

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



Prepared by:  
Ocala Marion Transportation  
Planning Organization and  
Marion Transit Services



Updated:  
June 13th, 2024

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

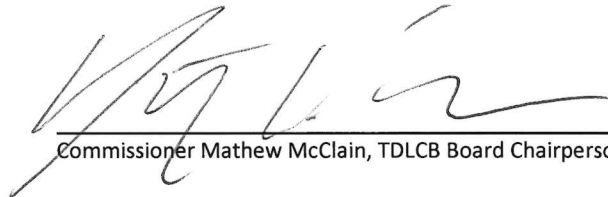
## TDSP CERTIFICATION

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

We further certify that the rates constrained herein have been thoroughly reviewed, evaluated, and approved. The Transportation Disadvantaged Service Plan (TDSP) will be reviewed in its entirety and approved by the Board at an official meeting held on June 13<sup>th</sup>, 2024.

06/13/2024

Date



Commissioner Mathew McClain, TDLCB Board Chairperson

6/13/24

Date



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: June 13, 2024

NAME	REPRESENTING	YES	NO	ABSENT
Mathew McClain	Board of County Commissioners ( <i>Chair</i> )			✓
Jeffrey Askew	Marion County Veterans Affairs	✓		
Gisela Ruiz	Agency for Healthcare Administration			✓
Tiffany McKenzie	Central Florida Community Action Association	✓		
Tracey Sapp	Department of Health			✓
Susan Hanley	Department of Elder Affairs	✓		
Iris Pozo	CLM Workforce			✓
Jeannette Estes	Agency for Persons with Disabilities	✓		
Andrea Melvin	Center for Independent Living ( <i>Vice-Chair</i> )	✓		
Anissa Pieriboni	Florida Center for the Blind			✓
Steven Neal	City of Ocala-SunTran	✓		
Angela Juaristic	Ocala Housing Authority			✓
Donnie Mitchell	Housing Finance Authority	✓		
Elizabeth Alacci	Dept. of Children and Families (DCF)			✓
Carlos Colon	Florida Department Of Transportation (FDOT)	✓		
Christopher Carlisle	Marion County School Board	✓		

6/13/2024  
Date

  
Commissioner Mathew McClain, TDLCB Chairperson



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***PUBLIC DISCLOSURE STATEMENT:***

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

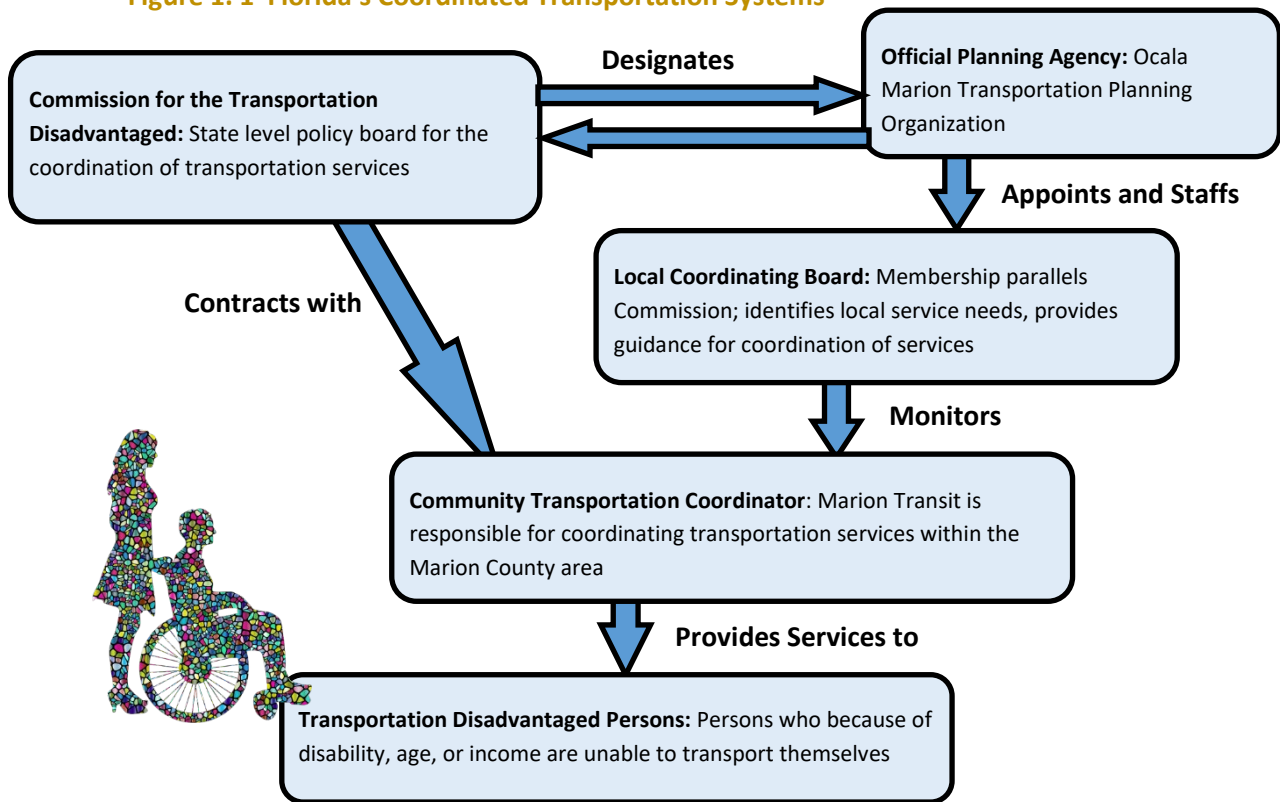
The purpose of the TD is to ensure the availability of efficient, cost-effective, and quality transportation services for the transportation disadvantaged population. Older adults who are lower income and/or have a disability are often considered transportation disadvantaged, are unable to drive due 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 Systems**



## 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

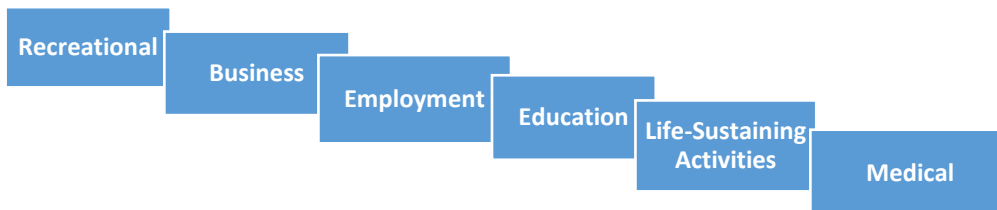
The Community Transportation Coordinator (CTC) is the agency responsible for providing coordinated transportation services for the transportation disadvantaged citizens in the county.

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 47 small cutaway-type buses serve an area of more than 1,600 square miles. Trip priorities are established by a subcommittee of the TDLCB and the TPO.

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



MT currently has coordination contracts with four entities that provide transportation services to their own residents: Advocacy Resource Center Marion, Inc. (ARC), and Florida Center for the Blind, Inc., Marion County School Board, and Bridge to Hope. The MT fare is \$2.00 per one-way trip. MT accepts

cash or passes for fare payment, and the fare must be paid upon boarding the vehicle; drivers are unable to provide change.

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

Marion County's public transit service, SunTran, is provided by the City of Ocala and managed by RATPDev. The service began operating in 1998 and currently operates a scheduled, fixed-route system six days per week to riders of all age groups. The regular full cash fare is \$1.50, with discounts offered for youth, students, older adults, and individuals with disabilities. Reduced rate passes are also available for youth/students and older adult/disabled passengers. SunTran contracts with Marion Transit Services (MT) for the required complementary Americans with Disabilities Act (ADA) paratransit services within ¼-mile of the SunTran fixed-route system.

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

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

#### *5. Public Participation*

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

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

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

Surveys are utilized as a form of gathering information and insight from the public. The TDLCB surveys as needed in order to receive comments first hand from the public. The TPO also participates in community outreach programs such as the “Marion County Day” which is designed to inform the community of the programs available within the County as well as, allowing residents to enjoy the outdoors while learning the countywide plans and activities.



The TPO maintains an interactive website and social media platforms such as Facebook, Twitter and LinkedIn for citizens to provide comments, and/or requests at any time. All plans, programs, surveys, committee and board meeting minutes, along with any interactive maps, can be found on the TPO website for review at any time.

This document is updated annually and revised as transit-related information is gathered for other documents such as the Long-Range Transportation Plan (LRTP), Transportation Improvement Plan (TIP), Public Participation Plan (PPP), Congestion Management Plan (CMP), and the Safety Action Plan (SAP).

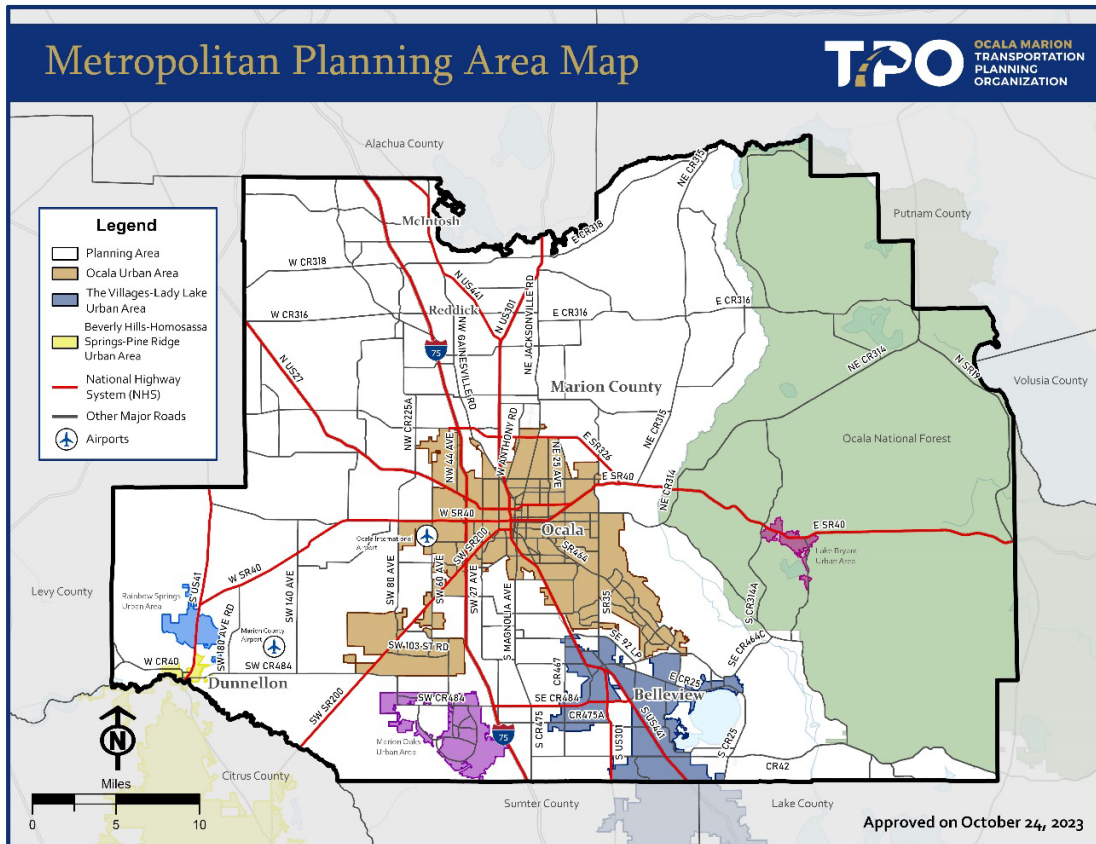
## ***Service Area Profile and Demographics***

