

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



Prepared By:

Ocala Marion Transportation
Planning Organization and
Marion Transit

Adopted:

October 15, 2020



**OCALA MARION
TRANSPORTATION
PLANNING
ORGANIZATION**

Website: Ocalamariontpo.org



TDSP CERTIFICATION

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

We further certify that the rates constrained herein have been thoroughly reviewed, evaluated, and approved. The Transportation Disadvantaged Service Plan (TDSP) will be reviewed in its entirety and approved by the Board at an official meeting held on October 15, 2020.

10/15/2020
Date

10/15/20
Date

Michelle Stone
Commissioner Michelle Stone, TDLCB Board Chairperson

Robert Balmes
Robert Balmes, TPO Director

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: October 15, 2020

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

Cooperative and comprehensive planning for our transportation needs
Marion County • City of Belleview • City of Dunnellon • City of Ocala

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

Table of Contents

Introduction to this Plan	7
Section 1: Development Plan.....	7
Introduction to the Service Area.....	7
1. Background of Transportation Disadvantaged Program	7
2. TDLCB Board.....	10
3. History of the Community Transportation Coordinator	10
4. Summary of Other Plans and Documents.....	11
5. Public Participation	12
Service Area Profile and Demographics.....	13
1. Service Area Description	13
2. Demographics/Land Use	14
3. Population Composition	14
4. Cultural Descriptions.....	14
5. Population Density.....	16
6. Age Distribution	17
7. Housing and Household Income	17
8. Education	18
9. Employment.....	19
10. Employment Density.....	20
11. Major Employers	20
12. Major Trip Generators	21
13. Household Vehicle Availability.....	22
.....	23
Service Analysis.....	23
1. Transportation Disadvantaged Population	23
2. Forecasts of Transportation Disadvantaged Population	23
3. Needs Assessment	27
4. Barriers to Coordination	28
Goals, Objectives, and Strategies.....	28

Vision Statement.....	29
Mission Statement	29
Implementation Plan	31
Section 2: Service Plan	33
Operations Element	33
1. Types, Hours and Days of Service	33
2. Accessing Service	34
3. Trip Eligibility.....	34
4. Trip Prioritization	35
5. Other Accessibility Processes/Procedures.....	35
6. Transportation Operators and Coordination Contractors	37
7. Public Transit Utilization	37
8. School Bus Utilization.....	37
9. Vehicle Inventory	38
10. System Safety Program (SSPP) Certification	38
11. Inter-County Services	38
12. Emergency Preparedness and Response	38
13. Marketing.....	38
14. Service Standards.....	39
15. Local Complaint and Grievance Procedures/Processes.....	40
Section 3: Quality Assurance.....	40
CTC Monitoring and Evaluation Process for Operators and Coordination Contractors	40
1. CTC Evaluation	40
2. Cost/Revenue Allocation and Rate Structure Justification	41

List of Tables:

Table 1.1: Ocala Marion TPO Planning Area	13
Table 1.2: Population by Race.....	15
Table 1.3: Marion County and Florida Population Growth Projections, 2020-2045	16
Table 1.4: Marion County Municipalities	16
Table 1.5: Employment Characteristics-Marion County and Florida 2020 (Not Seasonally Adjusted)	20



Table 1.6: Major Employers	21
Table 1.7: Registered Vehicles by Age	22
Table 1.8: TD Population	23
Table 1.9: Forecast General TD Population	25
Table 1.10: Critical Need Transportation Disadvantaged	26
Table 1.11: Marion County Forecasted Annual Trip Demand, 2019-2025	26
Table 1.12: Implementation Plan.....	31
 Table 2.1: Agreements with Outside Transportation Agencies	 37
Table 2.2: CTC Service Standards	39
 Table 3.1: FCTD Calculated Rates.....	 41
Table 3.2: SunTran Fare Structure/MT Fare Structure	41

List of Figures:

Figure 1.1: Florida’s Coordinated Transportation System	9
Figure 1.2: Population by Race	15
Figure 1.3: Population by Age	17
Figure 1.4: Household Income	18
Figure 1.5: Educational Attainment Distribution	19
Figure 1.6: TD Population Groups	24
Figure 1.7: Funding Sources	27

List of Appendix:

Appendix A – Summary Review of Other Plans	42
Appendix B – Vehicle Inventory	47
Appendix C – Marion Transit Grievance Procedures.....	48
Appendix D – System Safety Program Plan Certification.....	49

Appendix E – Quality Assurance Program Evaluation (QAPE), Corrective Action Plan, and CTC Evaluation	50
Appendix F - FCTD Rate Model Calculation Spreadsheets	51

PUBLIC DISCLOSURE STATEMENT:

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



Introduction to this Plan

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

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

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

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

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

Section 1: Development Plan

Introduction to the Service Area

1. Background of Transportation Disadvantaged Program

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



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

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

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

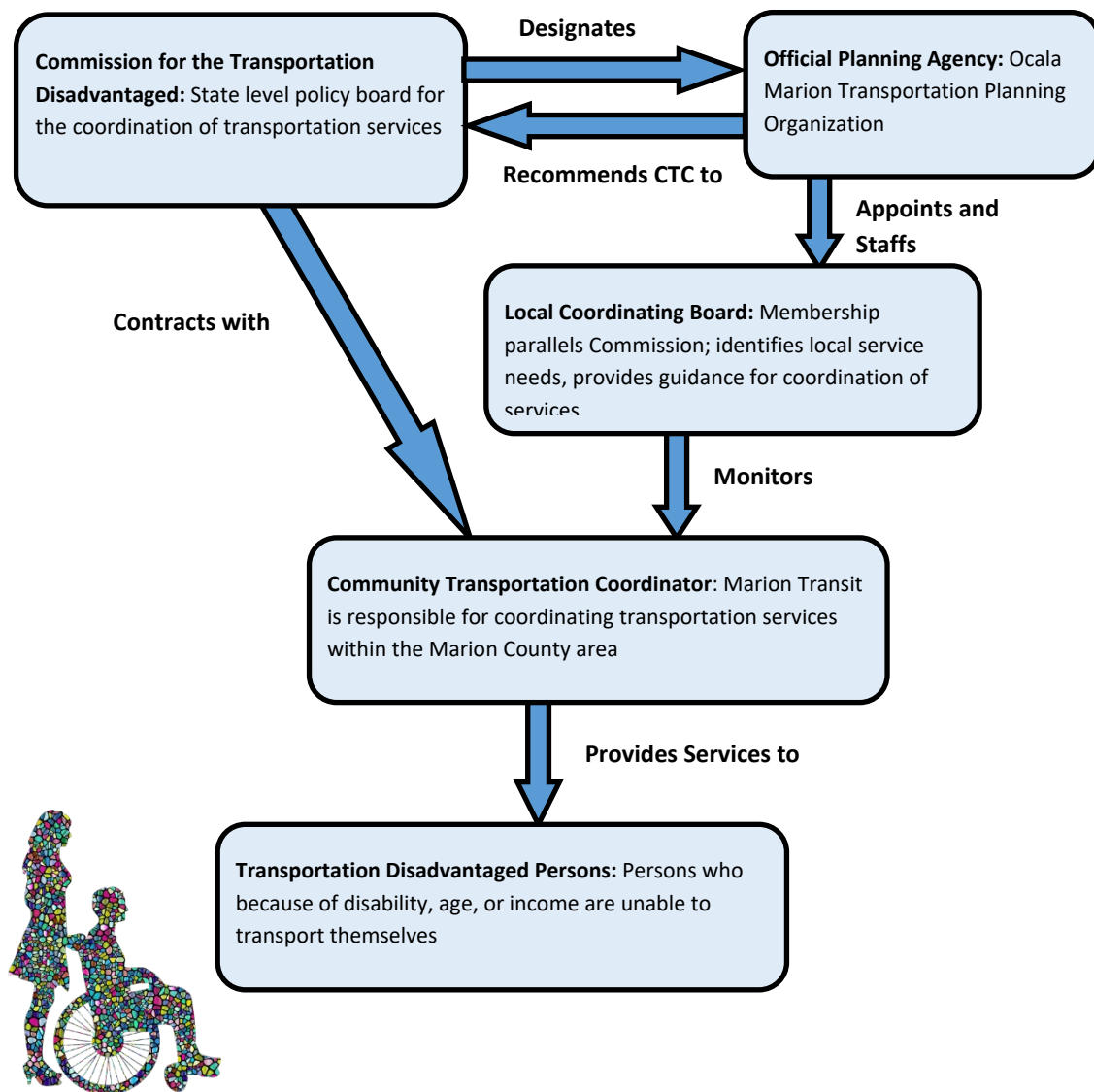
... those who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education,

shopping, social activities, or children who are handicapped or high-risk or at-risk as defined in Section 411.202, F.S.

