

MARION COUNTY TRANSPORTATION DISADVANTAGED SERVICE PLAN (TDSP) 2025 - 2030

Prepared by:



And

The Transportation Disadvantaged
Local Coordinating Board

Website: Ocalamariontpo.org

Approved: September 11, 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 September 11, 2025.

9/11/25
Date

9/11/25
Date


Commissioner Matt McClain, TDLCB Board Chairperson


Robert Balmes, TPO Director

Approved by the Commission for the Transportation Disadvantaged:

Date

Karen Somerset, Interim Executive Director

TDLCB ROLL CALL VOTE

2025 - 2030 TDSP

Approved Date: Sept. 11, 2025

NAME	REPRESENTING	YES	NO	ABSENT
Mathew McClain	Board of County Commissioners (Chair)	✓		
Daisy Diaz	Marion County Veterans Affairs	✓		
<u>Glorybee Nunez</u>	Agency for Healthcare Administration	✓		
Tiffany McKenzie	Central Florida Community Action Association	✓		
Tracey Sapp	Department of Health			✓
Susan Hanley	Department of Elder Affairs	✓		
Vacant	CLM Workforce			
Jeannette Estes	Agency for Persons with Disabilities	✓		
Andrea Melvin	Center for Independent Living (Vice-Chair)	✓		
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			✓
Casey Griffith	Marion County School Board	✓		
James East	Citizen			✓
Edward Griffin	Citizen	✓		

9-11-2025

Date


 Commissioner Mathew McClain, TDLCB Chairperson

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, deny the benefits of, or discriminate against 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 public input 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.

TABLE OF CONTENTS

Introduction	4
Section 1: Development Plan	5
A. Introduction to the Service Area	5
1. Background of the Transportation Disadvantaged Program	5
2. Purpose and Scope of the TD Program	6
3. TDLCB	7
4. History of the Community Transportation Coordinator	8
5. CTC Responsibilities and Oversight	8
6. Coordination Agreements and Fare Structure	9
7. Medicaid and Other Transit Services	9
8. Summary of Other Plans and Documents	10
9. Public Participation	10
10. Opportunities for Public Engagement	11
11. Digital Accessibility and Communication	11
B. Service Area Profile and Demographics	11
1. Service Area Description	11
2. Demographics/Land Use	13
3. Population Composition	13
4. Cultural Description	14
5. Population Density	16
6. Age Distribution	16
7. Population Over 60	16
8. Housing and Household Income	18
9. Education	19
10. Employment	20
11. Employment Density	20
12. Major Employers	21
13. Major Trip Generators	22
14. Household Vehicle Availability	22
15. Zero Vehicle Households	23
C. Service Analysis	25
1. Transportation Disadvantaged Population	25
2. Marion Transit Role and Paratransit Services	26
3. Forecasting the Transportation Disadvantaged Population	26
4. Understanding Transportation Disadvantaged Populations Categories	26

5. Disabled Population	29
6. Low Income Population	30
7. Needs Assessment	33
8. Funding	34
9. Barriers to Coordination	35
D. Goals, Objectives, and Strategies	36
1. Marion Transit Vision Statement	37
2. Marion Transit Mission Statement.....	37
3. Strategic Priorities for the Next Five Years (2025 to 2030)	37
E. Implementation Plan.....	40
Section 2: Service Plan	42
A. Operations Element.....	42
1. Types, Hours and Days of Service	42
2. Accessing Service	43
3. Trip Eligibility.....	43
4. Trip Prioritization	44
5. Other Accessibility Processes/Procedures.....	44
6. Transportation Operators and Coordination Contractors	46
7. Public Transit Utilization	46
8. School Bus Utilization.....	46
9. Vehicle Inventory	46
10. System Safety Program (SSPP) Certification	47
11. Inter-County Services.....	47
12. Emergency Preparedness and Response	47
13. Marketing.....	47
14. Service Standards.....	47
15. Local Complaint and Grievance Procedures/Processes.....	49
Section 3: Quality Assurance	49
A. CTC Monitoring and Evaluation Process for Operators and Coordination Contractors.....	49
1. Community Transportation Coordinator Evaluation	49
2. Cost Revenue Allocation and Rate Structure Justification.....	50

TABLE 1: POPULATION BY RACE	14
TABLE 2: MARION COUNTY AND FLORIDA POPULATION PROJECTIONS.....	15
TABLE 3: MARION COUNTY MUNICIPALITIES	15
TABLE 4: EMPLOYMENT CHARACTERISTICS - NOT SEASONALLY ADJUSTED.....	20
TABLE 5: REGISTERED VEHICLES BY AGE	23
TABLE 6: PASSENGER TRIPS BY TRIP PURPOSE	25
TABLE 7: FORECAST GENERAL TD POPULATION	29
TABLE 8: MARION COUNTY FORECASTED ANNUAL TRIP DEMAND	32
TABLE 9: CRITICAL NEED TRANSPORTATION DISADVANTAGED.....	33
TABLE 10: IMPLEMENTATION PLAN	40
TABLE 11: CTC SERVICE STANDARDS	48
TABLE 12: FCTD CALCULATED RATES	50
TABLE 13: SUNTRAN FARE STRUCTURE/MT FARE STRUCTURE.....	51
FIGURE 1: FLORIDA’S COORDINATED TRANSPORTATION SYSTEM	7
FIGURE 2: MARION TRANSIT SERVICES	9
FIGURE 3: OCALA MARION TPO PLANNING AREA	12
FIGURE 4: POPULATION BY AGE	16
FIGURE 5: POPULATION OVER 60 BY CENSUS TRACT	17
FIGURE 6: HOUSEHOLD INCOME	18
FIGURE 7: EDUCATIONAL ATTAINMENT	19
FIGURE 8: MAJOR EMPLOYERS.....	21
FIGURE 9: ZERO VEHICLE HOUSEHOLD POPULATION BY CENSUS TRACT	24
FIGURE 10: TD POPULATION GROUPS	27
FIGURE 11: DISABLED POPULATION BY CENSUS TRACT	30
FIGURE 12: POVERTY POPULATION BY CENSUS TRACT	31
FIGURE 13: PASSENGER TRIP DEMAND BREAKDOWN	34
FIGURE 14: TRIP DEMAND BREAKDOWN	35
FIGURE 15: COORDINATION CONTRACTORS	46
APPENDIX A: SUMMARY REVIEW OF OTHER PLANS	52
APPENDIX B: MARION TRANSIT’S VEHICLE INVENTORY	53
APPENDIX C: MARION TRANSIT GRIEVANCE PROCEDURES.....	54
APPENDIX D: SYSTEM SAFETY PROGRAM PLAN CERTIFICATION	55
APPENDIX E: QUALITY ASSURANCE PROGRAM EVALUATION, CORRECTIVE ACTION AND CTC EVALUATION.....	56
APPENDIX F: FCTD RATE MODEL CALCULATION SPREADSHEETS.....	57
APPENDIX G: ADVERSE INCIDENTS.....	58

Introduction

The transportation needs of individuals who are transportation disadvantaged or require paratransit services are critical to supporting their mobility, independence, and access to essential services.

These populations often face significant barriers to participating fully in daily life due to limitations in physical ability, cognitive function, or economic resources. A comprehensive and coordinated

approach is vital to accurately identify, assess, and effectively address the transportation challenges faced by individuals who need reliable access to medical care, employment, education, and community engagement opportunities.



Marion County, Florida, remains dedicated to enhancing mobility options for residents experiencing physical, mental, or financial barriers that limit their ability to utilize traditional public transportation systems. The county's goal is to provide equitable, safe, and accessible transportation services that foster independence, support well-being, and promote social inclusion for all community members.

This plan presents a strategic framework aimed at improving and expanding transportation services for the transportation disadvantaged population, which includes, seniors, individuals with disabilities, and low-income residents. It emphasizes efficiency, safety, and accessibility while striving to meet both current and future mobility demands through a responsive and inclusive service model.

The Transportation Disadvantaged Service Plan (TDSP) is an annually updated tactical plan that reflects the evolving needs of the local transportation disadvantaged population. It encompasses the following key components to guide the effective delivery of transportation services and ensure alignment with state and local priorities.

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

This plan 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 Florida Commission for the Transportation Disadvantaged (FCTD). The Transportation Disadvantaged Local Coordinating Board (TDLCB) will review and approve this plan prior to submission to the FCTD for final action.

Section 1: Development Plan

A. Introduction to the Service Area

1. Background of the Transportation Disadvantaged Program

The Florida Commission for the Transportation Disadvantaged (FCTD) was created by the Florida Legislature in 1989 to coordinate transportation services for individuals who are considered transportation disadvantaged. This population includes individuals who, due to age, disability, or limited income, are unable to transport themselves or purchase transportation services.

Although the FCTD is an independent agency housed within the Florida Department of Transportation (FDOT), it operates as an independent agency with its own rulemaking authority and control over its budget. The Commission is responsible for establishing policies and providing oversight in several critical areas, including:

- Quality assurance
- Program evaluation
- Technical assistance and training
- Review of policies and procedures
- Contract management
- Financial accountability

To strengthen local involvement in transportation coordination efforts, the FCTD created Local Coordinating Boards (LCBs). These boards help ensure that community needs are reflected in transportation planning and service delivery. The FCTD also appoints and supervises Community Transportation Coordinators (CTC), who are responsible for managing paratransit services in each of Florida's 67 counties. CTC's work closely with both LCB and local TPO to ensure services are efficiently delivered and aligned with the regional transportation goals. TPO's are federally mandated in all urbanized areas with populations exceeding 50,000 where federal transportation funds are utilized. Their primary role is to:

- Coordinate and develop regional transportation plans
- Ensure fair, inclusive, and impartial decision-making processes
- Collaborate with FDOT and other partners to meet both state and federal transportation planning requirements

Each TPO must also include a Transportation Disadvantaged (TD) component as part of its overall transportation planning efforts.

In Marion County, the Ocala Marion Transportation Planning Organization (TPO) serves as the Designated Official Planning Agency (DOPA). The TPO is supported by two advisory committees, the Technical Advisory Committee (TAC) and the Citizen’s Advisory Committee (CAC). These committees are tasked with reviewing transportation plans, studies, proposed projects, and providing recommendations to the TPO Board for final approval.

2. Purpose and Scope of the TD Program

The purpose of the TD program is to provide efficient, cost-effective, and high-quality transportation for individuals who are transportation disadvantaged. This includes:

- Older adults with limited income
- Persons with disabilities or medical conditions preventing them from driving
- Individuals who cannot afford or do not have access to a personal vehicle
- Residents without access to transit services

Transportation disadvantage often extends beyond mobility issues. It can create barriers to essential services such as:

- Healthcare
- Nutritious food
- Employment
- Education
- Social and community engagement

The foundation of the TD program dates back to 1979, when Florida Statute Chapter 427 was enacted. This statute mandated the coordination of transportation services for the disadvantaged, following concerns about fragmented and duplicative efforts. An interagency agreement between FDOT and the Department of Health and Rehabilitation Services (HRS) laid the groundwork for this coordinated approach.