### ***1. Service Area Description***

Marion County is located in northern central Florida, just north of Lake and Sumter counties, east of Levy County, and south of Alachua County. The county seat of Ocala is centrally located within the county. Ocala is the largest incorporated city in Marion County, followed by the cities of Belleview and Dunnellon. Marion County has two other incorporated areas, McIntosh and Reddick, which are located in northern

Marion County. The Villages, which is a census designated place is one of the fastest growing retirement communities in the entire United States. The Villages are predominately located in Lake and Sumter counties to the south, with a growing portion in southern Marion County. The eastern part of the county is dominated by the Ocala National Forest. A major interstate, I-75 runs north and south on the western edge of the City of Ocala. The area has seen a great influx of distribution centers due mostly to the availability of land, and the close proximity to I-75, which connects some of the state’s major metropolitan areas such as Orlando, Tampa, and Jacksonville, to Marion County. **Table 1.1** provides an overview of the study area.

**Table 1. 1 Ocala Marion TPO Planning Area**



**2. Demographics/Land Use**

As part of the analysis for this plan was the relationship between land use and transportation. As an update to the TDSP, land use was reviewed for both the City of Ocala and Marion County. Both the City of Ocala and Marion County have an array of land uses, similar to other municipalities. These range from residential, multi-family, commercial, and industrial. Therefore, the relationship between land use and transportation are vitally important. TPO staff works diligently with planners and engineers at all of our

local partners to ensure that the level of service on roadways are adequate to support the demand for whatever uses are adjacent to a particular corridor.

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

### 3. Population Composition

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

**Table 1. 2 Population by Race**

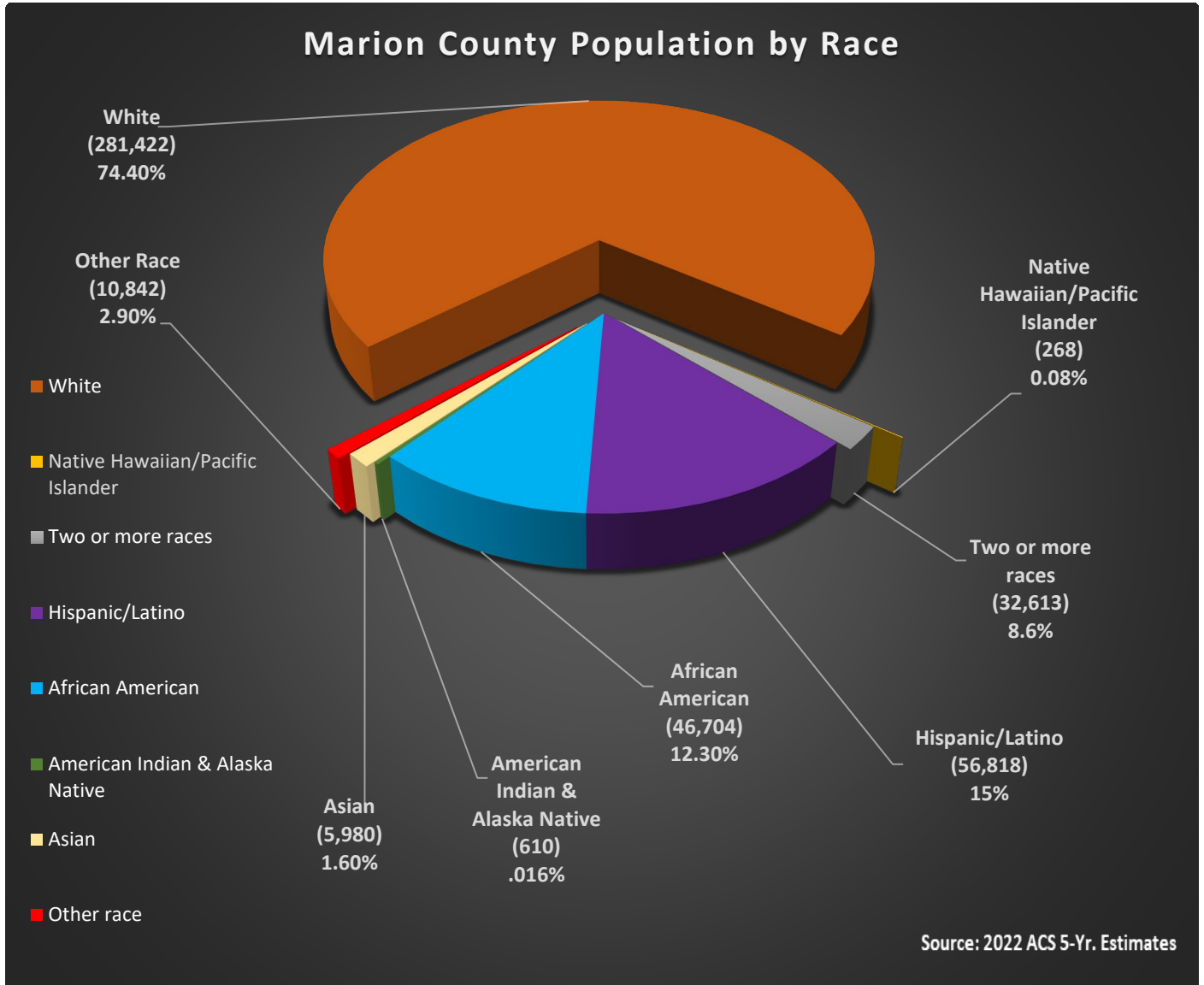
<i>Race</i>	<i>Population</i>	<i>Percent of Population</i>
White	281,422	74.40%
African American	46,704	12.30%
Two or more races	32,613	8.6%
Asian	5,980	1.60%
American Indian & Alaska Native	610	.016%
Native Hawaiian/Pacific Islander	54	.014%
Other race	10,842	2.90%
<b>Total</b>	<b>378,225</b>	<b>100.00%</b>
Hispanic/Latino of any race	56,818	15.0%

Source: ACS 2022- 5-year estimates. Items may not add to totals or compute to displayed percent due to rounding.

#### 4. Cultural Descriptions

Marion County has a total population of 378,225 according to the American Community Survey's (ACS) 2022 5-year estimates. The chart and graph **Table 1.2** and **Figure 1.2** highlight the racial makeup of Marion County.

**Figure 1.2 Population by Race**



Marion County's population increased from 375,908 persons in 2020 to 378,225 persons in 2022, an overall increase of 0.62%. It is estimated that the population will continue to increase according to the 2024 Population report by the Bureau of Economic and Business Research (BEER) at the University of



Florida. Using BEBR Florida population medium growth projections, the population of Marion County is expected to increase by 30% by 2050. **Table 1.3** provides an overview of the population projections for Marion County and Florida from 2023 to 2050. Marion County is experiencing high residential and business growth, which will require a higher demand for transit service in the future.

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

Area	Population Estimate	Population Projections						Population Growth
		2023	2025	2030	2035	2040	2045	
Marion County	403,966	417,100	446,400	471,100	491,700	510,200	526,500	30%
Florida	22,634,867	23,292,200	24,698,500	25,815,000	26,682,000	27,409,400	28,065,000	24%

Source: BEBR 2025 - 2050 Population Projections, January 2024

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

**Table 1.4 Marion County Municipalities**

Geographic Area	2020	2023	2020 - 2023 Population Change
Marion County	375,908	403,966	28,058
Belleview	5,413	5,833	420
Dunnellon	1,928	2,015	87
McIntosh	463	465	2
Ocala	63,591	66,368	2,777
Reddick	449	477	28
UNINCORPORATED	304,064	328,808	24,744