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

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

Figure 1.1: Florida's Coordinated Transportation System



2. TDLCB Board

The composition of the TDLCB is in accordance with Rule 41-2.012, F.A.C., and brings together local area stakeholders. TDLCB members constitute a broad-based group including individuals from agencies that purchase trips or have a role in public transit, representatives of the disabled, elderly and economically disadvantaged in the area, as well as an elected official appointed by the TPO Board who serves as TDLCB Chair. The TDLCB coordinates transportation needs of the disadvantaged, including individuals with physical and economic challenges and senior citizens facing mobility issues. The TDLCB assists the TPO in identifying local service needs and provides information, advice, and direction to the CTC on services to be provided to the transportation disadvantaged community.

3. History of the Community Transportation Coordinator

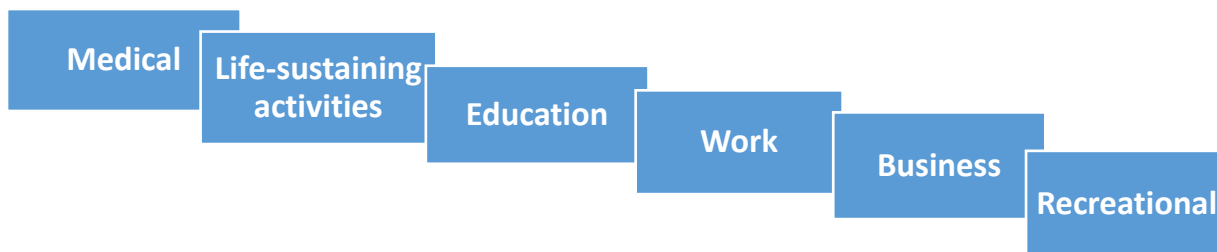
The Community Transportation Coordinator (CTC) is the agency responsible for providing coordinated transportation services for the transportation disadvantaged citizens in the county.

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

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

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

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



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

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

Marion County's public transit service, SunTran, is provided by the City of Ocala and managed by RATPDev. The service began operating in 1998 and currently operates a scheduled, fixed-route system six days per week to riders of all age groups. The regular full cash fare is \$1.50, with discounts offered for youth, students, older adults, and individuals with disabilities. Reduced rate passes are also available for youth and older adult passengers. SunTran contracts with MT for the required complementary Americans with Disabilities Act (ADA) paratransit services within $\frac{3}{4}$ -mile of the SunTran fixed-route system.

4. Summary of Other Plans and Documents

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

5. Public Participation

Public participation is at the center of the transportation planning process, as transportation networks affect the public in a many ways. Therefore, the voice of the public is essential in ensuring that the transportation decisions that are made, are efficient, and effective at serving the residents they impact. The transportation network affects economic vitality, personal and freight mobility, and local/regional priorities, it is critical for the voices of everyone to be heard and documented.

The TPO is the Official Planning Agency for the TDLCB. Public participation has always been an important priority of the TPO. The TPO works with area government entities, businesses and



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

An ongoing opportunity for

citizens to participate in the development of local transit plans and to address other transit concerns is provided at all TDLCB meetings. Prior to each meeting, workshop, or event, the TPO advertises in the local newspaper to allow the county citizens the opportunity to attend in person in order to participate, comment and express their concerns, approval or disapproval. The TPO also maintains an interactive website and social media platforms such as Twitter and LinkedIn for citizens to provide comments, and/or requests at any time.

This document is updated annually and revised as transit-related information is gathered for other documents such as the Long Range Transportation Plan (LRTP), Transportation Improvement Plan (TIP), and the Public Involvement Plan (PIP).

Service Area Profile and Demographics

1. Service Area Description

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

Table 1.1: Ocala Marion TPO Planning Area



2. Demographics/Land Use

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

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

3. Population Composition

Population changes are important indicators for the economy, as they have an impact on education, healthcare, housing, recreation and transportation. Those changes affect many types of public funding and in turn requires the best possible planning. The demographic characteristics include the age, gender structure, and race/ethnicity. In addition, the economy, employment opportunities, and housing availability also influence population change. Along with characteristics, economic cycles contribute to the demographic makeup. Projecting these economic cycles however can be difficult, the information provided is conservative in order to properly account for long term trends. Drastic changes such as the effects of COVID-19, unemployment, housing market crisis, and recessions can cause changes not currently projected.

4. Cultural Descriptions

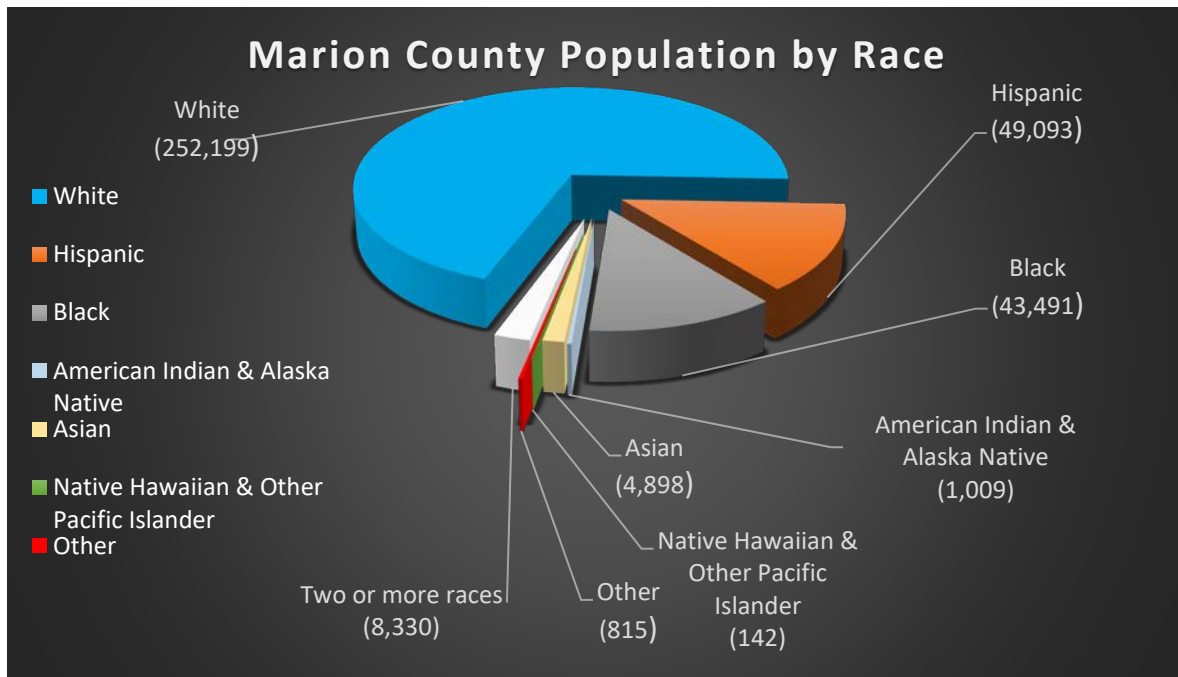
Marion County has a total population of 359,977 according to the American Community Survey's (ACS) 2018 one-year estimates. The chart and graph seen below **Table 1.2 and Figure 1.2**, below, highlight the racial makeup of Marion County.

Table 1.2: Population by Race

<i>Race</i>	<i>Population</i>	<i>Percent of Population</i>
White	252,199	70.06%
Hispanic	49,093	13.64%
Black	43,491	12.08%
Two or more races	8,330	2.31%
Asian	4,898	1.36%
American Indian & Alaska Native	1,009	0.28%
Other	815	0.23%
Native Hawaiian & Other Pacific Islander	142	0.04%
Total	359,977	100.00%

Source: ACS 2018 1-year estimates

Figure 1.2: Population by Race



Marion County's population increased from 336,811 persons in 2015 to 359,977 persons in 2018, an overall increase of 7%. It is estimated that the population will continue to increase according to the 2020 Population report by the Bureau of Economic and Business Research (BEBR) at the University of Florida. Using BEBR Florida population projections, the population of Marion County is expected to increase by 28% by 2045. **Table 1.3** provides an overview of the population projections for Marion County and Florida from 2020 to 2045. Marion County is

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

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

Area	Population Estimate	Population Projections						Population Growth
	2019	2020	2025	2030	2035	2040	2045	2019-2045
Marion 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

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

Table 1.4: Marion County Municipalities

Geographic Area	2018	2019 Estimates	2018 - 2019 Population Change
Marion County	348,371	360,421	12,050
Belleview	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