The statutory definition of transportation disadvantaged includes:

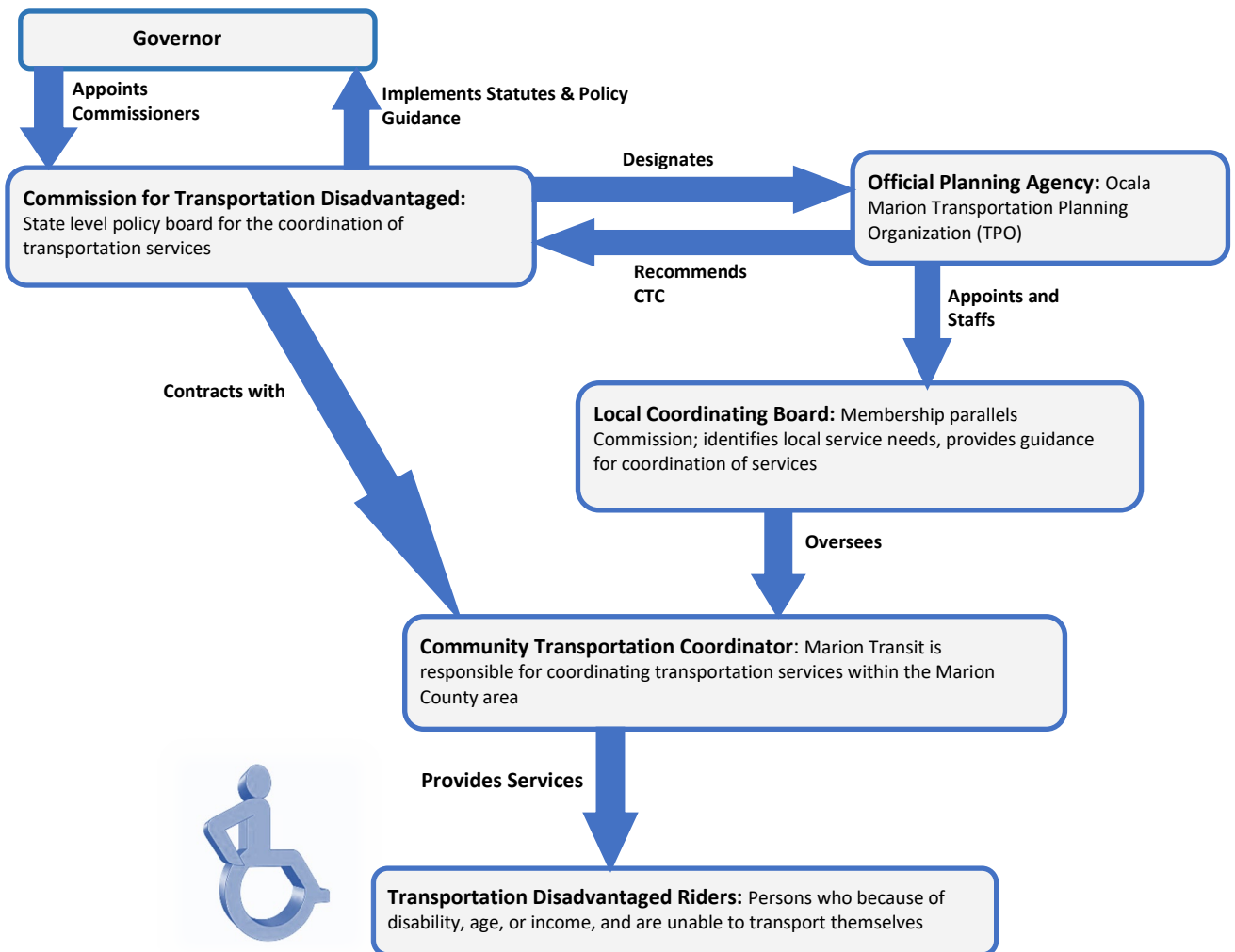
“...those who, because of physical or mental disability, income status, or age, are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education, shopping, social activities, or children who are handicapped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

The goal of the TD program is to provide a level of service that is comparable to what non-disabled individuals receive through fixed-route public transit systems. To achieve this, paratransit services are used, paratransit is a door-to-door transportation service specifically designed for individuals with disabilities or economic disadvantages.

Figure 1 presents the organizational structure of the agencies and stakeholders involved in delivering Florida's Transportation Disadvantaged services.

FIGURE 1: FLORIDA'S COORDINATED TRANSPORTATION SYSTEM

Florida Coordinated Transportation System Organizational



3. TDLCB

The composition of the TDLCB follows Rule 41-2.012, F.A.C., and brings together local area stakeholders.

TDLCB members represent a broad-based group, including individuals from agencies that purchase trips or participate in public transit, representatives of the disabled, elderly, and economically disadvantaged, as well as an elected official appointed by the TPO Board who serves as the DLCB Chair.

The DLCB coordinates transportation services for the disadvantaged, including those facing physical, economic, and mobility challenges, such as senior citizens. It supports the TPO by identifying local service needs and offers guidance, advice, and information to the CTC regarding services to be provided to the transportation disadvantaged community.

4. History of the Community Transportation Coordinator

The Community Transportation Coordinator (CTC) serves a critical role in ensuring that individuals who are transportation disadvantaged have access to safe, efficient, and affordable transportation services. Designated by the FCTD, the CTC is responsible for the administration, coordination, and delivery of these services within their designated service area. The FCTD requires that each CTC enter into a five-year agreement, during which time the CTC must submit and operate under a Transportation Disadvantaged Service Plan (TDSP).

The Commission's mission is to maximize the use of state, federal, and other funding sources to develop cost-effective transportation strategies that connect people, communities, and goods. Additionally, the Commission works to identify and address areas where public transportation is insufficient or underutilized.

5. CTC Responsibilities and Oversight

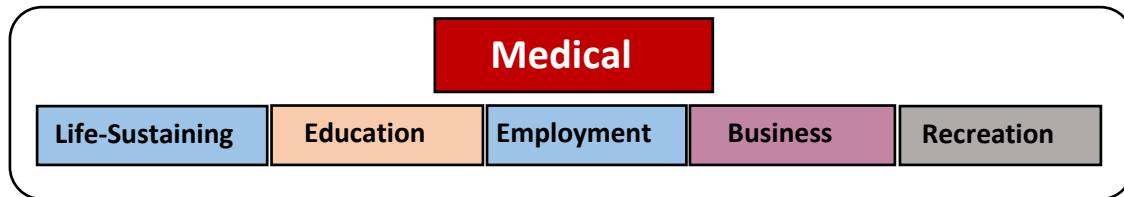
The CTC is charged with providing full-time management and oversight of transportation services for the TD population. Responsibilities include the coordination of service delivery, administration of operations, and compliance with the standards set forth by the FCTD. With approval from the DLCB, the CTC may broker or subcontract transportation services to private operators. Each year, the CTC must review and evaluate all operator contracts to ensure they align with state regulations and quality standards.

Every five years, the TPO conducts a competitive procurement process to select the most qualified candidate for the CTC role in its planning area. Once a selection is made, the TPO recommends the agency to the FCTD for final designation and approval.

In Marion County, Marion Transit (MT) has served as the designated CTC since 1982. MT began providing transportation services in 1976, initially focusing on meeting the needs of the county's aging population. On July 1, 2025, MT was reappointed as the CTC following a formal selection process. The agency is responsible for providing non-emergency medical transportation and other essential services to residents who require mobility assistance, in accordance with Chapter 427, Florida Statutes, and Rule 41-2 of the Florida Administrative Code.

As the CTC, MT delivers door-to-door paratransit services that accommodate a wide range of trip purposes. **Figure 2** shows the list of services as medical, life-sustaining, educational, employment, business, and recreational activities, with medical being the highest priority.

FIGURE 2: MARION TRANSIT SERVICES



MT's services are available to TD individuals throughout Marion County. The agency currently operates a fleet of 47 small cutaway-type buses and serves an area of over 1,600 square miles. Trip prioritization is determined by a subcommittee composed of members from the TDLCB and the TPO.

6. Coordination Agreements and Fare Structure

To enhance service coordination and coverage, MT has established agreements with the following four local organizations:

1. Advocacy Resource Center Marion, Inc. (ARC)
2. Florida Center for the Blind, Inc.
3. Bridge to Hope

These agencies provide transportation services directly to their respective client populations under the supervision and coordination of MT.

The standard fare for MT transportation services is \$2.00 per one-way trip. Riders may pay using cash or pre-purchased passes. All fares must be paid upon boarding, and drivers are not permitted to provide change.

7. Medicaid and Other Transit Services

While MT is the designated coordinator for TD transportation, Medicaid transportation services are administered under the Statewide Medicaid Managed Care program. Managed Care Plans are not required to coordinate with the CTC or TDLCB under Chapter 427, F.S., unless they voluntarily choose to do so. Currently, MT does not have a coordination agreement with any Medicaid Managed Care Plan.

Public fixed-route transit in Marion County is provided by SunTran, a service operated by the City of Ocala and managed by RATPDev. SunTran began operations in 1998 and offers scheduled service six days per week. The standard fare is \$1.50, with discounted fares and passes available to youth, students, seniors, and individuals with disabilities. MT is contracted by SunTran to deliver complementary Americans with Disabilities Act (ADA) paratransit services for eligible riders located within three-quarters of a mile from SunTran's fixed routes.

Marion Transit's long-standing role as the CTC underscores its commitment to serving the transportation needs of the county's most vulnerable populations. Through its coordinated approach, partnerships with local organizations, and integration with other public transit services, MT continues to support the FCTD's mission of delivering cost-effective, accessible, and inclusive transportation across Marion County.

8. Summary of Other Plans and Documents

This major update to the TDSP 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 the 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](#).

9. Public Participation

Public participation plays a central role in the transportation planning process, as transportation systems significantly impact the lives of residents. The input of residents helps ensure that decisions are not only efficient and effective but also responsive to the needs of those who are directly impacted. Given the transportation network's influence on economic development, freight and personal mobility, both locally and regionally, it is essential that everyone's voice is heard and documented. The TPO serves as the Designated Official Planning Agency (DOPA) for the TDLCB.



Public participation has consistently been a core value of the TPO. In collaboration with local governments, businesses, and community groups, the TPO ensures that transportation planning reflects the needs and priorities of the county. The Public Participation Plan (PPP) is followed closely when developing any transit-related projects or plans.

10. Opportunities for Public Engagement

Residents have ongoing opportunities to contribute to the development of local transit plans and raise transportation concerns during TDLCB meetings, committee meetings, and TPO Board meetings. Before each meeting, workshop, or event, the TPO advertises in the local newspaper seven (7) days in advance, inviting citizens to attend in person to share feedback, express support or concerns, and contribute to ongoing discussions.

Surveys are another key method for collecting input from the public. The TPO and TDLCB conduct surveys as needed to gather firsthand insights on transit-related issues and concerns. Additionally, the TPO engages with the community through outreach events such as *Stop on Red*, which educates the public on traffic safety, *Marion County Day*, an event that showcases county programs while encouraging outdoor engagement and informing residents about transportation initiatives and plans, and the *Alumni Academy*, that offers citizens a behind-the-scenes look at county governance and departmental operations, strengthening community understanding.

11. Digital Accessibility and Communication

The TPO maintains an interactive website and active social media presence on platforms such as Facebook, X, and LinkedIn, allowing residents to submit comments or requests at any time.

The website also hosts several safety and educational videos covering topics like speeding and aggressive driving, stopping at red lights, driving under the influence, bicycle and pedestrian safety, school bus safety, and serious injuries. All plans, programs, surveys, committee and board meeting minutes, and interactive maps are accessible on the TPO website, which serves as a centralized information hub on traffic and transportation matters. To engage the public effectively, the website is regularly updated with accurate and relevant content. The TPO continually seeks new and innovative ways to educate and inform residents.

B. Service Area Profile and Demographics

1. Service Area Description

Marion County is situated in north-central Florida. It lies just north of Lake and Sumter counties, east of Levy County, and south of Alachua County. The centrally located county seat is Ocala, which is also the largest incorporated city in the county. Other incorporated cities include Belleview and Dunnellon, with McIntosh and Reddick located in the northern part of the county.

