



## **Transportation Disadvantaged Local Coordinating Board (TDLCB) Meeting**

Marion County Growth Services - Training Room  
2710 E. Silver Springs Blvd., Ocala, FL 34470

**June 5, 2025 - 10:00 AM**

### **AGENDA**

- 1. CALL TO ORDER AND PLEDGE OF ALLEGIANCE**
- 2. ROLL CALL**
- 3. PROOF OF PUBLICATION**
- 4. PRESENTATIONS**
  - A. [Welcome to new board members](#) (Page #3)
- 5. CONSENT AGENDA**
  - A. [Meeting Minutes March 6, 2025](#) (Page #4)
- 6. ACTION ITEMS**
  - A. [Transportation Disadvantaged Service Plan \(TDSP\) Update](#) (Page #11)
  - B. [Memorandum of Agreement for new Community Transportation Coordinator \(CTC\)](#) (Page #104)
  - C. [2025-2026 Marion Transit Trip Rate Model](#) (Page #113)
- 7. DISCUSSION ITEMS**
  - A. Commissioner McClain Presentation
  - B. Subcommittee's Update
    - Community Affairs Subcommittee
    - Health Affairs Subcommittee
- 8. COMMENTS BY TDLCB MEMBERS**
- 9. COMMENTS BY TPO STAFF**
- 10. COMMENTS BY TRANSPORTATION COORDINATOR (CTC)**

## **11. PUBLIC COMMENT – (Limited to two (2) minutes)**

## **12. ADJOURNMENT**

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

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

The next regular meeting of the Ocala Marion Transportation Disadvantaged Local Coordinating Board  
will be held on September 4<sup>th</sup>, 2025.



**TO: TDLCB Board Members**

**FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner**

**RE: New Board Members**

---

**Summary**

We would like to welcome our new Board Members:

- Ms. Daisy Diaz, Director of Veterans Services
- Mr. Eric Ostanik, Supervisor of Transportation, Marion County Public Schools

**Attachment(s)**

Informative only

**Action Requested**

None

Any additional comments and/or suggestions please contact Liz Mitchell,  
[liz.mitchell@marionfl.org](mailto:liz.mitchell@marionfl.org).



**Transportation Disadvantaged Local Coordinating Board (TDLCB) Meeting**

Marion County Growth Services Training Room  
2710 E. Silver Springs Blvd., Ocala, FL 34470

March 6, 2025

10:00 AM

**MINUTES**

**Members Present:**

Matthew McClain  
Jeffrey Askew  
Gisela Ruiz (*alternate Emilio Santiago*)  
Tiffany McKenzie  
Tracey Sapp (*alternate Nicole Brickhouse*)  
Susan Hanley (*arrived at 10:05am*)  
Jeannette Estes  
Andrea Melvin  
Anissa Pieriboni  
Tom Duncan  
Carlos Colon

**Members Not Present:**

Iris Pozo  
Angela Juaristic  
Donnie Mitchell  
Elizabeth Alacci  
Jim East

**Others Present:**

Rob Balmes, TPO  
Shakayla Irby, TPO  
Elizabeth Mitchell, TPO

Brandon Palermo, Center for Independent Living  
Joseph Bartolomeo, Marion Senior Services  
Herman Schulz, Marion Senior Services  
Karen Williams, Marion Senior Services  
Clayton Murch, Marion Senior Services

### **Item 1. Call to Order and Pledge of Allegiance**

Chairman Matthew McClain called the meeting to order at 10:00am and led the board members in the Pledge of Allegiance.

### **Item 2. Roll Call**

Secretary Shakayla Irby called the roll and a quorum was present.

### **Item 3. Proof of Publication**

Secretary Shakayla Irby stated that the meeting had been published February 27, 2025 online on the TPO website and Facebook and Twitter pages, the City of Ocala, Belleview, and Dunnellon websites. The meeting was also published to the February 27, 2025 edition of the Ocala Star Banner.

### **Item 4. Consent Agenda**

Before the approval of the consent agenda, Chairman McClain recognized Mr. Jeffrey Askew for his dedication and many years of service to both the TDLCB and Marion County. Mr. Askew, who would be retiring, was attending his last TDLCB meeting. He gave brief comments, thanking everyone for their daily contributions and for the opportunity to serve on the TDLCB.

*Mr. Colon made a motion to approve the consent agenda, which was seconded by Ms. Pieriboni. The motion passed unanimously.*

### **Item 5A. Community Transportation Coordinator Evaluation**

Ms. Liz Mitchell presented to the TDLCB and said that the Florida Commission for the Transportation Disadvantaged designated a Community Transportation Coordinator (CTC) for each county/service area. The CTC was responsible for coordinating and/or providing transportation services to individuals who are transportation disadvantaged.

Citizens were considered "transportation disadvantaged" due to age (60 and above), income, or a disability, unable to drive, or do not have access to other transportation options.

Access was provided to medical appointments, employment, educational and other life sustaining services, including, groceries, shopping, meals, and social events, to those who are eligible.

Pursuant to Chapter 427 Florida Statutes 427.015(2), the performance of the Community Transportation Coordinator (CTC) shall be evaluated based on the Commission for the Transportation Disadvantaged (CTD) approved evaluation criteria.

TPO staff evaluated the TDLCB Community Transportation Coordinator to assure that their performance met the Commission for the Transportation Disadvantaged criteria.

TPO staff conducted the evaluation during the month of February and included an analysis of all relevant elements within the operations of Marion Transit Services. Examples include:

- Vehicle Operations & Maintenance
- Grievance Procedures
- Budget
- Contracts
- Driver Certification & Training
- Performance Standards

The evaluation encompassed management, operations, service, safety, vehicle maintenance, drivers and training, performance standards, grievance/complaint procedures, and quality assurance, utilizing the Commission for the Transportation Disadvantaged CTC Evaluation Workbook.

Ms. Mitchell reported that the TPO found all required policies and procedures, performance standards, quality standards, and safety standards were being adhered to. All drivers received training with continual updates and were retrained as necessary.

All vehicles were in good working order and maintained according to preset maintenance schedules.

A zero-tolerance substance abuse policy was enforced, including pre-employment drug and alcohol testing, as well as background checks. No recommendations were made at this time.

Overall, the system was well-managed, and riders received quality service. Marion Transit's drivers were carefully selected and monitored, demonstrating professionalism, care, and safety. Marion Transit continued to maintain a high level of rider satisfaction.

The TPO commended Marion Transit, its drivers, and staff for their dedication and service.

Ms. Mitchell thanked the volunteers who assisted with the call-in survey and ride-along.

Several TDLCB members praised Marion Transit for its service and congratulated them on a job well done. Ms. Mitchell highlighted comments from Mr. Carlos Colon of the Florida Department of Transportation (FDOT), who shared his observations via email. He noted that during the ride-along, he was outside the bus with the driver and observed all drivers conducting their pre-trip inspections. He commended this as excellent work, noting that the inspections included checks of fluids, tires, ramps, lights, horns, and more.

Chairman McClain expressed his appreciation for Marion Transit's dedication to its mission of caring for people, emphasizing that this commitment was truly special.

Ms. Melvin moved to approve the CTC Evaluation. Ms. McKenzie seconded, and the motion passed unanimously.

#### **Item 6A. Florida Alliance for Assistive Services and Technology**

Mr. Brandon Palermo, representing the Center for Independent Living, provided an overview of FAAST (Florida Alliance for Assistive Services and Technology). He explained that FAAST was established in 1993 and offers various services to support individuals with disabilities across Florida. There are 11 regional demonstration centers statewide, including one operated by the Center for Independent Living.

Mr. Palermo highlighted the four core services FAAST provides:

- Information and Assistance – Educating individuals on available assistive technologies, including whether they are free or require purchase.
- Device Loan Program – Allowing individuals to borrow assistive technology to test and determine its suitability.
- Training and Education – Offering guidance on how assistive devices function and how they can improve daily life.
- Financial Loans – Providing low-interest state-level loans to individuals who may not qualify for traditional bank loans, such as those on Social Security or with low credit scores.

He also talked about various assistive technologies available through FAAST, including:

- Bluetooth amplifiers for enhancing phone call clarity
- Voice-activated remotes for emergency contacts
- Reader pens that scan and read text aloud in multiple languages

Mr. Palermo noted that new technology is continuously being acquired, and ongoing training ensures that FAAST remains up to date with the latest advancements.

Ms. Melvin added that FAAST offers a wide range of assistive equipment, from high-tech devices to simple yet highly effective tools. She mentioned a low-tech device designed to assist individuals with limited mobility in scrubbing their backs. This device features a long handle with interchangeable attachments, including a loofah and a mirror. The mirror is particularly beneficial for individuals with conditions such as diabetes and neuropathy, allowing them to check the bottoms of their feet for wounds they might not feel.

She also highlighted other useful tools, such as a magnifier app for smartphones, which helps individuals read small text in dim lighting or on pill bottles.

Additionally, Ms. Melvin noted that FAAST provides technical assistance to businesses in need of assistive technology for their offices.

## **Item 7A. Subcommittee's Updates: Community Affairs and Health Affairs**

*Community Affairs – The committee did not get an opportunity to meet.*

### **Health Affairs**

Ms. Pieriboni provided an update on the committee's recent meeting, where the focus was on addressing ongoing issues with medical providers and the need for prompt responses to medical verification requests. The committee discussed hosting an annual breakfast to engage the community and proposed an awards program to recognize outstanding drivers and agencies.

The group also talked about supporting each other through better communication, with Ms. Mitchell handling flyer submissions and working to ensure timely information distribution via a single monthly email.

Regarding guest speakers, the committee is planning to rotate speakers from various local agencies and explore a presentation from United Way's 211 system. Ms. Pieriboni will follow up on scheduling and will collaborate with Ms. Mitchell to consider adding agency information to the committee website.

Finally, the committee is exploring alternative communication methods, such as radio and TV, to reach individuals with visual impairments or limited internet access.

## **Item 8. Comments by TDLCB Members**

Ms. McKenzie shared her positive experience with the ride-a-longs, stating that she always enjoyed them and echoed praise for Marion Transit.

Mr. Colon encouraged TDLCB members to participate in the ride-a-longs with Marion Transit when given the opportunity.

Mr. Duncan announced that SunTran had a new General Manager, Elizabeth Suchsland.

Ms. Melvin announced that the Center for Independent Living would host its 8th Annual Marion County Emergency Preparedness Expo on March 25, 2025, from 8:45 a.m. to 1:00 p.m. at the College of Central Florida, Ewers Century Center.

Ms. Estes shared with the Board that recent state-level appointments led to several position changes, including Senator Rubio's appointment as Secretary of State and Ashley Moody's appointment to the Senate. These shifts resulted in further reassignments within the governor's administration. She also informed the Board about a bill (tentatively 1050) that proposed consolidating the Division of Blind Services and the Department of Vocational Rehabilitation under the Agency for Persons with Disabilities, elevating it to a department-level agency. She noted that the bill had strong support and was awaiting legislative approval.



Mr. Santiago attended as an alternate for Ms. Ruiz and shared that the governor had been very supportive of recent changes, including efforts to secure funding for expansion. He informed the Board that in his role certifying new providers for the state, he ensured that organizations were aware of available resources. He emphasized the importance of understanding and addressing the needs of individuals with disabilities and compliance-related matters. He noted that while he primarily covered Volusia and Orange counties, he had previously worked with Marion County and commended the Board for its efforts.

Several Board members echoed praise for the outstanding work Marion Transit continued to do in accommodating its clients.

Ms. Pieriboni expressed appreciation for the professionalism and responsiveness she experienced from Marion Transit and the Florida Department of Transportation (FDOT). She shared that they aimed to announce their ribbon challenge for preschool to grade two by the next meeting in June, though the process had taken longer due to their meticulous approach. She also noted that they were undergoing a national accreditation process, which was intensive and coincided with their triennial review.

Additionally, she mentioned that her visit to the legislative delegation was well received, and she planned to contact local delegations for involvement. However, Tallahassee officials advised waiting until after May 6th. She also requested to meet with the Health Subcommittee after the meeting to schedule their next meeting date.

#### **Item 9. Comments by TPO Staff**

Ms. Mitchell informed the Board that the CTC's contract, which is renewed every five years, would expire in June of this year. She stated that the renewal process was underway and noted that the contract would be up for approval at the next meeting. She encouraged everyone to be on the lookout for it.

Mr. Balmes informed the Board that the TPO was working on the 2050 Long-Range Transportation Plan and was seeking public feedback through a survey. He noted that the survey aimed to gather input on areas of emphasis, community needs, and project locations. A QR code was provided for access, and he encouraged members to participate or share it with others. The survey would remain open until March 28th, and results would be shared once the assessment was completed.

#### **Item 10. Comments by CTC**

Mr. Murch expressed appreciation for the kind words from board members to Marion Transit and took the opportunity to highlight the key staff members who contribute to Marion Transit's success. He recognized the transit managers who oversee the drivers and ensure they meet high standards of care. He also acknowledged the staff responsible for scheduling to ensure timely transportation for clients.

He provided an update on fleet improvements, noting that five new buses had been received and were undergoing adjustments before being put into service. An additional five buses were being prepared for delivery, with a total of ten new buses expected in the system within the next few months. These buses were expected to enhance the rider experience.

Mr. Murch also recognized a transit driver as the Driver of the Quarter, highlighting years of service and significant contributions, particularly in client transportation and wheelchair trips.

Additionally, he shared year-end ridership statistics, reporting a 15.1% increase in ADA transport, a 3% increase in 5311 service, and a 10.8% increase in TD service.

He emphasized that overall ridership had grown consistently by approximately 10% annually, reflecting a continued demand for services, which Marion Transit would strive to meet.

#### **Item 11. Public Comment**

*There was no public comment.*

#### **Item 12. Adjournment**

Chairman McClain adjourned the meeting at 10:53am.

Respectfully Submitted By:

---

Shakayla Irby, TPO Administrative Assistant



**TO: TDLCB Board Members**

**FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner**

**RE: Transportation Disadvantaged Service Plan (TDSP) – 2025 Update**

---

### **Summary**

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

- Development Plan
- Service Plan
- Quality Assurance

The CTC is responsible for arranging transportation for TD persons, with approval from the Transportation Disadvantaged Local Coordinating Board (TDLCB). This is a plan that provides a 5-year vision for the local transportation disadvantaged (TD) program and is updated annually. This TDSP updates the TDSP Plan for 2025, and fulfills the annual requirement of the FCTD.

### **Attachment(s)**

- Updated 2025 TDSP Plan
- TDSP Presentation

### **Action Requested**

TPO staff is requesting the TDLCB review and approve the TDSP prior to submission to the FCTD for final action.

Any additional comments and/or suggestions please contact Liz Mitchell,  
[liz.mitchell@marionfl.org](mailto:liz.mitchell@marionfl.org).