Source: ACS 2018 1-year estimates

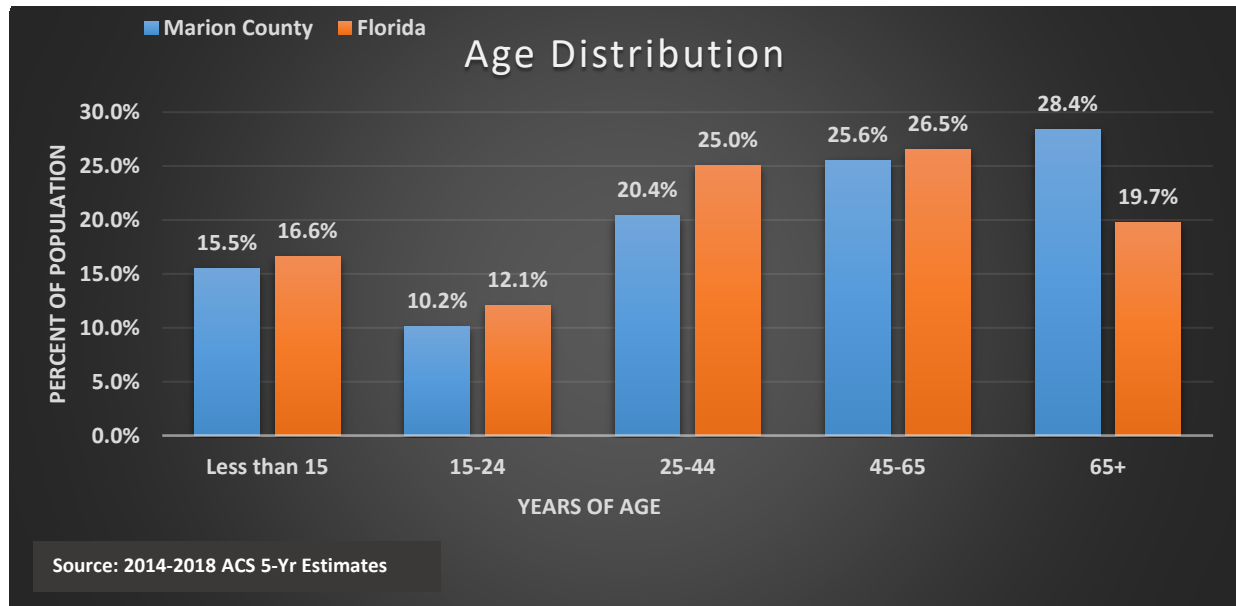
5. Population Density

The densest areas are projected to be within the Ocala urbanized area, in southwest Marion County along SR-40 and SR-200, and in 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 99th Street Road and south of 103rd Street Road.

6. Age Distribution

Figure 1.3 shows the Marion County and Florida populations by age distribution. According to the 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.

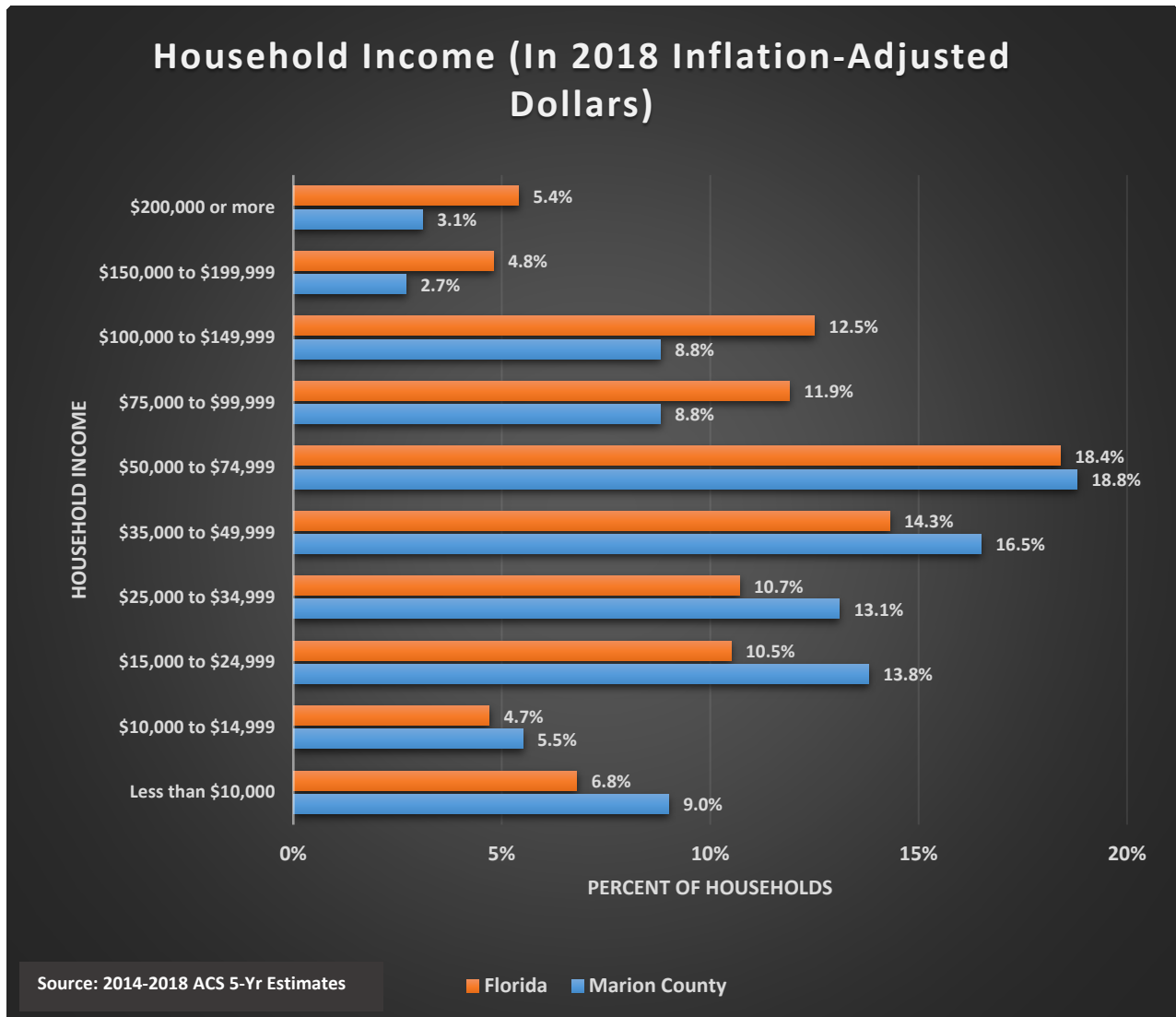
Figure 1.3: Population by Age



7. Housing and Household Income

There is a direct correlation between population growth and housing units. The growth rates for housing may slightly differ than the rates for population because housing units are smaller than the numbers of persons due to how many are living in one household. During the 12 months ending February 2019, existing home sales increased 180 homes, or 2 percent from the previous 12 months. The median property value in Marion County is \$150,600, and the homeownership rate is 75.6%. **Figure 1.4** compares the distribution of household income in Marion County and Florida. A larger share of Marion County residents earn an income within the three lowest income categories (below \$25,000). Additionally, a smaller share of Marion County residents earn an income within the four highest income categories (above \$75,000) compared to the Florida state average. The Marion County median household income is approximately 10% lower than Florida, with Marion County’s median income at \$43,361 and Florida’s at \$53,267.