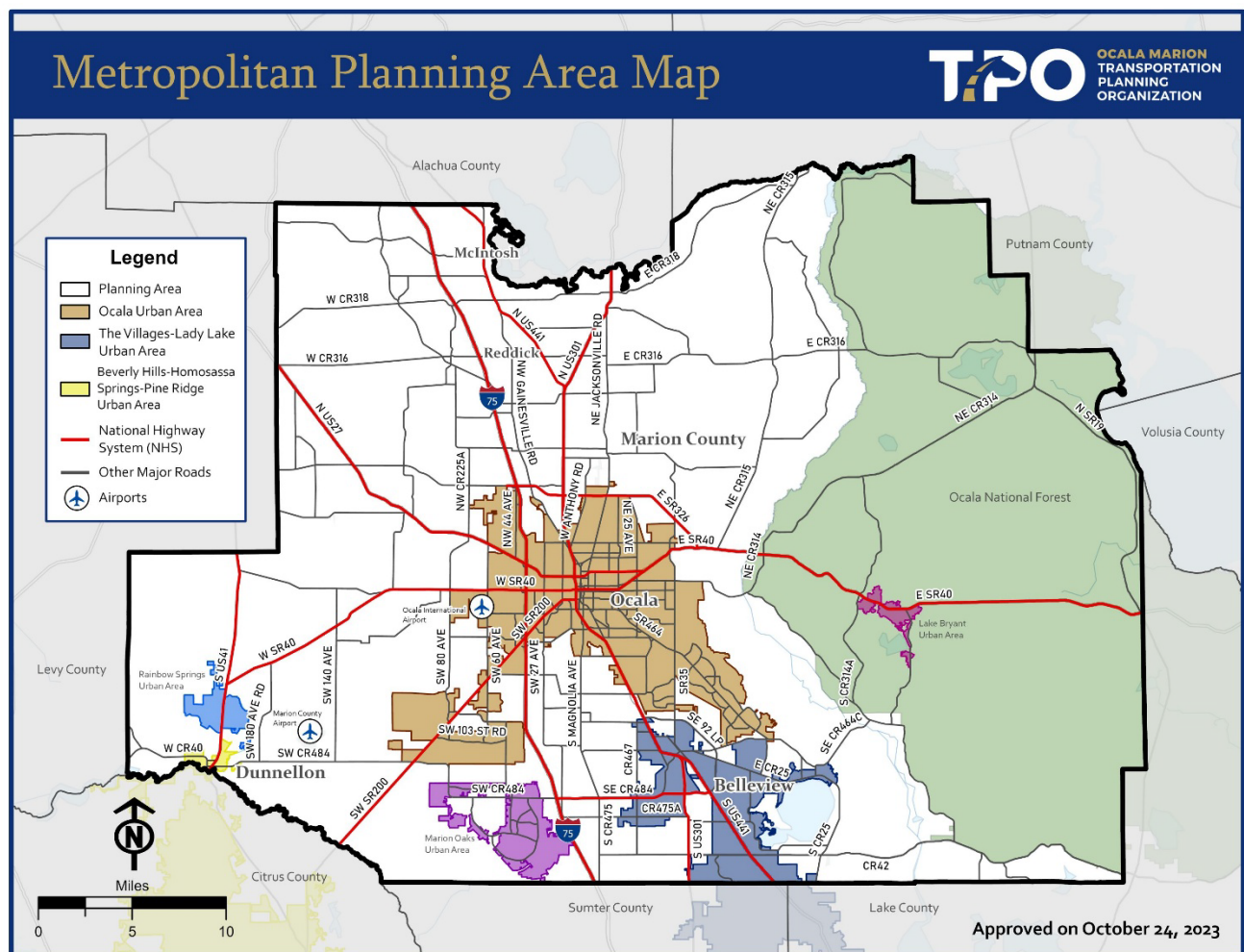
The Villages, a rapidly growing retirement community and census-designated place, is primarily located in Lake and Sumter counties to the south, but its footprint is expanding into southern Marion County. The eastern portion of the county is largely occupied by the Ocala National Forest. Interstate 75 (I-75) runs north-south along the western edge of Ocala, offering vital connectivity to major Florida cities such as Orlando, Tampa, and Jacksonville.

This prime location, combined with ample available land, has made Ocala an ideal spot for distribution centers. Beyond distribution, the area hosts a diverse range of employers, including manufacturing companies, healthcare institutions, and agricultural enterprises. For example, major companies like Amazon have opened large fulfillment centers near I-75, capitalizing on the convenient transportation routes for quick and efficient delivery. Manufacturing facilities, including those producing automotive components and packaging products, provide substantial employment opportunities to the local workforce. The healthcare sector is also a significant employer, with facilities like HCA Florida Ocala Hospital and HCA Florida West Marion Hospital expanding services to meet the needs of a growing population.

Additionally, Ocala's longstanding agricultural industry, especially its renowned horse farms and timber production, continues to support many jobs and contribute to the regional economy.

Figure 3 offers an overview of the study area.

FIGURE 3: OCALA MARION TPO PLANNING AREA



2. Demographics/Land Use

As part of this plan's analysis, the connection between land use and transportation was closely examined. In updating the TDSP, land use patterns within both the City of Ocala and Marion County were reviewed. Like many municipalities, these areas include a variety of land uses, such as residential, multi-family, commercial, and industrial. Because of this mix, the relationship between land use and transportation is critically important.

The TPO staff works collaboratively with local planners and engineers to ensure roadway service levels are sufficient to meet the demands created by adjacent land uses. A fundamental aspect of the planning process involves analyzing the connection between land use and transportation systems. Understanding how land is developed, whether for residential, commercial, industrial, or recreational purposes directly influences transportation needs and infrastructure demands. TPO staff carefully evaluates these land use patterns and incorporates that information into every stage of the planning and project review process. By aligning transportation planning with current and future land development, the TPO ensures that roadways, transit options, and pedestrian facilities are designed to serve the community efficiently and sustainably. This integrated approach leads to smarter investments, better mobility, and more community-focused outcomes that support the long-term growth and well-being of Marion County residents.

3. Population Composition

Population growth in Ocala is driven by several key factors. Affordable housing options make the city attractive to both young professionals and retirees looking to escape the high costs of larger metro areas. The region's natural surroundings, including numerous parks, lakes, and trails, offer appealing outdoor recreational activities that draw families and outdoor fans. The warm climate is another factor enticing people to relocate to the area year-round. Moreover, Ocala's strategic transportation links and growing job market encourage businesses to establish operations here, further fueling population increases. Improvements in local infrastructure and community services also enhance the area's appeal, supporting a steady influx of new residents seeking a high quality of life.

Population changes are important indicators for the economy, as they have an impact on education, healthcare, housing, recreation, and transportation. These shifts influence various types of public funding and highlight the need for comprehensive and proactive planning. Demographic characteristics such as age, gender distribution, and race/ethnicity play a vital role in shaping community needs and priorities. In addition, factors like economic conditions, job availability, and housing accessibility also drive changes in population patterns.

Beyond these elements, economic cycles, periods of growth and decline, further affect the makeup and movement of the population. Although predicting these cycles with precision is challenging, the data used is intentionally conservative to ensure long-term trends are accurately reflected in future planning efforts. **Table 1** displays the most recent population profile of Marion County.

TABLE 1: POPULATION BY RACE

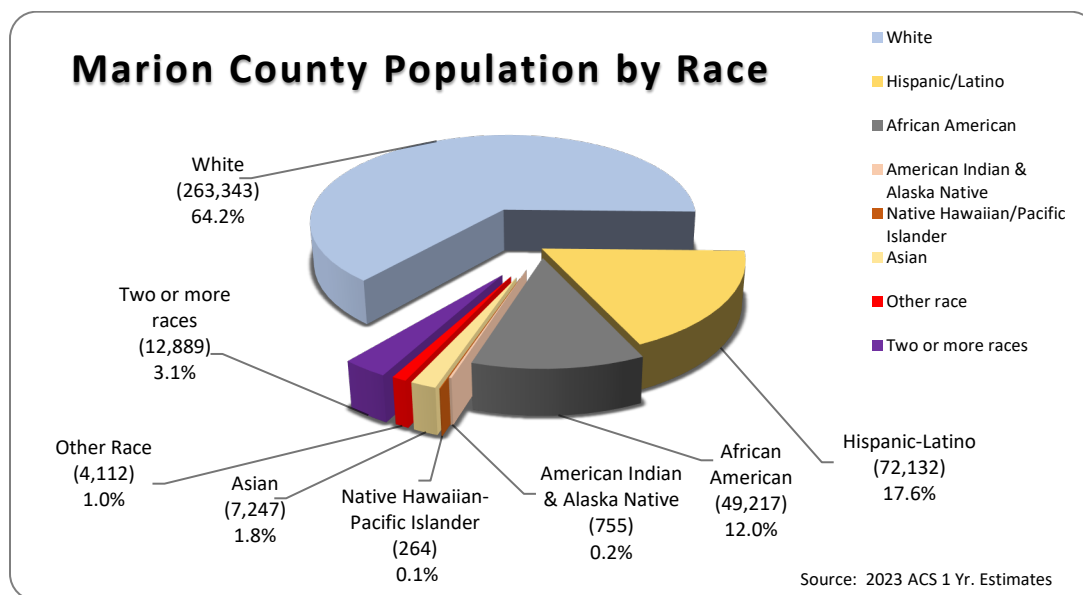
<i>Race</i>	<i>Population</i>	<i>Percent of Population</i>
*White	263,343	64.2%
Hispanic	72,132	17.6%
African American	49,217	12.0%
Two or more races	12,889	3.1%
Asian	7,247	1.8%
American Indian & Alaska Native	755	0.2%
Other	4,112	1.0%
Native Hawaiian & Other Pacific Islander	264	0.1%
Total	409,959	100.00%

Source: ACS 2023 1-year estimates. Items may not add to totals or compute to displayed percent due to rounding. *White alone, not Hispanic or Latino

4. Cultural Description

Based on the American Community Survey's (ACS) 2023 1-Year estimates, Marion County has a total population of 409,959. The county's racial composition is primarily White (non-Hispanic), making up the largest portion of the population. Hispanic or Latino residents represent the second-largest group. The population also includes a significant number of African American residents, as well as individuals identifying as two or more races. Smaller portions of the population identify as Asian, American Indian and Alaska Native, or as Native Hawaiian and Other Pacific Islander. A portion of the population is also categorized under "Other." The chart and graph in **Table 1** and **Figure 4** highlight the racial makeup of Marion County.

FIGURE 4 POPULATION RACE



Marion County's population increased from 375,908 persons in 2020 to 409,959 persons in 2024, reflecting an overall growth of 9.1%. This steady rise indicates strong regional development and sustained interest in the area as a desirable place to live and work.

According to the 2024 Population Report by the Bureau of Economic and Business Research (BEBR) at the University of Florida, this upward trend is expected to continue in the coming decades. The report projects that Marion County will experience significant population gains driven by factors such as economic expansion, affordable housing, a favorable climate, and improved infrastructure. Continued residential and commercial development is likely to attract new residents and businesses, reinforcing Marion County's role as a growing hub within north-central Florida.

Using BEBR's medium growth projections for Florida, Marion County's population is expected to increase by 26.2% by the year 2050. **Table 2** presents a detailed overview of population projections for both Marion County and the state of Florida from 2025 through 2050. The county is currently experiencing rapid residential and business expansion, which is anticipated to drive greater demand for transit services in the future. This growth underscores the need for strategic transportation planning to accommodate increasing travel needs and support sustainable development throughout the region.

TABLE 2: MARION COUNTY AND FLORIDA POPULATION PROJECTIONS

<i>Area</i>	<i>Population Projections</i>						<i>Popu- lation Growth</i>
	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

Marion County is home to five incorporated areas, which include the municipalities and towns of Belleview, Dunnellon, McIntosh, Ocala, and Reddick.

To better understand local growth patterns, population trends were analyzed for all five of these communities. **Table 3** provides a summary of those trends, offering insight into how each area has evolved over time. The data reveals that most of these municipalities and towns have experienced population growth, reflecting the broader upward trend seen across the county. In addition to the incorporated areas, many of Marion County's unincorporated communities have also seen notable increases in population.

TABLE 3: MARION COUNTY MUNICIPALITIES

<i>Geographic Area</i>	<i>2024</i>	<i>2020</i>	<i>2020 – 2024 Population Change</i>
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

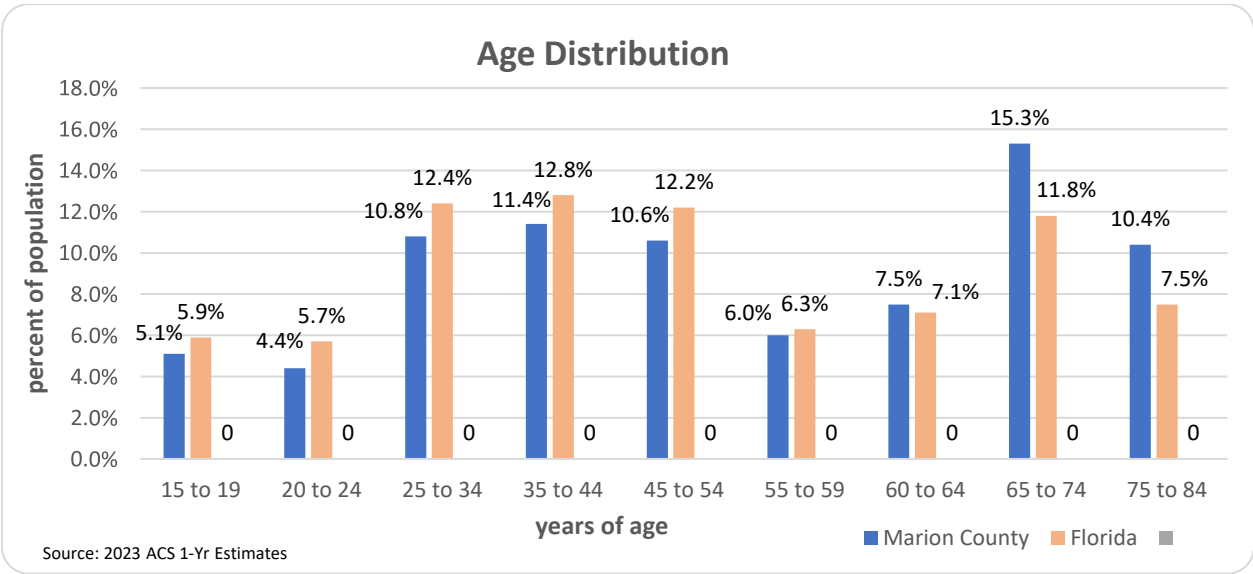
5. Population Density

The highest population densities in Marion County are projected to be concentrated within the Ocala urbanized area, particularly in the southwestern region along key corridors such as State Road 40 (SR-40) and State Road 200 (SR-200). Significant growth is also expected in and around the municipalities of Dunnellon and Belleview, where residential development and infrastructure improvements continue to attract new residents. Additionally, densely populated communities such as The Villages and On Top of the World, both located near SW 99th Street Road and just south of 103rd Street Road are anticipated to see continued expansion.