*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)

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



Prepared by:

Ocala Marion TPO  
Marion Transit Services  
And  
Transportation Disadvantaged Local Coordinating Board

Updated: June 5th, 2025



## 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 5<sup>th</sup>, 2025 .

\_\_\_\_\_  
Date

\_\_\_\_\_  
Commissioner Mathew McClain, TDLCB Board Chairperson

\_\_\_\_\_  
Date

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

Approved by the Commission for the Transportation Disadvantaged:

\_\_\_\_\_  
Date

\_\_\_\_\_  
Karen Somerset, Interim Executive Director

# TDLCB ROLL CALL VOTE

For Approval of Marion County's TDSP Update

Approved Date: **June 5 th, 2025**

NAME	REPRESENTING	YES	NO	ABSENT
Mathew McClain	Board of County Commissioners ( <i>Chair</i> )			
Daisy Diaz	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			
Tom Duncan	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)			
Eric Ostanik	Marion County School Board			

\_\_\_\_\_  
Date

\_\_\_\_\_  
Commissioner Mathew McClain, TDLCB Chairperson



Transportation Disadvantaged Service Plan

# Table of Contents

<b>INTRODUCTION TO THIS PLAN.....</b>	<b>7</b>
<b>SECTION 1: DEVELOPMENT PLAN.....</b>	<b>7</b>
INTRODUCTION TO THE SERVICE AREA.....	7
1. <i>Background of Transportation Disadvantaged Program</i> .....	7
2. <i>TDLCB Board</i> .....	9
3. <i>History of the Community Transportation Coordinator</i> .....	10
4. <i>Summary of Other Plans and Documents</i> .....	11
5. <i>Public Participation</i> .....	11
SERVICE AREA PROFILE AND DEMOGRAPHICS .....	12
1. <i>Service Area Description</i> .....	12
2. <i>Demographics/Land Use</i> .....	13
3. <i>Population Composition</i> .....	14
4. <i>Cultural Descriptions</i> .....	15
5. <i>Population Density</i> .....	16
6. <i>Age Distribution</i> .....	17
7. <i>Housing and Household Income</i> .....	17
8. <i>Education</i> .....	18
9. <i>Employment</i> .....	19
10. <i>Employment Density</i> .....	20
11. <i>Major Employers</i> .....	20
12. <i>Major Trip Generators</i> .....	21
13. <i>Household Vehicle Availability</i> .....	21
SERVICE ANALYSIS .....	22
1. <i>Transportation Disadvantaged Population</i> .....	22
2. <i>Forecasts of Transportation Disadvantaged Population</i> .....	23
3. <i>Needs Assessment</i> .....	26
4. <i>Barriers to Coordination</i> .....	27
GOALS, OBJECTIVES, AND STRATEGIES .....	28
5. <i>Marion Transit Vision Statement</i> .....	28
6. <i>Marion Transit Mission Statement</i> .....	28
IMPLEMENTATION PLAN.....	31
<b>SECTION 2: SERVICE PLAN.....</b>	<b>33</b>
OPERATIONS ELEMENT.....	33
1. <i>Types, Hours and Days of Service</i> .....	33
2. <i>Accessing Service</i> .....	34
3. <i>Trip Eligibility</i> .....	34
4. <i>Trip Prioritization</i> .....	35
5. <i>Other Accessibility Processes/Procedures</i> .....	35
6. <i>Transportation Operators and Coordination Contractors</i> .....	37



7. Public Transit Utilization .....	37
8. School Bus Utilization.....	37
9. Vehicle Inventory .....	38
10. System Safety Program (SSPP) Certification .....	38
11. Inter-County Services .....	38
12. Emergency Preparedness and Response.....	38
13. Marketing .....	38
14. Service Standards.....	39
15. Local Complaint and Grievance Procedures/Processes .....	40

### **SECTION 3: QUALITY ASSURANCE ..... 40**

CTC MONITORING AND EVALUATION PROCESS FOR OPERATORS AND COORDINATION CONTRACTORS.....	40
1. CTC Evaluation .....	41
2. Cost/Revenue Allocation and Rate Structure Justification.....	41

### **LIST OF TABLES**

TABLE 1. 1 Ocala Marion Tpo Planning Area .....	13
TABLE 1. 2 Population By Race .....	14
TABLE 1. 3 Marion County And Florida Population Projections .....	16
TABLE 1. 4 Marion County Municipalities .....	16
TABLE 1. 5 Employment Characteristics-Not Seasonally Adjusted.....	19
TABLE 1. 6 Major Employers.....	20
TABLE 1. 7 Registered Vehicles By Age.....	21
TABLE 1. 8 Passenger Trips By Trip Purpose.....	22
TABLE 1. 9 Forecast General Td Population .....	24
TABLE 1. 10 Critical Need Transportation Disadvantaged .....	25
TABLE 1. 11 Marion County Forecasted Annual Trip Demand .....	25
TABLE 1. 12 Implementation Plan .....	31
TABLE 2. 1 Coordination Contractors .....	37
TABLE 2.2: CTC Service Standards .....	39
TABLE 3.1: FCTD Calculated Rates.....	41
TABLE 3.2: Suntran Fare Structure/Mt Fare Structure .....	42

### **LIST OF FIGURES**





FIGURE 1. 1 Florida’s Coordinated Transportation Systems ..... 9

FIGURE 1. 2 Population By Race ..... 15

FIGURE 1. 3 Population By Age..... 17

FIGURE 1. 4 Household Income ..... 18

FIGURE 1. 5 Educational Attainment Distribution ..... 19

FIGURE 1. 6 Td Population Groups ..... 23

FIGURE 1. 7 Trip Breakdown..... 26

FIGURE 1.8 Trip Funding Breakdown.....27

**APPENDIX**

APPENDIX A: Summary Review Of Other Plans ..... 43

APPENDIX B: MT’s Vehicle Inventory ..... 48

APPENDIX C: Marion Transit Grievance Procedures ..... 49

APPENDIX D: System Safety Program Plan Certification ..... 50

APPENDIX E: Quality Assurance Program Evaluation (Qape), Corrective Action Plan, And Ctc Evaluation ..... 51

APPENDIX F: Fctd Rate Model Calculation Spreadsheets..... 52



***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.

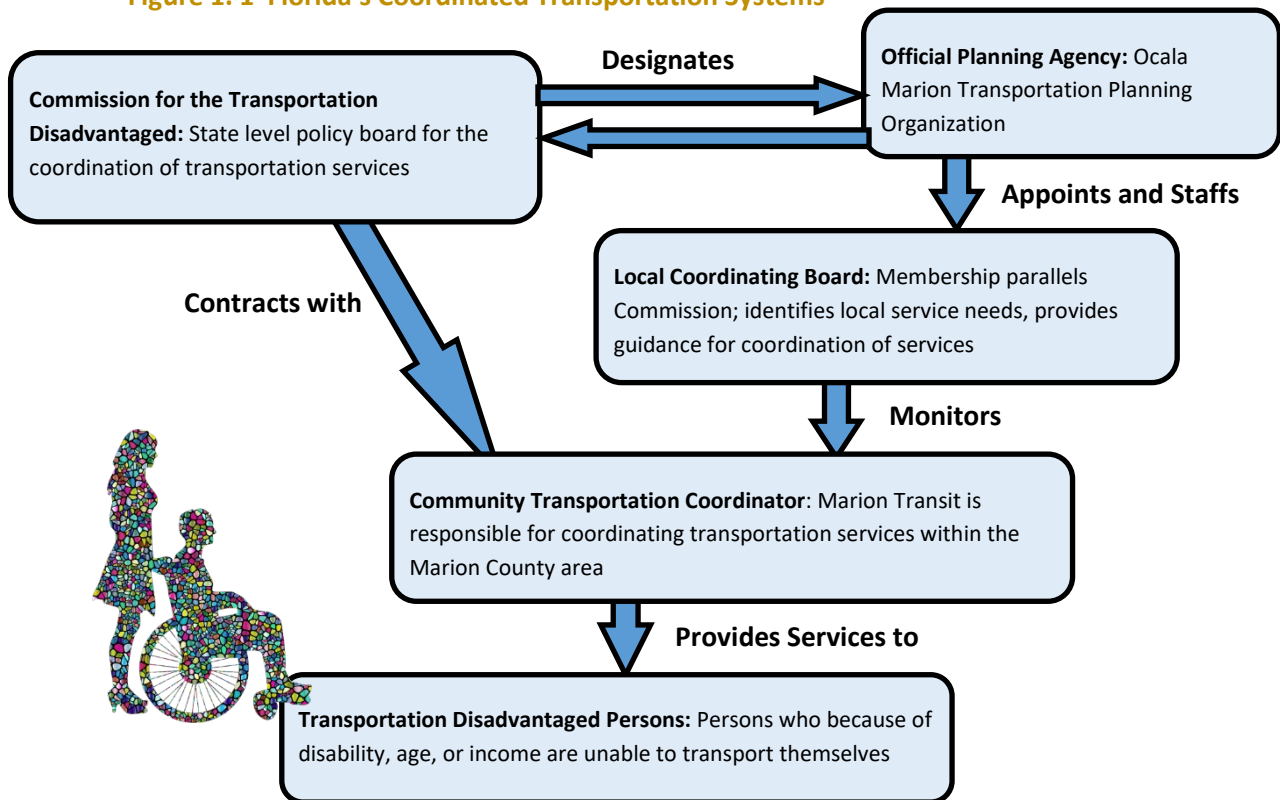
The purpose of the TD is to ensure the availability of efficient, cost-effective, and quality transportation services for the transportation disadvantaged population. Older adults who are lower income and/or have a disability are often considered transportation disadvantaged, are unable to drive due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

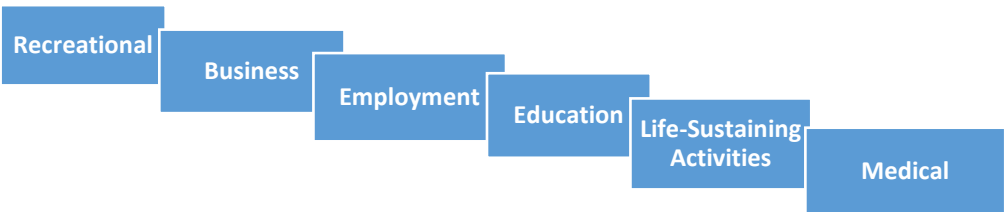
The Community Transportation Coordinator (CTC) is the agency responsible for providing coordinated transportation services for the transportation disadvantaged citizens in the county.

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 ¾-mile of the SunTran fixed-route system.

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

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

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

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



An ongoing opportunity for citizens to participate in the development of local transit plans and to address other transit concerns is provided at all TDLCB meetings, Committee meetings, and TPO Board meetings. Prior to each meeting, workshop, or event, the TPO advertises in the local newspaper to allow the county citizens the opportunity to attend in person in order to participate, comment and express their concerns, approval or disapproval.

Surveys are utilized as a form of gathering information and insight from the public. The TDLCB surveys as needed in order to receive comments first hand from the public. The TPO also

participates in community outreach programs such as the “Marion County Day” which is designed to inform the community of the programs available within the County as well as, allowing residents to enjoy the outdoors while learning the countywide plans and activities.

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

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

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

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

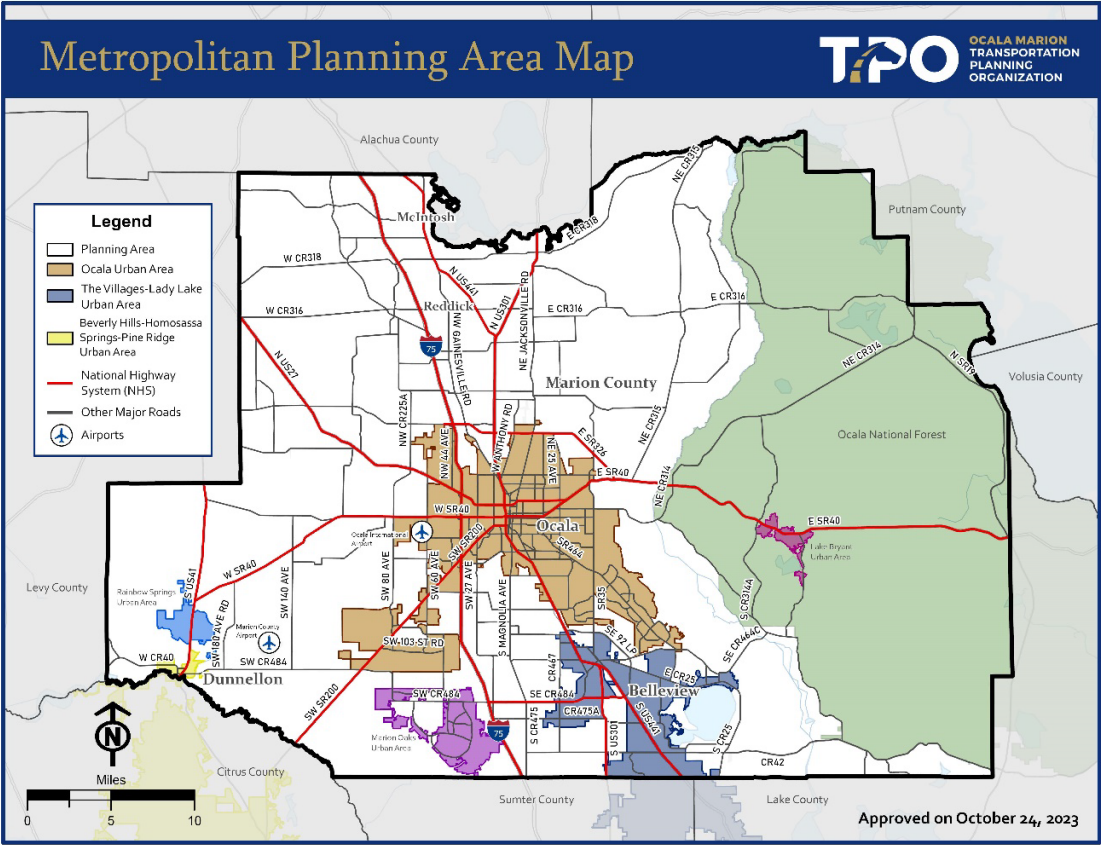
Marion County is located in northern central Florida, just north of Lake and Sumter counties, east of Levy County, and south of Alachua County. The county seat of Ocala is centrally located within the county. Ocala is the largest incorporated city in Marion County, followed by the cities of Belleview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





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

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



**2. Demographics/Land Use**

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

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

The TPO is served by two advisory committees, the Technical Advisory Committee (TAC) and the Citizen Advisory Committee (CAC). These committees review all plans, studies, and proposed projects before recommending to the TPO Board for approval. A component of all reviews is considering what the relationship between land use and transportation are. Staff is always considering how the land is used 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.

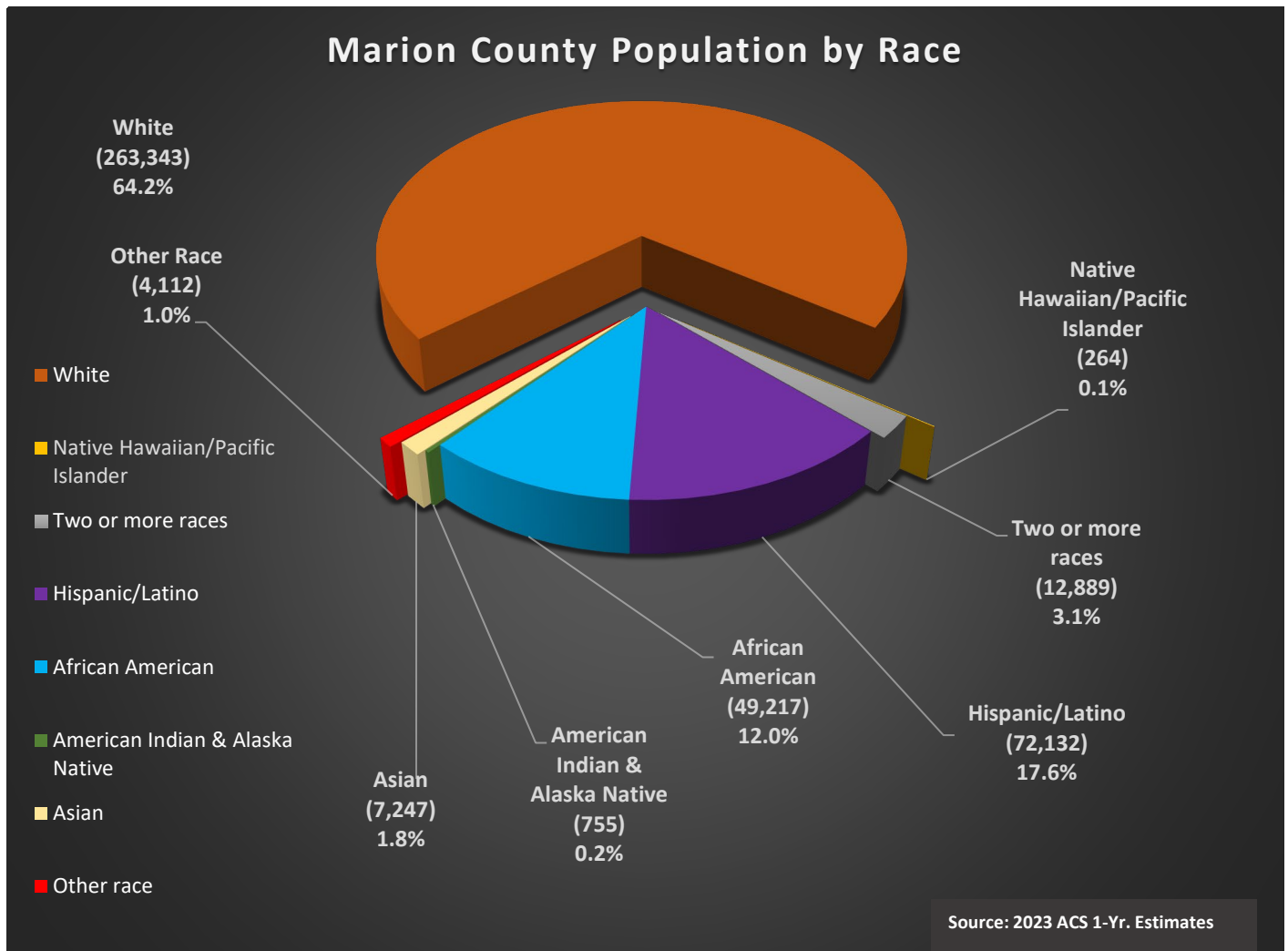
**Table 1. 2 Population by Race**

<i>Race</i>	<i>Population</i>	<i>Percent of Population</i>
*White	263,343	64.2%
African American	49,217	12.0%
Two or more races	12,889	3.1%
Asian	7,247	1.8%
American Indian & Alaska Native	755	0.2%
Native Hawaiian/Pacific Islander	264	0.1%
Other race	4,112	1.0%
Hispanic/Latino of any race	72,132	17.6%
<b>Total</b>	<b>409,959</b>	<b>100.00%</b>
<small>Source: 2023 ACS 1-Year Estimates. Items may not add to totals or compute to displayed percent due to rounding. *White alone, not Hispanic or Latino</small>		

#### 4. Cultural Descriptions

Marion County has a total population of 409,959 according to the American Community Survey's (ACS) 2023 1-Year estimates. The chart and graph Table 1.2 and Figure 1.2 highlight the racial makeup of Marion County.