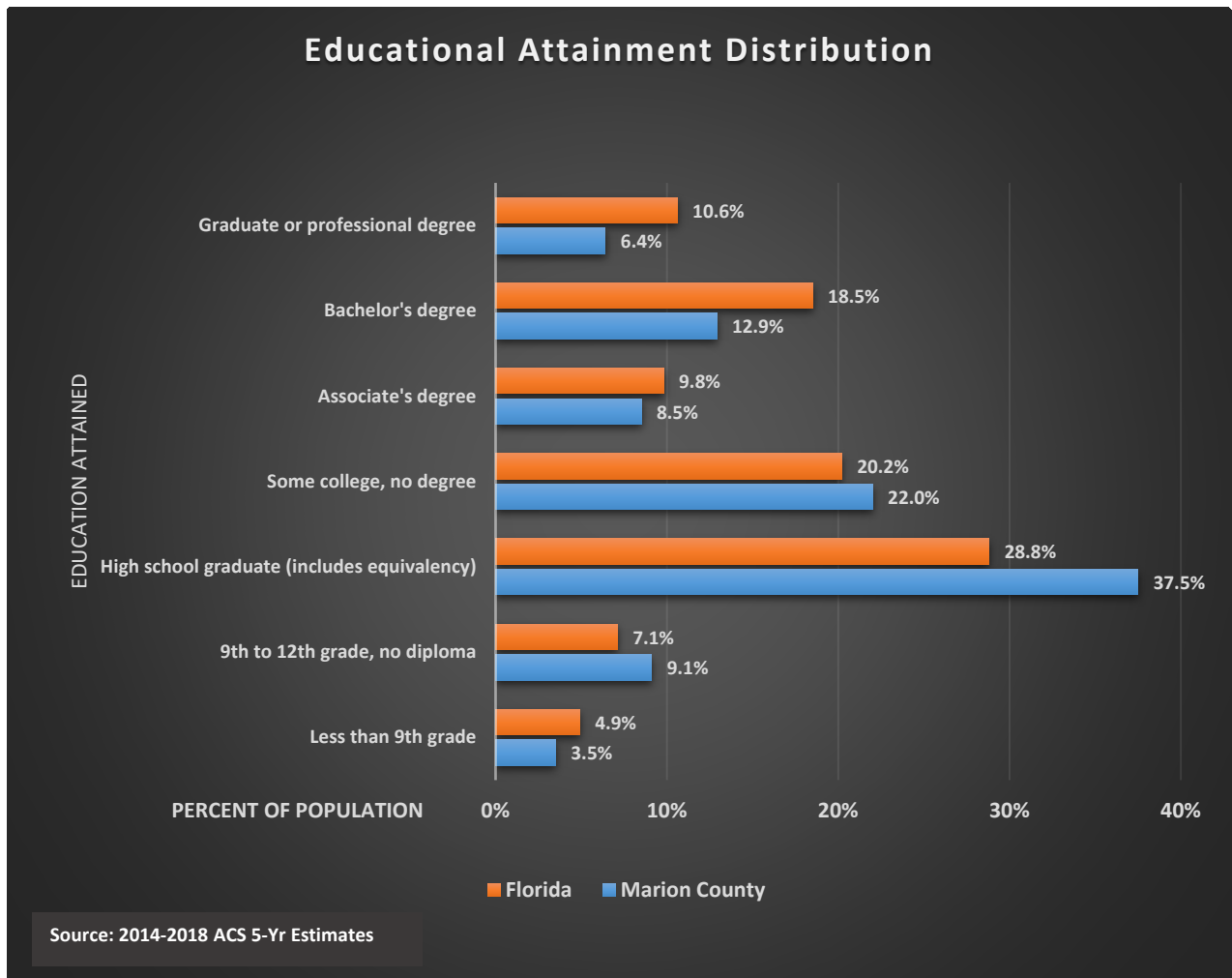
Figure 1.4: Household Income



8. Education

The educational attainment of people in Marion County and Florida is shown in **Figure 1.5**. The category with the largest share of both Marion County and Florida residents is high school graduate (includes equivalency), which includes 37.5% of Marion County residents and about 29% of Florida residents. Overall, a larger proportion of Florida residents have obtained higher levels of education, including an Associate's degree, Bachelor's degree, graduate and/or professional degree, than Marion County residents.

Figure 1.5: Educational Attainment Distribution



9. Employment

Table 1.5 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 June 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 1.5: Employment Characteristics-Marion County and Florida 2020 (Not Seasonally Adjusted)

<i>Area</i>	<i>Civilian Labor Force</i>	<i>Number Employed</i>	<i>Number Unemployed</i>	<i>Unemployment Rate</i>
Marion County	133,949	122,557	11,392	8.5%*
Florida	9,789,000	8,744,000	1,045,000	10.7%*
* Due to the pandemic, COVID-19, these numbers aren't a true representation of the unemployment rate				
**All State of Florida estimates except unemployment rates are rounded to the nearest thousand. Items may not add to totals or compute to displayed percent due to rounding.				
Source: Florida Department of Economic Opportunity June 2020 Data				

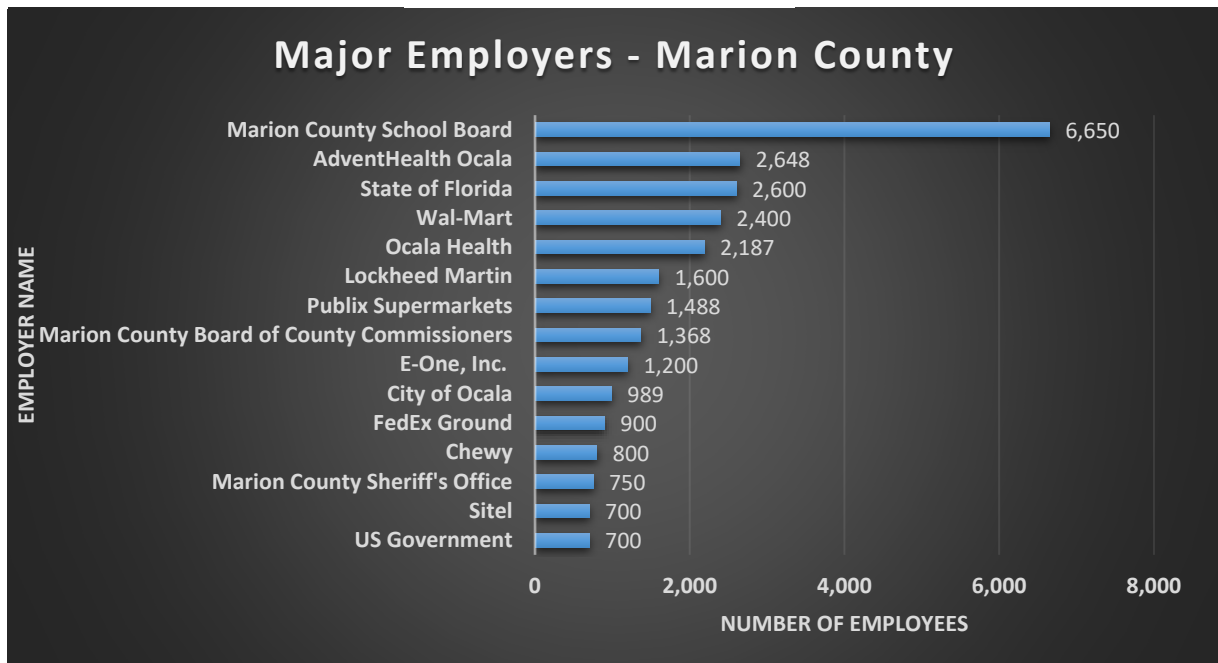
10. Employment Density

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

11. Major Employers

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

Table 1.6: Major Employers



Source: Ocala/Marion County Chamber and Economic Partnership (as of 8/11/2020)

12. Major Trip Generators

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

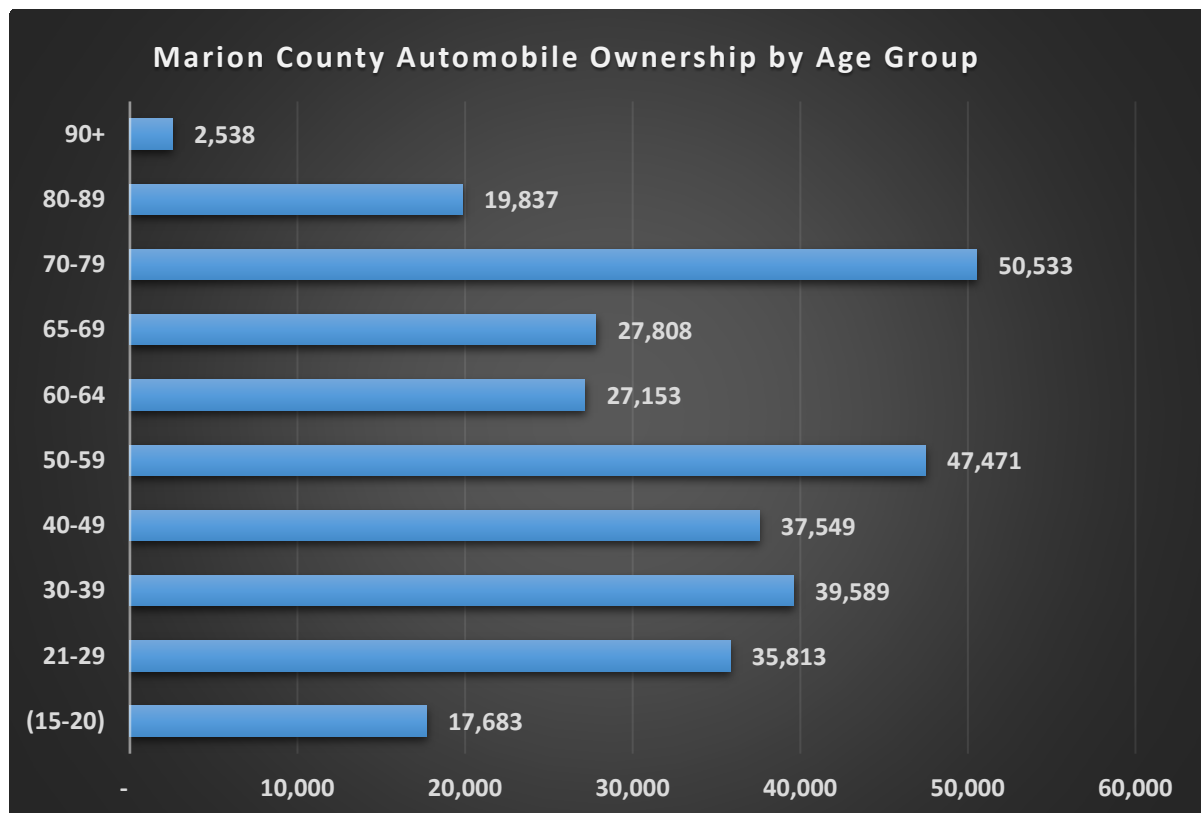
1	Davita-East Dialysis Center	2870 SE 1st Av	Ocala
2	Davita-Shores Dialysis Center	9310 Spring Rd	Ocala
3	Davita-West Dialysis Center	8585 SW Hwy 200	Ocala
4	Wal-Mart	2600 SW 19th Av Rd	Ocala
5	Davita-South Dialysis Center	13940 US Hwy 441	Lady Lake
6	Davita-North Dialysis Center	2620 W Hwy 316	Citra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

Source: Marion Senior Services (August 2020)

13. Household Vehicle Availability

Marion County has just over 300,000 registered vehicles according to the latest report (2020) by the Florida Department of Highway Safety and Motor Vehicles. The majority of the registered vehicles belong to the ages between 21 and 59, with the 50-59 age group being the single largest age group. The chart and **Table 1.7** seen below demonstrate how the registered vehicles look by age group.

