERTIFICATION**

The undersigned hereby certifies that he/she is the Chairperson of the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board and that the foregoing is a full, true and correct copy of the Grievance Procedures of this Local Coordinating Board as adopted by the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board on the 20<sup>th</sup> day of February 2020.

  
Commissioner Michelle Stone, TDLCB Chairperson

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

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

Date of incident:	Vehicle Unit/License No.-Color-Type	Time of Incident:
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Please list the name(s) and phone number(s) of any person, if known, that can be contacted for additional information to support or clarify your allegation(s):
Please explain as clearly as possible HOW, WHY, WHEN and WHERE is your alleged complaint. Include as much information as possible. Additional pages may be attached if needed.
Please indicate what would be an acceptable resolution:

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

Please submit to: Address in the step process

☐ Additional Pages are attached.

Ocala Marion TPO Grievance Procedures  
Adopted 2/20/2020



## TDLCB COMPLAINT TRACKING FORM

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

### **COMPLAINT TO THE CTC –STEP 1**

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

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

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

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

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

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

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

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

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

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

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

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

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

## FCTD Rate Model Calculation Spreadsheets

## Preliminary Information Worksheet

Version 1.4

**CTC Name:** Marion Senior Services, Inc. d/b/a Marion Transit  
**County (Service Area):** Transit  
**Contact Person:** Tom Wilder / Rhonda Blaney  
**Phone #** 352.620.3519 / 352.620.3501

### Check Applicable Characteristic:

#### ORGANIZATIONAL TYPE:

- ☐ Governmental
- ☒ Private Non-Profit
- ☐ Private For Profit

#### NETWORK TYPE:

- ☐ Fully Brokered
- ☒ Partially Brokered
- ☐ Sole Source

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

Comprehensive Budget Worksheet

Version 1.4

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

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

	Prior Year's ACTUALS from July 1st of 2018 to June 30th of 2019	Current Year's APPROVED Budget, as amended from July 1st of 2019 to June 30th of 2020	Upcoming Year's PROPOSED Budget from July 1st of 2020 to June 30th of 2021	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

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

Local Non-Govt

Farebox	\$ 107,068	\$ 102,500	\$ 102,500	-4.3%	0.0%	
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other						
Bus Pass Program Revenue						

Local Government

District School Board						
Compl. ADA Services						
County Cash	\$ 885,178	\$ 928,543	\$ 973,283	4.9%	4.8%	
County In-Kind, Contributed Services						
City Cash	\$ 347,250	\$ 320,000	\$ 320,000	-7.8%	0.0%	
City In-kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						

CTD

Non-Spons. Trip Program	\$ 783,192	\$ 784,181	\$ 784,181	0.1%	0.0%	
Non-Spons. Capital Equipment						
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						

USDOT & FDOT

49 USC 5307						
49 USC 5310	\$ 384,044	\$ 379,049	\$ 374,000	-1.3%	-1.3%	
49 USC 5311 (Operating)	\$ 704,290	\$ 766,800	\$ 837,419	8.9%	9.2%	
49 USC 5311(Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)		\$ 197,182			-100.0%	
Bus Pass Program Revenue						

AHCA

Medicaid						
Other AHCA (specify in explanation)	\$ 42,808	\$ 236,061	\$ 45,000	451.4%	-80.9%	
Bus Pass Program Revenue						

DCF

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

DOH

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

DOE (state)

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

AWI

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

DOEA

Older Americans Act						
Community Care for Elderly						
Other DOEA (specify in explanation)	\$ 675	\$ 2,355	\$ 850	249.1%	-63.9%	
Bus Pass Program Revenue						

DCA

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



Comprehensive Budget Worksheet

Version 1.4

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

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

	Prior Year's ACTUALS from July 1st of 2018 to June 30th of 2019	Current Year's APPROVED Budget, as amended from July 1st of 2019 to June 30th of 2020	Upcoming Year's PROPOSED Budget from July 1st of 2020 to June 30th of 2021	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