Source: BEBR Florida Estimates of 2023 Population by County and City, April 2023

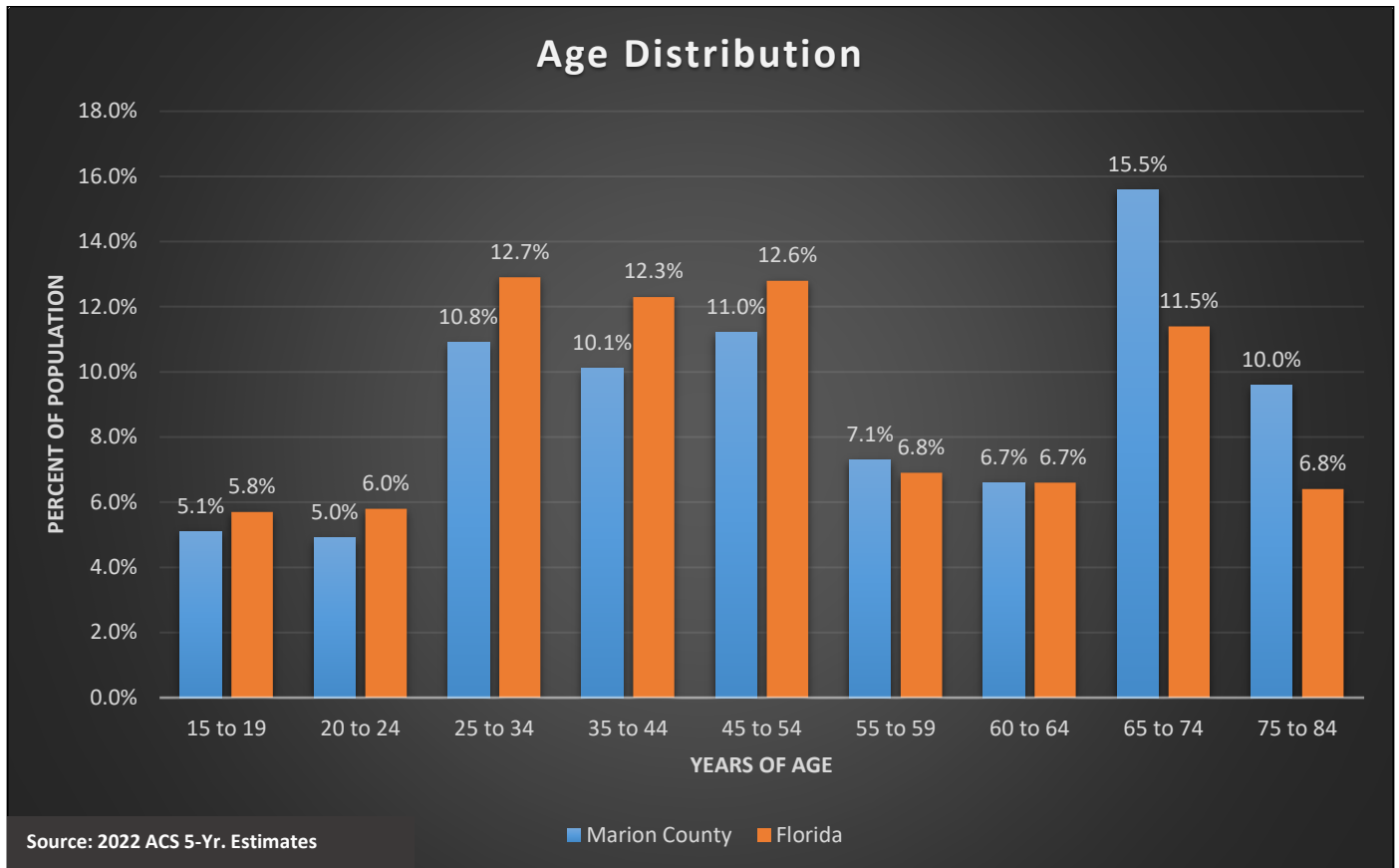
### 5. Population Density

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

## 6. Age Distribution

Marion County and Florida populations are shown in **Figure 1.3** by age distribution. According to the 2022 ACS five-year estimates, more than 26% of Marion County’s population is 65 years of age or older compared to 20% for Florida. The 65-to-74 age group includes a high percentage of the Marion County population, indicating that the older age group is significant, requiring increased public transportation demand.

**Figure 1.3 Population by Age**

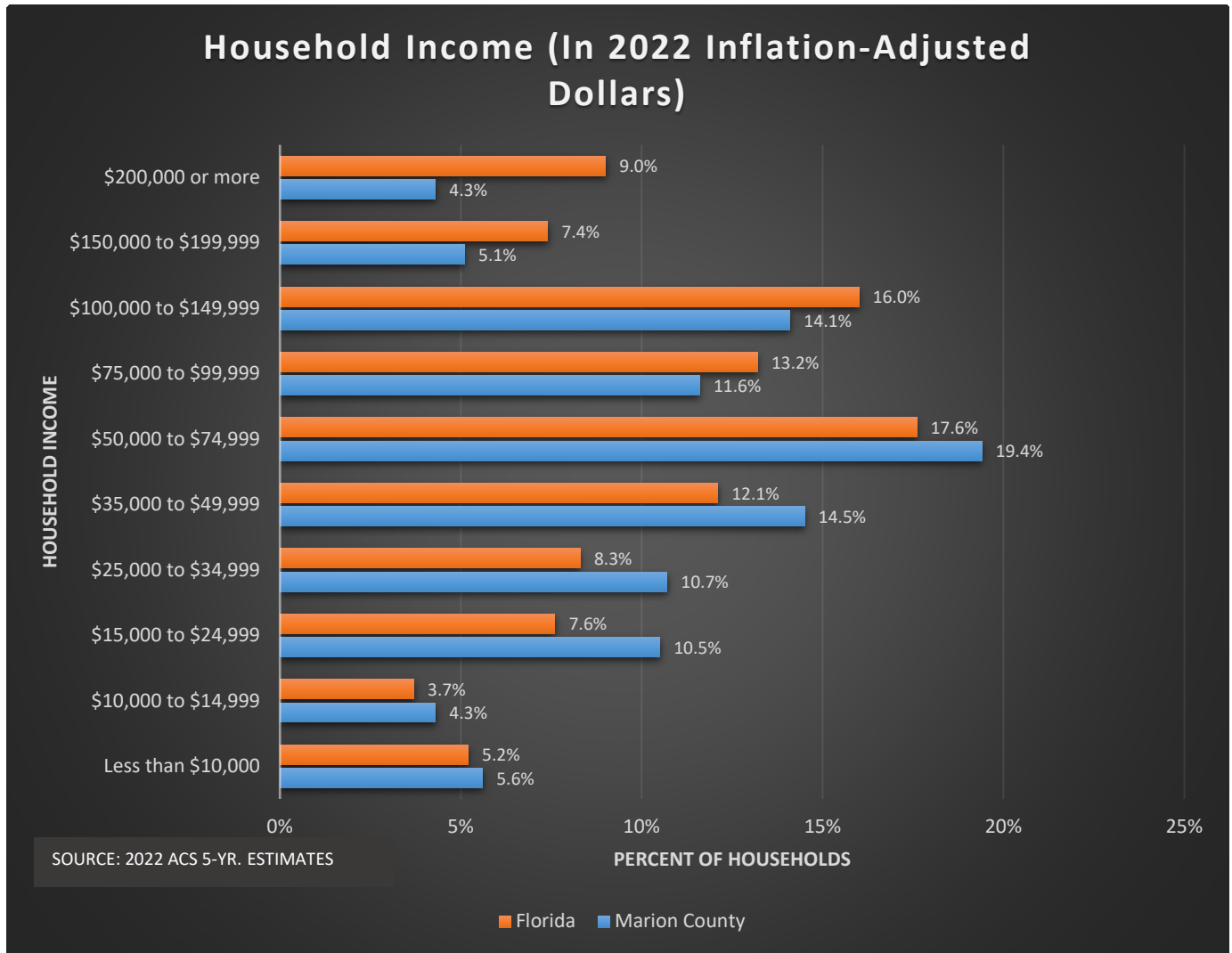


## 7. Housing and Household Income

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 January 2024, existing home sales decreased 13.3%. The median property value in Marion County is \$274,189, and the homeownership rate is 76.5%. **Figure 1.4** compares the distribution of household income in Marion County and Florida. A larger share of Marion County residents earns an income within the five lowest

income categories (below \$50,000). Additionally, a smaller share of Marion County residents earns an income slightly lower than the four highest income categories (above \$75,000) compared to the Florida state average. The Marion County median household income is approximately 28% lower than Florida, with Marion County’s median income at \$54,190 and Florida’s at \$69,303

**Figure 1.4 Household Income**

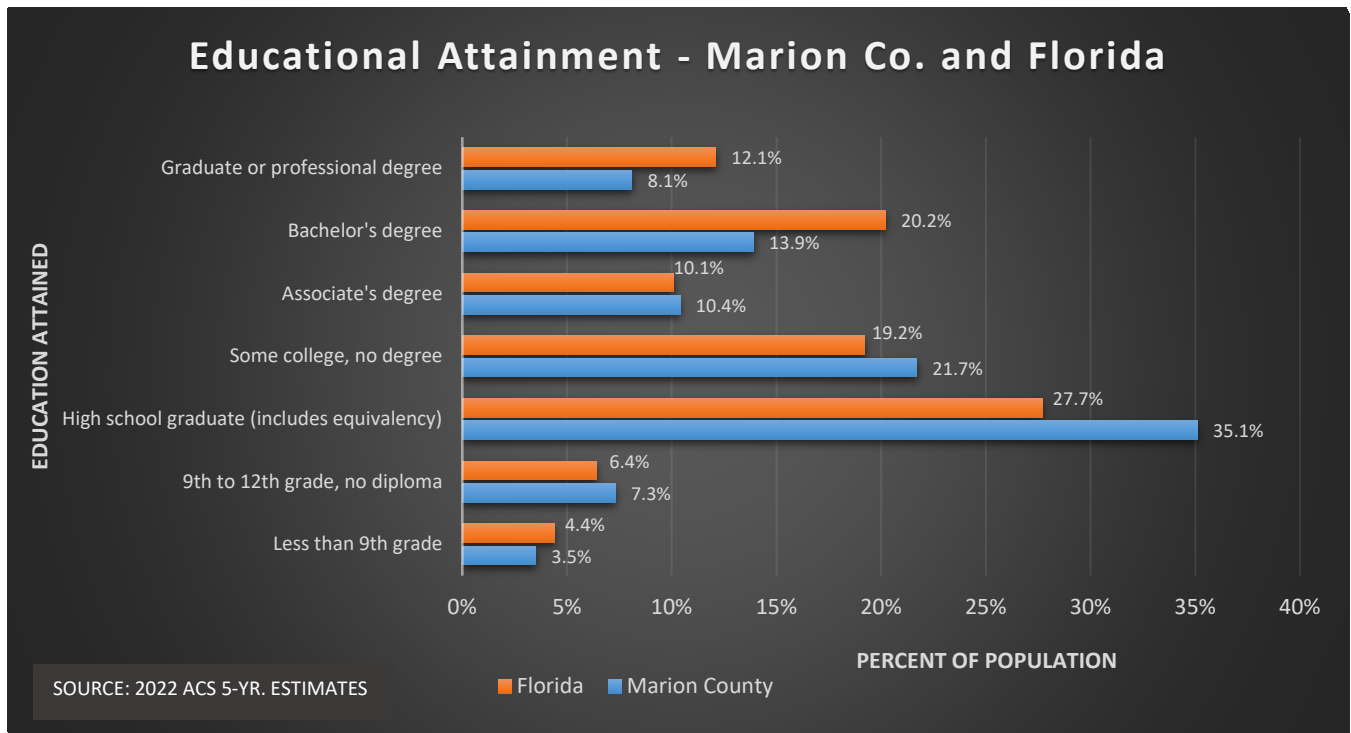


## 8. Education

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 35.1% of Marion County residents and about 28% of Florida residents.

Overall, a larger proportion of Florida residents have obtained higher levels of education, including a Bachelor’s degree, graduate and/or professional degree, than Marion County residents.

**Figure 1.5 Educational Attainment Distribution**



## 9. Employment

**Table 1.5 Employment Characteristics-Not Seasonally Adjusted**

Area	Civilian Labor Force	Number Employed	Number Unemployed	Unemployment Rate
Marion County	152,494	146,217	6,277	4.1%*
Florida	11,077,000	10,728,000	348,000	3.1%

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

**Table 1.5** includes the current labor force, employment, and unemployment data for Marion County and Florida. The data provided in the table presents a snapshot from the Florida Department of Economic Opportunity Labor Market Employment Statistics for February 2024. These figures show that Marion County has a slightly higher unemployment rate than the state as a whole, though the rates are not seasonally adjusted.