Table 1.7: Registered Vehicles by Age



Age Group										
15-20	21-29	30-39	40-49	50-59	60-64	65-69	70-79	80-89	90+	Total
17,683	35,813	39,589	37,549	47,471	27,153	27,808	50,533	19,837	2,538	305,974

Source: Florida Department of Highway Safety and Motor Vehicles 2020 Report

Service Analysis

1. Transportation Disadvantaged Population

Table 1.8 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 1.8: TD Population

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 year		
Source: Annual Performance Reports from 2017-2019, FCTD		

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

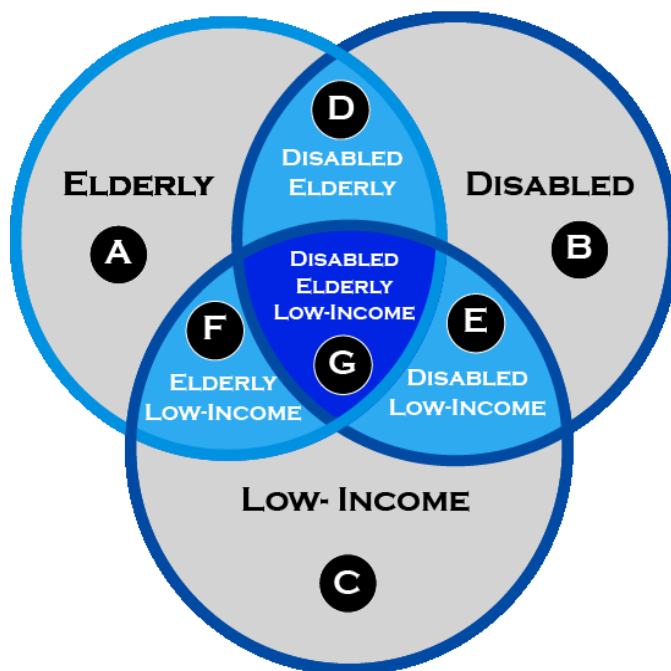
2. Forecasts of Transportation Disadvantaged Population

The TD population was estimated using the methodology developed by the CTD utilizing data from various sources to forecast demand. The travel demand forecasting methodology was updated 2015 to address some of the changes in policy and demographics that have occurred over the past years since the original methodology was established in 1993.

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

Figure 1.6: TD Population Groups

<i>General TD Population</i>		<i>% of Total</i>
<i>Non-Duplicated General TD Population Estimate</i>	138,852	37.9%



<i>County Pop. By Age</i>	<i>Total Pop by Age</i>	<i>% of Total Pop</i>	<i>Population Below Poverty Level by Age</i>	<i>% of Total Pop Below Poverty Level by Age</i>	<i>Total Population with a Disability by Age</i>	<i>% of Total Pop with a Disability by Age</i>	<i>Total Pop with Disability and Below Poverty Level by Age</i>	<i>% Total Pop with a Disability and Below Poverty Level by Age</i>
<5 years age	18,339	5.0%	4,133	1.1%	0	0.0%	4,133	5.32%
5-17	48,529	13.3%	12,774	3.5%	4338	1.2%	5,928	1.62%
18-34	23,281	6.4%	8,895	2.4%	4,771	1.3%	6,404	1.75%
35-64	168,570	46.1%	16,858	4.6%	18,187	5.0%	21,861	5.97%
Total Non-Elderly	258,719	70.7%	42,660	11.7%	27,296	7.5%	38,326	10.47%
65-74	79,238	21.7%	4,873	1.3%	13,209	3.6%	15,992	4.37%
75+	27,984	7.6%	4,408	1.2%	20,820	5.7%	23,352	6.38%
Total Elderly	107,222	29.3%	9,281	2.5%	34,029	9.3%	39,344	10.75%
Total	365,941	100%	51,941	14.2%	61,325	16.8%	77,670	21.22%

E - Estimate non-elderly/disabled/ low income	From Base Data (I11)	38,326
B - Estimate non-elderly/ disabled/not low income	Subtract I9 from G11	(11,030)
G - Estimate elderly/disabled/low income	From Base Data (I14)	39,344
D- Estimate elderly/ disabled/not low income	Subtract I11 from G14	(5,315)
F - Estimate elderly/non-disabled/low income	Subtract I14 from E14	(30,063)
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C14	103,256
C - Estimate low income/not elderly/not disabled	Subtract I11 from E11	4,334
Total - Non-Duplicated		138,852

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

Table 1.9 shows the forecasts of the general TD population for Marion County and references the categories shown in **Figure 1.6**. As shown, the 2019 TD population in Marion County is estimated to be 138,852, representing approximately 37.9% of the total population. This population includes all persons with disabilities, older adults, low-income persons, and children who are high-risk or at-risk and is expected to increase by approximately 9% over the five-year period of 2020-2025.

Table 1.9: Forecast General TD Population

<i>General TD Population Forecast</i>	<i>2019</i>	<i>2020</i>	<i>2021</i>	<i>2022</i>	<i>2023</i>	<i>2024</i>	<i>2025</i>
Overlapping Circle Component							
E - Estimate non-elderly/disabled/ low income	38,326	38,882	39,445	40,017	40,598	41,186	41,783
B - Estimate non-elderly/ disabled/not low income	-11,030	-11,190	-11,352	-11,517	-11,684	-11,853	-12,025
G - Estimate elderly/disabled/low income	39,344	39,914	40,493	41,080	41,676	42,280	42,893
D- Estimate elderly/ disabled/not low income	-5,315	-5,392	-5,470	-5,550	-5,630	-5,712	-5,794
F - Estimate elderly/non-disabled/low income	-30,063	-30,499	-30,941	-31,390	-31,845	-32,307	-32,775
A - Estimate elderly/non-disabled/not low income	103,256	104,753	106,272	107,813	109,376	110,962	112,571
C - Estimate low income/not elderly/not disabled	4,334	4,397	4,461	4,525	4,591	4,657	4,725
TOTAL GENERAL TD POPULATION	138,852	140,865	142,908	144,980	147,082	149,214	151,378
TOTAL POPULATION	365,941	371,247	376,630	382,090	387,630	393,251	398,953

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

Table 1.10 presents the Critical Need TD population forecasts and includes individuals who, due to severe physical limitations or low income, are unable to transport themselves or purchase transportation and are dependent upon others to obtain access to health care, employment, education, shopping, social activities, and other life-sustaining activities. As shown, the Marion County's 2019 Critical Need TD population is estimated to be 61,325, representing nearly 44% of the general TD population.

Table 1.10: Critical Need Transportation Disadvantaged

County Pop. By Age	Total Population with a Disability by Age	% with a Severe Disability by Age	Total Population with a Severe Disability by Age	% of Total Pop with Severe Disability by Age	% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
< 5 years of age	0					
5-17	4,338	4.20%	182	0.39%		
18-34	4,771	6.30%	301	0.51%		
35-64	18,187	13.84%	2,517	2.04%		
Total Non-Elderly	27,296		3,000	1.22%	28.60%	858
65-74	13,209	27.12%	3,582	2.81%		
75+	20,820	46.55%	9,692	9.44%		
Total Elderly	34,029		13,274	5.77%	11.70%	1,553
Total	61,325		16,274	3.42%		2,411

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

In 2021, the Critical Need TD population is expected to make 650,988 total annual trips as shown below in **Table 1.11**. The number of Critical Need trips needed is expected to increase 9% over the five-year period.