Figure 1. 2 Population by Race



Marion County's population increased from 375,908 persons in 2020 to 409,959 persons in 2024, an overall increase of 9.1%. It is estimated that the population will continue to increase according to the 2024 Population report by the Bureau of Economic and Business Research (BEBR) at the University of Florida.

Using BEBR Florida population medium growth projections, the population of Marion County is expected to increase by **26.2%** by 2050. **Table 1.3** provides an overview of the population projections for Marion County and Florida from **2025** 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 Projections						Population Growth
	2025	2030	2035	2040	2045	2050	2025 - 2050
Marion County	417,101	446,399	471,093	491,661	510,191	526,535	26.2%
Florida	23,292,200	24,698,545	25,814,954	26,682,030	27,409,376	28,065,018	20.5%

Source: BEBR 2025 - 2050 Population Projections, November 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 **displayed**, the majority of the population within Marion County has increased, including the unincorporated areas.

**Table 1.4 Marion County Municipalities**

Geographic Area	2024	2020	2020 -2024 Population Change
Marion County	419,510	375,908	43,602
Belleview	5,941	5,413	528
Dunnellon	2,015	1,928	87
McIntosh	470	463	7
Ocala	69,556	63,591	5,965
Reddick	465	449	16
UNINCORPORATED	341,063	304,064	36,999

Source: BEBR Estimates of Population 2024, April 1, 2024

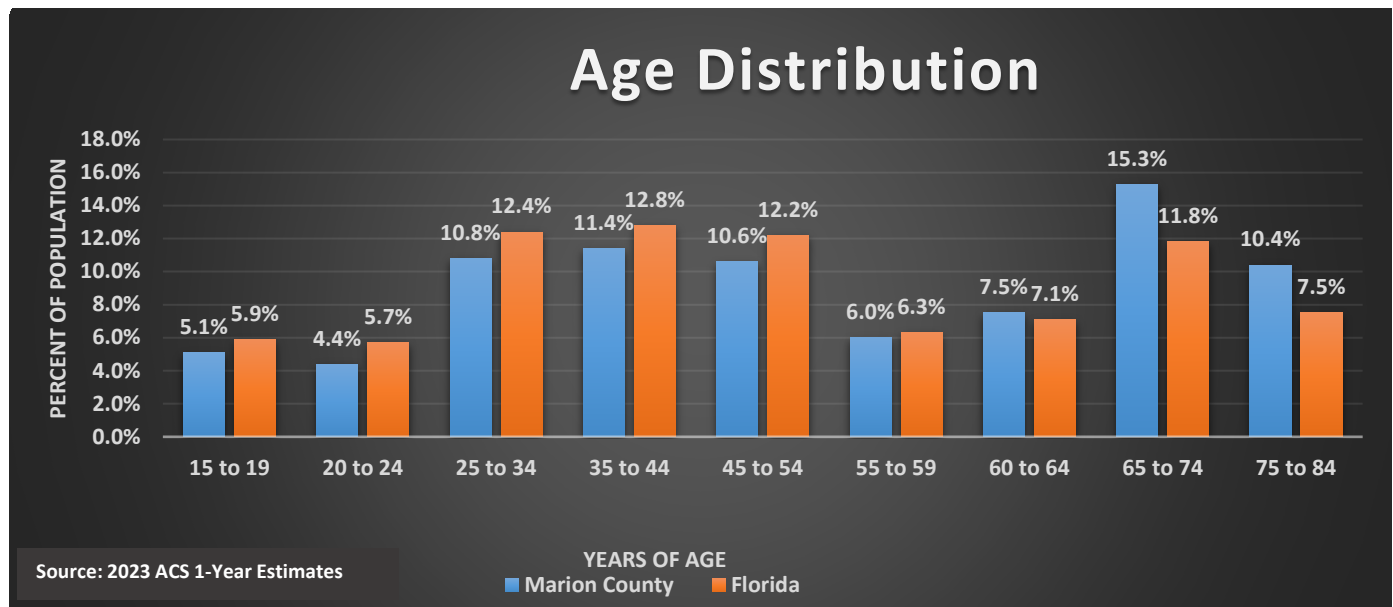
## 5. Population Density

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 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 **2023 ACS 1-year estimates**, more than **25.7 %** of Marion County's population is 65 years of age or older compared to **19.3 %** 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.

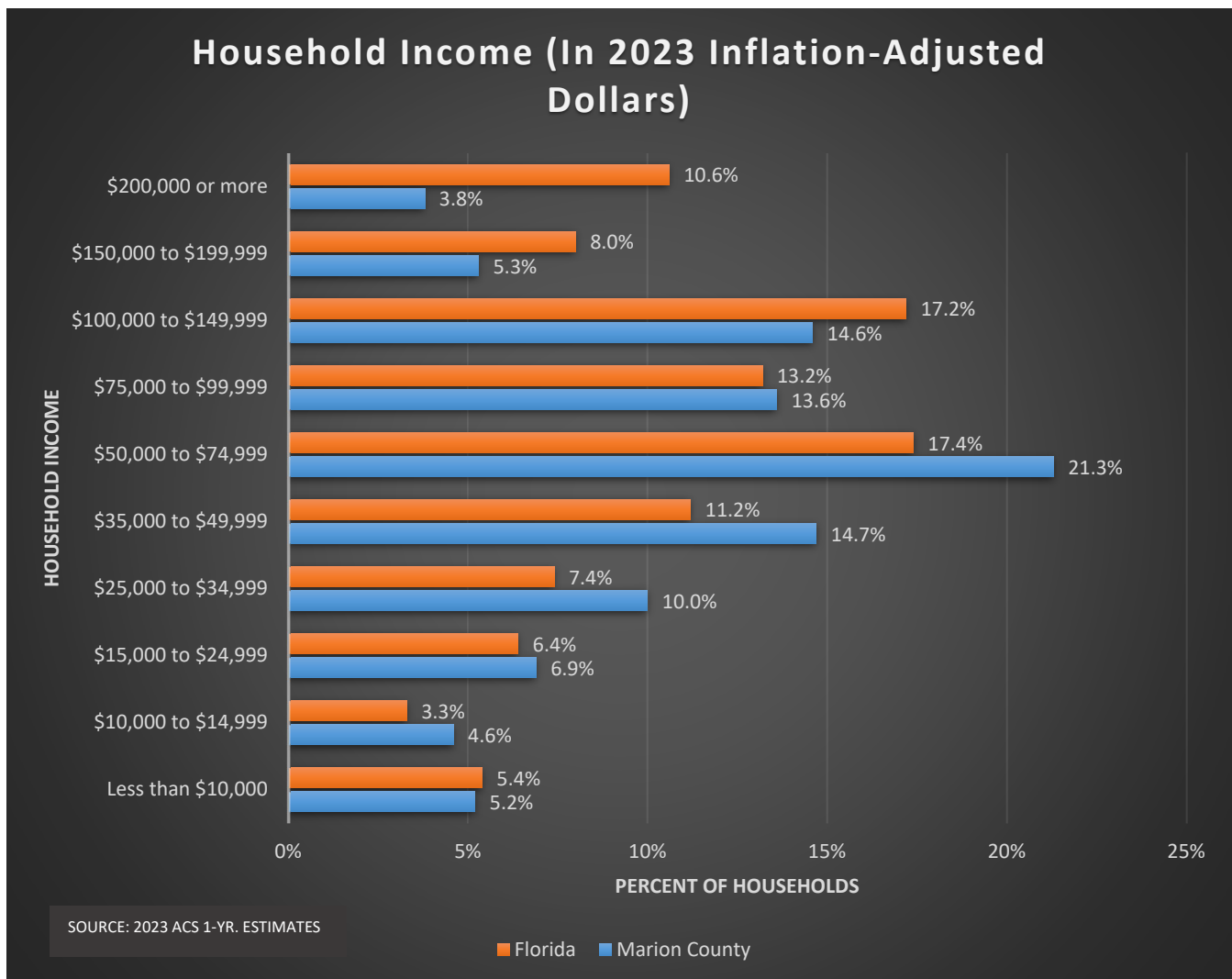
**Figure 1.3 Population by Age**



## 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. According to the **Ocala/Marion County Association of Realtors, Monthly Market Detail Report dated April, 2025**, during the 12 months ending **March 2025**, existing home sales **increased 35.1%** from **March of 2024**. The median property value in Marion County is **\$301,500**. **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 **25%** lower than Florida, with Marion County's median income at **\$58,606** and Florida's at **\$73,311**.

Figure 1. 4 Household Income

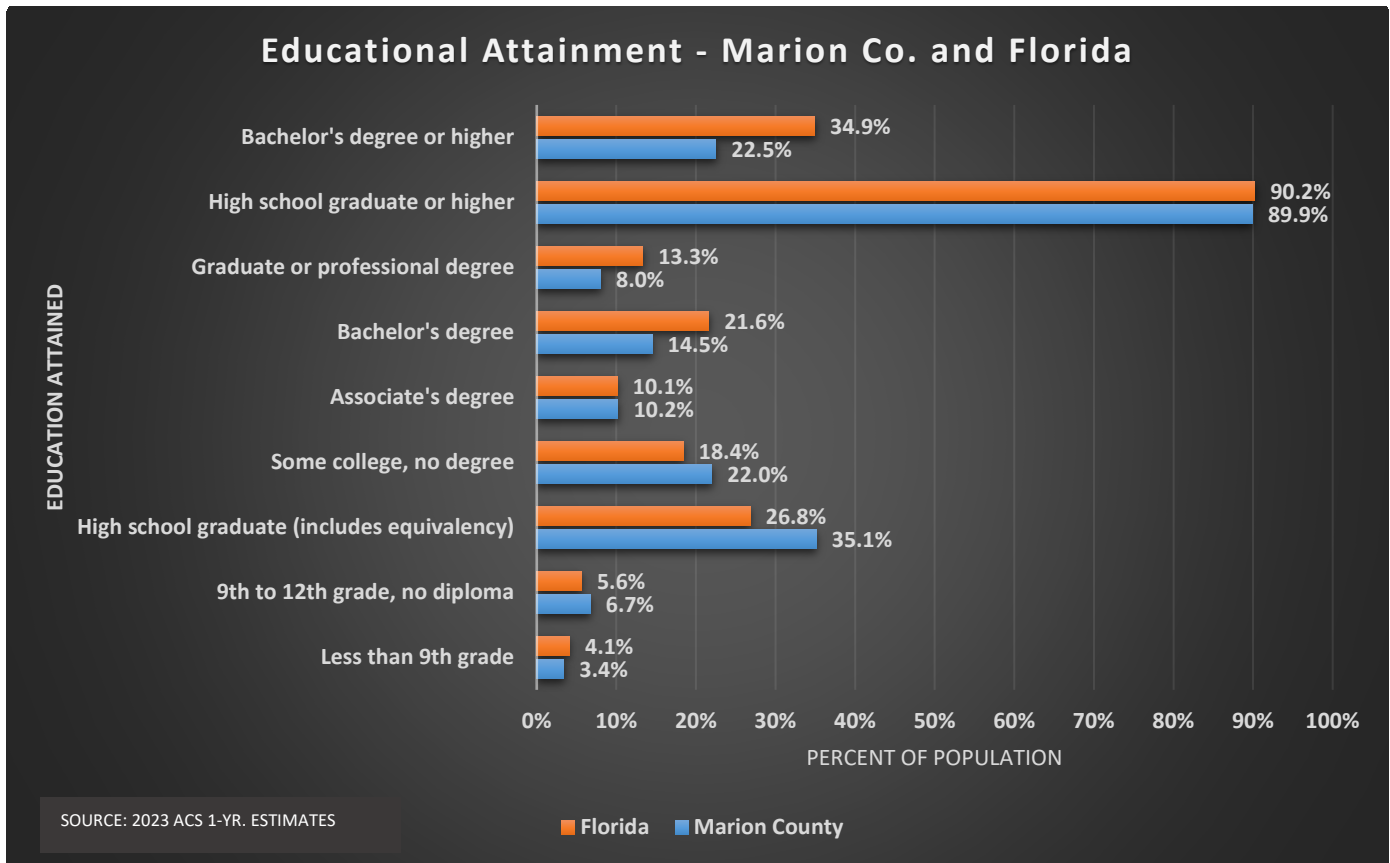


## 8. Education

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 or higher, which includes **89.9%** of Marion County residents and about **90.2%** 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	159,834	152,400	7,434	4.7%*
Florida	11,176,000	10,760,000	415,000	3.7%

\* 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: 2025 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 2025. 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.



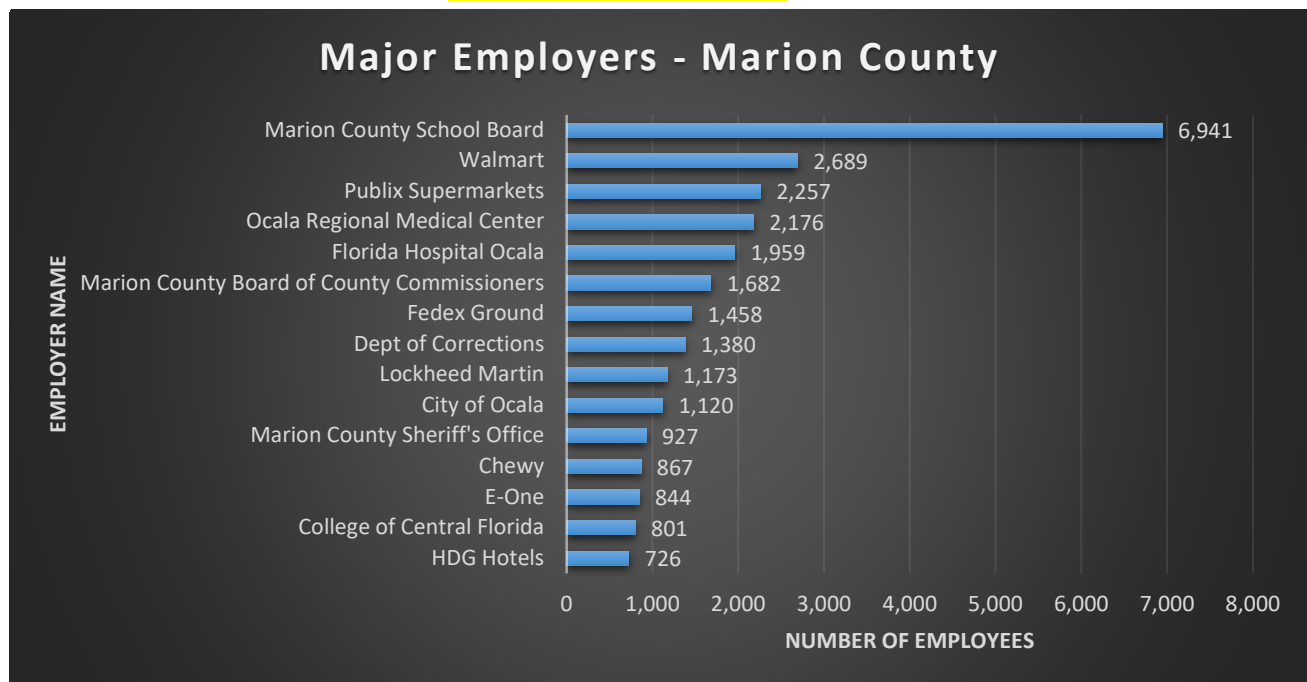
## 10. Employment Density

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: Data-Axle, Employer Database 2024 Edition 1



## 12. Major Trip Generators

Major trip generators in Marion County for paratransit trips are medical facilities (hospitals, healthcare clinics, and dialysis facilities), and local shopping centers. Trips to other locations such as parks, libraries, government/social services, religious activities, and restaurants are also requested. Below is a list of the major trip generators. TD services are provided county-wide, with service to any location in the county, and ADA service is provided within ¾ mile of SunTran fixed route service.