6. Age Distribution

Figure 4 illustrates the age distribution of the populations in Marion County and the state of Florida. Based on the U.S. Census Bureau’s 2023 American Community Survey (ACS) 1-year estimates, individuals aged 65 and older make up more than 25.7% of Marion County’s population, compared to 19.3% statewide. Notably, the 60 to 84 age group represents a substantial portion of Marion County’s residents. This demographic trend highlights a growing need for public transportation options that are accessible, reliable, and tailored to the mobility requirements of older adults. As the aging population continues to increase, planning for age-friendly transportation infrastructure will become increasingly critical to support community independence.

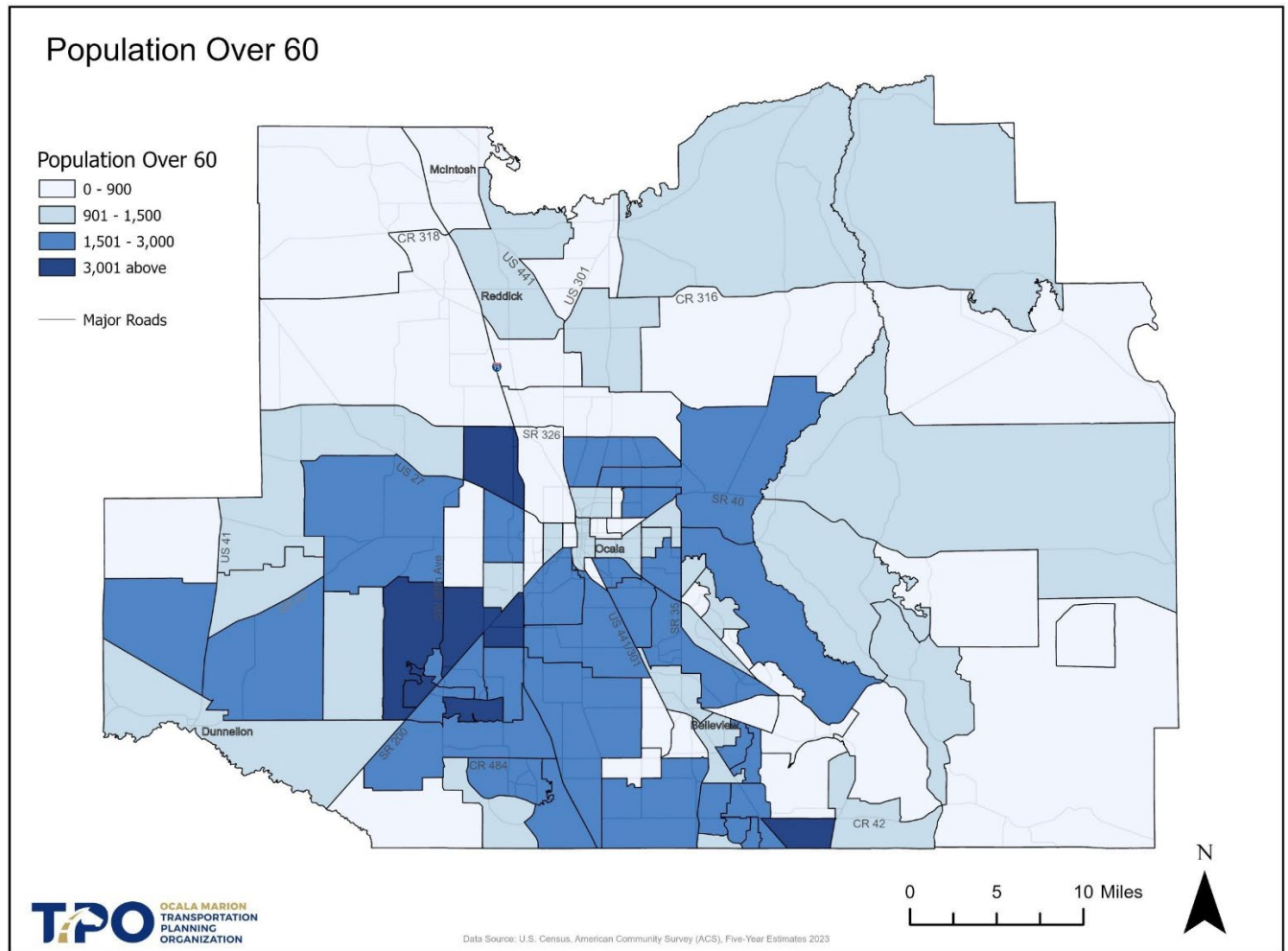
FIGURE 4: POPULATION BY AGE



7. Population Over 60

Figure 5 displays the concentration of the population of adults over 60 in Marion County by Census Tract. As displayed, the largest population areas are located in southwest Marion County west of and hear the SR 200 corridor; the area between US 27 and SR 326; and southeastern area, south of CR 42 near the Villages.

FIGURE 5: POPULATION OVER 60 BY CENSUS TRACT



The *Over-60 Population Map of Marion County*, offers a geographic visualization and highlights concentrations of where older adults, aged 60 and above, reside throughout the county. This map illustrates the proportion of the population aged 60 and over in different parts of Marion County. Each area is typically color-coded to represent the percentage of older residents, with darker shades indicating higher concentrations. The data provides insight into the spatial patterns of aging within the county and helps identify communities with increased demand for age-related services and infrastructure. Seniors often have unique needs related to healthcare access, mobility, housing, and social engagement. Mapping their distribution enables local governments, nonprofits, healthcare providers, and urban planners to:

- Plan age-friendly communities.
- Expand transportation options.
- Improve access to medical and recreational facilities.
- Address social isolation and aging-in-place challenges.

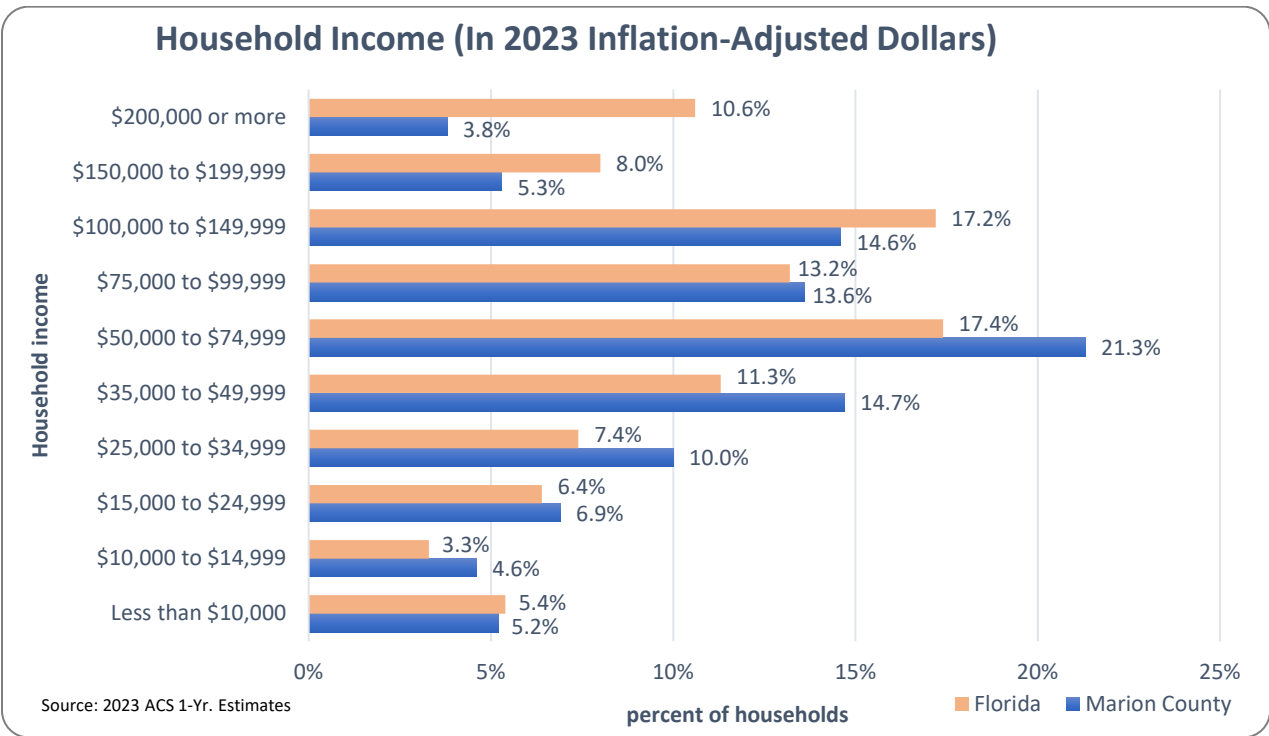
8. Housing and Household Income

There is a clear relationship between population growth and the expansion of housing units. However, housing unit growth does not always mirror population growth precisely, as household sizes can vary. A single housing unit may accommodate multiple individuals, meaning the rate of increase in housing units may be slightly lower than that of the population.

According to the Monthly Market Detail Report from the Ocala/Marion County Association of Realtors (April 2025), existing home sales in Marion County rose by 35.1% over the 12-month period ending in March 2025, compared to the same period ending in March 2024. This surge reflects strong demand for housing, likely driven by continued population growth and in-migration. As of early 2025, the median property value in Marion County reached \$301,500, indicating a robust and active real estate market.

Figure 6 presents a comparison of household income distribution between Marion County and the state of Florida. A larger proportion of Marion County residents fall within the five lowest income brackets (under \$50,000) compared to the statewide average. Alternatively, Marion County shows a smaller share of households in the upper-income tiers (above \$75,000). This disparity is also reflected in the median household income, Marion County’s median income is approximately 25% lower than Florida’s overall, standing at \$58,606 compared to the statewide median of \$73,311. These income trends, combined with rising property values, underscore the importance of affordable housing initiatives and economic development strategies that address the needs of lower- and middle-income residents.