Table 1.11: Marion County Forecasted Annual Trip Demand, 2019-2025

Critical Need TD Population Forecast	2019	2020	2021	2022	2023	2024	2025
Total Critical TD Population							
Disabled	16,274	16,510	16,749	16,992	17,238	17,488	17,742
Low Income Not Disabled No Auto/Transit	777	788	800	811	823	835	847
Total Critical Need TD Population	17,051	17,298	17,549	17,803	18,061	18,323	18,589
Daily Trips - Critical Need TD Population							
Severely Disabled	797	809	821	833	845	857	869
Low Income - Not Disabled – No Access	1,475	1,497	1,518	1,540	1,563	1,585	1,608
Total Daily Trips Critical Need TD Population	2,273	2,311	2,350	2,390	2,430	2,473	2,517
Annual Trips	629,530	640,169	650,988	661,990	673,177	685,092	697,219

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

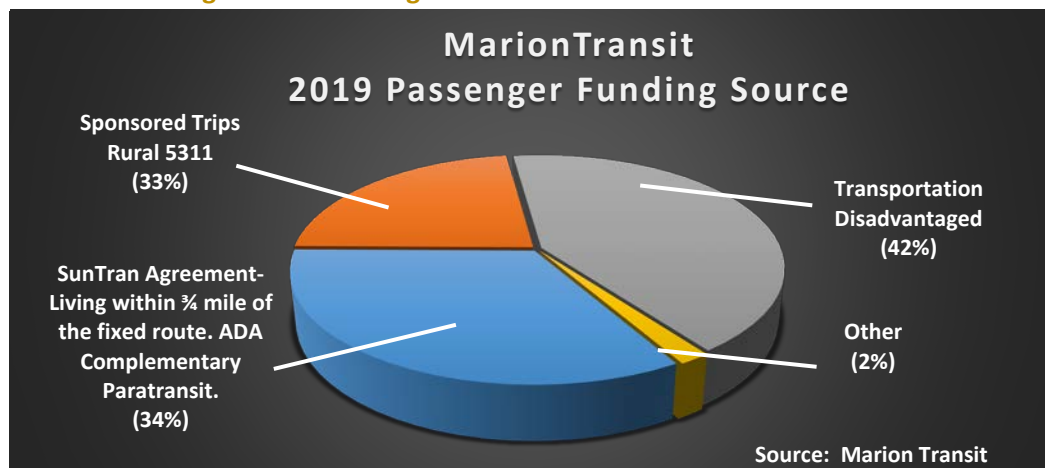
3. Needs Assessment

Assessment of existing and unmet needs for public transportation for low income older adults and persons with disabilities is essential. An inventory of existing transportation providers and identification of redundancies and gaps in service were used to identify unmet needs or duplications of public transportation services. It is assumed that there will be a growing need for public transit in the higher-density areas in Marion County. Older persons may be more likely to use public transportation as the aging process begins to limit their ability or preference to drive. Marion County has a larger proportion of older adults compared to the statewide average. According to the 2014–2018 ACS, more than 27% of Marion County’s population is 65 years of age or older compared to nearly 17% for Florida.

MT has found that the Transportation Disadvantaged Trip and Equipment Grant is formula based throughout all the counties in Florida. Marion County has been traditionally known as a rural county relying on federal funding through the 5311 FDOT Grant to sponsor trips. However, in recent years the non-sponsored trips paid out of the Transportation Disadvantaged Trip and Equipment Grant has not kept up with these trips and MT must prioritize these trips. This has resulted in TD Riders not being able to fully take advantage of the system. The county’s unincorporated areas encompass a large portion of MT’s trips and with the 2020 Census just around the corner, many of these areas of Marion County will no longer be considered rural areas resulting in more demand for non-sponsored trips. Marion Oaks is one example of such an area with approximately 15,000 residents needing service to healthcare, employment and shopping. Qualifying and providing service in this area without more funding will result in a decreased quality in service.

Therefore, the Commission for the Transportation Disadvantaged will need to focus on adjusting their formula for funding or develop new funding to cover these trips.

Figure 1.7: Funding Sources



4. Barriers to Coordination

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

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

Goals, Objectives, and Strategies

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

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

Vision Statement

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

Mission Statement

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

MT will focus the next five years to increase access to public transportation within the rural areas of Marion County utilizing route deviation in conjunction with demand response services and work towards reducing reservations closer to next day appointments. MT will continue to provide service that meets the needs of Marion County's transportation disadvantaged, combined with safety and integrated with other county modes of travel.

MT's goals, objectives and strategies are:

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

Objectives:

1. Continue to monitor and assess riders to transition to fixed-route services.
2. Carefully match the best possible transit solution for every particular need.
3. Make sure that the application and registration process is simplified but as effective as possible.

Strategies:

- a. Annually assess the applications of current riders that are able to transition to fixed route system.
- b. At the time the reservationist takes the call monitor and adjust as needed the service standards for customer service to ensure consideration of their needs.
- c. Annually update the application and registration process to meet the needs of the customer.

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

Objectives:

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

Strategies:

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

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

Objectives:

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

Strategies:

- a. Maintain effective means of communication where customers can provide input through the TDLCB meetings, website and social media.
- b. Work with customers at the time they call in a reservation to attain their buy-in for no shows, and cancellations.
- c. Look at and update the routes at a minimum annually.

4. Provide transportation services with safety at the forefront

Objectives:

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

Strategies:

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

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

Objectives:

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

Strategies:

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

Implementation Plan

Table 1.12: Implementation Plan

OBJECTIVE	STRATEGY	RES- PON- SIBLE	MEASURE STATUS
GOAL 1. To provide the best possible transportation service to those in the service area.			
Continue to monitor and assess riders to transition to fixed-route services	Annually assess the applications of current riders that are able to transition to fixed route system	CTC TDLCB	CTC reports to TDLCB Ongoing

Carefully match the best possible transit solution for every particular need	At the time the reservationist takes the call, monitor and adjust as needed the service standards for customer service to ensure consideration of their needs	CTC	CTC to monitor -Daily
Make sure that the application and registration process is simplified but as effective as possible	Annually update the application and registration process to meet the needs of the customer	CTC TDLCB	CTC to monitor minimum - Annually
GOAL 2. Educate the riders and general public on services provided.			
Participate in community events to educate	Continue to make presentations and participate in speaking engagements in the community at minimum one a month	CTC	Number of presentations - Ongoing
Maintain a presence on the internet to improve public image	Maintain website and social media platforms up-to-date for public image	CTC	Customer input -Ongoing
Respond to complaints immediately to improve public perception and identify problems	Immediate notification of complaint to Grievance Committee for resolution and annually update grievance procedures	CTC TDLCB	CTC to report to TDLCB - Quarterly
GOAL 3. Remain flexible and open-minded in terms of routes and riders' needs.			
Ensure that requests received are communicated and considered as possible feasible changes and/or corrections	Maintain effective means of communication where customers can provide input through the TDLCB meetings, website and social media	CTC TDLCB	Maintain comment cards buses/website - Ongoing
Best practices in terms of less call hold time, pick-up window, and reservation time	Work with customers at the time they call in a reservation to attain their buy-in for no shows and cancellations	CTC	CTC to monitor - Daily
Continued assessment of the routes for more efficient service	Look at and update the routes at a minimum annually	CTC	CTC will monitor for cost efficiency -Annually
GOAL 4. Provide the transportation services with safety at the forefront.			
Adhere to the System Safety Program Plan and meet all requirements	Continue background check, drug tests and physical compliance for all drivers at onset of employment and random testing regularly	CTC	CTC to monitor documentation - Daily
All vehicles to receive regularly scheduled maintenance and daily inspections	Ascertain qualified mechanics are utilized for repair of the uses and drivers sign off daily for inspections	CTC	CTC to monitor documentation - Daily
Maintain a process for sanitizing and cleaning all vehicles every day	Establish procedures for cleaning of buses and continued awareness and education on sanitizing with drivers doing daily logs	CTC	CTC to monitor customer input -Daily
GOAL 5. Maintain consistent coordination to provide effective service to public and private partners.			
Build a rapport with both public and private partners to better understand their needs	Arrange to meet on a quarterly basis in an effort to build rapport	CTC	CTC to monitor -Ongoing
Work to establish a mutual trust with partners	Share plans and routes with partners quarterly at the meeting in order to build mutual trust	CTC	CTC report to TDLCB-Qtrly
Coordinate resources to better serve and maintain costs down with efficient service	Maintain communication quarterly to close any gaps in service and ways to improve costs and efficiency.	CTC	CTC to monitor Ongoing

Section 2: Service Plan

Operations Element

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

1. Types, Hours and Days of Service

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

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

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

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

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

In total, 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.

2. Accessing Service

Riders may call MT's Reservations line at 352-620-3071 Monday through Friday from 8:00 am to 5:00 pm to schedule a trip. Reservations may not be made more than 2 weeks prior but not less than 72 hours before their appointment time. However, ADA Complementary paratransit eligible riders may call by 5:00 pm the day before their scheduled appointment. The reservationist will listen to every request, discuss the circumstances, and 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 MT's Reservationist who determines the rider's eligibility, assigns the appropriate sponsor, and then assigns the trip in the software (RouteMatch) program. Next, MT's scheduler reviews the scheduled trips and proceeds to assign them to a manifest/bus for transportation on the designated date/time. The rider is then transported from origin to destination (door to door) as requested.