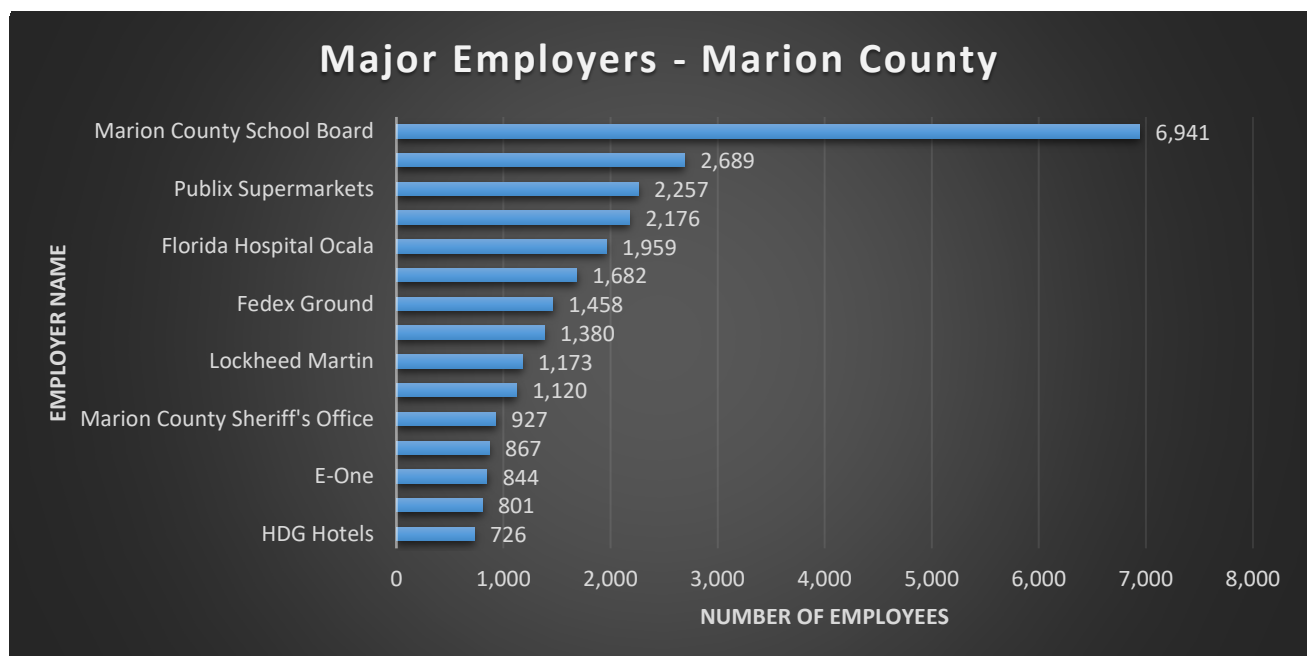
## 10. Employment Density

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

## 11. Major Employers

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

Table 1.6 Major Employers



Prepared by: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research. Source: Employer Database 2024 Edition 2

### 12. Major Trip Generators

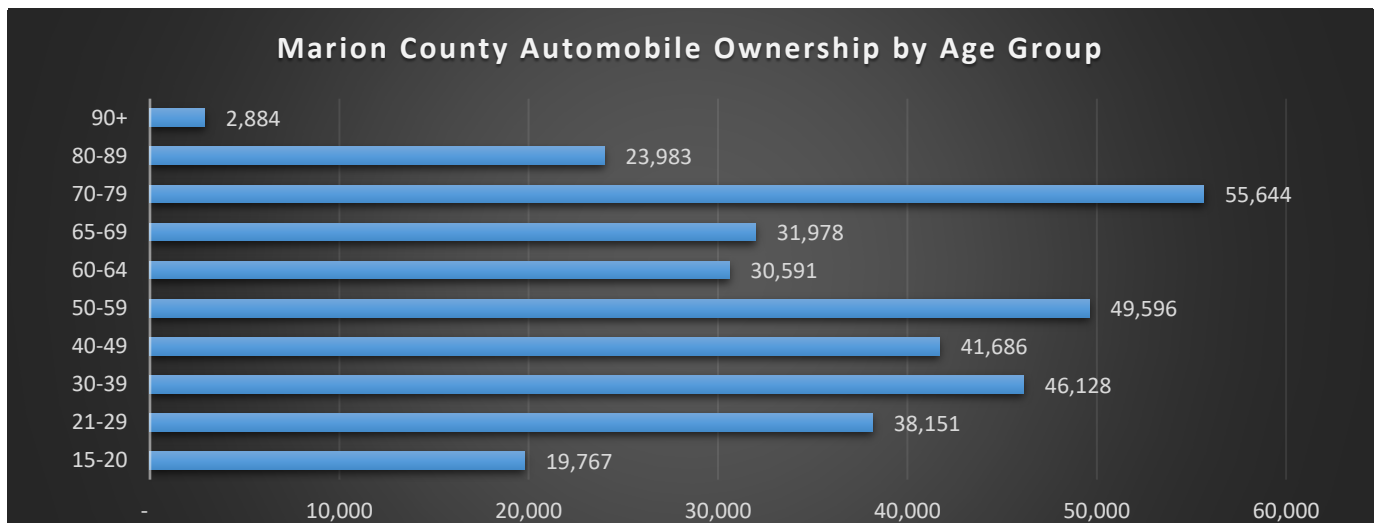
Major trip generators in Marion County for paratransit trips are medical facilities (hospitals, healthcare clinics, and dialysis facilities), and local shopping centers. Trips to other locations such as parks, libraries, government/social services, religious activities, and restaurants are also requested. Below is a list of the major trip generators. TD services are provided county-wide, with service to any location in the county, and ADA service is provided within ¼ mile of SunTran fixed route service.

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

### 13. Household Vehicle Availability

Marion County has 340,408 registered vehicles according to the latest report (2024) by the Florida Department of Highway Safety and Motor Vehicles. The majority of the registered vehicles belong to the ages between 21 and 59, with the 70-79 age group being the single largest age group. The chart and **Table 1.7** seen below demonstrate how the registered vehicles look by age group.

**Table 1.7 Registered Vehicles by Age**



Age Group										
15-20	21-29	30-39	40-49	50-59	60-64	65-69	70-79	80-89	90+	Total
19,767	38,151	46,128	41,686	49,596	30,591	31,978	55,644	23,983	2,884	340,408

Source: Florida Department of Highway Safety and Motor Vehicles 2024 Report

## Service Analysis

### 1. Transportation Disadvantaged Population

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



given to medical riders with education, training, and nutrition following closely behind. The potential elderly population in Marion County continues to grow, creating a high demand on paratransit services.

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

PURPOSE	2021	2022	2023
Medical	58,220	39,527	40,482
Employment	1,617	2,468	4,557
Edu/Train/DayCare	7,167	10,064	20,490
Nutritional	12,879	14,922	17,291
Life-Sustaining Other	2,972	3,777	4,954
TOTAL	82,855	70,758	87,774

Source: Annual Operating Reports from 2022-2023, FCTD

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

## 2. Forecasts of Transportation Disadvantaged Population

The TD population was estimated using the methodology developed by the CTD utilizing data from various sources to forecast demand. The travel demand forecasting methodology was updated 2015 to address some of the changes in policy and demographics that have occurred over the past years since the original methodology was established in 1993. The TD population and travel demand estimates for Marion County were calculated from a series of automated formulas from the work book using the 2023 CUTR, Paratransit Service Demand Estimation Tool and 2023 socio-economic data from BEBR. The pre-coded data included in the workbook’s automated formulas is derived from the US Census Bureau’s Survey of Income and Program Participation (SIPP).

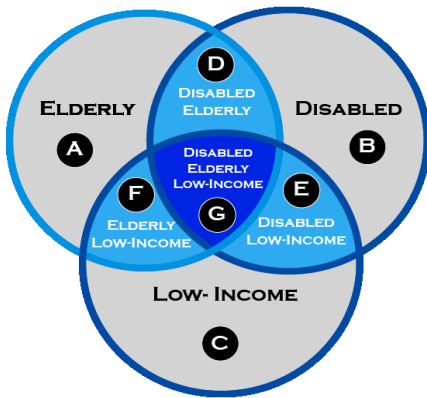


Figure 1. 6 TD Population Groups

General TD Population	% of Total	
Non-Duplicated General TD Population Estimate	181,721	47.2%

County Pop. By Age	Total Pop by Age	% of Total Pop	Population Below Poverty Level by Age	% of Total Pop Below Poverty Level by Age	Total Population with a Disability by Age	% of Total Pop with a Disability by Age	Total Pop with Disability and Below Poverty Level by Age	% Total Pop with a Disability and Below Poverty Level by Age
< 5 Years of Age	16,671	4.3%	5,136	1.3%	37	0.1%	0	0.00%
5-17	53,933	14.0%	11,535	3.0%	2,955	0.8%	929	0.24%
18-34	67,332	17.5%	11,553	3.0%	5,691	1.5%	1,041	0.27%
35-64	134,110	34.8%	14,622	3.8%	23,433	6.1%	4,221	1.10%
<b>Total Non Elderly</b>	<b>272,046</b>	<b>70.7%</b>	<b>42,846</b>	<b>11.1%</b>	<b>32,116</b>	<b>8.3%</b>	<b>6,191</b>	<b>1.61%</b>
65-74	60,342	15.7%	5,285	1.4%	12,136	3.2%	1,590	0.41%
75+	52,608	13.7%	3,173	1.0%	22,113	5.7%	2,401	0.62%
<b>Total Elderly</b>	<b>112,950</b>	<b>29.3%</b>	<b>8,998</b>	<b>2.3%</b>	<b>34,249</b>	<b>8.9%</b>	<b>3,991</b>	<b>1.04%</b>
<b>Total</b>	<b>384,996</b>	<b>100%</b>	<b>51,844</b>	<b>13.5%</b>	<b>66,365</b>	<b>17.2%</b>	<b>10,182</b>	<b>2.64%</b>

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.



<b>Double Counts Calculations</b>		
E - Estimate non-elderly/disabled/ low income	From Base Data (I11)	6,191
B - Estimate non-elderly/ disabled/not low income	Subtract I11 from 11	25,925
G - Estimate elderly/disabled/low income	From Base Data (I14)	3,991
D- Estimate elderly/ disabled/not low income	Subtract I14 from 14	30,258
F - Estimate elderly/non-disabled/low income	Subtract I14 from 14	5,007
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C14	73,694
C - Estimate low income/not elderly/not disabled	Subtract I11 from 11	36,655
<b>Total - Non-Duplicated</b>		<b>181,721</b>

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.

**Table 1.9** shows the forecasts of the general TD population for Marion County and references the categories shown in **Figure 1.6**. As shown, the 2023 TD population in Marion County is estimated to be 181,721 representing approximately 47.2% of the total population. This population includes all persons with disabilities, older adults, low-income persons, and children who are high-risk or at-risk and is expected to increase by approximately 11.62% over the five-year period.