FIGURE 6: HOUSEHOLD INCOME



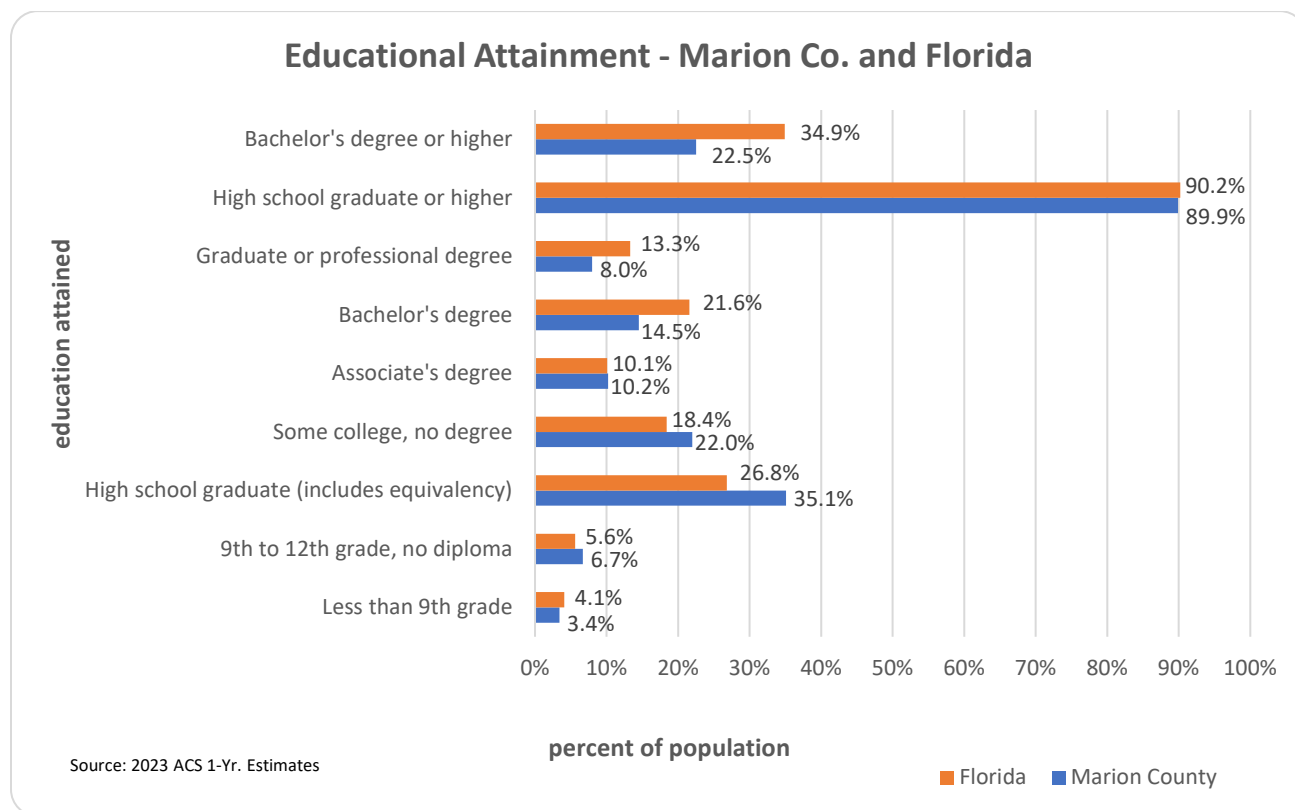
9. Education

Figure 7 displays the educational attainment levels for residents of Marion County and the state of Florida. The largest category in both regions is individuals who have completed high school or higher, encompassing 89.9% of Marion County residents and approximately 90.2% of Florida residents. This indicates a relatively strong baseline level of education in both areas.

However, a closer examination reveals that Florida overall has a higher share of residents with advanced educational credentials, including Bachelor's degrees, graduate degrees, and professional degrees, compared to Marion County. This educational gap suggests that while Marion County maintains solid high school graduation rates, it lags behind the state average in post-secondary educational attainment.

The implications of this difference are significant for workforce development and economic opportunity. Higher levels of education are often linked to increased earning potential, lower unemployment rates, and greater capacity for innovation. Expanding access to higher education and vocational training in Marion County could help bridge this gap and support long-term regional growth and competitiveness.

FIGURE 7: EDUCATIONAL ATTAINMENT



10. Employment

Based on data from the Florida Department of Economic Opportunity's Labor Market Employment Statistics for February 2025 **Table 4** presents current labor force, employment, and unemployment statistics for Marion County and the State of Florida. This table offers a snapshot of the region's economic conditions, specifically focusing on workforce participation and job availability.

The data reveals that Marion County's unemployment rate is slightly higher than the statewide average. However, it's important to note that these figures are not seasonally adjusted, meaning short-term fluctuations, such as those related to tourism cycles, agriculture, or temporary employment trends, may impact the comparison.

While the difference in unemployment rates is relatively small, it highlights the importance of ongoing efforts to strengthen local job markets. This may include expanding access to workforce training, supporting small businesses, and attracting industries that provide stable, year-round employment. Monitoring labor trends helps ensure that economic development strategies are aligned with the needs of both employers and job seekers in Marion County.

TABLE 4: 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%*
Source: 2025 Florida Department of Economic Opportunity. * 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				

11. Employment Density

Similar to population patterns, employment density in Marion County is primarily concentrated in and around central Ocala, forming the core of the region's economic activity. Outside the urban center, additional pockets of high employment density are evident in key strategic locations:

- Along State Road (SR) 200, southwest of Ocala near the I-75 interchange,
- The Belleview area, positioned along U.S. Highway 301 southeast of Ocala,
- The Dunnellon area, and
- The corridor west of I-75, near Ocala International Airport, which has become a hub for transportation, distribution, and equine-related industries.

Compared to general population distribution, employment is more heavily centralized along major arterial roadways and key transportation corridors. These areas benefit from strong connectivity, infrastructure, and access to regional and interstate markets, making them attractive for business development and industrial operations. Future growth projections suggest that employment will continue to expand where high job concentration already exists.

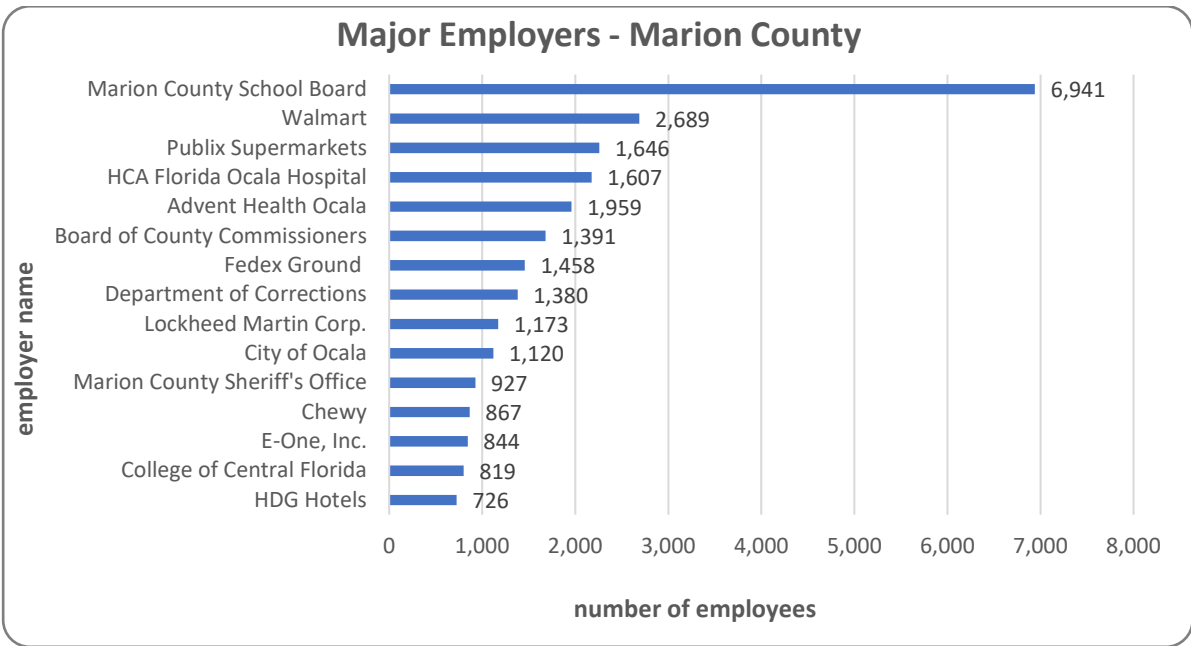
Additionally, new growth is anticipated just south of Reddick along I-75, signaling potential for further economic development in emerging areas. This pattern emphasizes the importance of targeted infrastructure investment and land use planning to support continued job growth and efficient transportation access across the region.

12. Major Employers

Marion County’s economy is supported by a diverse mix of major industries, including government, education, healthcare, manufacturing, distribution, transportation, and leisure/hospitality. These sectors form the backbone of the local labor market and contribute significantly to the county’s overall economic stability. The Marion County School Board is the largest employer in the county, employing more than twice as many individuals as the next largest organization, underscoring the critical role of public education in the regional workforce. Other significant employment centers include major healthcare facilities such as HCA Florida Ocala Hospital and HCA Florida West Marion Hospital, which serve as both essential healthcare providers and large-scale employers. The manufacturing sector is also a key contributor to the local economy, with prominent firms such as Lockheed Martin and E-One playing central roles in high-skilled job creation and export-oriented production. In addition, the retail sector provides substantial employment opportunities through large retail chains such as Publix Super Markets and Walmart, which have multiple locations throughout the county. The distribution and transportation industries are growing rapidly, particularly around key infrastructure assets such as I-75 and Ocala International Airport, making Marion County a strategic logistics hub within Central Florida.

Figure 8 provides a detailed breakdown of the major public and private sector employers in Marion County, highlighting their respective industries and workforce size.

FIGURE 8: MAJOR EMPLOYERS



Prepared by: Florida Department of Economic Opportunity, Bureau of Workforce Statistics and Economic Research.
Source: Data-Axle. Employer Database 2024 Edition 1

13. Major Trip Generators

Paratransit services in Marion County are driven by a variety of major trip generators, with the highest demand originating from medical-related destinations. These include hospitals, healthcare clinics, dialysis centers, and other specialized treatment facilities, reflecting the critical transportation needs of residents requiring ongoing medical care.

In addition to medical trips, there is also consistent demand for transportation to local shopping centers, where individuals access essential goods and services. Riders frequently request trips to community-based destinations such as public parks, libraries, government buildings, social service agencies, religious institutions, and restaurants, highlighting the importance of transportation for social, recreational, and civic engagement.

The list below outlines the primary trip generators that consistently produce demand for paratransit services in the county.

Marion County offers TD services countywide, ensuring access to any location within county limits for eligible individuals. Additionally, ADA complementary paratransit service is provided within ¾ mile of any SunTran fixed-route bus line, in compliance with federal accessibility regulations.

This combination of broad TD coverage and ADA compliant service ensures that individuals with mobility challenges, particularly seniors and persons with disabilities, have reliable access to healthcare, shopping, and community resources, thereby supporting independence and quality of life.

1. Transitions Life Center	3360 NW Gainesville Rd.	Ocala	Medical
2. Davita East Dialysis Center	2870 SE 1st 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 41st Court	Ocala	Workplace for Disabled
8. Wal-Mart	9570 SW Hwy 200	Ocala	Retail
9. Wal-Mart	2600 SW 19th Ave. Rd.	Ocala	Retail
10. Davita North Dialysis Center	2620 W. Hwy 316	Ocala	Medical

Source: Marion Transit

14. Household Vehicle Availability

As of 2024, Marion County reports 340,408 registered vehicles, according to the Florida Department of Highway Safety and Motor Vehicles. This number reflects the county's strong reliance on personal vehicles as a primary mode of transportation.

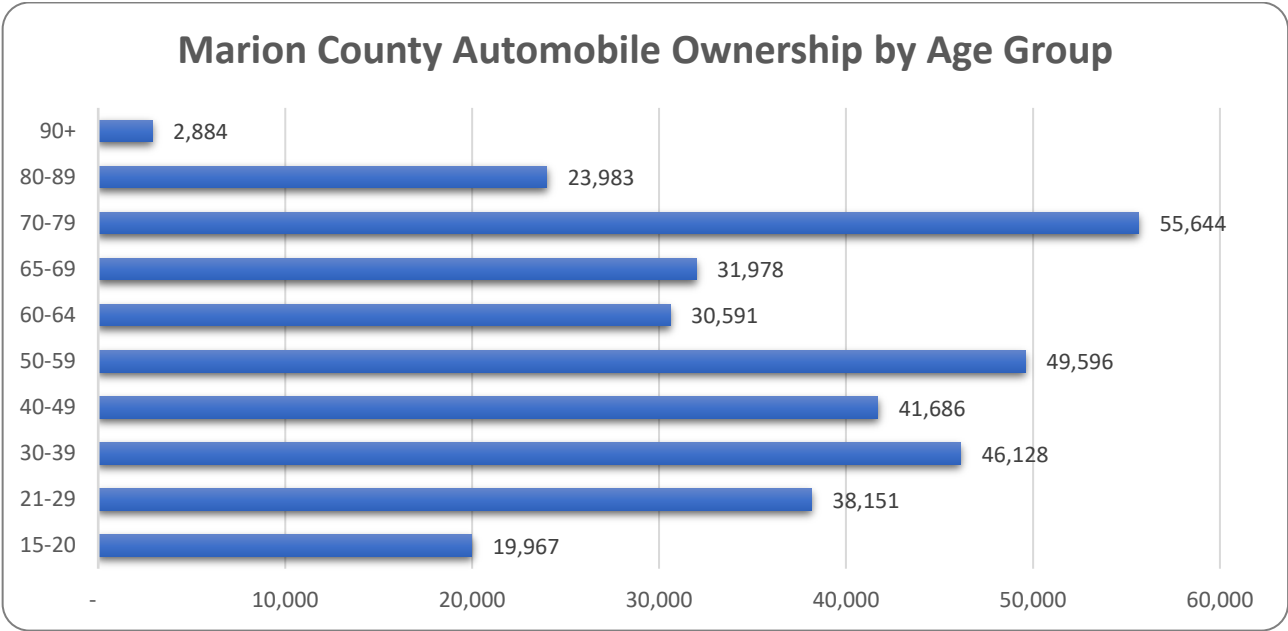
Vehicle ownership spans all age groups, but the majority of registrations are concentrated among residents aged 21 to 59, who represent the core of the working-age population. Interestingly, the 70–79 age group accounts for the second highest number of registered vehicles among individual age brackets, highlighting the continued driving activity and independence of older adults in the county.