3. Trip Eligibility

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

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

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



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

4. Trip Prioritization

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

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

5. Other Accessibility Processes/Procedures

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

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

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

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

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

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

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

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

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

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

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

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

6. Transportation Operators and Coordination Contractors

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

Table 2.1: Agreements with Outside Transportation Agencies

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

7. Public Transit Utilization

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

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

8. School Bus Utilization

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



9. Vehicle Inventory

To properly operate TD services, MT maintains a fleet of approximately 43 cutaway buses in various seating configurations of less than 15 passengers each for ambulatory and wheelchair riders. All of MT's fleet is ADA accessible equipped some with wheelchair lifts having a capacity of up to 1,000 pounds. Several "spare" vehicles are included within this fleet for when vehicles are out of service for repairs or inspections. Each in-service bus is inspected following a mandatory pre and post-trip inspection by drivers. Safety issues found can immediately place a bus out-of-service until repaired.

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

10. System Safety Program (SSPP) Certification

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

11. Inter-County Services

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

12. Emergency Preparedness and Response

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

13. Marketing

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

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

14. Service Standards

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

Table 2.2: CTC Service Standards

Service Standard	Policy/Measure
Accidents	MT Preventable Accident Standards are <1 accident per 100,000 miles.
Advance Reservations	Trips must be scheduled a minimum of 72 hours prior to date of travel and at a maximum of two weeks in advance of date of travel, with exception of ADA Complementary Paratransit – by 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.
Road calls	No more than one road call per 10,000 miles.
Service Animals	Service Animals are allowed to accompany riders in accordance with ADA; MT must be notified when reservation is made that you will have a service animal traveling with you.
Training	All transportation safety-sensitive employees required to complete 60 minutes of drug and alcohol training annually. All new drivers complete a minimum of 80 hours of Field Operator Training with a Field Training Operator who covers all the required training for new personnel before going solo. This training includes both book/video and hands on training with a trainer. All drivers complete mandatory training every three years at least once. Training includes; customer satisfaction, wheelchair restraints, loading/unloading, defensive driving, distracted driving and other necessary training. All training is either classroom, online, observing, or interaction with a trainer.
Wheelchair	Drivers cannot assist wheelchairs over more than 1 step or curb. The minimum clear width for single wheelchair passage shall be 32 inches (815 mm) at a point for a maximum length of 24 inches and 36 inches (915 mm) continuously. Lift capacity (chair & rider combined) may not exceed the lift maximum limits usually 800 or 1000 pounds depending on the bus.
Drug & Alcohol	MT requires each driver be drug screened prior to hiring. MT also has a zero-tolerance policy for drug abuse and follow the recommended Federal Transportation Authority (FTA) policy. This policy includes random drug and alcohol testing once on board.

15. Local Complaint and Grievance Procedures/Processes

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

Section 3: Quality Assurance

CTC Monitoring and Evaluation Process for Operators and Coordination Contractors

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



1. CTC Evaluation

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

2. Cost/Revenue Allocation and Rate Structure Justification

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

Table 3.1: FCTD Calculated Rates

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

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

Table 3.2: SunTran Fare Structure/MT Fare Structure

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

Appendix A – Summary Review of Other Plans

Local Government Comprehensive Plans

City of Ocala

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

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

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

Marion County

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

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

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

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

Regional Plans

Ocala 2035 Vision

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

Transit Development Plans

SunTran

The City of Ocala operates and manages the day to day operations and financial matters for the fixed route public transit provider in Marion County. The latest approved Transit Development Plan (TDP) for SunTran was approved in 2017. In the plan it mentions several opportunities for further expansion and the funding that would be required to obtain such expansion. In addition, TPO staff has worked with SunTran and City of Ocala staff to ensure that transit efficiency and availability increases where uses are necessary and applicable.

TDSP

TPO Staff in conjunction with the Transportation Disadvantaged Local Coordinating Board (TDLCB) and the Community Transportation Coordinator (CTC) approved the latest TDSP annual update in June of this year. However, a new CTC was selected during the same month, which requires staff to conduct a major update, due by November 1, 2020. The current plan highlights existing goals, objectives, and strategies to help improve the efficiency of the transit system for the disadvantaged community here in Marion County. The TDSP looks at current demographics, land use, and automobile ownership to better predict where new customers and users could be potentially gained. This helps staff at the local municipalities and the TPO, better plan for the transportation needs of its citizens.

Commission for Transportation Disadvantaged Plans

Annual Performance Report (2015 - 2019)

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

Annual Operations Report for Marion County

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

Ocala Marion County Transportation Planning Organization (TPO) Plans

2040 Long-Range Transportation Plan (LRTP)

The Ocala Marion County TPO is the federal designated metropolitan planning agency for Marion County. The TPO is required by federal statute to update the LRTP every five years. The LRTP is a blueprint used to guide the transportation system throughout Marion County over the next twenty plus years. The 2040 LRTP discusses service improvements including new route expansions and increased frequency. However, due to funding constraints the expansions and increased frequency were both determined to not be cost feasible. The LRTP was reviewed for consistency with this plan update.

Transportation Improvement Program (TIP) FY 2020/21 – 2024/25

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



Summary

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

Appendix B – MT's Vehicle Inventory

MTS#	Agency's Bus Number	Year/Make	Vehicle Length (Feet)	Ambulatory Seats	Wheelchair Spaces	ADA Accessory (Lift/Ramp, etc.)	Current Use
1	1202 (32)	2012 Chevrolet	23	12	4	Lift	Spare
2	1204 (41)	2012 Chevrolet	23	12	4	Lift	Daily Use
3	1205 (50)	2012 Dodge	12	6	1	Ramp	Spare
4	1301 (04)	2013/Chevrolet	23	10	6	Lift	Spare
5	1302 (07)	2013/Chevrolet	23	10	6	Lift	Spare
6	1303 (24)	2013/Chevrolet	23	10	2	Lift	Spare
7	1304 (26)	2013/Chevrolet	23	10	4	Lift	Out/Serv.
8	1305 (31)	2013/Chevrolet	23	10	6	Lift	Daily Use
9	1306 (42)	2013/Chevrolet	23	10	6	Lift	Spare
10	1401 (08)	2014/Chevrolet	23	10	6	Lift	Daily Use
11	1402 (10)	2014/Chevrolet	23	10	6	Lift	Daily Use
12	1403 (17)	2014/Chevrolet	23	10	4	Lift	Daily Use
13	1404 (18)	2014/Chevrolet	23	10	6	Lift	Daily Use
14	1405 (29)	2014/Chevrolet	23	10	6	Lift	Daily Use
15	1406 (34)	2014/Chevrolet	23	10	6	Lift	Daily Use
16	1407 (37)	2014/Chevrolet	23	10	6	Lift	Daily Use
17	1501 (15)	2015/Ford E-450	23	10	6	Lift	Daily Use
18	1502 (40)	2015/Ford E-450	23	10	6	Lift	Daily Use
19	1601 (5)	2016/Ford E-450	23	10	6	Lift	Daily Use
20	1602 (9)	2016/Ford E-450	23	10	6	Lift	Daily Use
21	1603 (11)	2016/Ford E-450	23	10	6	Lift	Daily Use
22	1604 (20)	2016/Ford E-450	23	10	6	Lift	Daily Use
23	1605 (21)	2016/Ford E-450	23	10	6	Lift	Daily Use
24	1701	2017/Ford/Tran	22	9	2	Lift	Daily Use
25	1702	2017/Ford/Tran	22	9	2	Lift	Daily Use
26	1703	2017/Ford/Tran	22	9	2	Lift	Daily Use
27	1704	2017/Ford/Tran	22	9	2	Lift	Daily Use
28	1705	2017/Ford/Tran	22	9	2	Lift	Daily Use
29	1801	2018/Chevrolet	24	11	4	Lift	Daily Use
30	1802	2018/Chevrolet	24	11	4	Lift	Daily Use
31	1803	2018/Chevrolet	24	11	4	Lift	Daily Use
32	1804	2018/Chevrolet	24	11	4	Lift	Daily Use
33	1805	2018/Chevrolet	24	11	4	Lift	Daily Use
34	1900	2019/Ford E-450	23	12	4	Lift	Daily Use
35	1901	2019/Ford E-450	23	12	4	Lift	Daily Use
36	1902	2019/Ford E-450	23	12	4	Lift	Daily Use
37	1903	2019/Ford E-450	23	12	4	Lift	Daily Use
38	1904	2019/Ford E-450	23	12	4	Lift	Daily Use
39	2001	2020/Ford E-450	23	12	4	Lift	Daily Use
40	2002	2020/Ford E-450	23	12	4	Lift	Daily Use
41	2003	2020/Ford E-450	23	12	4	Lift	Daily Use
42	2004	2020/Ford E-450	23	12	4	Lift	Daily Use
43	2005	2020/Ford E-450	23	12	4	Lift	Daily Use

Appendix C – Marion Transit Grievance Procedures

Inserted

**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
 1101SW 20th Court
 Ocala, Florida 34471

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

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

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

Article VI: Appeal Process-STEP 2

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

The appeal must be in writing and addressed to:

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

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

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

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

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

Address all appeals to:

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

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

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

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

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

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

Article IX: General

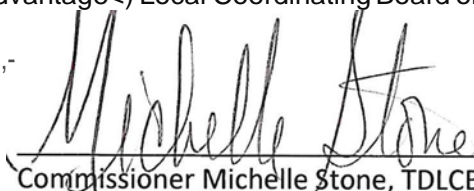
The Transportation Disadvantaged Local Coordinating Board Grievance Procedures may be amended by a two-thirds (2/3) vote of members present, if a quorum exists, and all Members have been notified of proposed changes at least seven (7) working days in advance of the meeting.