**Table 1.9 Forecast General TD Population**

<b>General TD Population Forecast</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
<i>Overlapping Circle Component</i>							
E - Estimate non-elderly/disabled/ low income	6,191	6,329	6,469	6,613	6,760	6,911	7,064
B - Estimate non-elderly/ disabled/not low income	25,925	26,501	27,091	27,693	28,309	28,938	29,582
G - Estimate elderly/disabled/low income	3,991	4,080	4,170	4,263	4,358	4,455	4,554
D- Estimate elderly/ disabled/not low income	30,258	30,931	31,619	32,322	33,040	33,775	34,526
F - Estimate elderly/non-disabled/low income	5,007	5,118	5,232	5,348	5,467	5,589	5,713
A - Estimate elderly/non-disabled/not low income	73,694	75,333	77,008	78,720	80,470	82,259	84,088
C - Estimate low income/not elderly/not disabled	36,655	37,470	38,303	39,155	40,025	40,915	41,825
<b>TOTAL GENERAL TD POPULATION</b>	<b>181,721</b>	<b>185,761</b>	<b>189,892</b>	<b>194,114</b>	<b>198,430</b>	<b>202,842</b>	<b>207,352</b>
<b>TOTAL POPULATION</b>	<b>384,996</b>	<b>393,556</b>	<b>402,307</b>	<b>411,252</b>	<b>420,396</b>	<b>429,743</b>	<b>439,299</b>

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.

In 2023, the Critical Need TD population is expected to make 1924 total daily trips as shown below in **Table 1.10**. The number of Critical Need trips needed is expected to increase 8.83% over the five year period.



**Table 1. 10 Marion County Forecasted Annual Trip Demand**

Critical Need TD Population Forecast	2023	2024	2025	2026	2027	2028
<b>Total Critical TD Population</b>						
<i>Disabled</i>	17,312	17,697	18,091	18,493	18,904	19,324
<i>Low Income Not Disabled No Auto/Transit</i>	567	579	592	605	619	632
<b>Total Critical Need TD Population</b>	<b>17,879</b>	<b>18,276</b>	<b>18,683</b>	<b>19,098</b>	<b>19,523</b>	<b>19,957</b>
<b>Daily Trips - Critical Need TD Population</b>						
<i>Severely Disabled</i>	848	867	886	906	926	947
<i>Low Income - Not Disabled - No Access</i>	1,076	1,100	1,124	1,149	1,175	1,201
<b>Total Daily Trips Critical Need TD Population</b>	<b>1,924</b>	<b>1,957</b>	<b>1,990</b>	<b>2,023</b>	<b>2,058</b>	<b>2,094</b>
<b>Annual Trips</b>	<b>509,934</b>	<b>518,551</b>	<b>527,315</b>	<b>536,227</b>	<b>545,289</b>	<b>554,940</b>

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.

**Table 1.11** 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 healthcare, employment, education, shopping, social activities, and other life-sustaining activities. As shown, the Marion County’s 2022 Critical Need TD population is estimated to be 66,365, representing nearly 36.52% of the general TD population.

**Table 1. 11 Critical Need Transportation Disadvantaged**

County TD Population by Age	Total TD Population with Disability by Age	% with a Severe Disability by Age	Total Population with Severe Disability by Age	% of Total Pop with Severe Disability by Age	% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
<5	37	4.20%	2	0		
-17	2,955	4.20%	124	0.23%		
18-34	5,691	6.30%	359	0.53%		
35-64	23,433	13.84%	3,243	2.42%		
<b>Total Non-Elderly</b>	<b>32,116</b>		<b>3,727</b>	<b>1.37%</b>	<b>28.60%</b>	<b>1,066</b>
65-74	12,136	27.12%	3,291	5.45%		
75+	22,113	46.55%	10,294	19.57%		
<b>Total Elderly</b>	<b>34,249</b>		<b>13,585</b>	<b>12.03%</b>	<b>11.70%</b>	<b>1,589</b>
<b>Total</b>	<b>66,365</b>		<b>17,312</b>	<b>4.50%</b>		<b>2,655</b>

Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.

### 3. Needs Assessment

Assessment of existing and unmet needs for public transportation for low income older adults and persons with disabilities is essential. An inventory of existing transportation providers and identification of redundancies and gaps in service were used to identify unmet needs or duplications of public transportation services. It is assumed that there will be a growing need for public transit in the higher-density areas in Marion County. Older persons may be more likely to use public transportation as the aging process begins to limit their ability or preference to drive. Marion County has a larger proportion of older adults compared to the statewide average. According to the BEBR Population Estimates, approximately 30.1% of Marion County's population is 65 years of age or older compared to 21.5% for Florida.

MT receives funding from the Transportation Disadvantaged Trip and Equipment Grant which is formula based and divided among all the counties in Florida. Marion County has been traditionally known as a rural county relying on federal funding through the 5311 FDOT Grant to sponsor trips. In recent years the funding of non-sponsored trips through the Transportation Disadvantaged Trip and Equipment Grant has not kept up with rising cost and demand. As a result, MT has to, on occasion, prioritize trip offerings. This has resulted in TD Riders not being able to fully take advantage of the system.

Figure 1. 7 Trip Demand Breakdown

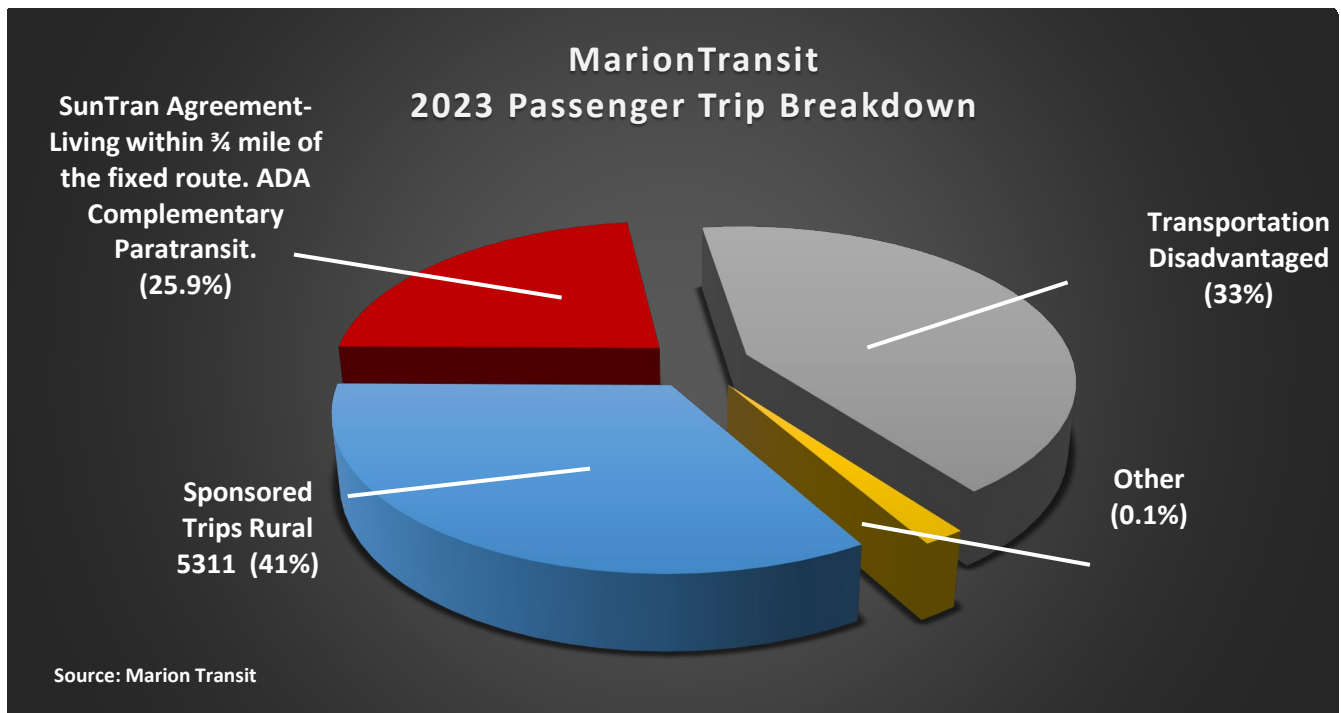
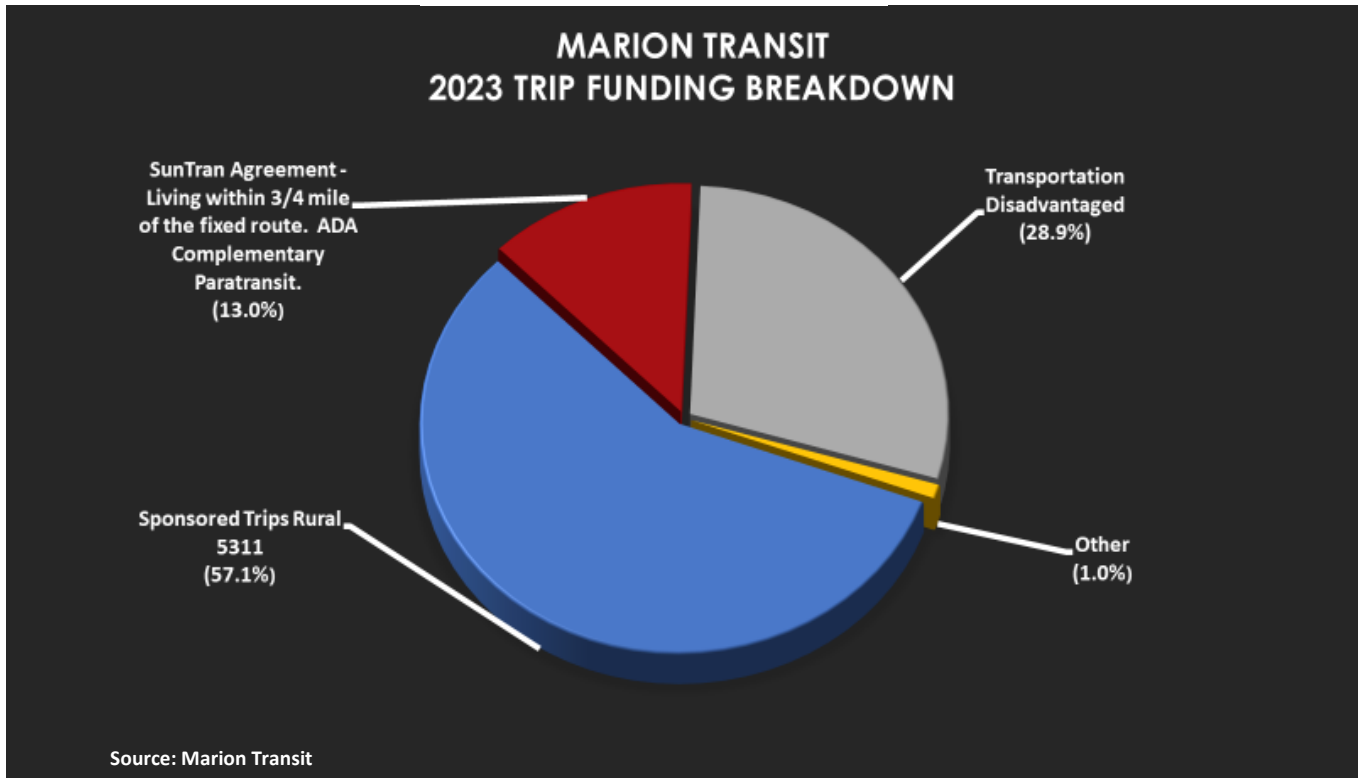


Figure 1.8 Trip Funding Breakdown



As illustrated in **Figure 1.7** the county’s unincorporated areas encompass a large portion of MT’s trips. **Figure 1.8** shows the funding breakdown for those areas, and the shortfall in comparison to **Figure 1.7**. Qualifying and providing service without more funding will result in a decreased quality in service. An independent study to analyze areas throughout the county with a need for specialized door-to-door service for healthcare, employment and shopping was done. The study done in collaboration between MT and the TPO revealed the need to expand service to the distant areas of the County needing TD transport, currently not being serviced.