APD						
Office of Disability Determination						
Developmental Services						
Other APD (specify in explanation)						
Bus Pass Program Revenue						
DJJ						
(specify in explanation)						
Bus Pass Program Revenue						
Other Fed or State						
xxx						
xxx						
xxx						
Bus Pass Program Revenue						
Other Revenues						
Interest Earnings						
Insurance Loss Reimbursement	\$ 36,800			-100.0%		
Sale of Vehicles	\$ 45,100			-100.0%		
Bus Pass Program Revenue						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue is Short By =						
		None				
Total Revenues =		\$3,336,404	\$3,716,671	\$3,437,233	11.4%	-7.5%

EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors!)						
Operating Expenditures						
Labor	\$ 1,529,872	\$ 1,280,000	\$ 1,415,000	-16.3%	10.5%	
Fringe Benefits	\$ 426,127	\$ 386,707	\$ 399,718	-9.3%	3.4%	
Services	\$ 295,011	\$ 426,420	\$ 298,995	44.5%	-29.9%	
Materials and Supplies	\$ 431,673	\$ 403,092	\$ 373,499	-6.6%	-7.3%	
Utilities	\$ 29,813	\$ 26,274	\$ 26,274	-11.9%	0.0%	
Casualty and Liability	\$ 137,024	\$ 160,585	\$ 142,585	17.2%	-11.2%	
Taxes	\$ 793	\$ 1,100	\$ 1,100	38.8%	0.0%	
Purchased Transportation:						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services						
Other						
Miscellaneous	\$ 26,564	\$ 14,300	\$ 14,007	-46.2%	-2.1%	
Operating Debt Service - Principal & Interest						
Leases and Rentals	\$ 142	\$ 1,550	\$ 1,550	994.6%	0.0%	
Contrib. to Capital Equip. Replacement Fund						
In-Kind, Contributed Services	\$ -	\$ -	\$ -			
Allocated Indirect						
Capital Expenditures						
Equip. Purchases with Grant Funds		\$ 576,231	\$ 374,000		-35.1%	
Equip. Purchases with Local Revenue		\$ 91,412	\$ 41,505		-54.6%	
Equip. Purchases with Rate Generated Rev.						
Capital Debt Service - Principal & Interest						
	\$ 328,059	\$ 349,000	\$ 349,000	6.4%	0.0%	
ACTUAL YEAR GAIN		\$131,327				
Total Expenditures =		\$3,205,077	\$3,716,671	\$3,437,233	16.0%	-7.5%
See NOTES Below.						

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

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

Comprehensive Budget Worksheet

Version 1.4

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

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

	Prior Year's ACTUALS from July 1st of 2018 to June 30th of 2019	Current Year's APPROVED Budget, as amended from July 1st of 2019 to June 30th of 2020	Upcoming Year's PROPOSED Budget from July 1st of 2020 to June 30th of 2021	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

Budgeted Rate Base Worksheet

Version 1.4

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

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

	Upcoming Year's <b>BUDGETED</b> Revenues
	from
	July 1st of
	<b>2020</b>
	to
	June 30th of
	<b>2021</b>
1	2

What amount of the <u>Budgeted Revenue</u> in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?	Budgeted Rate <u>Subsidy Revenue</u> <b>EX</b> cluded from the Rate Base	What amount of the <u>Subsidy Revenue</u> in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?
3	4	5

REVENUES (CTC/Operators ONLY)

Local Non-Govt

Farebox	\$	102,500
Medicaid Co-Pay Received	\$	-
Donations/ Contributions	\$	-
In-Kind, Contributed Services	\$	-
Other	\$	-
Bus Pass Program Revenue	\$	-

Local Government

District School Board	\$	-
Compl. ADA Services	\$	-
County Cash	\$	973,283
County In-Kind, Contributed Services	\$	-
City Cash	\$	320,000
City In-kind, Contributed Services	\$	-
Other Cash	\$	-
Other In-Kind, Contributed Services	\$	-
Bus Pass Program Revenue	\$	-