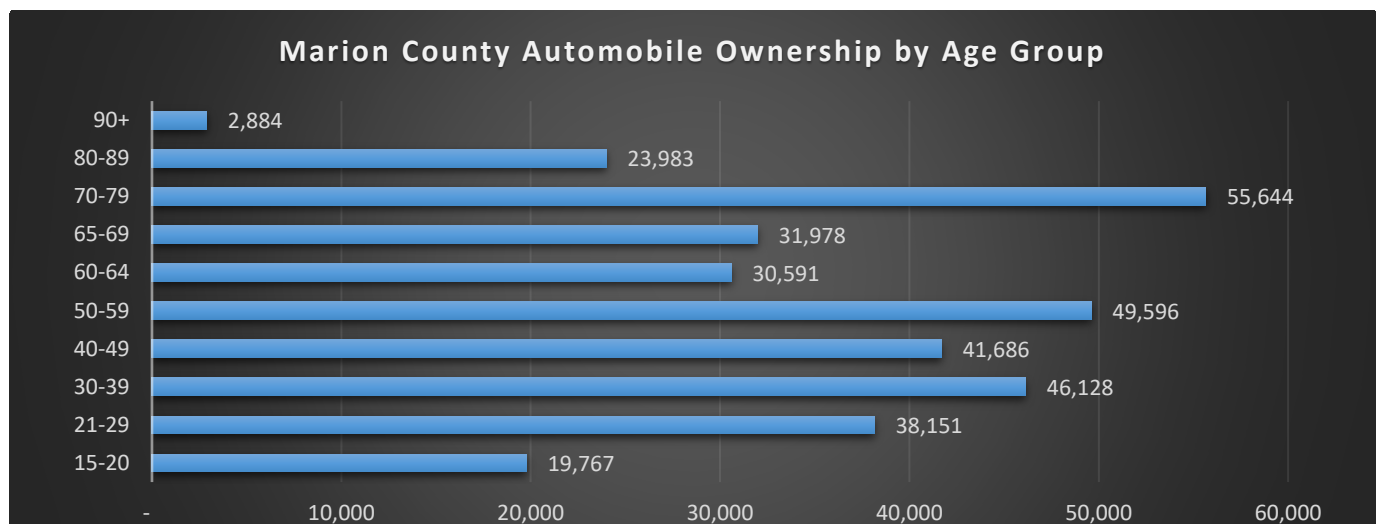
1.	Transitions Life Center	3360 NW Gainesville Rd.	Ocala	Medical
2.	Davita East Dialysis Center	2870 SE 1 <sup>st</sup> Ave.	Ocala	Medical
3.	Wal-Mart	4980 E. Silver Springs Blvd.	Ocala	Retail
4.	Davita Shores Dialysis Center	9310 Spring Rd.	Ocala	Medical
5.	Davita West Dialysis Center	8585 SW Hwy 200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

Source: Marion Transit

## 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 life-sustaining, education, and training 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	2022	2023	2024
Medical	39,527	40,482	40,282
Employment	2,468	4,557	5,071
Edu/Train/DayCare	10,064	20,490	20,530
Nutritional	14,922	17,291	18,931
Life-Sustaining Other	3,777	4,954	21,797
TOTAL	70,758	87,774	106,611

Source: Annual Operating Reports from 2023-2024, 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 2024 CUTR, Paratransit Service Demand Estimation Tool and 2024 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).

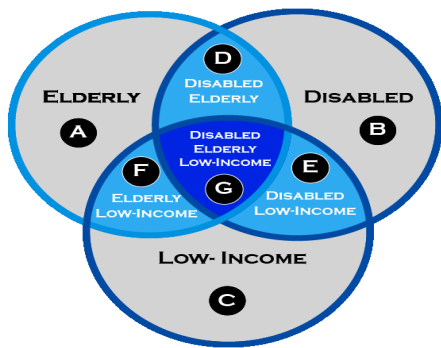


Figure 1. 6 TD Population Groups

General TD Population	% of Total	
Non-Duplicated General TD Population Estimate	191,879	46.8%

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	18,967	4.6%	6,144	1.5%	161	0.2%	0	0.00%
5-17	57,732	14.1%	14,091	3.4%	5,084	1.2%	1,040	0.25%
18-34	69,216	16.9%	10,060	2.5%	6,725	1.6%	1,289	0.31%
35-64	145,683	35.5%	18,791	4.6%	19,015	4.6%	4,224	1.03%
<b>Total Non Elderly</b>	<b>291,598</b>	<b>71.1%</b>	<b>49,086</b>	<b>12.0%</b>	<b>30,985</b>	<b>7.6%</b>	<b>6,553</b>	<b>1.60%</b>
65-74	62,701	15.3%	12,116	3.0%	13,532	3.3%	1,919	0.47%
75+	55,660	13.6%	3,384	0.8%	23,890	5.8%	2,811	0.69%
<b>Total Elderly</b>	<b>118,361</b>	<b>28.9%</b>	<b>15,500</b>	<b>3.8%</b>	<b>37,422</b>	<b>9.1%</b>	<b>4,730</b>	<b>1.15%</b>
<b>Total</b>	<b>409,959</b>	<b>100%</b>	<b>64,586</b>	<b>15.8%</b>	<b>68,407</b>	<b>16.7%</b>	<b>11,283</b>	<b>2.75%</b>

Source: 2023 ACS 1-Yr. Estimates

<b>Double Counts Calculations</b>		
E - Estimate non-elderly/disabled/ low income	From Base Data (I11)	6,553
B - Estimate non-elderly/ disabled/not low income	Subtract I11 from 11	24,432
G - Estimate elderly/disabled/low income	From Base Data (I14)	4,730
D- Estimate elderly/ disabled/not low income	Subtract I14 from 14	32,692
F - Estimate elderly/non-disabled/low income	Subtract I14 from 14	10,770
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C14	70,169
C - Estimate low income/not elderly/not disabled	Subtract I11 from 11	42,533
<b>Total - Non-Duplicated</b>		<b>191,879</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 **2024** TD population in Marion County is estimated to be **191,879** representing approximately **47%** 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 **12%** over the five-year period.

**Table 1. 9 Forecast General TD Population**

General TD Population Forecast	2024	2025	2026	2027	2028	2029	2030
<i>Overlapping Circle Component</i>							
E - Estimate non-elderly/disabled/ low income	6,,553	6,682	6,814	6,948	7,085	7,225	7,367
B - Estimate non-elderly/ disabled/not low income	24,432	24,914	25,405	25,906	26,416	26,937	27,468
G - Estimate elderly/disabled/low income	4,730	4,823	4,918	5,015	5,114	5,215	5,318
D- Estimate elderly/ disabled/not low income	32,692	33,336	33,994	34,664	35,347	36,044	36,754
F - Estimate elderly/non-disabled/low income	10,770	10,982	11,199	11,420	11,645	11,874	12,108
A - Estimate elderly/non-disabled/not low income	70,169	71,552	72,963	74,401	75,868	77,363	78,888
C - Estimate low income/not elderly/not disabled	42,533	43,371	44,226	45,098	45,987	46,894	47,818
<b>TOTAL GENERAL TD POPULATION</b>	<b>191,879</b>	<b>195,661</b>	<b>199,518</b>	<b>203,451</b>	<b>207,462</b>	<b>211,551</b>	<b>215,722</b>
<b>TOTAL POPULATION</b>	<b>409,959</b>	<b>418,040</b>	<b>426,281</b>	<b>434,684</b>	<b>443,252</b>	<b>451,990</b>	<b>460,900</b>
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.							

In 2025, the Critical Need TD population is expected to make **1460** total daily trips as shown below in **Table 1.10**. The number of Critical Need trips needed is expected to increase **8.9%** over the five year period.

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

Critical Need TD Population Forecast	2024	2025	2026	2027	2028	2029	2030
<b>Total Critical TD Population</b>							
<i>Disabled</i>	18,066	18,422	18,786	19,156	19,534	19,919	20,311
<i>Low Income Not Disabled No Auto/Transit</i>	290	296	302	307	314	320	326
<b>Total Critical Need TD Population</b>	<b>18,356</b>	<b>18,718</b>	<b>19,087</b>	<b>19,463</b>	<b>19,847</b>	<b>20,238</b>	<b>20,637</b>
<b>Daily Trips - Critical Need TD Population</b>							
<i>Severely Disabled</i>	885	903	920	939	957	976	995
<i>Low Income - Not Disabled - No Access</i>	551	562	573	584	595	607	619
<b>Total Daily Trips Critical Need TD Population</b>	<b>1,436</b>	<b>1,460</b>	<b>1,485</b>	<b>1,510</b>	<b>1,535</b>	<b>1,563</b>	<b>1,590</b>
<b>Annual Trips</b>	<b>380,513</b>	<b>386,944</b>	<b>393,483</b>	<b>400,133</b>	<b>406,895</b>	<b>414,097</b>	<b>421,427</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 **2025** Critical Need TD population is estimated to be **68,407**, representing nearly **35%** 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	161	4.20%	7	0		
-17	5,084	4.20%	214	0.37%		
18-34	6,725	6.30%	424	0.61%		
35-64	19,015	13.84%	2,632	1.81%		
<b>Total Non-Elderly</b>	<b>30,985</b>		<b>3,276</b>	<b>1.12%</b>	<b>28.60%</b>	<b>937</b>
65-74	13,532	27.12%	3,670	5.85%		
75+	23,890	46.55%	11,121	19.98%		
<b>Total Elderly</b>	<b>37,422</b>		<b>14,791</b>	<b>12.50%</b>	<b>11.70%</b>	<b>1,731</b>
<b>Total</b>	<b>68,407</b>		<b>18,066</b>	<b>4.41%</b>		<b>2,667</b>

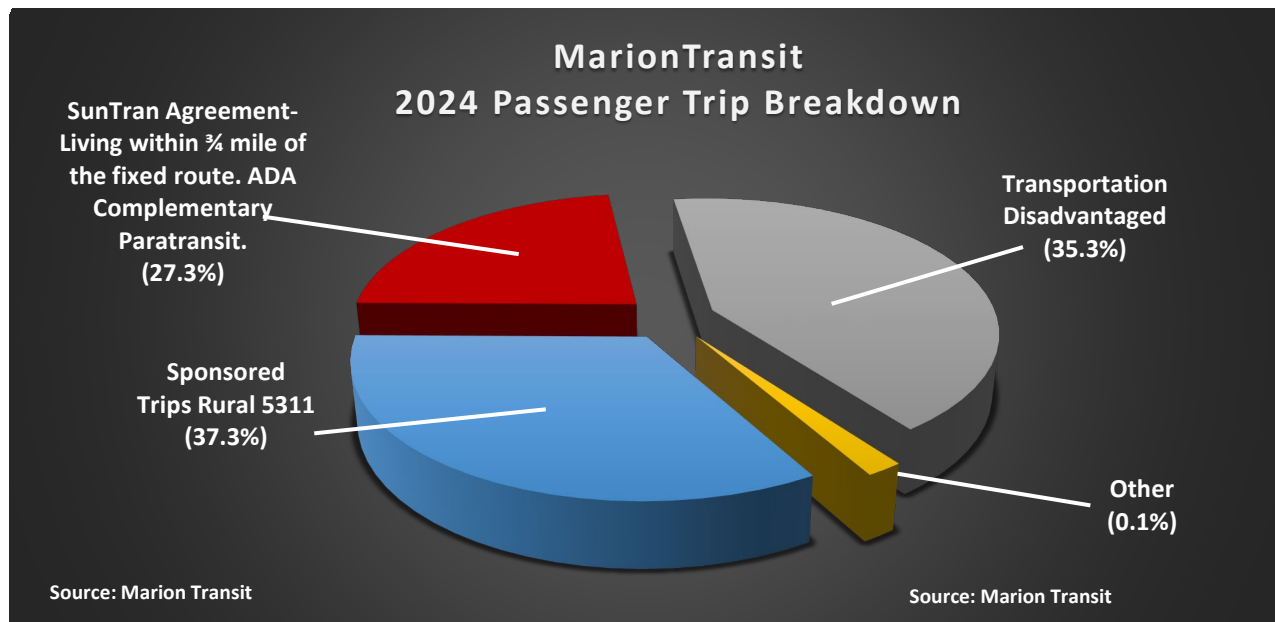
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.

### 3. Needs Assessment

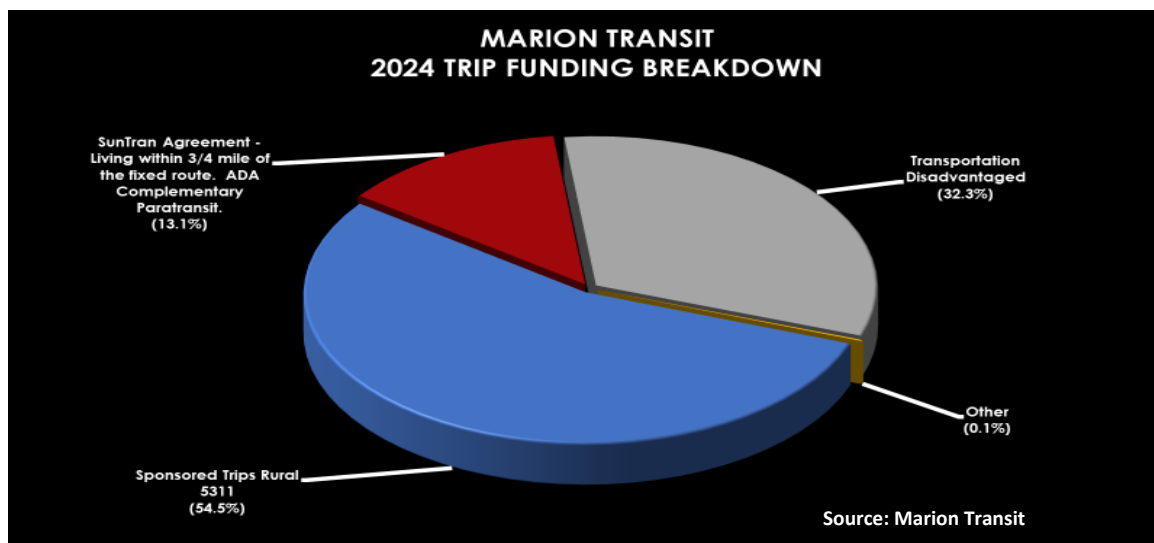
Assessment of existing and unmet needs for public transportation for low income older adults and persons with disabilities is essential. An inventory of existing transportation providers and identification of redundancies and gaps in service were used to identify unmet needs or duplications of public 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 25% of Marion County's population is 65 years of age or older compared to 19% 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. Share plans and routes with partners at the quarterly meeting in order to build mutual trust.
- c. Maintain communication quarterly to close any gaps in service and look for ways to improve costs and efficiency.

## Implementation Plan

**Table 1. 12 Implementation Plan**

OBJECTIVE	STRATEGY	PERSON	MEASURE-STATUS	2025 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. Funding has been an issue, currently on hold.
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. Ongoing
<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
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. More comprehensive information has been added. Ongoing
Respond to complaints immediately to improve public perception and identify problems	Immediate notification of complaint to Grievance Committee for resolution and annually update grievance procedures	CTC TDLCB	CTC to report to TDLCB – Quarterly	Immediate attention is given and followed according to procedures. If any complaints, MT is following the new "Adverse incident quarterly reporting". 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. Also, 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. MT is soliciting presentations in an attempt to find the best possible option.
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. Additional areas will be considered as growth, need and funding arises. – Funding has been an issue. New routes have been identified however start date is on hold due to funding. 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. 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
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 each day -.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 . The TPO and MT presented at the Center for the Blind School - 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 ¾ mile from a SunTran fixed bus route are directed to use the fixed-route bus system. All SunTran vehicles are ADA accessible. To ensure that all citizens of Marion County are provided with equal access to public transportation, SunTran undergoes ADA certification; contracts with the Center for Independent Living of North Central Florida to assist with the rider certification/eligibility process.

## 8. School Bus Utilization

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

## **9. Vehicle Inventory**

To properly operate TD services, MT maintains a fleet of approximately 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	
<b>MT'S FARE DESCRIPTION</b>	<b>MT FARE AMOUNT</b>	
MT ONE-WAY FARES	\$2.00	

## Appendix A Summary Review of Other Plans

### Local Government Comprehensive Plans

#### City of Ocala

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

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

Staff at the City of Ocala works hand in hand with TPO staff to ensure that all projects that are proposed are both compatible to their vision and land use. TPO and City of Ocala staff work together on project proposals, traffic methodology, and any proposed amendments that could possibly affect the availability of multimodal facilities within the planning area. 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 two main tools to promote a better-connected transportation system. The two tools are utilizing the complete streets program and road diets. In addition, increasing the accessibility of public transit was also recommended to either reduce congestion, connect neighborhoods that are not currently connected and to provide additional transportation choices to citizens. The City of Ocala is currently 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 2025. 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 began development of the 2050 LRTP in April of 2024 with scheduled adoption in November 2025.

### **Transportation Improvement Program (TIP) FY 2026 to 2030**

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 2026 to 2030 to be adopted June 23, 2025.

## 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

Bus Number	Year / Make	Vehicle Length (Feet)	Ambulator Seats	Wheelchair (left Spaces)	ADA Accessory (Ramps, etc)	Current Use	Current Condition
1205 (50)	2012/Dodge	12	6	1	Ramp	Spare	Good
1602 (09)	2016/Ford E-	23	10	3	Lift	Daily Use	Excellent
1603 (11)	2016/Ford E-	23	10	3	Lift	Daily Use	Excellent
1604 (20)	2016/Ford E-	23	10	3	Lift	Daily Use	Excellent
1701	2017/Ford/Tra	22	9	3	Lift	Daily Use	Excellent
1702	2017/Ford/Tra	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-	23	12	3	Lift	Daily Use	Excellent
2001	2020/Ford E-	23	12	3	Lift	Daily Use	Excellent
2002	2020/Ford E-	23	12	3	Lift	Daily Use	Excellent
2003	2020/Ford E-	23	12	3	Lift	Daily Use	Excellent
2004	2020/Ford E-	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
2501	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2502	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2503	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2504	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2505	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2506	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2507	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2508	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2509	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent
2510	2025/Ford E-450	23	12	3	Lift	Daily Use	Excellent

## Appendix C: Marion Transit Grievance Procedures

**Inserted**

# **GRIEVANCE PROCEDURES**

## **OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD**

### **Article 1: Preamble**

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

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

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

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

### **Article III: Definitions**

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

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

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

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

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

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

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

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

All written complaints can be sent to:

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

and/or

Ocala Marion TPO  
2710 E. Silver Springs Blvd.  
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**

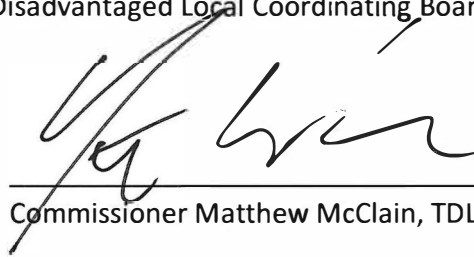
The Transportation Disadvantaged Local Coordinating Board Grievance Procedures may be amended by a two-thirds (2/3) vote of members present, if a quorum exists, and all Members have been notified of proposed changes at least seven (7) working days in advance of the meeting.