#### 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. The County's fast pace growth adding to the high demand.
- Providing service to the rural areas is difficult to keep costs low due to the geographic size of the service area.
- Other agencies are not allocating sufficient funds to secure transportation services for participation in their programs leaving the burden on TD funds.
- Insufficient funds to provide service for the non-sponsored trips as opposed to sponsored trips.
- Fixed route public transportation service is not available in many of the rural areas of the county, again leaving the burden on TD funds.

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

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

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

#### ***5. Marion Transit Vision Statement***

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

#### ***6. Marion Transit Mission Statement***

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

MT will focus the next five years to increase access to public transportation within the rural areas of Marion County utilizing route deviation in conjunction with demand response services and work towards reducing reservations closer to next day appointments. An analysis of MT's call-in, routing and

appointment system is currently under way in an effort to move toward a decreased lead time. MT will improve current technology or acquire new technology to facilitate the effort in lead-time reduction. MT will continue to provide service that meets the needs of Marion County's transportation disadvantaged, combined with safety and integrated with other county modes of travel.

MT's goals, objectives and strategies are:

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

Objectives:

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

Strategies:

- a. Annually assess the applications of current riders that are able to transition to fixed route system. Continually looking for options to move to fixed routes as has been done in Dunnellon and Marion Oaks areas by reviewing concentration and consistency of riders.
- b. At the time the reservationist takes the call, monitor and adjust as needed the service standards for customer service to ensure consideration of their needs.
- c. Annually update the application and registration process to meet the needs of the customer. Registration has been streamlined in anticipation of reducing call hold time, pick-up window, and reservation time.

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

Objectives:

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

Strategies:

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

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

#### Objectives:

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

#### Strategies:

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

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

#### Objectives:

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

#### Strategies:

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

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

#### Objectives:

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

#### Strategies:

- a. Arrange to meet on a quarterly basis in an effort to build rapport.

- b.
- c. Share plans and routes with partners at the quarterly meeting in order to build mutual trust.
- d. Maintain communication quarterly to close any gaps in service and look for ways to improve costs and efficiency.

## Implementation Plan

**Table 1. 12 Implementation Plan**

OBJECTIVE	STRATEGY	PERSON	MEASURE-STATUS	2023 STATUS UPDATE
<b>GOAL 1. To provide the best possible transportation service to those in the service area.</b>				
Continue to monitor riders to transition to fixed-route services	Annually assess the applications of current riders that are able to transition to fixed route system	CTC TDLCB	CTC reports to TDLCB Ongoing	2 new fixed route areas have been identified. Start date is being coordinated with internal stakeholders.
Carefully match the best possible transit solution for every particular need	When the reservationist takes the call, monitor, adjust as needed the service standards to ensure consideration of their needs	CTC	CTC to monitor - Daily,	Registration process has been streamlined and simplified - Ongoing
Make sure the application-registration process is simplified but effective	Annually update the application and registration process to meet the needs of the customer	CTC TDLCB	CTC to monitor minimum – Annually	Process has been streamlined and updated. Continue monitoring and looking for areas of improvement.
<b>GOAL 2. Educate the riders and general public on services provided.</b>				
Participate in community events to educate	Continue to make presentations and participate in speaking engagements in the community at minimum one a month	CTC	Number of presentations -	Ongoing-Presentation made to Realtors Association.
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	MT website has been redesigned and new, more comprehensive information has been added.
Respond to complaints immediately to improve public perception and identify problems	Immediate notification of complaint to Grievance Committee for resolution and annually update grievance procedures	CTC TDLCB	CTC to report to TDLCB – Quarterly	Immediate attention is given and followed according to procedures-Ongoing
<b>GOAL 3. Remain flexible and open-minded in terms of routes and riders' needs.</b>				
Ensure that requests received are considered as feasible changes and/or corrections	Maintain effective means of communication where customers can provide input through the TDLCB meetings, website and social media	CTC TDLCB	Maintain comment cards on buses/website	Comment card sealed boxes have been placed on the buses for input. Public comment is provided at every quarterly meeting. - 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-	MT has begun research for a new software package to help facilitate and support this.
Continued assessment of routes for more efficient service	Look at and update the routes at a minimum annually	CTC	CTC to monitor cost efficiency - Annually	2 new fixed route areas have been identified. Start date is being coordinated with internal stakeholders. Additional areas will be considered as growth and need arises. – Ongoing

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

Adhere to the System Safety Program Plan and meet all requirements	Arrange to meet on a quarterly basis in an effort to build rapport	CTC	CTC to monitor documentation – Daily	Program is monitored and is strictly adhered to - Ongoing
All vehicles to receive regularly scheduled maintenance and daily inspections	Share plans and routes with partners quarterly at the meeting in order to build mutual trust	CTC	CTC to monitor documentation – Daily	Maintenance schedule is followed and strictly adhered to - Ongoing
Maintain a process for sanitizing and cleaning all vehicles every day	Maintain communication quarterly to close any gaps in service and ways to improve cost and efficiency	CTC	CTC to monitor customer input - Daily	All buses are sanitized between riders and at end of the day – We installed a no-cost telematics system on the buses that measures hard braking and sudden acceleration that helps address driving habits and correct aggressive driving behavior. Ongoing

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

Build a rapport with both public/private partners to better understand their needs	Arrange to meet on a quarterly basis in an effort to build rapport	CTC	CTC to monitor	Public outreach and presentations assist with a better rapport - Ongoing
Work to establish a mutual trust with partners	Share plans and routes with partners quarterly at the meeting in order to build mutual trust	CTC TDLCB	CTC report to TDLCB-Qtrly	Ongoing
Coordinate resources to better serve and maintain costs down with efficient service	Maintain communication quarterly to close any gaps in service and ways to improve cost and efficiency	CTC	CTC to monitor	Continual monitoring and assessing new innovative ways to hold costs down - Ongoing

## **Section 2: Service Plan**

### **Operations Element**

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

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

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

TD Trip requests are currently prioritized in the following order:

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

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

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

to set this type of schedule up. \*Approved ADA Complementary Paratransit riders are able to reserve trips by 5:00 pm the day before their appointment.

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

## **2. Accessing Service**

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

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

## **3. Trip Eligibility**

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

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

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

#### 4. Trip Prioritization

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

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

#### 5. Other Accessibility Processes/Procedures

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

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

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

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

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

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

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

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

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

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

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

### 6. Transportation Operators and Coordination Contractors

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

**Table 2. 1 Coordination Contractors**

NAME	CONTACT	ADDRESS	PHONE	AGREEMENT TYPE
Advocacy Resource Center Marion, Inc.	Leneia L. Clyatt, Interim CEO	2800 SE Maricamp Rd., Ocala, FL	352-387-2210	Coordination Agreement
Florida Center for the Blind, Inc.	Anissa Pieriboni, CEO	1411 NE 22 <sup>nd</sup> Avenue, Ocala, FL	352-873-4700	Coordination Agreement
Marion County School Board	Kevin Christian, Representative	512 S.E. Third St., Ocala, FL	352-671-7555	Special Data Share Agreement
Bridge to Hope	Audrey Bell, Owner	631 NW 56 <sup>th</sup> Court, Ocala, FL	352-497-7816	Coordination Agreement

### 7. Public Transit Utilization

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

**Note:** All requests for MT transportation services with trip origins and destinations within the ¼ mile from a SunTran fixed bus route are directed to use the fixed-route bus system. All SunTran vehicles are ADA accessible. To ensure that all citizens of Marion County are provided with equal access to public transportation, SunTran undergoes ADA certification; contracts with the Center for Independent Living of North Central Florida to assist with the rider certification/eligibility process.

### 8. School Bus Utilization

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



## **9. Vehicle Inventory**

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

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

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

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

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

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

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

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

## **13. Marketing**

Marketing is focused on getting public transportation to those who require the service that MT provides and it is done using brochures, local newspapers, presenting at community meetings and on MT's website

([www.mariontransit.org](http://www.mariontransit.org)). All of MT’s buses are marked with MT’s name and phone number. MT’s newer fleet include the words: “Call – Connect – Ride” and phone number 352-620-3071 in bold letters.

#### 14. Service Standards

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

**Table 2.2: CTC Service Standards**

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



Wheelchair	Drivers cannot assist wheelchairs over more than 1 step or curb. The minimum clear width for single wheelchair passage shall be 32 inches (815 mm) at a point for a maximum length of 24 inches and 36 inches (915 mm) continuously. Lift capacity (chair & rider combined) may not exceed the lift maximum limits usually 800 or 1000 pounds depending on the bus.
Drug - Alcohol	MT requires each driver be drug screened prior to hiring. MT also has a zero-tolerance policy for drug abuse and follow the recommended Federal Transportation Authority (FTA) policy. This policy includes random drug and alcohol testing once on board.

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

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

### Section 3: Quality Assurance

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

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



## 1. CTC Evaluation

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

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

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

**Table 3.1: FCTD Calculated Rates**

FCTD Calculated Rates	
<i>Ambulatory (and Escort)</i>	Trip Charge: \$ 32.90
<i>Wheelchair</i>	Trip Charge: \$ 56.40
<i>Stretcher (Contracted)*</i>	* MT does not offer stretcher services

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

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

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

## Appendix A Summary Review of Other Plans

### Local Government Comprehensive Plans

#### City of Ocala

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

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

Staff at the City of Ocala works hand in hand with TPO staff to ensure that all projects that are proposed are both compatible to their vision and land use. TPO and City of Ocala staff work together on project proposals, traffic methodology, and any proposed amendments that could possibly affect the availability of multimodal facilities within the planning area. Once the Ocala Vision 2050 is complete it will act as the basis for updating this Comprehensive Plan.