CTD

Non-Spons. Trip Program	\$	784,181
Non-Spons. Capital Equipment	\$	-
Rural Capital Equipment	\$	-
Other TD	\$	-
Bus Pass Program Revenue	\$	-

USDOT & FDOT

49 USC 5307	\$	-
49 USC 5310	\$	374,000
49 USC 5311 (Operating)	\$	837,419
49 USC 5311(Capital)	\$	-
Block Grant	\$	-
Service Development	\$	-
Commuter Assistance	\$	-
Other DOT	\$	-
Bus Pass Program Revenue	\$	-

AHCA

Medicaid	\$	-
Other AHCA	\$	45,000
Bus Pass Program Revenue	\$	-

DCF

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

DOH

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

DOE (state)

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

AWI

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

DOEA

Older Americans Act	\$	-
Community Care for Elderly	\$	-
Other DOEA	\$	850
Bus Pass Program Revenue	\$	-

DCA

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

\$	51,250	\$	51,250	
		\$	-	
		\$	-	
\$	-	\$	-	
		\$	-	
\$	-	\$	-	

\$	-	\$	-	
\$	-	\$	-	
\$	973,283	\$	-	
\$	-	\$	-	
\$	320,000	\$	-	
\$	-	\$	-	
		\$	-	
\$	-	\$	-	
\$	-	\$	-	

\$	784,181	\$	-	\$	-
\$	-	\$	-	\$	-
\$	-	\$	-	\$	-
		\$	-		
\$	-	\$	-		

\$	-	\$	-	
\$	-	\$	374,000	\$ 374,000
\$	837,419	\$	-	
\$	-	\$	-	\$ -
\$	-	\$	-	
\$	-	\$	-	
\$	-	\$	-	
\$	-	\$	-	
\$	-	\$	-	

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

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

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

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

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

\$	-	\$	-	
\$	-	\$	-	
		\$	850	
\$	-	\$	-	

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

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

BLUE cells  
Should be funds generated by rates in this spreadsheet

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

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

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

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

GOLD cells

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

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

- |   |  |  |
|---|--|--|
| <p>What amount of the <u>Budgeted Revenue</u> in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as full match for these type revenues?</p> | <p>Budgeted Rate<br/><u>Subsidy Revenue</u><br/><b>EXcluded</b> from the Rate Base</p> | <p>What amount of the <u>Subsidy Revenue</u> in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?</p> |
| <b>3</b>  | <b>4</b>   | <b>5</b>   |

\$	-	\$	-
\$	-	\$	-
		\$	-
\$	-	\$	-
<hr/>			
		\$	-
\$	-	\$	-
<hr/>			
		\$	-
\$	-	\$	-
<hr/>			
		\$	-
		\$	-
		\$	-
\$	-	\$	-
<hr/>			
\$	-	\$	-
		\$	-
		\$	-
\$	-	\$	-
<hr/>			
\$	-	\$	-
		\$	-
		\$	-
\$	-	\$	-
<hr/>			
\$	-	\$	-
<hr/>			
\$	2,966,133	\$	471,100
\$		\$	374,000

Amount of Budgeted  
Operating Rate  
Subsidy Revenue

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

2018 - 2019

4

## Worksheet for Program-wide Rates

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

Version 1.4

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

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

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

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

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

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

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

### PROGRAM-WIDE RATES

Total Projected Passenger Miles = 1,000,000

Rate Per Passenger Mile = \$ 2.97

Total Projected Passenger Trips = 82,000

Rate Per Passenger Trip = \$ 36.17

Fiscal Year

2020 - 2021

Avg. Passenger Trip Length = 12.2 Miles

### Rates If No Revenue Funds Were Identified As Subsidy Funds

Rate Per Passenger Mile = \$ 3.44

Rate Per Passenger Trip = \$ 41.92

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

#### Vehicle Miles

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

#### Vehicle Revenue Miles (VRM)

The miles that vehicles are scheduled to or actually travel while in revenue service. Vehicle revenue miles exclude:

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

#### Passenger Miles (PM)

The cumulative sum of the distances ridden by each passenger.