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

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

CERTIFICATION

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

D Additional Pages are attached.

TDLCB COMPLAINT TRACKING FORM

Name of Complainant: _____

COMPLAINT TO THE CTC -STEP 1

File Number _____

Date of pt_ Complaint: _____ Date of pt_ Resolution: _____

Action Taken (including date of letter): _____

APPEAL = COMPLAINT TO THE TDLCB GRIEVANCE SUBCOMMITTEE - STEP 2

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

Date of Subcommittee Hearing: _____

Action Taken (including date of letter): _____

APPEAL = COMPLAINT TO THE TDLCB-STEP 3

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

Date of TDLCB Hearing: _____

Action Taken (including date of letter): _____

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

Date sent: _____

Appendix D – System Safety Program Plan Certification

Inserted

**BUS TRANSIT SYSTEM
ANNUAL SAFETY CERTIFICATION**

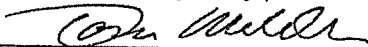
DATE: January 3, 2020

BUS TRANSIT SYSTEM: Marion Senior Services, Inc. d/b/a Marion Transit

ADDRESS: 1101 S.W. 20th Court
Ocala, Florida 34471

**IN ACCORDANCE WITH FLORIDA STATUTE 341.061
THE BUS TRANSIT SYSTEM NAMED ABOVE HEREBY CERTIFIES TO THE FOLLOWING:**

1. The adoption of a System Safety Program Plan (SSPP) and the Security Program Plan (SPP) pursuant to Florida Department of Transportation safety standards set for in Rule Chapter 14-90, Florida Administrative Code (F.A.C.).
Current date of Adopted SSPP: July 29, 2016
Current date of Adopted SPP: August 1, 2016
2. Compliance with adopted safety standards in the SSPP and the SPP.
3. Performance of annual safety inspections on all operational buses in accordance with Rule 14-90.009, F.A.C. (This should be signed by the Officer responsible for management of the bus transit system to certify compliance.)



Signature
Tom Wilder

Name (Printed or Typed):
Transportation Director

Title

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

Advanced Tire & Service

Name
2199 N.W. 10th Street

Address (Street Number)
Ocala, Florida 34475

Address (City, State, Zip Code)
January 1, 2019 – December 2019. (Present)

Date(s) of Inspection

Advanced Vehicle Modifications (Wheelchair Lifts)

Name
7265 S.W. 62nd Avenue, Unit 1

Address (Street Number)
Ocala, Florida 34476

Address (City, State, Zip Code)
January 1, 2019 – December 2019. (Present)

Date(s) of Inspection

Don's Garage

Name

218 S.W. 10th Street

Address (Street Number)

Ocala, Florida 34471

Address (City, State, Zip Code)

January 1, 2019 – December 2019. (Present)

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

N/A



Florida Department of Transportation

RICK SCOTT
GOVERNOR

133 South Semoran Blvd.
Orlando, Florida 32807

MIKE DEW
SECRETARY

October 8, 2018

Tom Wilder, Transportation Director
Marion Senior Services
1101 SW 20th Court
Ocala, FL 34471

RE: Compliance Notice for the Marion Senior Services 2018 Triennial Review

Dear Mr. Wilder:

This letter is to confirm that our site visit for the 2018 Marion Senior Services Triennial Review on July 9, 2018 was satisfactory and we have found your agency to comply with the Florida Department of Transportation's (FDOT) regulations for providing public transportation services and for receiving federal funding under 49 U.S.C. § 5310, § 5311, and § 5339. A summary of review findings is provided as an appendix to this Compliance Notice. Your agency's response was received by the FDOT reviewer via the Corrective Action Plan (CAP) on September 14, 2018.

Your cooperation during the entire process was greatly appreciated and we look forward to working with you in the future to provide safe and efficient transportation for the residents of Marion County.

Should you have any questions or require additional information, please do not hesitate to contact me directly at (407) 482-7860, diane.poitras@dot.state.fl.us or Kayla Costello (407) 482-7887, kayla.costello@dot.state.fl.us.

Sincerely,

Diane Poitras
Transit Programs Administrator
FDOT District Five

Attachment 1 – Triennial Review CAP Matrix

DP/kc

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

Inserted



TO: Tom Wilder

FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner on behalf of the LCB

RE: Evaluation Completion Status

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

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

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

Our evaluation found that the system is well ran with little or no issues. The TPO has provided a few recommendations as well as commendations as a result of our evaluation.

RECOMMENDATIONS-COMMENDATIONS

Recommendations:

1. Provide readily available comment cards on each bus for input from the riders with a sealed drop box.
2. Place the “Riding Rules” and “Marion Senior Services” brochures on each bus readily available for the riders to pick up and review.
3. Standardize the location of the pertinent phone numbers on each bus with an emphasis on the size of the numbers (larger for distance viewing from the back of the bus).

Commendations:

1. Riders are pleased and speak highly of the overall system and the staff.
2. The innovation and development of the deviated route called the “Blue Line” in the City of Dunnellon to achieve a more cost effective result with a more timely response.
3. Marion Transit Services monitors and continues to make the changes required to provide the coverage necessary to maintain happy riders, given the vast size of the county.

We wish continued improvement and success to Marion County Transit Services and the CTC.

Via Email –

February 25, 2020

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

Re: CTC Annual Evaluation – Marion Transit

To whom it may concern:

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

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

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

Thank you.

Sincerely,



Tom Wilder, Transportation Director & CTC

Attachment

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

Appendix F - FCTD Rate Model Calculation Spreadsheets

Inserted

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 BUDGETED Revenues
	from
	July 1st of
	2020
	to
	June 30th of
	2021
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> EX 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

- | | |
|----------|--|
| | Upcoming Year's
BUDGETED
Revenues |
| | from |
| | July 1st of |
| | 2020 |
| | to |
| | June 30th of |
| | 2021 |
| 1 | 2 |

<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 local match for these type revenues?</p>	<p>Budgeted Rate <u>Subsidy Revenue</u> Excluded 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>
3	4	5

APD	
Office of Disability Determination	\$ -
Developmental Services	\$ -
Other APD	\$ -
Bus Pass Program Revenue	\$ -
DJJ	
DJJ	\$ -
Bus Pass Program Revenue	\$ -
Other Fed or State	
xxx	\$ -
xxx	\$ -
xxx	\$ -
Bus Pass Program Revenue	\$ -
Other Revenues	
Interest Earnings	\$ -
Insurance Loss Reimbursement	\$ -
Sale of Vehicles	\$ -
Bus Pass Program Revenue	\$ -
Balancing Revenue to Prevent Deficit	
Actual or Planned Use of Cash Reserve	\$ -
Total Revenues =	\$ 3,437,233

[illegible]

EXPENDITURES (CTC/Operators ONLY)	
Operating Expenditures	
Labor	\$ 1,415,000
Fringe Benefits	\$ 399,718
Services	\$ 298,995
Materials and Supplies	\$ 373,499
Utilities	\$ 26,274
Casualty and Liability	\$ 142,585
Taxes	\$ 1,100
Purchased Transportation:	
Purchased Bus Pass Expenses	\$ -
School Bus Utilization Expenses	\$ -
Contracted Transportation Services	\$ -
Other	\$ -
Miscellaneous	\$ 14,007
Operating Debt Service - Principal & Interest	\$ -
Leases and Rentals	\$ 1,550
Contrib. to Capital Equip. Replacement Fund	\$ -
In-Kind, Contributed Services	\$ -
Allocated Indirect	\$ -
Capital Expenditures	
Equip. Purchases with Grant Funds	\$ 374,000
Equip. Purchases with Local Revenue	\$ 41,505
Equip. Purchases with Rate Generated Rev.	\$ -
Capital Debt Service - Principal & Interest	\$ -
	\$ 349,000
Total Expenditures = \$ 3,437,233	
<i>minus EXCLUDED Subsidy Revenue =</i>	<i>\$ 471,100</i>
Budgeted Total Expenditures INCLUDED in	
Rate Base =	\$ 2,966,133
Rate Base Adjustment ¹ =	
Adjusted Expenditures Included in Rate	
Base =	\$ 2,966,133

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

SECTION V: Rate Calculations for Multiple Services:

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

RATES FOR FY: 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	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

Combination Trip and Mile Rate				
	Ambul	Wheel Chair	Stretcher	Group
2 If you answered # 1 above and want a COMBINED Rate per Trip PLUS a per Mile add-on for 1 or more services,...			Leave Blank	Leave Blank
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =				\$0.00
Rate per Passenger Mile for Balance =	\$2.31	\$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

Version 1.4