#### Marion County

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

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

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

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

## Regional Plans

### Ocala 2035 Vision

As mentioned in the Local Government Comprehensive Plan section, the City of Ocala has invested a great deal of time, energy, and effort into ensuring that their transportation system is safe, efficient, and accessible to all users. The 2035 Vision is another way the city highlights and demonstrates their commitment to this effort. The Mobility and Community Connectivity section of this document discusses utilizing to main tools to promote a better-connected transportation system. The two tools are utilizing the complete streets program and road diets. In addition, increasing the accessibility of public transit was also recommended to either reduce congestion, connect neighborhoods that are not currently connected and to provide additional transportation choices to citizens. The City of Ocala is currently is in the process of updating/replacing Ocala 2035 Vision with Ocala Vision 2050.

### Transit Development Plan

#### SunTran

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

#### TDSP

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



## **Commission for Transportation Disadvantaged Plans**

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

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

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

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

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

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

The Ocala Marion County TPO is the federal designated metropolitan planning agency for Marion County. The TPO is required by federal statute to update the LRTP every five years. The LRTP is a blueprint used to guide the transportation system throughout Marion County over the next twenty plus years. The 2045 LRTP discusses service improvements including new route expansions and increased frequency. However, due to funding constraints the expansions and increased frequency were both determined to not be cost feasible. The LRTP was reviewed for consistency with this plan update. The TPO will begin updating the new 2050 LRTP in late spring of 2024.

### **Transportation Improvement Program (TIP) FY 2026 to 2028**

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

consistency with this plan. The TIP is currently being updated for FY 2025 to 2029 to be adopted June 25, 2024.

## 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 providing a more multimodal and transit friendly environment. They have implemented processes into their reviews of proposed development to ensure that the proposed use doesn't detract from any approved transit plans throughout the area. In addition, plans from the Commission for Transportation Disadvantaged, SunTran, and Marion Transit were analyzed to ensure consistency with this major plan update to the TDSP.



Appendix B: MT's Vehicle Inventory

MARION TRANSIT FLEET INVENTORY							
Agency's Bus Number	Year / Make	Vehicle Length (Feet)	Ambulatory Seats	Wheelchair Spaces	ADA Accessory (Lift, Ramp, Etc)	Current Use	Current Condition
1205 (50)	2012/Dodge	12	6	1	Ramp	Spare	Good
1305 (31)	2013/Chevy	23	10	3	Lift	Daily Use	Good
1401 (08)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1403 (17)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1404 (18)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1405 (29)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1406 (34)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1407 (37)	2014/Chevy	23	10	3	Lift	Daily Use	Excellent
1501 (15)	2015/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1502 (40)	2015/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1601 (05)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1602 (09)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1603 (11)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1604 (20)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1605 (21)	2016/Ford E-450	23	10	3	Lift	Daily Use	Excellent
1701	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1702	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1703	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1704	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1705	2017/Ford/Tran	22	9	3	Lift	Daily Use	Excellent
1801	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1802	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1803	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1804	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1805	2018/Chev	24	11	3	Lift	Daily Use	Excellent
1900	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1901	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1902	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1903	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
1904	2019/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2001	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2002	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2003	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2004	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2005	2020/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2101	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2102	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2103	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2104	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2105	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2106	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2107	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2108	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2109	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2110	2021/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2111	2021/Ford E-450	25	14	2	Lift	Daily Use	Excellent
2112	2021/Ford E-450	25	14	2	Lift	Daily Use	Excellent

Revised 4/5/2024



**Inserted**

# GRIEVANCE PROCEDURES

## OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

### **Article 1: Preamble**

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

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

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

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

### **Article III: Definitions**

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

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

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

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

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

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

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

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

All written complaints can be sent to:

Marion Senior Services	and/or	Ocala Marion TPO
1101 SW 20 <sup>th</sup> Court		2710 E. Silver Springs Blvd.
Ocala, Florida 34471		Ocala, Florida 34470

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

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

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

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

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

The appeal must be in writing and addressed to:

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

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

6. A written recommendation will be rendered to all parties involved within ten (10) working days from the date of the recommendation and will include the following, in writing:
  - a. Statement that a meeting was held and the involved parties were given an opportunity to present their position(s).
  - b. The issues discussed and clearly defined
  - c. Reason(s) for the recommendation based on the information provided
7. Grievance Subcommittee must report all grievances and recommendations to the full Transportation Disadvantaged Local Coordinating Board.

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

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

Address all appeals to:

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

5. Once an appeal has been received, the TDLCB shall meet and render its recommendation within sixty (60) working days of the date the appeal was filed.
6. The complainant shall be notified in writing of the mutually agreed upon date, time and place where the appeal shall be heard. This written notice shall be mailed at least ten (10) working days in advance of the meeting.

7. A written recommendation will be rendered to all parties involved within ten (10) working days from the date of the recommendation and will include the following, in writing:
  - a. Statement that a meeting was held and the involved parties were given an opportunity to present their position(s).
  - b. The issues discussed and clearly defined
  - c. Reason(s) for the recommendation based on the information provided

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

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

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

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

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

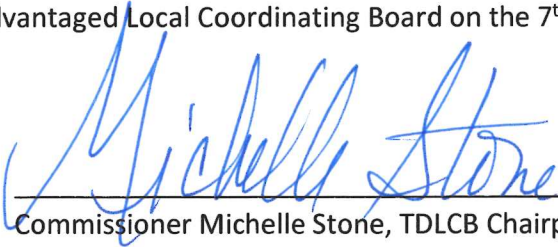
The implementation of these rules and procedures will ensure quality control and the ability to provide an impartial body to hear complaints and submit recommendations regarding the grievance as indicated.

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



**CERTIFICATION**

The undersigned hereby certifies that he/she is the Chairperson of the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board and that the foregoing is a full, true and correct copy of the Grievance Procedures of this Local Coordinating Board as adopted by the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board on the 7<sup>th</sup> day of December 2023.

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

  
\_\_\_\_\_  
Robert Balmes, TPO Director

## COMPLAINT FORM

### OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

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

Date of incident:	Vehicle Unit/License No.-Color-Type	Time of Incident:
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Please list the name(s) and phone number(s) of any person, if known, that can be contacted for additional information to support or clarify your allegation(s):

Please explain as clearly as possible HOW, WHY, WHEN and WHERE is your alleged complaint. Include as much information as possible. Additional pages may be attached if needed.

Please indicate what would be an acceptable resolution:

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

Please submit to: Address in the step process

Additional Pages are attached.

## TDLCB COMPLAINT TRACKING FORM

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

### **COMPLAINT TO THE CTC –STEP 1**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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**Appendix D: System Safety Program Plan Certification**

**Inserted**



*Florida Department of Transportation*

RON DESANTIS  
GOVERNOR

420 W. Landstreet  
Orlando, Florida 32824

KEVIN J. THIBAUT, P.E.  
SECRETARY

May 14, 2021

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

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

Dear Mr. Wilder:

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

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

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

Sincerely,

DocuSigned by:  
  
1053F40140014E0...

Diane Poitras  
Transit Programs Administrator  
District Five

DP/bg

Inserted



## Community Transportation Coordinator Annual Evaluation Certification

### 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 Community Transportation Coordinator Annual Evaluation of this Local Coordinating Board as adopted by the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board on the 14th day of March, 2024.

Commissioner Michelle Stone, TDLCB Board Chairperson

Robert Balmes, TPO Director



February 29, 2024

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

RE: 2024 CTC Performance Evaluation

Dear Mr. Murch:

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

The TDLCB looked at:

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

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

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

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

---

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



**Recommendations:**

In 2022 the TPO recommended sealed drop boxes be installed for comments from the riders. The boxes were installed and initially did well receiving comments. However, the boxes were installed in a location near the driver facing the front of the bus, at times unnoticeable. We are recommending some signage to point out that there is a comment box available and note as to its location. This will also serve as a reminder that we encourage “rider input”.

Florida statute (stated below) is for the grievance phone numbers to be posted. While this rule is being followed the pertinent phone numbers on each bus continues to be too small.

Statute: 41.2.006 (f) A local toll free phone number for complaints or grievances shall be posted inside the vehicle. The TD Helpline phone number (1(800) 983-2435) shall also be posted inside all vehicles of the coordinated system.

Service is geared for the disadvantaged, inside the bus many are unable to get up close to view the TD Helpline and complaint phone numbers that are posted in the front by the driver. These numbers need to be larger and could be positioned down the sides of the buses for better viewing from the back of the bus, and the wheelchair riders that are secured in the very back.

**Commendations:**

In speaking with the riders, and the call-in surveys, Marion Transit continues to receive rave reviews from the riders. The drivers are courteous, caring and considerate. Many riders stated that their drivers “are like family” since they see each other several times during the week. We commend Marion Transit for their hard work and dedication.

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

Sincerely,



Robert Balmes  
TPO Director



# MARION TRANSIT

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

February 29, 2024

Ocala Marion TPO  
Attn: Elizabeth Mitchell – Grants Coordinator/Fiscal Planner  
2710 E. Silver Springs Blvd.  
Ocala, FL 34470

Re: CTC ANNUAL EVALUATION – MARION TRANSIT

Dear Ms. Mitchell:

Marion Transit, the current Community Transportation Coordinator (CTC) for Marion County, recently completed a review conducted by the Ocala Marion Transportation Planning Organization (TPO).

We have received the 2024 Performance Evaluation letter. Thank you for taking the time to review our processes. We appreciate the feedback.

Appropriate steps to address the recommendations referenced in the letter will be taken to help ensure that our riders are given all tools necessary to make it easier to provide feedback regarding our performance.

We appreciate all the hard work put into this review by the TPO.