Table 5 and the accompanying chart provide a visual breakdown of registered vehicles by age group, offering insight into mobility patterns across demographic segments. These trends are especially relevant for transportation planning and traffic safety initiatives, as they indicate where demand is greatest and which age groups are most actively using personal vehicles. As Marion County’s population continues to age, understanding vehicle registration patterns will be critical for anticipating future transportation needs, including age-friendly infrastructure and expanded mobility options for residents who may eventually reduce or cease driving.

TABLE 5: 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
19,967	38,151	46,128	41,686	49,596	30,591	31,978	55,644	23,983	2,884	340,608

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



15. Zero Vehicle Households

Figure 9 displays the population distribution of households with no ownership of a vehicle (Zero Vehicle Households). As displayed, high concentrations are located in the southwestern corner of the County near the Dunnellon area; Marion Oaks and the south-central areas, just north of the Sumter County line; southeastern areas near Silver Springs Shores; northwestern areas between CR 316 and 326; and around some areas of central Ocala/Marion County.

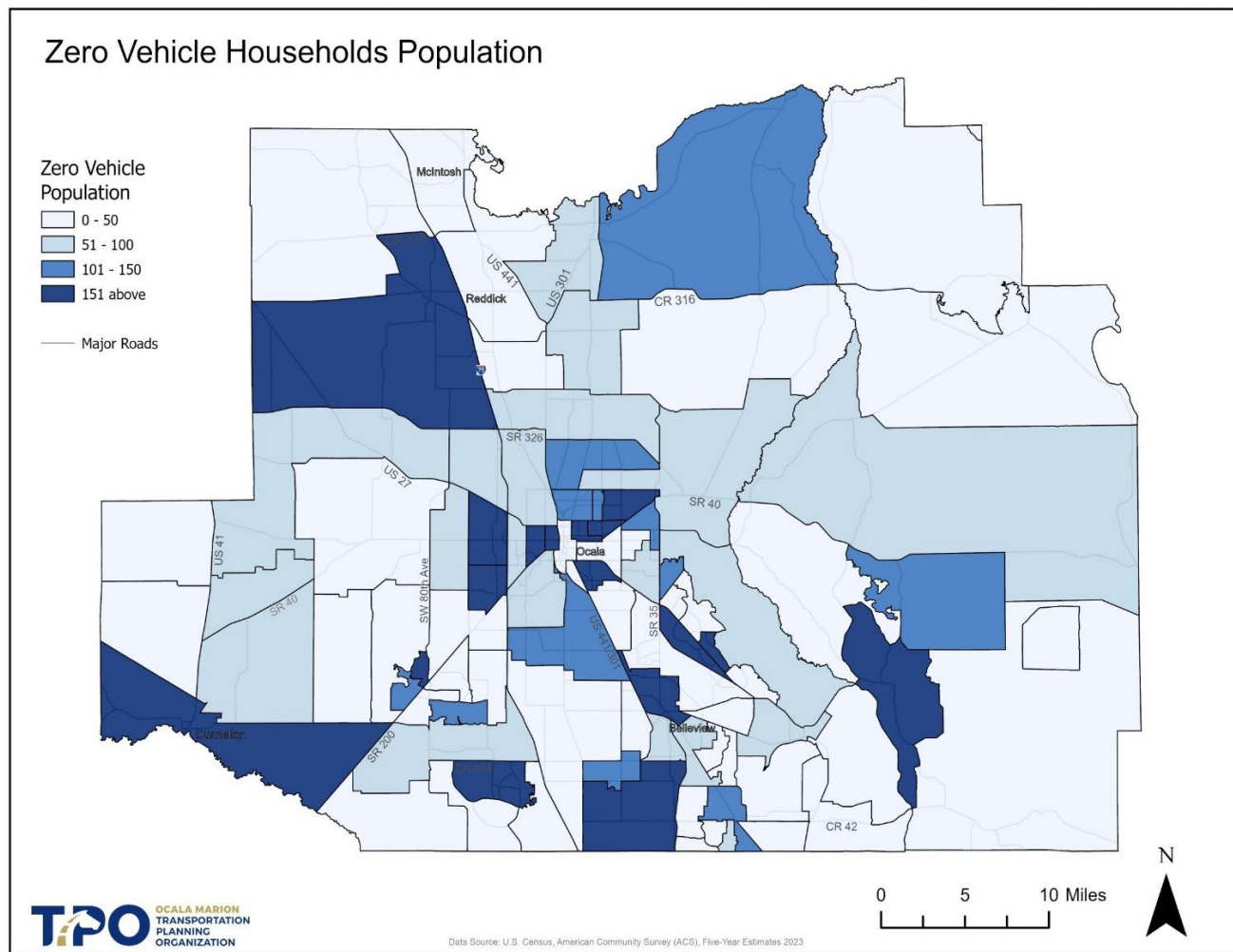
The *Zero Vehicle Population Map of Marion County*, provides a visual representation of households without access to a personal vehicle. This map highlights the geographic distribution of transportation-limited households across the county.

This map displays the percentage of households in each area of Marion County that report having no access to a car, truck, or van. Areas with higher proportions of no-vehicle households are often shaded in darker colors, allowing for quick visual identification of transportation-vulnerable communities. Households without vehicles may face challenges in reaching employment, schools, healthcare facilities, grocery stores, and other critical services.

Identifying these areas helps local governments, transit agencies, and social service organizations prioritize infrastructure investments, improve transit routes, and develop mobility programs tailored to community needs.

This tool is essential for promoting inclusive transportation planning and ensuring that all residents of Marion County have equitable access to opportunities and services, regardless of vehicle ownership.

FIGURE 9: ZERO VEHICLE HOUSEHOLD POPULATION BY CENSUS TRACT



C. Service Analysis

1. Transportation Disadvantaged Population

Marion Transit is committed to promoting independence and quality of life for older adults, enabling them to age in place, safely, and comfortably within their homes, neighborhoods, and communities. By providing accessible and reliable transportation, MT serves as a vital resource for individuals who are no longer able to drive and lack support from family or friends. This service helps reduce social isolation and eliminates the stress of arranging rides for essential daily activities.

Among the various trip purposes, medical transportation remains the most in demand, especially for individuals requiring access to life-sustaining treatments such as dialysis or regular health checkups. Following medical trips, other common trip types include those for education, job training, and other essential services, which are also prioritized to support personal development and self-sufficiency. **Table 6** presents a three-year comparison of trips categorized by trip purpose, offering insight into the evolving transportation needs of Marion County's residents who rely on paratransit services.

With Marion County's senior population steadily increasing, the pressure on paratransit services continues to grow. Meeting this rising demand will require thoughtful planning and resource allocation to ensure that safe, accessible, and equitable transportation remains available for all who need it, especially the county's most vulnerable residents.



TABLE 6: PASSENGER TRIPS BY TRIP PURPOSE

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

Source: Annual Operating Reports from 2023-2024, FCTD

2. Marion Transit Role and Paratransit Services

Marion Transit serves as the designated Community Transportation Coordinator (CTC) for Marion County. As part of this role, MT is responsible for managing and operating the county's paratransit services. These services provide critical public transportation options for the TD population within the county. Priority service is extended to individuals who experience mobility limitations, do not possess or operate a personal vehicle, and lack access to transportation assistance from family or friends. MT's mission is to ensure that essential travel needs are met for residents who might otherwise face significant barriers to mobility.

3. Forecasting the Transportation Disadvantaged Population

The estimation of the Transportation Disadvantaged population in Marion County is based on a structured forecasting methodology developed by the Florida Commission for the Transportation Disadvantaged (FCTD). This methodology integrates data from multiple sources to project travel demand accurately. It was last updated in 2015 to reflect evolving policy frameworks and demographic trends that have emerged since the original model's inception in 1993.

For the year 2024, projections of both the TD population and corresponding travel demand were calculated using a set of automated formulas embedded within the CUTR (Center for Urban Transportation Research) Paratransit Service Demand Estimation Tool. This tool utilizes 2024 socio-economic data provided by the Bureau of Economic and Business Research (BEBR) and incorporates pre-coded data derived from the U.S. Census Bureau's Survey of Income and Program Participation (SIPP). The combination of updated socio-economic inputs and refined forecasting algorithms enables a more accurate assessment of paratransit needs in Marion County, helping inform service planning and resource allocation.

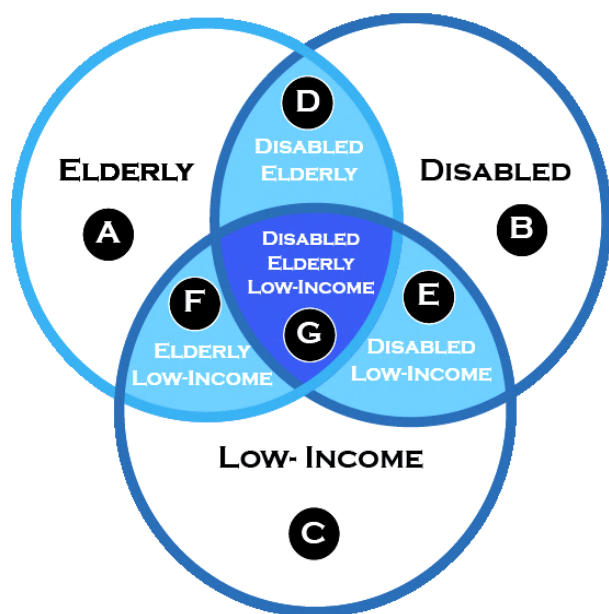
4. Understanding Transportation Disadvantaged Populations Categories

The FCTD classifies individuals into two main categories based on their need for transportation assistance. This section explains the Category One TD Population, using a Venn diagram to illustrate how age, disability, and income status intersect to identify transportation disadvantages. Category One includes individuals who fall into any of the following groups:

- Elderly
- Disabled
- Low-Income
- Children who are "high-risk" or "at-risk"

Most high-risk or at-risk children are also classified as either disabled and/or low-income (though not shown in this diagram, they are included in the definition).

These individuals may or may not currently be unable to transport themselves, but they are considered at higher risk of transportation barriers due to physical, or financial limitations. Individuals in regions A through G qualify as Category One TD Population as follows:



- A. *Elderly only* – older adults without disability or income issues
- B. *Disabled only* – individuals with physical/mental Impairment
- C. *Low-income only* – individuals financially limited
- D. *Elderly & Disabled* – Aging individual with impairment
- E. *Disabled & Low-Income* – Impaired and financially limited
- F. *Elderly & Low-Income* – Older adults facing financial barriers
- G. *Elderly, Disabled & Low-Income* – Most at-risk population

FIGURE 10: TD POPULATION GROUPS

<u>General TD Population</u>		% 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%
Total Non Elderly	291,598	71.1%	49,086	12.0%	30,985	7.6%	6,553	1.60%
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%
Total Elderly	118,361	28.9%	15,500	3.8%	37,422	9.1%	4,730	1.15%
Total	409,959	100%	64,586	15.8%	68,407	16.7%	11,283	2.75%

Source: 2023 ACS 1-Yr. Estimates

Double Counts Calculations		
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
Total - Non-Duplicated		191,879
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.		

All individuals in regions A through G qualify as Category One TD Population. These groups matter because:

- Disability impacts a person's ability to physically or mentally use standard transportation.
- Low-income status affects a person's financial ability to afford transportation.
- Age alone does not always affect mobility but is often associated with higher rates of disability and poverty.

Category Two TD Population (for reference), includes only individuals who:

- Are unable to transport themselves or
- Cannot purchase necessary transportation

Category Two is more restrictive and determines eligibility for TD Trust Fund subsidies. Some individuals in Category One may not qualify for Category Two unless they demonstrate a clear inability to access transportation independently. Eligibility for funding in Category Two requires demonstrating inability to self-transport or purchase services.

Table 7 provides a detailed forecast of the General TD Population in Marion County from 2024 through 2030, based on the overlap categories shown in **Figure 10**. Marion County's General TD Population is estimated at 191,879, accounting for roughly 47% of the total population. This includes all individuals who are elderly, disabled, low-income, or high-risk/at-risk children. Over the next six years, this population is expected to grow by approximately 12%, reaching 215,722 by 2030.