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 12th day of December 2024.

A handwritten signature in black ink, appearing to read 'Matthew McClain', written over a horizontal line.

Commissioner Matthew McClain, TDLCB Chairperson

A handwritten signature in blue ink, appearing to read 'Robert Balmes', written over a horizontal line.

Robert Balmes, TPO Director

## COMPLAINT FORM

### OCALA MARION TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

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

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

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

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

Please submit to: Address in the step process

☐ Additional Pages are attached.

## TDLCB COMPLAINT TRACKING FORM

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

### **COMPLAINT TO THE CTC –STEP 1**

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

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

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

---



---



---

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

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

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

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

---



---



---

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

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

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

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

---



---



---

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

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

If you need more space to explain please use the back of this form.



## Appendix D: System Safety Program Plan Certification

**Inserted**





*Florida Department of Transportation*

RON DESANTIS  
GOVERNOR

420 W. Landstreet Rd.  
Orlando, FL 32824

JARED W. PERDUE, P.E.  
SECRETARY

August 28, 2024

Clayton Murch  
Transit Director  
Marion Senior Services  
1101 Southwest 20th Court  
Ocala, Florida 34471

**Re: Marion Senior Services dba Marion Transit – 2024 Florida Department of Transportation (FDOT)  
Triennial Review Compliance Notice**

Dear Mr. Murch:

This letter is to confirm that the 2024 FDOT Triennial Review conducted on February 13, 2024, with Marion Transit is now closed. Following the triennial review, findings were published on March 22, 2024. After reviewing all corrective action plans submitted, the Department has found your agency in compliance with the FDOT regulations for providing public transportation services and for receiving state funding under Public Transit Block Grant and federal funding programs 49 U.S.C. §5311 and §5310. A summary of review findings and subsequent responses is provided in Attachment A of this notice. Thank you for cooperating with the FDOT review team to work towards compliance in various areas of your organization's public transportation program.

Your cooperation during the process was greatly appreciated. The Department looks forward to continuing its valued partnership with your agency to provide safe and efficient public transportation for the residents of Marion County.

Sincerely,

DocuSigned by:  
  
90462CF203F4435...

Carlos Colón, FCCM  
Transit Project Coordinator  
FDOT District Five

c:

Jo Santiago, Transit Intermodal Supervisor – FDOT District Five  
Sophia Villavicencio-Ortiz, In-House Consultant – VHB  
Jennifer Martinez, Executive Director – Marion Senior Services  
Herman Schulz, Transit Manager – Marion Senior Services

Attachment A – Corrective Action Plan Matrix

**Inserted**



*Florida Department of Transportation*

RON DESANTIS  
GOVERNOR

420 W. Landstreet Rd.  
Orlando, FL 32824

JARED W. PERDUE, P.E.  
SECRETARY

August 28, 2024

Clayton Murch  
Transit Director  
Marion Senior Services  
1101 Southwest 20th Court  
Ocala, Florida 34471

**Re: Marion Senior Services dba Marion Transit – 2024 Florida Department of Transportation (FDOT)  
Triennial Review Compliance Notice**

Dear Mr. Murch:

This letter is to confirm that the 2024 FDOT Triennial Review conducted on February 13, 2024, with Marion Transit is now closed. Following the triennial review, findings were published on March 22, 2024. After reviewing all corrective action plans submitted, the Department has found your agency in compliance with the FDOT regulations for providing public transportation services and for receiving state funding under Public Transit Block Grant and federal funding programs 49 U.S.C. §5311 and §5310. A summary of review findings and subsequent responses is provided in Attachment A of this notice. Thank you for cooperating with the FDOT review team to work towards compliance in various areas of your organization's public transportation program.

Your cooperation during the process was greatly appreciated. The Department looks forward to continuing its valued partnership with your agency to provide safe and efficient public transportation for the residents of Marion County.

Sincerely,

DocuSigned by:  
  
90462CF203F4435...

Carlos Colón, FCCM  
Transit Project Coordinator  
FDOT District Five

c:

Jo Santiago, Transit Intermodal Supervisor – FDOT District Five  
Sophia Villavicencio-Ortiz, In-House Consultant – VHB  
Jennifer Martinez, Executive Director – Marion Senior Services  
Herman Schulz, Transit Manager – Marion Senior Services

Attachment A – Corrective Action Plan Matrix

**Attachment A: Corrective Action Plan Matrix**

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Observation: An offered suggestion, view, or comment regarding compliance performance. An observation may address or refer to information obtained during the review. Reviewers are encouraged to provide appropriate observations and recommendations on best practices even when no deficiency or area of concern exists.	
Compliance Area	Observation
Project Management/Financial Information: Contract and Invoicing	The below is an overview of the active Public Transportation Grant Agreements (PTGAs) Marion Transit has with FDOT: - Contract G1V53 is set to expire 12/31/2024 (has already received an extension) - Contract G2508 is set to expire 12/31/2025 (has already received an extension) Marion Transit should monitor their active contracts closely. <b>TransCIP Finding #: F000005283</b>
Title VI: Plan and Support Documents	Section 4.4 in Marion Transit's Title VI Plan mentions ARC Marion as a subrecipient and also mentions "Your Community Transit." Marion Transit should update language as applicable. <b>TransCIP Finding #: F000005275</b>
Vehicle Maintenance: Maintenance Plan	It was noticed that some of the PM Program key point in the SSPP were not in the Maintenance Plan and recommend adding 10%-mile interval deviations, QC/QA checks to ensure that the inspections and repairs, both in-house and contracted, are completed and documented properly, and safety inspection as part of the maintenance inspections and are performed every 6,000 miles. <b>TransCIP Finding #: F000005210</b>
Drug and Alcohol Testing: Drug and Alcohol Training	Agency is currently utilizing TAPTCO for their 60 minutes of new hire drug awareness training. This program is not compliant with 655.14(b)(2). It is recommended that they begin utilizing the FTA Drug Awareness Video, <a href="https://transit-safety.fta.dot.gov/DrugAndAlcohol/Tools/DrugAwarenessVideo/Default.aspx">https://transit-safety.fta.dot.gov/DrugAndAlcohol/Tools/DrugAwarenessVideo/Default.aspx</a> . <b>TransCIP Finding #: F000005158</b>

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
1.	Vehicle Maintenance: Pre and Post-Trip Inspections	Reviewers noted a trend of inoperable emergency brakes and corrosion on vehicle batteries and other defects on vehicle batteries.	Marion Transit should conduct a campaign of all vehicle batteries and emergency brakes and repair as needed. Marion Transit should upload a copy of work orders and/or invoices as applicable in the "Supporting Documentation" section below. In addition, a response is required in the text box titled, "Corrective Action Plan." <b>TransCIP Finding #: F000005284</b>	Clayton Murch	Campaign was conducted on the entire fleet. The work orders are attached. All battery terminals were cleaned and emergency brakes were checked for proper operation. 2 Vehicles were identified that did not pass the emergency brake test. They were sent for repair. Invoices are attached.	On 4/10/2024 and 4/19/2024, Marion Transit uploaded documentation as proof a campaign to inspect all vehicle batteries and emergency brakes was completed and repairs were completed as needed. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
2.	Project Management/ Financial Information: Procurement	During the review, Marion Transit was unable to provide a copy of a procurement policy that satisfies FDOT minimum requirements.	Marion Transit must upload a Procurement Policy that satisfies FDOT requirements in the "Supporting Documentation" section in TransCIP. In addition, a response is required in the text box titled, "Corrective Action Plan." <b>TransCIP Finding #: F000005282</b>	Clayton Murch	Procurement policy has been updated with April 2024 Guidance and re-uploaded.	On 4/3/2024, Marion Transit uploaded a copy of its Procurement Policy. In April 2024, FDOT updated the language included in the FDOT Procurement Guidance for Transit Agencies. Consequently, if Marion Transit wants to include the new FDOT Procurement Guidance for Transit Agencies as a reference within Marion Transit's Procurement Policy, pages 6 - 64 should be deleted and can be replaced with the document uploaded in the "Supporting Documentation" section titled, "Procurement Guidance 2023 Final." Note: On 6/7/2024, Marion Transit uploaded an updated procurement guidance that satisfies FDOT requirements. <b>Finding closed.</b>
3.	Coordinated Plan: Coordinated Public Transportation/ Human Services	The Transportation Disadvantaged Service Plan (TDSP) uploaded into TransCIP is not signed by the Florida Commission for the Transportation Disadvantaged.	Marion Transit must provide a copy of the TDSP signed by the Florida Commission for the Transportation Disadvantaged. The copy should be uploaded in the "Supporting Documentation" section below. A response is required in the text box titled, "Corrective Action Plan." <b>TransCIP Finding #: F000005281</b>	Clayton Murch	Signature page for the TDSP is attached below.	On 3/28/2024, Marion Transit uploaded copy of the TDSP signed by the Florida Commission for the Transportation Disadvantaged. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
4.	Equal Employment Opportunity: EEO Program Policy	<p>Since Marion Transit employs 50 or more transit-related employees and received capital and operating assistance in excess of \$1 million, Marion Transit is required to complete an Abbreviated EEO Program, per FTA Circular 4704.1A. However, during the review, Marion Transit was unable to provide a copy of an Abbreviated EEO Program that satisfies FTA requirements. An Abbreviated EEO Program will have the following:</p> <ul style="list-style-type: none"><li>o Statement of Policy</li><li>o Dissemination Plan</li><li>o Designation of Personnel Responsibility</li><li>o Assessment of Employees Practices</li><li>o Monitoring and Reporting Plan</li></ul>	<p>Marion Transit must upload a copy of an Abbreviated EEO Program under the "Supporting Documentation" section below that satisfies FTA requirements. An Abbreviated EEO Program must include the following:</p> <ul style="list-style-type: none"><li>o Statement of Policy</li><li>o Dissemination Plan</li><li>o Designation of Personnel Responsibility</li><li>o Assessment of Employees Practices</li><li>o Monitoring and Reporting Plan</li></ul> <p>After uploading a copy of the document, a response must be included in the text box titled "Corrective Action Plan."</p> <p><b>TransCIP Finding #: F000005280</b></p>	Clayton Murch	Complete Affirmative Action Plan (including EEO Policy) has been attached.	<p>On 4/26/2024, Marion Transit uploaded a copy of its EEO Policy. However, the uploaded EEO Policy does not satisfy the requirements for an Abbreviated EEO Program according to FTA Circular 4704.1A. Marion Transit must review the checklist uploaded and guidance information in "Supporting Documentation" in TransCIP and make applicable updates to their EEO Policy and upload a revised EEO Policy. Note: On 6/12/2024, Marion Transit uploaded an abbreviated EEO Program that satisfies the minimum requirements. The Executive Director signed the policy and the agency uploaded a copy 8/16/2024. This document was reviewed.</p> <p><b>Finding closed.</b></p>
5.	Americans with Disabilities Act: Service Equity	<p>Marion Transit's Riding Rules brochure states that "Pets must be kept in small carriers (Guide dogs and service animals may accompany disabled passengers." However, a definition of service animal is not provided and other applicable USDOT guidelines.</p>	<p>Marion Transit must include the definition of a service animal according to US DOT and other general guidelines to ensure that the service animal policy adheres to the Americans with Disabilities Act CFR 49 Part 37. The Community Transportation Association of America (CTAA) published a training video within this link: <a href="https://www.youtube.com/watch?v=GeyuHOr1gmw">https://www.youtube.com/watch?v=GeyuHOr1gmw</a> that provides guidance on the development of service animal policies. In addition, FDOT reviewers have uploaded information that outlines the requirements for a Service Animal Policy for the agency's use under the "Supporting Documentation" section. After updating the Riding Rules brochure and other applicable documentation, Marion Transit should notify FDOT reviewers of the update and FDOT reviewers will review Marion Transit's website. In addition, a response must be included in the text box titled "Corrective Action Plan."</p> <p><b>TransCIP Finding #: F000005279</b></p>	Clayton Murch	Riding rules have been updated on the website to reflect the USDOT service animal definition. Service animal policy created and adopted is attached as well.	<p>On 4/5/2024, Marion Transit uploaded updated its Riding Rules brochure, implemented a service animal policy, and updated its information shared on their website to reflect an accurate definition of service animals per USDOT guidelines.</p> <p><b>Finding closed.</b></p>



FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
6.	Americans with Disabilities Act: Service Equity	ADA Complaint Form did not include the email address, along with the phone number and the address on the website.	Marion Transit must ensure that the ADA Complaint Form includes the email address, along with the phone number of the appropriate point of contact. After Marion Transit's ADA Complaint Form has been updated, a copy of the form must be uploaded in the "Supporting Documentation" section in TransCIP and a response must be included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005278</b>	Clayton Murch	ADA Complaint Forms (both English and Spanish) are attached. They have been updated to reflect the phone number and email address of the appropriate point-of-contact.	On 3/28/2024, Marion Transit uploaded updated ADA and Title VI Complaint Forms to reflect the email address and phone number of the appropriate contact. <b>Finding closed.</b>
7.	Americans with Disabilities Act: Service Equity	Marion Transit's ADA Complaint Process was not available on Marion Transit's website. The ADA Complaint Process must meet the following requirements: (1)The process for filing a complaint, including the name, address, telephone number, and email address of the employee designated under paragraph (a) of this section, must be sufficiently advertised to the public, such as on the entity's website; (2) The procedures must be accessible to and usable by individuals with disabilities; (3) The entity must promptly communicate its response to the complaint allegations, including its reasons for the response, to the complainant and must ensure that it has documented its response.	Marion Transit's ADA Complaint Process must be posted on Marion Transit's website. After Marion Transit's ADA Complaint Process has been posted to the website, a response must be included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005277</b>	Clayton Murch	Complaint process and updated complaint forms have been uploaded to the mariontransit.org website.	On 4/3/2024, Marion Transit uploaded a screenshot of the updated information posted on their website that reflects their ADA Complaint Process. <b>Finding closed.</b>
8.	Americans with Disabilities Act: Service Equity	Marion Transit's Title VI Plan notes that all key documents are written in English and Spanish. However, the reasonable modification policy was not available in Spanish during the review.	Marion Transit must provide a copy of the Reasonable Modification Policy in Spanish by uploading a copy in the "Supporting Documentation" section. In addition, Marion Transit must ensure that the Spanish version is available on Marion Transit's website and a response must be included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005276</b>	Clayton Murch	The Reasonable Modification Policy and Request Form (in Spanish) is attached. The form has also been added to the Marion Transit website.	On 3/28/2024, Marion Transit uploaded a copy of the Reasonable Modification Policy in Spanish that satisfies the minimum requirements. <b>Finding closed.</b>



FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
9.	Title VI: Plan and Support Documents	Marion Transit's Title VI Plan mentions on 4-1 that the "Complaint procedure will be made available to the public on Marion Transit's website. However, FDOT reviewers were unable to locate the complaint procedure.	Marion Transit must ensure that the Title VI Complaint Procedure is available to the public on Marion Transit's website. After updating Marion Transit's website, a response must be included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005274</b>	Clayton Murch	Website has been updated to include the complaint procedure.	On 4/3/2024, Marion Transit uploaded a screenshot showing that the Title VI Complaint Procedure was uploaded to their website. <b>Finding closed.</b>
10.	Vehicle Maintenance: Vehicle Files	The file review indicates that PM inspections are conducted 99% on-time. However, several safety sensitive and critical safety defects were identified during the vehicle inspections which indicate that the PM program may need to be reevaluated.	Due to safety sensitive and critical safety defects identified during the vehicle inspections, Marion Transit must conduct refresher training on the Preventative Maintenance Guide uploaded in the "Supporting Documentation" section below. After the refresher training is completed, Marion Transit must upload documentation such as sign in sheets, training certificates, or other appropriate documentation under the "Supporting Documentation" section in TransCIP that reflects the refresher training was completed and provide a response in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005219</b>	Clayton Murch	Marion Transit met with its maintenance provider and reviewed the requirements referenced in the Preventative Maintenance Guide. Marion Transit re-trained drivers on the PM Guide at the April 25, 2024 drivers' meeting. Marion Transit has also increased direct observation of drivers physically conducting pre/post-trip inspections.	On 4/26/2024, Marion Transit uploaded documentation as proof that the refresher training on the Preventative Maintenance Guide was completed. <b>Finding closed.</b>
11.	Facility Maintenance: Facilities and Equipment Plan	A Safety Data Sheet (SDS) binder was maintained and up to date for chemicals available to keep vehicles clean and for in-house staff to add fluids as needed. However, the SDS binder was in an office.	It is recommended a copy of the SDS binder be placed in the area where operators are cleaning the vehicles. It is also recommended a portable eyewash station be installed in the same area. After including the SDS binder and a portable eyewash station in close proximity of where vehicles are cleaned, Marion Transit must upload photos under the "Supporting Documentation" section below as proof the activities were completed. In addition, Marion Transit must provide a response in the text box titled, "Corrective Action Plan." <b>TransCIP Finding #: F000005218</b>	Clayton Murch	Additional SDS binders were placed in the bus wash area. Portable eyewash station was installed in the area as well. Pictures are attached.	On 4/5/2024 and 4/8/2024, Marion Transit uploaded photos as proof the eye wash station was installed and the SDS binders were placed in the bus wash area. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
12.	Vehicle Maintenance: Vehicle Files	The file review indicates that PM inspections are conducted 99% on-time. However, several safety sensitive and critical safety defects were identified during the vehicle inspections which indicate that the PM program may need to be reevaluated.	<p>Due to safety sensitive and critical safety defects identified during the vehicle inspections, Marion Transit must conduct refresher training on the Preventative Maintenance Guide uploaded in the "Supporting Documentation" section below. After the refresher training is completed, Marion Transit must upload documentation such as sign in sheets, training certificates, or other appropriate documentation under the "Supporting Documentation" section in TransCIP that reflects the refresher training was completed and provide a response in the text box titled "Corrective Action Plan."</p> <p><b>TransCIP Finding #: F000005217</b></p>	Clayton Murch	Marion Transit met with its maintenance provider and reviewed the requirements referenced in the Preventative Maintenance Guide. Marion Transit re-trained drivers on the PM Guide at the April 25, 2024 drivers' meeting. Marion Transit has also increased direct observation of drivers physically conducting pre/post-trip inspections.	On 4/26/2024, Marion Transit uploaded documentation as proof that the refresher training on the Preventative Maintenance Guide was completed. <b>Finding closed.</b>
13.	Vehicle Maintenance: Vehicle Files	A trend was noticed during the file review of conducting brake jobs shortly after PM inspections are performed, which indicates that maintenance activities are not closely monitored.	<p>Marion Senior Services can improve monitoring by tracking mileages between brake jobs to predict potential issues from becoming failures and recommend inspecting brakes during PM “A” inspections.</p> <p><b>TransCIP Finding #: F000005216</b></p>	Clayton Murch	Upon review of the Preventative Maintenance Guide Book, we show that brake inspections are not included with an "A" service. Please provide additional clarification as to whether the guidebook needs to be updated and we should adopt the brake checks at every service language. Marion Transit management team met with our maintenance provider and they agreed to "inspect" brakes during PM "A" inspections.	<p>Note: On 04/26/2024, Marion Senior Services cited that their maintenance provider will "inspect" their brakes during the PM "A" inspections. Although brake inspections are not specifically required in the Preventative Maintenance Guidebook, the FDOT representatives highly recommend that brake inspections be conducted during an "A" level preventative maintenance inspection. It should be noted that the Preventative Maintenance Guidebook is a general guide and each agency may have different needs and varying preventative maintenance programs to meet those needs.</p> <p><b>Finding closed.</b></p>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Areas of Concern: Weakness in the adoption or implementation of procedures, and/or weaknesses with regard to conformance with state and federal guidelines. Recommendations will be provided to address areas of concern. The agency is required to develop and submit a CAP and implementation schedule for each area of concern, for approval by District 5.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
14.	Drug and Alcohol Testing: Pre-Employment-Testing and Background Checks	Marion Transit was unable to provide documentation that FTA drug & alcohol background checks were performed during the review period. Due to a recent turn-over in Human Resources, files were unable to be located.	Marion Transit must implement a procedure to ensure that drug and alcohol background checks are performed in accordance with 40.25. It is recommended that DER oversees and/or manages this process and all other roles and responsibilities related to FTA drug and alcohol testing. A copy of the procedure must be uploaded in the "Supporting Documentation" section and a response included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005157</b>	Clayton Murch	Marion Transit has included the Release of Information Form in the new hire paperwork (attached). Its completion will be required of all applicable applicants. The revised procedure indicating that the DER oversees/manages all aspects of FTA drug and alcohol testing is attached - see #4.	On 4/10/2024, Marion Transit uploaded revised procedure indicating that the DER oversees/manages all aspects of FTA drug and alcohol testing. Marion Transit also uploaded a new Release of Information Form that will be completed by new employees, as applicable. <b>Finding closed.</b>
15.	Drug and Alcohol Testing: Random Testing	A review of Marion Transit's random testing in 2023 revealed a pattern of predictability in that testing was only performed between the hours of 8:45 am - 5:00 p.m. Marion Transit's operational hours are 6:00 a.m. to 7:00 p.m.	During the response period, agency should perform at least one random test between the hours of 6:00 a.m. - 8:30 a.m. and/or between 5:00 p.m. - 7:00 p.m. A copy of the revised procedure to address this issue must be uploaded to the "Supporting Documentation" section and a response included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005154</b>	Clayton Murch	Marion Transit will perform at least one random test between the hours of 6:00 am – and 8:30 am and/or between 5:00 pm and 7:00 pm each quarter. Revised procedure is attached - see #6 - Random Testing section of attachment.	On 4/10/2024, Marion Transit uploaded a revised procedure that cites at least one random test will occur between the hours of 6:00 a.m. - 8:30 a.m. and/or between 5:00 p.m. - 7:00 p.m. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
1.	Vehicle Maintenance: Vehicle Files	Marion Transit's PM inspection practices are inconsistent with the maintenance policies and procedures stated in their Maintenance Plan. The Maintenance Plan states lifts are serviced on preventative maintenance inspections according to the manufacturer's specifications. During the file review wheelchair lift PM inspection is not serviced on preventative maintenance inspections and the wheelchair section of the PM checklist is left blank. Files show wheelchair lifts PM inspection are serviced annually using a separate inspection checklist and repairs are outsourced.	Marion Transit must ensure their PM policies and practices are consistent. Marion Transit must upload a revised Maintenance Plan that reflects the maintenance practices being implemented that satisfy FDOT requirements. The revised Maintenance Plan must be uploaded in the "Supporting Documentation" section in TransCIP and a response must be included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005214</b>	Clayton Murch	Marion Transit will align its current PM policies and practices. Lift inspections/service will be done at regular A-B-A-C PM intervals. Maintenance Plan is attached.	On 4/10/2024, Marion Transit uploaded a revised Maintenance Plan that shows their PM policies and practices are consistent. <b>Finding closed.</b>
2.	Vehicle Maintenance: Pre and Post-Trip Inspections	During the pre-trip observation, some of the required components were not inspected as stated in the agency's SSPP and Maintenance Plan.	Marion Senior Services must provide refresher training to their operators on how to properly conduct pre/post-trip inspection. Pre-trip training can be accessed through the COTA website at <a href="https://www.floridacota.org/">https://www.floridacota.org/</a> that includes these links, <a href="https://vimeo.com/aecomvizstudio/review/425185614/25356890b3">https://vimeo.com/aecomvizstudio/review/425185614/25356890b3</a> <a href="https://vimeo.com/aecomvizstudio/review/417692113/cbfbcb6e9c2">https://vimeo.com/aecomvizstudio/review/417692113/cbfbcb6e9c2</a> . After the refresher training is completed, Marion Transit must upload documentation such as sign in sheets, training certificates, or other appropriate documentation under the "Supporting Documentation" section in TransCIP that reflects the refresher training was completed and provide a response in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005213</b>	Clayton Murch	Pre/Post-trip inspection training was conducted for all drivers present at the drivers' meeting on 4/25/2024. Drivers not in attendance were trained individually on prior other dates.	On 4/26/2024, Marion Transit uploaded a training sign in sheet and pre-post trip training certificates as proof the refresher training for drivers was completed. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
3.	Vehicle Maintenance: Pre and Post-Trip Inspections	During the vehicle inspections, critical and safety sensitive defects were identified. Vehicles 1403/FDOT 94557, 2103/FDOT 50131, 2105/FDOT 50124, and 2112/FDOT 50142 were removed from service by the FDOT District Representative due to the critical nature of the defects identified.	Marion Transit repaired the following vehicles while on-site: -1403/FDOT 94557; 2103/FDOT 50131; and 2112/FDOT 50142 (documentation was uploaded in the supporting documentation section in TransCIP below). Marion must repair the remaining safety defects on vehicle 2105/FDOT 50124, 2107/FDOT 50149, and 1501 (please refer to documentation uploaded in the supporting documentation section in TransCIP below). After completing the repairs, Marion Transit must upload copies of invoices and/or work orders as proof the repairs were completed and provide a response in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005211</b>	Clayton Murch	Repairs to identified defects have been completed. The invoices/work orders are attached. Drivers will be retrained on pre/post-trip inspection procedures as referenced in FINDING #5213.	On 4/9/2024, Marion Transit uploaded invoices/work orders as proof repairs on vehicles 2105/FDOT 50124, 2107/FDOT 50149, and 1501 were completed. <b>Finding closed.</b>



FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
4.	Vehicle Maintenance: Maintenance Plan	Marion Transit's Maintenance Plan did not satisfy FDOT minimum requirements according to F.A.C. Chapter 14-90: -The outsourced maintenance facilities in the Maintenance Plan did not match the maintenance service providers that the agency is currently using. -The information management section within the Maintenance Plan did not specify oversight of ongoing maintenance activities, such as procedures for tracking and monitoring maintenance information, including how often this information is tracked and monitored, how the information is used by the agency to provide oversight, and who is responsible for this task. - The fleet inventory did not include current mileage and average annual mileage.	Marion Transit must update their Maintenance Plan to address the following:  - Must update the Maintenance Plan with the current outsourced maintenance facilities vendors that are conducting preventative maintenance inspections and repairs.  - Must update the information management section to specify oversight of ongoing maintenance activities, such as procedures for tracking and monitoring maintenance information, including how often this information is tracked and monitored, how the information is used by the agency to provide oversight, and who is responsible for this task. - Must update the fleet inventory to include current mileage and average annual mileage.  After making the required updates, the revised Maintenance Plan must be uploaded in the "Supporting Documentation" section below and a response included in the text box titled "Corrective Action Plan."  <b>TransCIP Finding #: F000005209</b>	Clayton Murch	Maintenance Plan with the current outsourced maintenance facilities vendors that are conducting preventative maintenance inspections and repairs has been updated. The information management section has been updated to specify oversight of ongoing maintenance activities, such as procedures for tracking and monitoring maintenance information, including how often this information is tracked and monitored, how the information is used by the agency to provide oversight, and who is responsible for this task. The fleet inventory has been updated to include current mileage and average annual mileage.	On 4/5/2024, Marion Transit uploaded updated Vehicle Maintenance Plan that satisfies FDOT minimum requirements according to F.A.C. Chapter 14-90. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
5.	Safety and Security: Driver Training	Marion Transit operators observed during the virtual ride check did not operate the vehicles according to applicable training and laws. Operators were observed driving with one hand, turning too fast, eating on the bus, and making incomplete stops at traffic signals.	Marion Transit must conduct refresher training for all operators to promote safe driving practices. Training exercises may be accessed via the National Rural Transit Assistance Program at <a href="https://www.nationalrtap.org/Training/National-RTAP-Training-Overview">https://www.nationalrtap.org/Training/National-RTAP-Training-Overview</a> . An example training course is the Safety Training and Rural Transit (START) Online course. After the refresher training is completed, Marion Transit must upload documentation such as sign in sheets, training certificates, or other appropriate documentation under the "Supporting Documentation" section in TransCIP that reflects the refresher training was completed and provide a response in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005207</b>	Clayton Murch	The three (3) drivers observed operating incorrectly have been trained on START prior to the original deadline of 4/26/2024. An extension for the remainder of the drivers was requested due to timing required to complete the course. START training certificates attached.	On 07/01/2024, Marion Transit uploaded training certificates for the refresher training that was conducted for their drivers. <b>Finding closed.</b>
6.	Safety and Security: Driver Training	Marion Transit does not address all the requirements for Event Investigations as required by Rule 14-90 FAC, as listed below: - Events are not investigated and documented in a final report that includes a description of the investigation activities, identified causal factors and any identified corrective actions. The reviewer examined 7 Event Investigations files, 4 of 7 were incomplete. Corrective action plans are developed by the bus transit system that will identify planned actions and schedule for implementation.	Marion Transit must address all outstanding training requirements for drivers as identified on the review document uploaded in the "Supporting Documentation" section. Available training opportunities can be located on the Florida Transit Safety and Operations Network's website: <a href="https://ftson.org/training/">https://ftson.org/training/</a> . After the training is completed, Marion Transit must upload documentation such as sign in sheets, training certificates, or other appropriate documentation under the "Supporting Documentation" section in TransCIP that reflects the refresher training was completed and provide a response in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005206</b>	Clayton Murch	All drivers were set up for online training on <a href="https://ftson.org/training">ftson.org/training</a> . The drivers on the review document completed the training. Other drivers will complete the training on their 3-year cycle per Marion Transit SSPP. Drivers were trained/certified on all different types of vehicles that our agency utilizes.	On 4/8/2024, 4/16/2024, and 4/26/2024, Marion Transit uploaded training sign-in sheets and certificates as proof outstanding driver training was completed. <b>Finding closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
7.	Safety and Security: Event Investigations	Vehicle # 117 FDOT # 99520: Outer roll barrier will not retract (CSC), Reverse Alarm audible sound weak (SS), Right side body panel light missing (SS)	<p>Due to unsatisfactory practices identified during the review of documentation associated with event investigations, Marion Transit must conduct refresher training by reviewing the TSI Guidelines to determine recordability and NSC Preventability guidelines provided in the "Supporting Documentation" section below. After the refresher training is completed, Marion Transit must upload documentation such as sign in sheets, training certificates, or other appropriate documentation under the "Supporting Documentation" section in TransCIP that reflects the refresher training was completed and provide a response in the text box titled "Corrective Action Plan."</p> <p><b>TransCIP Finding #: F000005205</b></p>	Clayton Murch	The management team at Marion Transit was trained on TSI Guidelines to determine recordability and NSC Preventability guidelines on 4/23/2024. A new form that better captures the requirements of the Final Report referenced in Rule 14-90 FAC is attached. Staff was retrained on the proper methodology for completing the Final Report.	On 4/24/2024, Marion Transit uploaded documentation as proof refresher training on TSI guidelines and NSC Preventability guidelines was completed. In addition, Marion Transit uploaded a new form that satisfies the requirements of Rule 14-90 FAC. <b>Finding closed.</b>
8.	Safety and Security: Driver Qualifications	<p>Marion Transit does not address all the requirements for Qualification, Selection and Training as required by Rule 14.90 FAC, as listed below:</p> <p>-Criminal Background checks: The reviewer examined 20 drivers’ files; 9 of the 20 were found to be non- compliant.</p> <p>-Driving Background checks: The reviewer examined 20 drivers’ files; 13 of the 20 were found to be non- compliant.</p>	<p>Marion Transit must address all the requirements for Qualification, Selection and Training as required by Rule 14.90 FAC by providing appropriate documentation as proof that the criminal and driving background checks were completed for the drivers listed in the document uploaded in the section "Supporting Documentation" below. If Marion Transit is concerned about uploading sensitive information, Marion Transit should request a screen sharing session with FDOT representatives to review the criminal and driving background checks. A response must be provided in the text box titled "Corrective Action Plan."</p> <p><b>TransCIP Finding #: F000005202</b></p>	Clayton Murch	The missing background checks (5-year) and annual MVR review documents are attached. Marion Transit will run MVRs as part of a driver's annual review. 5-yr background checks are being maintained on a spreadsheet by the HR department.	On 4/10/2024, Marion Transit uploaded the missing background checks (5-year) and annual MVR review documents. <b>Finding closed.</b>



FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
9.	Safety and Security: Emergency Management and Security	Marion Transit does not address all the requirements for the Security Program Plan (SPP) as required by Rule 14.90 FAC as listed below: - Emergency preparedness drills and exercises – documentation of drills and exercises conducted was not provided. - Review threat and vulnerability assessments - the agency does not have a threat and vulnerability plan updated - Marion Transit did not provide any documentation of drills and exercises or threat and vulnerability assessments.	Marion Transit must address all the requirements for the Security Program Plan (SPP) as required by Rule 14.90 FAC by addressing the following and uploading supporting documentation in the "Supporting Documentation:" - Complete emergency preparedness drills and exercises - Complete threat and vulnerability assessments and create a threat and vulnerability plan In addition, provide a response in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005201</b>	Clayton Murch	Marion Transit has implemented the recommendations provided by FDOT. A Threat & Vulnerability Assessment has been completed. Marion Transit has requested a screen sharing session with FDOT to review. Recommendations provided by Ocala Fire Rescue during the 4/2/2024 fire drill have been added to the SPP.	On 7/24/2024, Marion Transit participated in a screen sharing session with FDOT representatives and COTA specialists to show updates to their emergency preparedness drills/exercises and threat and vulnerability plans. During the screen sharing session, reviewers noted that the updates satisfy FDOT requirements. <b>Finding closed.</b>
10.	Drug and Alcohol Testing: Pre-Employment Testing and Background Checks	Marion Transit could not provide documentation that all pre-employment DOT covered employees are asked, "Have you tested positive, or refused to test, on any DOT pre-employment drug or alcohol test administered by an employer to which you applied for, but did not obtain, a safety-sensitive position in the past two years?"	During the response period, Marion Transit should implement procedures to include the Pre-Employment Notification & Acknowledgement form uploaded in the "Supporting Documentation" section below for all FTA covered new hires. A copy of the procedure must be uploaded to the "Supporting Documentation" section and a response included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005156</b>	Clayton Murch	Marion Transit has included the Pre-Employment Notification & Acknowledgement Form in the new hire paperwork. Completion of it is required. The revised procedure is attached - See #4 (page 4).	On 4/10/2024, Marion Transit uploaded a new procedure that cites the use of the Pre-Employment Notification & Acknowledgement form. <b>Findings closed.</b>

FDOT District 5 Triennial Review 5311- Corrective Action Plan Matrix – Marion Transit (2024)

Deficiency: Area(s) found to be deficient or inadequate in complying with state and federal guidelines. Requirements to address deficiency will be indicated. The agency is required to develop and submit a CAP and implementation schedule for approval for each deficiency arising from a compliance review. District 5 will provide the CAP and implementation schedule for all deficiencies arising from a non-compliance review.						
#	Compliance Area	Finding	Recommendation	Responsible Party	Agency Response to Finding	FDOT Response
11.	Drug and Alcohol Testing: Post-Violation	Marion Transit could not present documentation that Substance Abuse Professional (SAP) referrals were given to the three applicants who tested positive during 2023.	Marion Transit must implement a procedure to ensure all individuals testing positive receive a referral for a minimum of two (2) local DOT qualified SAPs, in accordance with Section 655.62(a). A copy of the procedure must be uploaded to the "Supporting Documentation" section and a response included in the text box titled "Corrective Action Plan." <b>TransCIP Finding #: F000005155</b>	Clayton Murch	SAP letters for the 3 positive tests are attached. The policy that outlines SAP letter procedures is attached. See item #4 for DER oversight, #5 for pre-employment positive result, #10 for refusing to submit, #13 for positive drug tests (employees), #17 for positive alcohol tests (employees).	On 4/4/2024 and 4/11/2024, Marion Transit uploaded a new procedure to ensure all individuals testing positive receive a referral for a minimum of two (2) local DOT qualified SAPs. Marion Transit also uploaded a new SAP letter template. <b>Finding closed.</b>



March 7, 2025

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

RE: 2025 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 members of the TDLCB with the assistance of the TPO staff looked at:

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

In summary, 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. Some of the Riders expressed an interest in weekend service as well as the need for across county trips.

The TDLCB and the TPO have no recommendations that would improve the overall system, at this time.

*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)

**Commendations:**

In speaking with the riders, and the call-in surveys, Marion Transit continues to receive rave reviews from the riders. The drivers are highly regarded due to their patience, caring and considerate behavior. Many mentioned that they would not know what they would do, without this service.

Last year the evaluation revealed a need to have larger helpline and complaint phone numbers, we are pleased to say that Marion Transit acted promptly on this recommendation, and as a result the numbers are highly visible from the rear of the bus. 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

Cc: File

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, 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						
49 USC 5310			\$ 432,488			
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)  
**Bus Pass Program Revenue**

## DJJ

(specify in explanation)  
**Bus Pass Program Revenue**

## Other Fed or State

FL GAS TAX REFUND \$ 30,349 \$ 22,563 \$ 25,000  
xxx  
xxx  
**Bus Pass Program Revenue**

## Other Revenues

Interest Earnings  
**GAIN ON ASSETS**

**Bus Pass Program Revenue**

## Balancing Revenue to Prevent Deficit

Actual or Planned Use of Cash Reserve

Balancing Revenue is Short By =

None

Total Revenues = \$3,336,044 \$3,629,072 \$5,201,503 8.8% 43.3%

## 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					

**ACTUAL YEAR LOSS**

Total Expenditures = (\$303,289) \$3,639,334 \$3,629,072 \$5,201,502 -0.3% 43.3%

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

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

What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue Excluded from the Rate Base	What amount of the Subsidy Revenue 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

Alcohol, 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	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

\$ -	\$ -	
\$ -	\$ 348,000	
\$ 900,000	\$ 817,105	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ 74,466	
\$ -	\$ -	
\$ -	\$ -	

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

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

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

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

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

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

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

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

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

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

BLUE cells  
Should be funds generated by rates in this spreadsheet

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

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

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

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

## GOLD cells

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



## Worksheet for Program-wide Rates

CTC: Marion Senior Serv  
County: Marion

Version 1.4

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

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

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

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

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

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

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

### PROGRAM-WIDE RATES

Total Projected Passenger Miles = 1,000,000

Rate Per Passenger Mile = \$ 3.29

Total Projected Passenger Trips = 80,000

Rate Per Passenger Trip = \$ 41.12

Fiscal Year

2024

Avg. Passenger Trip Length = 12.5 Miles

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

Rate Per Passenger Mile = \$ 5.20

Rate Per Passenger Trip = \$ 65.02

**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
		Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Ambulatory	Wheelchair	Stretcher	Group
Leave Blank	Leave Blank		

Effective Rate for Contracted Services:

per Passenger Mile =

per Passenger Trip =

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

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

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

Worksheet for Multiple Service Rates

CTC: Marion Senior Services  
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

☐

Pass. Mile

Leave Blank

3. If you answered Yes to # 1 and completed # 2, for how many of the projected  
Passenger Trips / Passenger Miles will a passenger be accompanied by an escort?

Leave Blank

4. How much will you charge each escort?.....

Leave Blank

SECTION IV: Group Service Loading

1. If the message "You Must Complete This Section" appears to the right, what is the projected total  
number of Group Service Passenger Miles? (otherwise leave blank).....

Do NOT  
Complete  
Section IV
- ..... And what is the projected total number of Group Vehicle Revenue Miles?

Loading Rate  
0.00 to 1.00

SECTION V: Rate Calculations for Multiple Services:

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

		RATES FOR FY: 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	0
Rate per Passenger Mile =		\$2.63	\$4.51	\$0.00	\$0.00	\$0.00				per passenger	per 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	\$0.00				per passenger	per group
vered # 1 above and want a COMBINED Rate per Trip <u>PLUS</u> a per Mile add-on for 1 or more services,...											
Combination Trip and Mile Rate											
		Ambul	Wheel Chair	Stretcher	Group						
...INPUT the Desired Rate per Trip (but must be <u>less</u> than per trip rate above) =				Leave Blank	Leave Blank						\$0.00
Rate per Passenger Mile for Balance =		\$2.63	\$4.51	\$0.00	\$0.00	\$0.00				per passenger	per group

Rates if No Revenue Funds Were Identified As Subsidy Funds				
Ambul	Wheel Chair	Stretcher	Group	
\$4.16	\$7.13	\$0.00	\$0.00	\$0.00
		per passenger	per group	
Ambul	Wheel Chair	Stretcher	Group	
\$52.02	\$89.17	\$0.00	\$0.00	\$0.00
		per passenger	per group	

Worksheet for Multiple Service Rates

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

CTC: Marion Senior Se  
County: Marion

Version 1.4

Program These Rates Into Your Medicaid Encounter Data



**TO: TDLCB Board Members**

**FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner**

**RE: Memorandum of Agreement (CTC Selection)**

---

**Summary**

Currently, a five (5) year contract is in place for Transportation Disadvantaged Services serving Marion County. The contract is between the Florida Commission for Transportation Disadvantaged (CTD) and the Community Transportation Coordinator (CTC), Marion Senior Services, Inc. This contract expires on June 30<sup>th</sup>, 2025.

The TPO is the Designated Official Planning Agency (DOPA) for the Transportation Disadvantaged Program. As part of our contractual duties, the TPO facilitates the procurement process to recommend a CTC to the Commission to continue providing services for the next five (5) year period from July 1<sup>st</sup>, 2025 to June 30<sup>th</sup>, 2030.

On May 28<sup>th</sup>, the TPO Board approved staff to work with Marion County Procurement Services to issue a request for “Letter of Interest”. A Letter of Interest was issued on May 29<sup>th</sup>, 2024 through June 12<sup>th</sup>, 2024. Upon issuing the Letter of Interest soliciting responses for the CTC position, the TPO received one sole response from Marion Transit. The TPO has recommended Marion Transit to be our CTC for the next five (5) years.

**Attachment(s)**

- Memorandum of Agreement (MOA)

**Action Requested**

Staff is requesting approval of the MOA.

Any additional comments and/or suggestions please contact Liz Mitchell, [liz.mitchell@marionfl.org](mailto:liz.mitchell@marionfl.org)



Contract # TD2536

Effective: 07/01/2025 to 06/30/2030

STATE OF FLORIDA  
COMMISSION FOR THE TRANSPORTATION DISADVANTAGED  
**MEMORANDUM OF AGREEMENT**

This Memorandum of Agreement is between the COMMISSION FOR THE TRANSPORTATION DISADVANTAGED, hereby referred to as the "Commission," and Marion Senior Services, 1101 SW 20<sup>th</sup> Court, Ocala, Florida, 34471 the COMMUNITY TRANSPORTATION COORDINATOR, designated pursuant to Chapter 427, F.S., to serve the transportation disadvantaged for the community that includes the entire area of Marion county(ies), and hereafter referred to as the "Coordinator."

This Agreement is made in consideration of the mutual benefits to both parties; said consideration acknowledged hereto by the parties as good and valuable consideration.

The Parties Agree:

- I. The Coordinator Shall:
  - A. Become and remain totally apprised of all of the Transportation Disadvantaged resources available or planned in their designated service area. This knowledge will be used to plan, coordinate, and implement the most cost effective transportation disadvantaged transit system possible under the economic and other conditions that exist in the designated service area.
  - B. Plan and work with Community Transportation Coordinators in adjacent and other areas of the state to coordinate the provision of community trips that might be handled at a lower overall cost to the community by another Coordinator. This includes honoring any Commission-approved statewide certification program that allows for intercounty transportation opportunities.
  - C. Arrange for all services in accordance with Chapter 427, Florida Statutes, and Rule 41-2, FAC, and as further required by the Commission and the local Coordinating Board approved Transportation Disadvantaged Service Plan.
  - D. Return any acquired profits or surplus funds originating through the course of business as the Coordinator that are beyond the amounts(s) specifically identified and approved in the accompanying Transportation Disadvantaged Service Plan. Such profits or funds shall be returned to the Coordinator's transportation system or to any subsequent Coordinator, as a total transportation system subsidy, to be applied to the immediate following operational year. The Coordinator will include similar language in all coordination contracts to assure that transportation disadvantaged related revenues are put back into transportation disadvantaged services.

E. Accomplish this Project by:

1. Developing a Transportation Disadvantaged Service Plan for approval by the local Coordinating Board and the Commission. Coordinators who are newly designated to a particular service area shall submit a local Coordinating Board approved Transportation Disadvantaged Service Plan, within 120 calendar days following the execution of the Coordinator's initial memorandum of agreement with the Commission, for approval by the Commission. All subsequent Transportation Disadvantaged Service Plans shall be submitted and approved with the corresponding memorandum of agreement. The approved Transportation Disadvantaged Service Plan will be implemented and monitored to provide for community-wide transportation services for purchase by non-sponsored transportation disadvantaged persons, contracting social service agencies, and other entities that use local, state, or federal government funds for the purchase of transportation for the transportation disadvantaged.
2. Maximizing the use of available public school transportation resources and public fixed route or fixed schedule transit services and assuring that private or public transit, paratransit operators, and school boards have been afforded a fair opportunity to participate to the maximum extent feasible in the planning process and in the development of the provisions of the Transportation Disadvantaged Service Plan for the transportation disadvantaged.
3. Providing or arranging 24-hour, 7-day per week transportation disadvantaged service as required in the designated service area by any Federal, State or Local Government agency sponsoring such services. The provision of said services shall be furnished in accordance with the prior notification requirements identified in the local Coordinating Board and Commission approved Transportation Disadvantaged Service Plan.
4. Complying with all local, state, and federal laws and regulations that apply to the provision of transportation disadvantaged services.
5. Submitting to the Commission an Annual Operating Report detailing demographic, operational, and financial data regarding coordination activities in the designated service area. The report shall be prepared on forms provided by the Commission and according to the instructions of said forms.

F. Comply with Audit and Record Keeping Requirements by:

1. Utilizing the Commission recognized Chart of Accounts defined in the *Transportation Accounting Consortium Model Uniform Accounting System for Rural and Specialized Transportation Providers* (uniform accounting system) for all transportation disadvantaged accounting and reporting purposes. Community Transportation Coordinators with existing and equivalent accounting systems are not required to adopt the Chart of Accounts in lieu of their existing Chart of Accounts but shall prepare all reports, invoices, and fiscal documents relating to the transportation disadvantaged functions and activities using the chart of accounts and accounting definitions as outlined in the above referenced manual.

2. Assuming the responsibility of invoicing for any transportation services arranged, unless otherwise stipulated by a purchase of service contract or coordination contract.
  3. Maintaining and filing with the Commission, local Coordinating Board, and all purchasing agencies/entities such progress, fiscal, inventory, and other reports as those entities may require during the period of this Agreement.
  4. Providing copies of finance and compliance audits to the Commission and local Coordinating Board as requested by the Commission or local Coordinating Board.
- G. Retain all financial records, supporting documents, statistical records, and any other documents pertinent to this Agreement for a period of five (5) years after termination of this Agreement. If an audit has been initiated and audit findings have not been resolved at the end of five (5) years, the records shall be retained until resolution of the audit findings. The Coordinator shall assure that these records shall be subject to inspection, review, or audit at all reasonable times by persons duly authorized by the Commission or this Agreement. They shall have full access to and the right to examine any of the said records and documents during the retention period.
- H. Comply with Safety Requirements by:
1. Complying with Section 341.061, F.S., and Rule 14-90, FAC, concerning System Safety; or complying with Chapter 234.051, F.S., regarding school bus safety requirements for those services provided through a school board; and
  2. Assuring compliance with local, state, and federal laws, and Commission policies relating to drug testing. Conduct drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration.
- I. Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of \$200,000 for any one person and \$300,000 per occurrence at all times during the existence of this Agreement for all transportation services purchased or provided for the transportation disadvantaged through the Community Transportation Coordinator. Upon the execution of this Agreement, the Coordinator shall add the Commission as an additional **named insured** to all insurance policies covering vehicles transporting the transportation disadvantaged. In the event of any cancellation or changes in the limits of liability in the insurance policy, the insurance agent or broker shall notify the Commission. The Coordinator shall insure that contracting transportation operators and coordination contractors also maintain the same minimum liability insurance, or an equal governmental insurance program. Insurance coverage in excess of \$1 million per occurrence must be approved by the Commission and the local Coordinating Board before inclusion in the Transportation Disadvantaged Service Plan or in the justification of rates and fare structures. Such coverage may be provided by a self-insurance program established and operating under the laws of the State of Florida and written verification of insurance protection in accordance with Section 768.28, Florida Statutes, shall be provided to the Commission upon request.

- J. Safeguard information by not using or disclosing any information concerning a user of services under this Agreement for any purpose not in conformity with the local, state and federal regulations (45 CFR, Part 205.50), except upon order of a court, written consent of the recipient, or his/her responsible parent or guardian when authorized by law.
- K. Protect Civil Rights by:
1. Complying with state and federal laws including but not limited to laws regarding discrimination on the basis of sex, race, religion, age, disability, sexual orientation, or national origin. The Coordinator gives this assurance in consideration of and for the purpose of obtaining federal grants, loans, contracts (except contracts of insurance or guaranty), property, discounts, or other federal financial assistance to programs or activities receiving or benefiting from federal financial assistance and agreeing to complete a Civil Rights Compliance Questionnaire if so requested by the Commission.
  2. Agreeing that compliance with this assurance constitutes a condition of continued receipt of or benefit from federal financial assistance, and that it is binding upon the Coordinator, its successors, subcontractors, transferee, and assignees for the period during which such assistance is provided. Assure that all operators, subcontractors, subgrantee, or others with whom the Coordinator arranges to provide services or benefits to participants or employees in connection with any of its programs and activities are not discriminating against those participants or employees in violation of the above statutes, regulations, guidelines, and standards. In the event of failure to comply, the Coordinator agrees that the Commission may, at its discretion, seek a court order requiring compliance with the terms of this assurance or seek other appropriate judicial or administrative relief, to include assistance being terminated and further assistance being denied.
- L. To the extent allowed by Section 768.28, Florida Statutes, and only to the monetary and other limitations contained therein, indemnify and hold harmless the Commission and all of the Commission's members, officers, agents, and employees; purchasing agency/entity officers, agents, and employees; and the local, state, and federal governments from any claim, loss, damage, cost, charge or expense arising out of any act, action, neglect or omission by the Coordinator during the performance of this Agreement, whether direct or indirect, and whether to any person or property to which the Commission or said parties may be subject, except that neither the Coordinator nor any of its sub-contractors will be liable under this section for damages arising out of injury or damage to persons or property directly caused or resulting from the sole negligence of the Commission or any of its members, officers, agents or employees; purchasing agency/entity, officers, agents, and employees; and local, state, or federal governments. Nothing herein is intended to serve as a waiver of sovereign immunity by any agency/entity or Coordinator to which sovereign immunity may be applicable. Nothing herein shall be construed as consent by a state agency/entity or political subdivision of the State of Florida or the federal government to be sued by third parties in any matter arising out of any Agreement or contract. Notwithstanding the foregoing, pursuant to Section 768.28, Florida Statutes, no agency or subdivision of the state shall be required to indemnify, insure, or assume any liability for the Commission's negligence.