Thank you,

Sincerely,

  
Clayton Murch, Transportation Director & CTC

Inserted

# Preliminary Information Worksheet

Version 1.4

**CTC Name:** Marion Senior Services, Inc.  
**County (Service Area):** Marion  
**Contact Person:** Clayton Murch  
**Phone #** 352-620-3519

## 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.  
County: Marion

1. Complete applicable GREEN cells in columns 2, 3, 4, 5, and 7

	Prior Year's <b>ACTUALS</b> from Jan 1st of <b>2022</b> to Dec 31st of <b>2022</b>	Current Year's <b>APPROVED</b> Budget, as <b>amended</b> from Jan 1st of <b>2023</b> to Dec 31st of <b>2023</b>	Upcoming Year's <b>PROPOSED</b> Budget from Jan 1st of <b>2024</b> to Dec 31st of <b>2024</b>	% 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	\$ 71,946	\$ 78,656	\$ 80,000	9.3%	1.7%	OTHER - INS LOSS REIMB
Medicaid Co-Pay Received						
Donations/ Contributions	\$ 4,337	\$ 6,024	\$ -	38.9%	-100.0%	
In-Kind, Contributed Services						
Other	\$ 7,613	\$ 29,272	\$ -	284.5%	-100.0%	
<b>Bus Pass Program Revenue</b>						

### Local Government

District School Board	\$ -	\$ 4,822	\$ -		-100.0%	
Compl. ADA Services	\$ 328,736	\$ 363,984	\$ 348,000	10.7%	-4.4%	
County Cash	\$ 614,094	\$ 723,237	\$ 1,717,105	17.8%	137.4%	
County In-Kind, Contributed Services	\$ -					
City Cash	\$ -					
City In-kind, Contributed Services						
Other Cash			\$ 74,466			
Other In-Kind, Contributed Services						
<b>Bus Pass Program Revenue</b>						

### CTD

Non-Spons. Trip Program	\$ 792,971	\$ 807,623	\$ 802,062	1.8%	-0.7%	
Non-Spons. Capital Equipment						
Rural Capital Equipment			\$ 74,466			
Other TD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

### USDOT & FDOT

49 USC 5307			\$ 432,488			
49 USC 5310						
49 USC 5311 (Operating)	\$ 1,162,942	\$ 1,409,860	\$ 1,547,917	21.2%	9.8%	
49 USC 5311(Capital)	\$ 317,812	\$ 183,033	\$ 100,000	-42.4%	-45.4%	
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

### AHCA

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

### DCF

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

### DOH

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

### DOE (state)

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

### AWI

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

### DOEA

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

### DCA

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

# Comprehensive Budget Worksheet

Version 1.4

CTC: Marion Senior Services, Inc.  
County: Marion

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

	Prior Year's <b>ACTUALS</b> from Jan 1st of <b>2022</b> to Dec 31st of <b>2022</b>	Current Year's <b>APPROVED</b> Budget, as amended from Jan 1st of <b>2023</b> to Dec 31st of <b>2023</b>	Upcoming Year's <b>PROPOSED</b> Budget from Jan 1st of <b>2024</b> to Dec 31st of <b>2024</b>	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

## APD

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

## DJJ

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

## Other Fed or State

FL GAS TAX REFUND	\$ 30,349	\$ 22,563	\$ 25,000	-25.7%	10.8%	
xxx						
xxx						
<b>Bus Pass Program Revenue</b>						

## Other Revenues

Interest Earnings						
GAIN ON ASSETS	\$ 5,244			-100.0%		
<b>Bus Pass Program Revenue</b>						

## Balancing Revenue to Prevent Deficit

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

Balancing Revenue is Short By =			None			
<b>Total Revenues =</b>	<b>\$3,336,044</b>	<b>\$3,629,072</b>	<b>\$5,201,503</b>	<b>8.8%</b>	<b>43.3%</b>	

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

### Operating Expenditures

Labor	\$ 1,864,186	\$ 1,954,000	\$ 2,228,240	4.8%	14.0%	
Fringe Benefits	\$ 348,090	\$ 305,307	\$ 365,494	-12.3%	19.7%	
Services	\$ 183,080	\$ 100,559	\$ 107,056	-45.1%	6.5%	
Materials and Supplies	\$ 875,107	\$ 883,377	\$ 977,580	0.9%	10.7%	
Utilities	\$ 36,002	\$ 54,089	\$ 59,498	50.2%	10.0%	
Casualty and Liability	\$ 271,595	\$ 149,626	\$ 546,728	-44.9%	265.4%	
Taxes	\$ 181	\$ 74	\$ 81	-59.1%	10.0%	
Purchased Transportation:						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services						
Other	\$ 9,117	\$ 15,825	\$ 17,408	73.6%	10.0%	
Miscellaneous	\$ 6,798	\$ 4,732	\$ 5,205	-30.4%	10.0%	
Operating Debt Service - Principal & Interest	\$ 478	\$ 359	\$ 395	-24.8%	10.0%	
Leases and Rentals						
Contrib. to Capital Equip. Replacement Fund						
In-Kind, Contributed Services	\$ -	\$ -	\$ -			
Allocated Indirect	\$ 35,928	\$ 157,695	\$ 49,162	338.9%	-68.8%	

### Capital Expenditures

Equip. Purchases with Grant Funds	\$ 8,772	\$ 3,430	\$ 770,190	-60.9%	22357.1%	
Equip. Purchases with Local Revenue			\$ 74,466			
Equip. Purchases with Rate Generated Rev.						
Capital Debt Service - Principal & Interest						

<b>ACTUAL YEAR LOSS</b>	<b>(\$303,289)</b>					
<b>Total Expenditures =</b>	<b>\$3,639,334</b>	<b>\$3,629,072</b>	<b>\$5,201,502</b>	<b>-0.3%</b>	<b>43.3%</b>	

See NOTES Below.

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

# Comprehensive Budget Worksheet

Version 1.4

CTC: Marion Senior Services, Inc.  
County: Marion

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

	Prior Year's <b>ACTUALS</b> from Jan 1st of <b>2022</b> to Dec 31st of <b>2022</b>	Current Year's <b>APPROVED</b> Budget, as <b>amended</b> from Jan 1st of <b>2023</b> to Dec 31st of <b>2023</b>	Upcoming Year's <b>PROPOSED</b> Budget from Jan 1st of <b>2024</b> to Dec 31st of <b>2024</b>	% 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

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

**Budgeted Rate Base Worksheet**

Version 1.4

CTC: Marion Senior Services, Inc.

County: Marion

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

	Upcoming Year's <b>BUDGETED</b> Revenues
	from
	Jan 1st of
	<b>2024</b>
	to
	Dec 31st of
	<b>2024</b>
1	2

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

**REVENUES (CTC/Operators ONLY)**

Local Non-Govt

Farebox	\$	80,000
Medicaid Co-Pay Received	\$	-
Donations/ Contributions	\$	-
In-Kind, Contributed Services	\$	-
Other	\$	-
<b>Bus Pass Program Revenue</b>	\$	-

Local Government

District School Board	\$	-
Compl. ADA Services	\$	348,000
County Cash	\$	1,717,105
County In-Kind, Contributed Services	\$	-
City Cash	\$	-
City In-Kind, Contributed Services	\$	-
Other Cash	\$	74,466
Other In-Kind, Contributed Services	\$	-
<b>Bus Pass Program Revenue</b>	\$	-

CTD

Non-Spons. Trip Program	\$	802,062
Non-Spons. Capital Equipment	\$	-
Rural Capital Equipment	\$	74,466
Other TD	\$	-
<b>Bus Pass Program Revenue</b>	\$	-

USDOT & FDOT

49 USC 5307	\$	-
49 USC 5310	\$	432,488
49 USC 5311 (Operating)	\$	1,547,917
49 USC 5311(Capital)	\$	100,000
Block Grant	\$	-
Service Development	\$	-
Commuter Assistance	\$	-
Other DOT	\$	-
<b>Bus Pass Program Revenue</b>	\$	-

AHCA

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

DCF

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

DOH

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

DOE (state)

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

AWI

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

DOEA

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

DCA

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

\$	40,000	\$	40,000
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

\$	802,062	\$	-	\$	-
\$	-	\$	-	\$	-
\$	-	\$	74,466	\$	74,466
\$	-	\$	-	\$	-
\$	-	\$	-	\$	-

\$	-	\$	-
\$	-	\$	432,488
\$	1,547,917	\$	(0)
\$	-	\$	100,000
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-
\$	-	\$	-

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

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

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

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

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

BLUE cells  
Should be funds generated by rates in this spreadsheet

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

local match req.  
\$ 89,118  
\$ -  
\$ 8,274  
\$ 48,054  
\$ 11,111

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

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

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

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





# Worksheet for Program-wide Rates

CTC: Marion Senior Serv Version 1.4  
 County: Marion

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

- Do **NOT** include trips or miles related to Coordination Contractors!
- Do **NOT** include School Board trips or miles UNLESS.....
- INCLUDE** all ONE-WAY passenger trips and passenger miles related to services you purchased from your transportation operators!
- Do **NOT** include trips or miles for services provided to the general public/private pay UNLESS..
- Do **NOT** include escort activity as passenger trips or passenger miles unless charged the full rate for service!
- Do **NOT** include fixed route bus program trips or passenger miles!

PROGRAM-WIDE RATES	
Total <u>Projected</u> Passenger Miles =	1,000,000
<b>Rate Per Passenger Mile = \$</b>	<b>3.29</b>
Total <u>Projected</u> Passenger Trips =	80,000
<b>Rate Per Passenger Trip = \$</b>	<b>41.12</b>

Fiscal Year

2024

<b>Avg. Passenger Trip Length =</b>	<b>12.5 Miles</b>
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Rates If No Revenue Funds Were Identified As Subsidy Funds	
<b>Rate Per Passenger Mile = \$</b>	<b>5.20</b>
<b>Rate Per Passenger Trip = \$</b>	<b>65.02</b>

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

### Vehicle Miles

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

### Vehicle Revenue Miles (VRM)

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

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

### Passenger Miles (PM)

The cumulative sum of the distances ridden by each passenger.

**Worksheet for Multiple Service Rates**

CTC: **Marion Senior Services** Version 1.4  
 County: **Marion**

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

**SECTION I: Services Provided**

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

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

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

Ambulatory	Wheelchair	Stretcher	Group
Leave Blank	Leave Blank	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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**

CTC: **Marion Senior Services** Version 1.4  
 County: **Marion**

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

**SECTION III: Escort Service**

1. Do you want to charge all escorts a fee?.....  
 Yes  
 No  
Skip #2 - 4 and Section IV and Go to Section V
2. If you answered Yes to #1, do you want to charge the fee per passenger trip OR .....  
 per passenger mile?.....  
 Pass. Trip **Leave Blank**  
 Pass. Mile
3. If you answered Yes to # 1 and completed # 2, for how many of the projected  
 Passenger Trips / Passenger Miles will a passenger be accompanied by an escort?  Leave Blank
4. How much will you charge each escort?.....  Leave Blank

**SECTION IV: Group Service Loading**

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

**SECTION V: Rate Calculations for Multiple Services:**

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

		RATES FOR FY: 2024			
		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	1,000,000	= 650,000	+ 350,000	+ Leave Blank	+ Leave Blank
Rate per Passenger Mile =		\$2.63	\$4.51	\$0.00	\$0.00
				per passenger	per group

		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	80,000	= 52,000	+ 28,000	+ Leave Blank	+ Leave Blank
Rate per Passenger Trip =		\$32.90	\$56.40	\$0.00	\$0.00
				per passenger	per group

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

		Combination Trip and Mile Rate			
		Ambul	Wheel Chair	Stretcher	Group
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =		<input type="text"/>	<input type="text"/>	Leave Blank	Leave Blank
Rate per Passenger Mile for Balance =		\$2.63	\$4.51	\$0.00	\$0.00
				per passenger	per group

		Rates If No Revenue Funds Were Identified As Subsidy Funds			
		Ambul	Wheel Chair	Stretcher	Group
Rate per Passenger Mile =		\$4.16	\$7.13	\$0.00	\$0.00
				per passenger	per group
Rate per Passenger Trip =		\$52.02	\$89.17	\$0.00	\$0.00
				per passenger	per group

### Worksheet for Multiple Service Rates

CTC: Marion Senior Set Version 1.4  
County: Marion

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

Program These Rates Into Your Medicaid Encounter Data