TABLE 7: 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
TOTAL GENERAL TD POPULATION	191,879	195,661	199,518	203,451	207,462	211,551	215,722
TOTAL POPULATION	409,959	418,040	426,281	434,684	443,252	451,990	460,900
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.							

The largest subgroup is elderly individuals without disability or low-income status, followed by those who are disabled only and low-income only. The most vulnerable population, those who are elderly, disabled, and low-income, will also see a notable increase. These projections, derived from the CUTR Paratransit Service Demand Estimation Tool (based on 265 service days annually), underscore the importance of long-term planning to ensure continued access and equity in transportation for all qualifying individuals.

5. Disabled Population

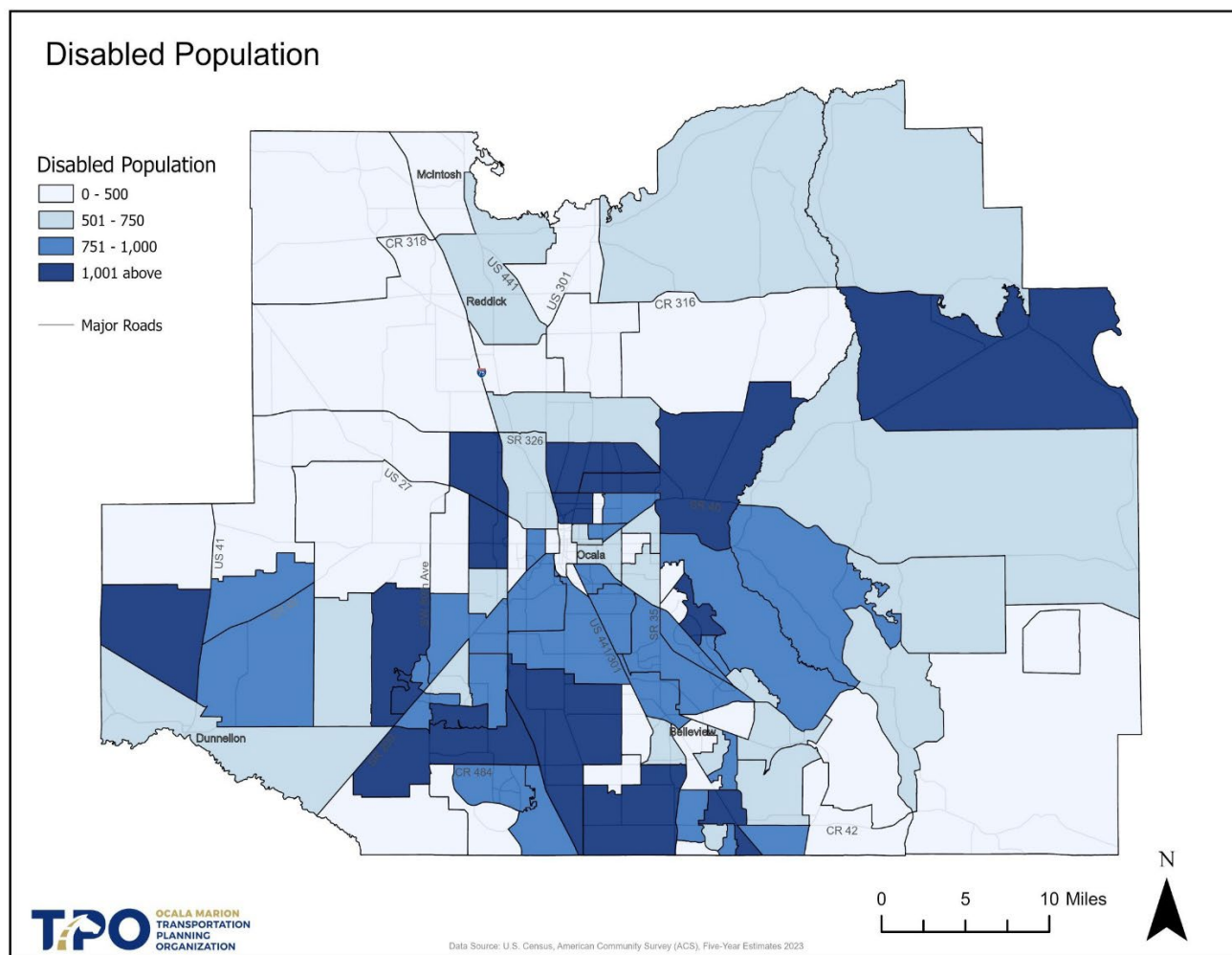
Figure 11 displays the population distribution of disabled residents of Marion County by Census Tract. As displayed, disabled population areas are widespread in the south-central portions of Marion County; north-central; and east in the Ocala National Forest and Salt Springs areas; and west in the Rainbow Springs area.

The *Disabled Population Map of Marion County* provides a geographic overview of where individuals with disabilities reside throughout the county. This map breaks down disability prevalence by local areas, helping to identify communities with higher concentrations of residents living with disabilities. Disabilities include a range of physical, mental, and sensory conditions that limit major life activities, such as mobility, cognition, vision, hearing, self-care, and independent living. Areas on the map are shaded or color-coded to indicate the percentage of the population with disabilities, with darker shades usually representing higher percentages.

The map is designed to help local stakeholders, including policymakers, healthcare providers, urban planners, and community organizations, better understand the spatial patterns of disability in the region. This can guide decisions about infrastructure, transportation, healthcare access, public services, and outreach initiatives.

This visualization is an important tool for promoting accessibility, equity, and informed community planning throughout Marion County.

FIGURE 11: DISABLED POPULATION BY CENSUS TRACT



6. Low Income Population

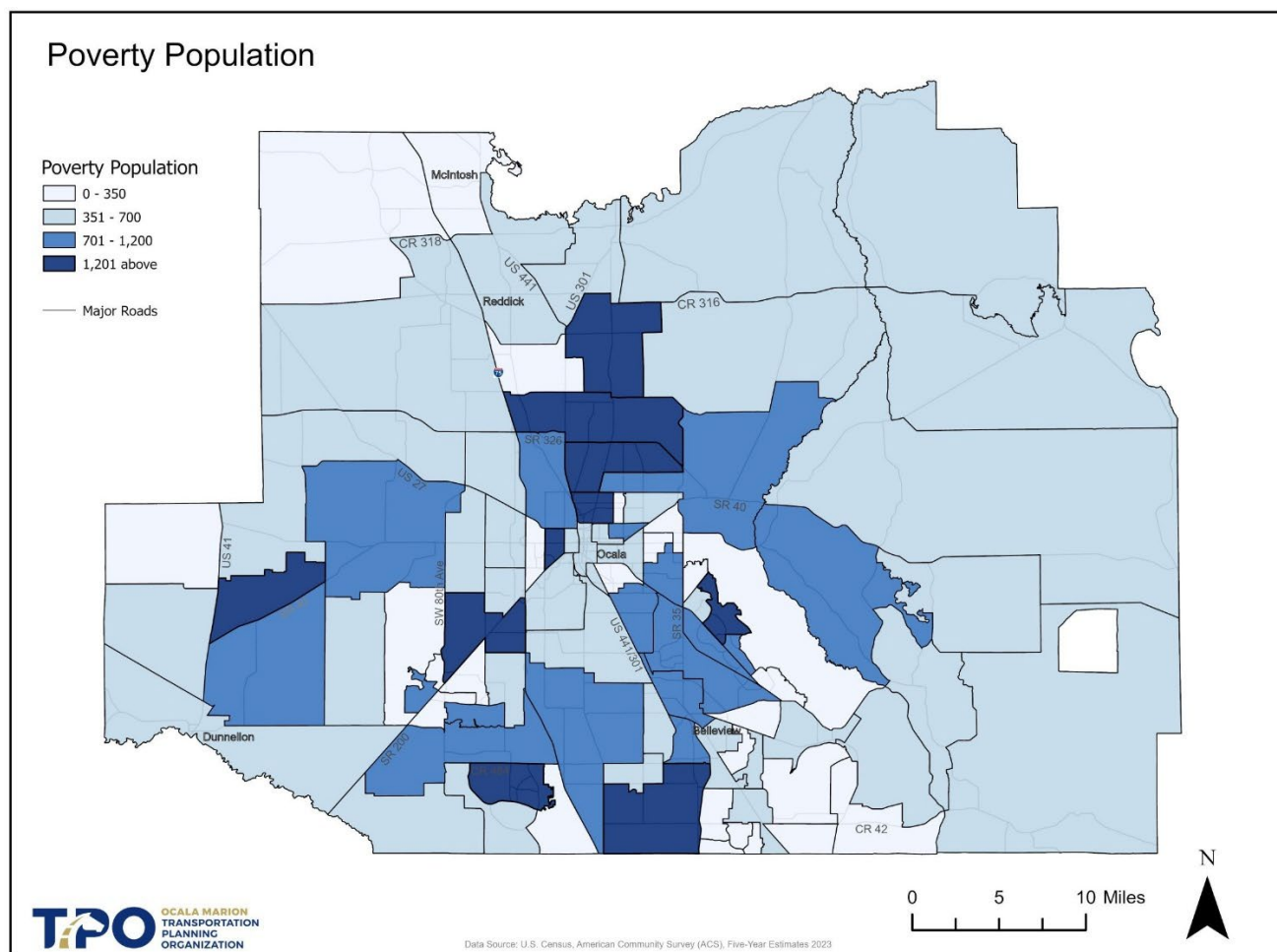
Figure 12 displays the population distribution of Low-Income residents (below poverty) of Marion County by Census Tract. As displayed, high concentrations of low-income areas are prevalent in the northern portions of the county, north of U.S. 27 to CR 316, east of I-75; western Marion County north of SR 40; areas along SR 200 west and east of the corridor; and in Marion Oaks and the south-central areas, just north of the Sumter County line.

The *Low-Income Population Map of Marion County*, provides a detailed look at the geographic distribution of residents living on limited financial resources. This map highlights areas within the county where poverty and low-income levels are most prevalent. Understanding the spatial patterns of low-income populations is essential for equitable community planning, targeted social services, and effective policy development.

This tool serves as a foundation for identifying areas of need, allocating resources, and promoting economic opportunity across the county.

This visual representation makes it easier to identify pockets of poverty, economic disparity, and regions that may benefit from additional social services, affordable housing, food assistance programs, and job development initiatives.

FIGURE 12: POVERTY POPULATION BY CENSUS TRACT



In 2025, Marion County’s Critical Need TD Population is projected to make approximately 1,460 daily trips, as shown in **Table 8**. Demand is expected to increase by 8.9% over the next five years, reaching 1,590 trips per day by 2030. This population includes individuals who are severely disabled or low-income without access to a personal vehicle or public transit. The total Critical Need TD population is forecasted to grow from 18,718 in 2025 to 20,637 by 2030, reflecting a steady rise in those requiring the highest level of transportation assistance.

Annual trip demand for this group is also expected to grow, from approximately 386,944 trips in 2025 to 421,427 by 2030, based on 265 days of paratransit service per year. These projections highlight the increasing burden on specialized transportation services and emphasizes the need for continued investment in accessible, high-priority transit options for Marion County’s most vulnerable residents.

TABLE 8: MARION COUNTY FORECASTED ANNUAL TRIP DEMAND

Critical Need TD Population Forecast	2024	2025	2026	2027	2028	2029	2030
Total Critical TD Population							
<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
Total Critical Need TD Population	18,356	18,718	19,087	19,463	19,847	20,238	20,637
Daily Trips Critical Need TD Population							
<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
Total Daily Trips Critical Need TD Population	1,436	1,460	1,485	1,510	1,535	1,563	1,590
Annual Trips	380,513	386,944	393,483	400,133	406,895	414,097	421,427
Source: CUTR, Paratransit Service Demand Estimation Tool. Based on paratransit service operating 265 days annually.							

Table 9 provides projections for the Critical Need TD Population in Marion County, focusing on individuals who are unable to transport themselves or afford transportation due to severe physical disabilities or extremely limited income. These individuals are entirely dependent on others or specialized services to access essential activities such as healthcare, employment, education, shopping, social engagement, and other life-sustaining needs. In 2025, Marion County’s Critical Need TD population is estimated to be 68,407, accounting for nearly 35% of the total General TD Population.