- M. Comply with standards and performance requirements of the Commission, the local Coordinating Board approved Transportation Disadvantaged Service Plan, and any purchase of service contracting agencies/entities. Failure to meet the requirements or obligations set forth in this MOA, and performance requirements established and monitored by the local Coordinating Board in the approved Transportation Disadvantaged Service Plan, shall be due cause for non-payment of reimbursement invoices until such deficiencies have been addressed or corrected to the satisfaction of the Commission.
- N. Comply with subcontracting requirements by executing or negotiating contracts for transportation services with Transportation Operators and Coordination Contractors, and assuring that the conditions of such contracts are maintained. The requirements of Part 1, Paragraph E.5. through M are to be included in all contracts, subcontracts, coordination contracts, and assignments made by the Coordinator for services under this Agreement. Said contracts, subcontracts, coordination contracts, and assignments will be reviewed and approved annually by the Coordinator and local Coordinating Board for conformance with the requirements of this Agreement.
- O. Comply with the following requirements concerning drivers and vehicles:
1. Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders, or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle.
  2. The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or utilization of wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. In certain paratransit service categories, the driver may also be required to open and close doors to buildings, except in situations in which assistance in opening/closing building doors would not be safe for passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian, and driver.
  3. All vehicles shall be equipped with two-way communications in good working order and be audible to the driver at all times to the base.
  4. All vehicles providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.

P. Comply with other requirements as follows:

1. Transport an escort of a passenger and dependent children as locally negotiated and identified in the local Transportation Disadvantaged Service Plan.
2. Determine locally in the Transportation Disadvantaged Service Plan, the use, responsibility, and cost of child restraint devices.
3. Transport with the passenger at no additional charge, passenger property that can be carried by the passenger and/or driver in one trip and can be safely stowed on the vehicle. Additional requirements may be negotiated for carrying and loading rider property beyond this amount. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.
4. Provide shelter, security, and safety of passengers at vehicle transfer points.
5. Post a local or other toll-free number for complaints or grievances inside each vehicle. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board.
6. Provide out-of-service-area trips, when determined locally and approved by the local Coordinating Board, except in instances where local ordinances prohibit such trips.
7. Keep interior of all vehicles free from dirt, grime, oil, trash, torn upholstery, damaged or broken seats, protruding metal or other objects or materials which could soil items placed in the vehicle or provide discomfort for the passenger.
8. Determine locally by the local Coordinating Board and provide in the local Transportation Disadvantaged Service Plan the billing requirements of the Community Transportation Coordinator. All bills shall be paid to subcontractors within 7 calendar days after receipt of said payment by the Coordinator, in accordance with Section 287.0585, Florida Statutes.
9. Maintain or have access to a passenger/trip database on each rider being transported within the system.
10. Provide each rider and escort, child, or personal care attendant adequate seating for paratransit services. No more passengers than the registered passenger seating capacity shall be scheduled or transported in a vehicle at any time. For transit services provided by transit vehicles, adequate seating or standing space will be provided to each rider and escort, child, or personal care attendant, and no more passengers than the registered passenger seating or standing capacity shall be scheduled or transported in a vehicle at any time.
11. First Aid shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

12. Cardiopulmonary Resuscitation shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

II. The Commission Shall:

- A. Recognize the Coordinator as the entity described in Section 427.011(5), Florida Statutes, and Rule 41-2.002(4), F.A.C.
- B. Attempt to insure that all entities with transportation disadvantaged funds will purchase transportation disadvantaged services through the Coordinator's system.

III. The Coordinator and the Commission Further Agree:

- A. Nothing in this Agreement shall require the Commission to observe or enforce compliance with any provision thereof, perform any other act or do any other thing in contravention of any applicable state law. If any of the provisions of this Agreement is found by a court of law to violate any applicable state law, the purchasing agency/entity will at once notify the Commission in writing in order that appropriate changes and modifications may be made by the Commission and the Coordinator to the end that the Coordinator may proceed as soon as possible with the provision of transportation services.
- B. If any part or provision of this Agreement is held invalid, the remainder of this Agreement shall be binding on the parties hereto.
- C. Termination Conditions:
1. Termination at Will - This Agreement may be terminated by either party upon no less than thirty (30) days notice, without cause. Said notice shall be delivered by certified mail, return receipt required, or in person with proof of delivery.
  2. Termination for Breach - Unless the Coordinator's breach is waived by the Commission in writing, the Commission may, by written notice to the Coordinator, terminate this Agreement upon no less than twenty-four (24) hours notice. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery. Waiver by the Commission of breach of any provision of this Agreement shall not be deemed to be a waiver of any other breach and shall not be construed to be a modification of the terms of this Agreement, and shall not act as a waiver or estoppel to enforcement of any provision of this Agreement. The provisions herein do not limit the Commission's right to remedies at law or to damages.
- D. This agreement will expire unless an extension is granted to the Coordinator in writing by the Commission, in accordance with Chapter 287, Florida Statutes.
- E. Renegotiations or Modifications of this Agreement shall only be valid when they have been reduced to writing, duly approved by the Commission, and signed by both parties hereto.

F. Notice and Contact:

The name and address of the contract manager for the Commission for this Agreement is: **Executive Director, 605 Suwannee Street, MS-49, Tallahassee, FL 32399-0450**. The representative/position of the Coordinator responsible for administration of the program under this Agreement is:

Clayton Murch, Transportation Director

Marion Senior Services, 1101 SW 20th Court, Ocala, Florida, 34471

In the event that either party designates different representatives after execution of this Agreement, notice of the name and address of the new representative will be rendered in writing to the other party and said notification attached to originals of this Agreement.

This document has been reviewed in its entirety and approved by the local Coordinating Board at its official meeting held on \_\_\_\_\_.

\_\_\_\_\_  
Coordinating Board Chairperson

WITNESS WHEREOF, the parties hereto have caused these presents to be executed.

COMMUNITY TRANSPORTATION  
COORDINATOR:

STATE OF FLORIDA, COMMISSION FOR  
THE TRANSPORTATION DISADVANTAGED:

Marion Senior Services

Agency Name

\_\_\_\_\_  
Printed Name of Authorized Individual

Jennifer Martinez  
Printed Name of Authorized Individual

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: Executive Director

Title: Executive Director





**TO: TDLCB Board Members**

**FROM: Liz Mitchell, Grants Coordinator/Fiscal Planner**

**RE: Marion Transit 2025-26 Trip Rate Model**

---

**Summary**

Each year, the TDLCB is required to approve Marion Transit's (MT) proposed trip rates. MT, as required, utilizes the Commission for Transportation Disadvantaged (CTD) Trip Rate Calculation process. The Trip Rate Calculation process considers numerous costs items including labor, fringe benefits, and insurance as well as, program income to determine the trip rates. This year, MT is proposing an increase in the charge for ambulatory and wheelchair patients.

TPO staff has reviewed the Trip Rate Calculation and concurs with the results. The proposed rates are as follows:

	Current Rate	Proposed Rate
Ambulatory	\$ 32.69	\$ 36.31
Wheelchair	\$ 56.04	\$ 62.25

**Attachment(s)**

- Trip Rate Calculation Sheets

**Action Requested**

TPO staff is requesting approval of the rates as proposed.

Any additional comments and/or suggestions please contact Liz Mitchell, [liz.mitchell@marionfl.org](mailto:liz.mitchell@marionfl.org).

## 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, and 7

	Prior Year's <b>ACTUALS</b> from Jan 1st of <b>2023</b> to Dec 31st of <b>2023</b>	Current Year's <b>APPROVED</b> Budget, as amended from Jan 1st of <b>2024</b> to Dec 31st of <b>2024</b>	Upcoming Year's <b>PROPOSED</b> Budget from Jan 1st of <b>2025</b> to Dec 31st of <b>2025</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	\$ 77,298	\$ 85,000	\$ 100,000	10.0%	17.6%	
Medicaid Co-Pay Received						
Donations/ Contributions	\$ 2,577			-100.0%		
In-Kind, Contributed Services						
Other						
<b>Bus Pass Program Revenue</b>						

### Local Government

District School Board	\$ 4,822	\$ 35,000	\$ 4,000	625.9%	-88.6%	
Compl. ADA Services	\$ 363,984	\$ 336,000	\$ 500,000	-7.7%	48.8%	
County Cash	\$ 1,614,071	\$ 922,973	\$ 1,669,991	-42.8%	80.9%	
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash		\$ 150,000	\$ 74,253		-50.5%	
Other In-Kind, Contributed Services						
<b>Bus Pass Program Revenue</b>						

### CTD

Non-Spons. Trip Program	\$ 807,623	\$ 771,834	\$ 818,586	-4.4%	6.1%	
Non-Spons. Capital Equipment		\$ 150,000			-100.0%	
Rural Capital Equipment						
Other TD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

### USDOT & FDOT

49 USC 5307						
49 USC 5310		\$ 1,200,000	\$ 944,932		-21.3%	
49 USC 5311 (Operating)	\$ 519,026	\$ 1,876,570	\$ 1,302,382	261.6%	-30.6%	
49 USC 5311(Capital)	\$ 183,033		\$ 100,000	-100.0%		
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

Alcohol, 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 ACTUALS from Jan 1st of 2023 to Dec 31st of 2023	Current Year's APPROVED Budget, as amended from Jan 1st of 2024 to Dec 31st of 2024	Upcoming Year's PROPOSED Budget from Jan 1st of 2025 to Dec 31st of 2025	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

## APD

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

## DJJ

(specify in explanation)						
Bus Pass Program Revenue						

## Other Fed or State

ST FL/GAS TAX REFUND	\$ 22,563		\$ 135,000	-100.0%		
xxx						
xxx						
Bus Pass Program Revenue						

## Other Revenues

Interest Earnings						
EMPLOYEE CONTRIBUTIONS TO MCSS	\$ 4,805			-100.0%		
INSURANCE LOSS REIMBURSEMENT RE	\$ 7,677			-100.0%		
Bus Pass Program Revenue						

## Balancing Revenue to Prevent Deficit

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

Balancing Revenue is Short By =			None			
Total Revenues =	\$3,607,477	\$5,527,377	\$5,649,144	53.2%	2.2%	

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

### Operating Expenditures

Labor	\$ 1,948,333	\$ 2,014,932	\$ 2,154,705	3.4%	6.9%	
Fringe Benefits	\$ 555,065	\$ 596,565	\$ 596,267	7.5%	-0.1%	
Services	\$ 1,032,753	\$ 376,295	\$ 1,085,212	-63.6%	188.4%	
Materials and Supplies	\$ 99,662	\$ 551,883	\$ 52,963	453.8%	-90.4%	
Utilities	\$ 54,089	\$ 31,590	\$ 72,455	-41.6%	129.4%	
Casualty and Liability	\$ 457,168	\$ 411,217	\$ 1,081,996	-10.1%	163.1%	
Taxes	\$ 795	\$ 366	\$ 866	-54.0%	136.9%	
Purchased Transportation:						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services						
Other						
Miscellaneous	\$ 65,528	\$ 44,044	\$ 54,940	-32.8%	24.7%	
Operating Debt Service - Principal & Interest						
Leases and Rentals	\$ 236	\$ 486	\$ 1,441	106.0%	196.5%	
Contrib. to Capital Equip. Replacement Fund		\$ -				
In-Kind, Contributed Services	\$ -	\$ -	\$ -			
Allocated Indirect						

### Capital Expenditures

Equip. Purchases with Grant Funds	\$ 493,456	\$ 1,200,000	\$ 474,045	143.2%	-60.5%	
Equip. Purchases with Local Revenue	\$ 54,828	\$ 150,000	\$ 74,253	173.6%	-50.5%	
Equip. Purchases with Rate Generated Rev.		\$ 150,000			-100.0%	
Capital Debt Service - Principal & Interest						

ACTUAL YEAR LOSS	(\$1,154,435)					
Total Expenditures =	\$4,761,912	\$5,527,378	\$5,649,144	16.1%	2.2%	

See NOTES Below.

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

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

# Budgeted Rate Base Worksheet

Version 1.4

CTC: Marion Senior Services, Inc.

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 BUDGETED Revenues
	from Jan 1st of <b>2025</b> to Dec 31st of <b>2025</b>
1	2

What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue EXCLUDED from the Rate Base	What amount of the Subsidy Revenue 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	\$ 100,000
Medicaid Co-Pay Received	\$ -
Donations/ Contributions	\$ -
In-Kind, Contributed Services	\$ -
Other	\$ -
<b>Bus Pass Program Revenue</b>	\$ -

### Local Government

District School Board	\$ 4,000
Compl. ADA Services	\$ 500,000
County Cash	\$ 1,669,991
County In-Kind, Contributed Services	\$ -
City Cash	\$ -
City In-Kind, Contributed Services	\$ -
Other Cash	\$ 74,253
Other In-Kind, Contributed Services	\$ -
<b>Bus Pass Program Revenue</b>	\$ -

### CTD

Non-Spons. Trip Program	\$ 818,586
Non-Spons. Capital Equipment	\$ -
Rural Capital Equipment	\$ -
Other TD	\$ -
<b>Bus Pass Program Revenue</b>	\$ -

### USDOT & FDOT

49 USC 5307	\$ -
49 USC 5310	\$ 944,932
49 USC 5311 (Operating)	\$ 1,302,382
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

Alcohol, 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>	\$ -

\$ 50,000	\$ 50,000	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

\$ 4,000	\$ -	
\$ -	\$ 500,000	
\$ 1,564,999	\$ 104,992	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ 74,253	
\$ -	\$ -	
\$ -	\$ -	

\$ 818,586	\$ -	\$ -
\$ -	\$ -	\$ -
\$ -	\$ -	\$ -
\$ -	\$ -	\$ -
\$ -	\$ -	\$ -

\$ -	\$ -	
\$ -	\$ 944,932	\$ 944,932
\$ 1,302,382	\$ (0)	\$ 104,992
\$ -	\$ 100,000	\$ 11,111
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

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

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

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

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

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

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

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

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

BLUE cells  
Should be funds generated by rates in this spreadsheet

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

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

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

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

## GOLD cells

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



## Worksheet for Program-wide Rates

CTC: Marion Senior Serv  
County: Marion

Version 1.4

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

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

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

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

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

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

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

### PROGRAM-WIDE RATES

Total Projected Passenger Miles = 1,075,000

Rate Per Passenger Mile = \$ 3.48

Total Projected Passenger Trips = 82,000

Rate Per Passenger Trip = \$ 45.61

Fiscal Year

2025

Avg. Passenger Trip Length = 13.1 Miles

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

Rate Per Passenger Mile = \$ 5.26

Rate Per Passenger Trip = \$ 68.89

**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  
County: Marion

Version 1.4

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
		Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Ambulatory	Wheelchair	Stretcher	Group
Leave Blank	Leave Blank		

Effective Rate for Contracted Services:

per Passenger Mile =

per Passenger Trip =

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

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

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



## Worksheet for Multiple Service Rates

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

### SECTION IV: Group Service Loading

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

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

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

RATES FOR FY: 2025					
	Ambul	Wheel Chair	Stretcher	Group	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	1,075,000	=	690,000 + 385,000 + Leave Blank	Leave Blank	0
Rate per Passenger Mile =	\$2.77	\$4.75	\$0.00	\$0.00	\$0.00
				per passenger	per group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	82,000	=	52,600 + 29,400 + Leave Blank	Leave Blank	
Rate per Passenger Trip =	\$36.31	\$62.25	\$0.00	\$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) =			Leave Blank	Leave Blank	\$0.00
Rate per Passenger Mile for Balance =	\$2.77	\$4.75	\$0.00	\$0.00	\$0.00
				per passenger	per group

Rate per Passenger Mile =

Rate per Passenger Trip =

Rates If No Revenue Funds Were Identified As Subsidy Funds				
Ambul	Wheel Chair	Stretcher	Group	
\$4.18	\$7.17	\$0.00	\$0.00	\$0.00
			per passenger	per group
Ambul	Wheel Chair	Stretcher	Group	
\$54.85	\$94.02	\$0.00	\$0.00	\$0.00
			per passenger	per group

**Worksheet for Multiple Service Rates**

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

CTC: Marion Senior St  
County: Marion

Version 1.4

Program These Rates Into Your Medicaid Encounter Data