Worksheet for Multiple Service Rates

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

CTC: Marion Senior S Version 1.4  
County: Marion Senior Services, Inc. d/b/a Marion Transit

SECTION I: Services Provided

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

Ambulatory	Wheelchair	Stretcher	Group
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Go to Section II for Ambulatory Service	Go to Section II for Wheelchair Service	STOP! Do NOT Complete Sections II - V for Stretcher Service	STOP! Do NOT Complete Sections II - V for Group Service

SECTION II: Contracted Services

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

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Skip # 2, 3 & 4 and Go to Section III for Ambulatory Service	Skip # 2, 3 & 4 and Go to Section III for Wheelchair Service	Do Not Complete Section II for Stretcher Service	Do Not Complete Section II for Group Service

2. If you answered YES to #1 above, do you want to arrive at the billing rate by simply dividing the proposed contract amount by the projected Passenger Miles / passenger trips?.....

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Leave Blank	Leave Blank		

Effective Rate for **Contracted Services**:

per **Passenger Mile** =

per **Passenger Trip** =

Ambulatory	Wheelchair	Stretcher	Group
Go to Section III for Ambulatory Service	Go to Section III for Wheelchair Service	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

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



Worksheet for Multiple Service Rates

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

CTC: Marion Senior S Version 1.4  
County: Marion Senior Services, Inc. d/b/a Marion Transit

SECTION III: Escort Service

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

☒ No
- Skip #2 - 4 and Section IV and Go to Section V
2. If you answered Yes to #1, do you want to charge the fee per passenger trip OR ..... per passenger mile?.....
- ☒ Pass. Trip

☐ Pass. Mile
- Leave Blank
3. If you answered Yes to # 1 and completed # 2, for how many of the projected Passenger Trips / Passenger Miles will a passenger be accompanied by an escort? ..... Leave Blank
4. How much will you charge each escort?..... Leave Blank

SECTION IV: Group Service Loading

1. If the message "**You Must Complete This Section**" appears to the right, what is the projected total number of Group Service Passenger Miles? (otherwise leave blank).....
- ..... And what is the projected total number of Group Vehicle Revenue Miles? .....
- Do NOT Complete Section IV
- Loading Rate 0.00 to 1.00

SECTION V: Rate Calculations for Multiple Services:

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

RATES FOR FY: 2020 - 2021					
	Ambul	Wheel Chair	Stretcher	Group	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) = 1,000,000	600,000	400,000	Leave Blank	Leave Blank	0
Rate per Passenger Mile =	\$2.31	\$3.95	\$0.00	\$0.00	\$0.00
				per passenger	per group

	Ambul	Wheel Chair	Stretcher	Group	
Projected Passenger Trips (excluding totally contracted services addressed in Section II) = 82,000	49,200	30,800	Leave Blank	Leave Blank	
Rate per Passenger Trip =	\$29.08	\$49.85	\$0.00	\$0.00	\$0.00
				per passenger	per group

Does Not = Total Projected Passenger Trips, with adjmt. for contracted services

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

Combination Trip and Mile Rate				
	Ambul	Wheel Chair	Stretcher	Group
...INPUT the Desired Rate per Trip (but must be <u>less</u> than per trip rate above) =			Leave Blank	Leave Blank
Rate per Passenger Mile for Balance =	\$2.31	\$3.95	\$0.00	\$0.00
				per passenger per group

Rates If No Revenue Funds Were Identified As Subsidy Funds				
	Ambul	Wheel Chair	Stretcher	Group
Rate per Passenger Mile =	\$2.67	\$4.58	\$0.00	\$0.00
				per passenger per group
	Ambul	Wheel Chair	Stretcher	Group
Rate per Passenger Trip =	\$33.70	\$57.77	\$0.00	\$0.00
				per passenger per group

Program These Rates Into Your Medicaid Encounter Data

**Worksheet for Multiple Service Rates**

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

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