This significant portion highlights the pressing need for targeted transportation solutions designed specifically for those with the most critical mobility barriers. The data emphasizes the importance of ongoing investment in accessible and affordable transportation services to support basic quality of life and ensure that vulnerable residents are not isolated from essential resources and opportunities.

TABLE 9: CRITICAL NEED TRANSPORTATION DISADVANTAGED

<i>County TD Population by Age</i>	<i>Total TD Population Disability by Age</i>	<i>% with Severe Disability by Age</i>	<i>Total Population Severe Disability by Age</i>	<i>% of Total Pop Severe Disability by Age</i>	<i>% of Severe Disability Below Poverty Level</i>	<i>Total Severe Disability Below Poverty Level</i>
<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%		
Total Non-Elderly	30,985		3,276	1.12%	28.60%	937
65-74	13,532	27.12%	3,670	5.85%		
75+	23,890	46.55%	11,121	19.98%		
Total Elderly	37,422		14,791	12.50%	11.70%	1,731
Total	68,407		18,066	4.41%		2,667

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

7. Needs Assessment

A comprehensive assessment of existing and unmet public transportation needs is essential to support low-income residents, older adults, and individuals with disabilities in Marion County. This evaluation involves reviewing current transportation providers, identifying service gaps and overlaps, and analyzing demographic trends to anticipate future demand. The assessment indicates that as Marion County's population becomes more concentrated in higher-density areas, the need for reliable and accessible public transit will continue to grow.

Older adults, in particular, are likely to rely more on public transportation as age-related challenges reduce their ability or willingness to drive. Marion County has a notably higher proportion of older residents than the state average, 25% of the population is aged 65 or older, compared to 19% statewide, according to the Bureau of Economic and Business Research (BEBR). This demographic trend reinforces the need for transit services that are accessible, dependable, and designed with aging users in mind.

The following needs have been identified for continued high quality transit services:

- Increased funding to meet the growing need of increased population and aging adults.
- Expanding fixed-route services and ensuring stops are located closer and designed for easy access. This would significantly encourage older adults to use public transportation. Making transit more convenient and accessible can also help reduce the demand for paratransit services, easing the overall transportation burden.
- Improved and more visible bus stop amenities that provide shelter from weather and create a more appealing transit experience, particularly for older adults and tourists.

- Expand fixed-routes to access more rural areas throughout the county. Currently major areas of the county remain without fixed route service. Offer flexible destination choices and extend operating hours along key thoroughfares.
- Enhance communication and foster stronger collaboration with neighboring counties to improve regional coordination, share resources, and address mutual challenges more effectively.

8. Funding

MT receives funding through Florida’s Transportation Disadvantaged Trip and Equipment Grant, which is distributed to all counties based on a formula. As a historically rural area, Marion County also depends on FTA Section 5311 funds, administered by FDOT, to support rural transit operations. However, in recent years, funding for non-sponsored trips, those not paid for by a third-party agency has not kept pace with growing demand and rising operational costs.

As a result, MT has occasionally been forced to prioritize trip requests, meaning not all TD-eligible individuals are able to access services consistently. This has limited the ability of some riders to reach essential destinations such as medical facilities, workplaces, grocery stores, and social services. Addressing these challenges will require strategic planning, increased investment, and a focus on ensuring that transit services meet the evolving needs of Marion County’s populations.

FIGURE 13: PASSENGER TRIP DEMAND BREAKDOWN

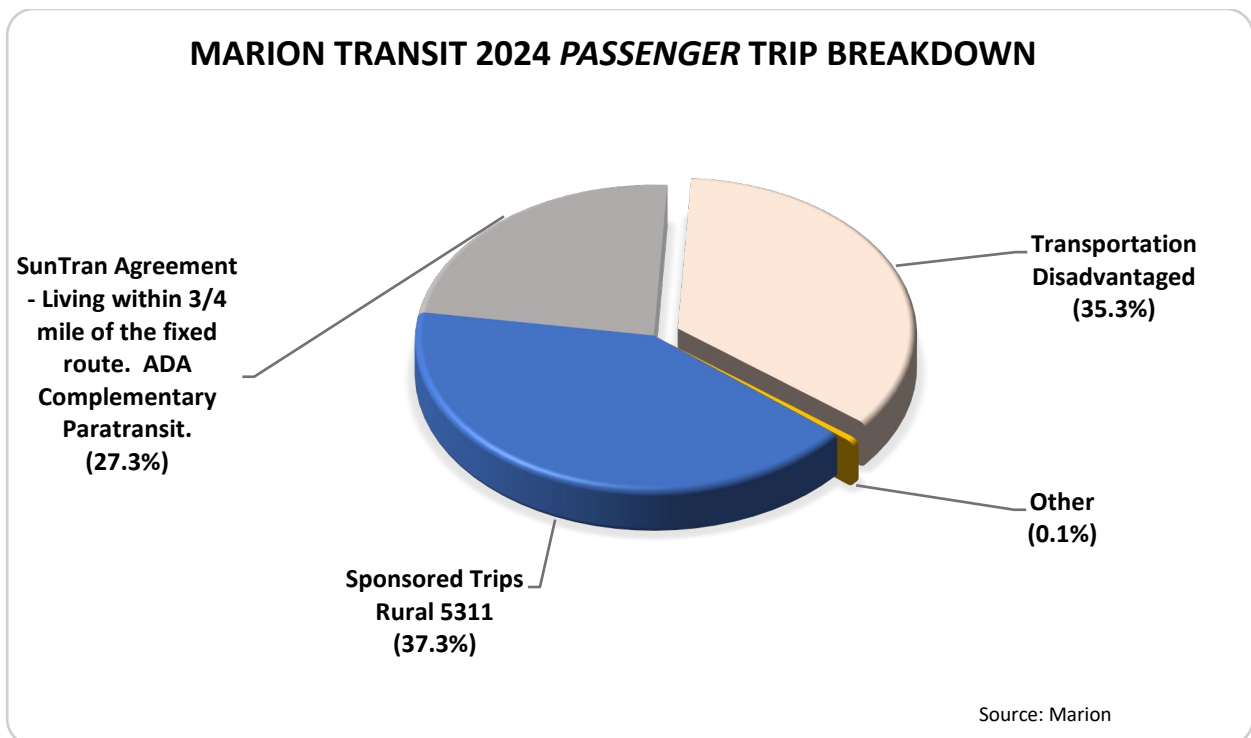
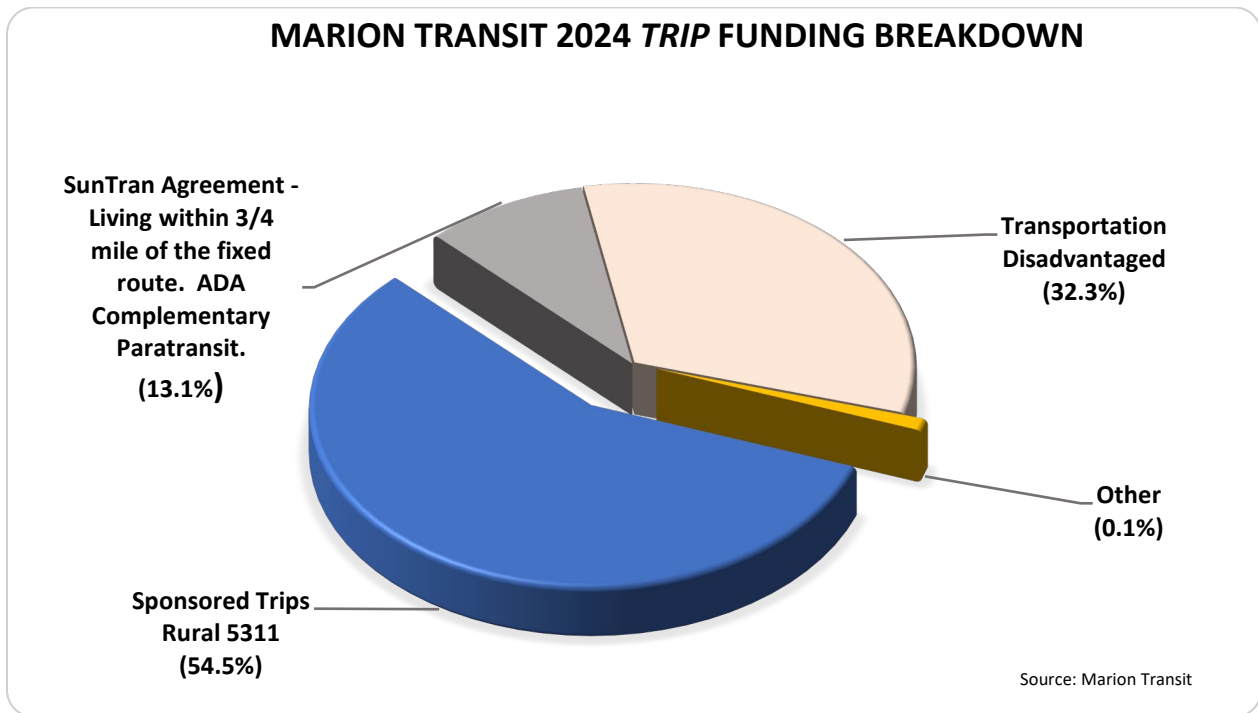


FIGURE 14: TRIP DEMAND BREAKDOWN



As shown in **Figure 13**, a significant portion of MT’s trips originate from the county’s unincorporated areas, highlighting the high demand for transportation services outside the urban centers. However, **Figure 14** reveals a funding breakdown that exposes a notable shortfall in resources allocated to these same unincorporated regions. This gap between demand and available funding poses a serious challenge, continuing to provide qualified transportation services without additional financial support will inevitably lead to a decline in service quality.

To better understand and address these needs, an independent study was conducted in collaboration between MT and the TPO. This study specifically analyzed geographic areas across Marion County where there is a critical need for specialized, door-to-door transportation services, particularly for healthcare access, employment, and shopping. The findings underscored a pressing requirement to expand transit coverage to more remote and underserved parts of the county that currently lack adequate TD services. Expanding service to these areas will be essential to ensuring equitable access to essential destinations for all county residents.

9. Barriers to Coordination

While understanding county-wide demographics and service needs is vital for MT to provide safe, reliable, and cost-effective transportation, identifying the obstacles that impede progress is crucial for effective planning and improvement. Recognizing these barriers helps MT prioritize actions and develop strategies to overcome challenges in delivering coordinated transportation services.

Funding remains the primary barrier to effective coordination. Rising operational costs, such as increases in fuel prices, higher insurance premiums, and personnel expenses, combined with growing demand driven by an aging population, place significant strain on available resources. Another challenge lies in ensuring that all agencies mandated to purchase transportation through the coordinated system are fully compliant and actively participating, which is crucial to maintaining efficient service coordination and funding flows. Additional potential barriers to coordination in Marion County include:

- **Geographic and Infrastructure Challenges:**
Marion County’s expansive rural areas, with dispersed populations and limited public transit infrastructure, complicate efforts to provide timely and cost-efficient service.
- **Workforce Shortages:**
Challenges in recruiting and retaining qualified drivers and staff impact service reliability and capacity.
- **Fragmented Service Providers:**
Multiple agencies operating without collaboration or communication can lead to service duplication, inefficiencies, and gaps in coverage.
- **Limited Rider Awareness and Accessibility:**
Many eligible riders may be unaware of available transportation options or face barriers in accessing information and booking services.

In addressing these barriers MT must foster stronger partnerships, invest in technology and workforce development, and enhance outreach efforts, ensuring coordinated, efficient, and equitable transportation services for all residents of Marion County.

D. Goals, Objectives, and Strategies

Crafting a clear vision for transit services is a vital part of the TDSP. The establishment of goals, objectives, and strategies is essential for turning this vision into actionable steps that effectively serve the community. The vision defines the role of the CTC, the populations it serves, and the most effective ways to deliver transportation services. This section details MT’s long-term goals, specific measurable objectives to guide progress, and the strategies designed to achieve these objectives.

MT’s vision and mission statements reflect a strong commitment to excellence and a rider-focused approach that underpins all operations and planning efforts.

1. Marion Transit Vision Statement

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

2. 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.

3. Strategic Priorities for the Next Five Years (2025 to 2030)

Over the next five years, MT will prioritize expanding paratransit or door-to-door access to underserved rural areas of Marion County by integrating route deviation options alongside demand-response services. A key focus is reducing reservation lead times to approach next-day scheduling, improving convenience and responsiveness for riders. To achieve this, MT is conducting a comprehensive analysis of its call-in, routing, and appointment systems to identify opportunities for reducing wait times and improving operational efficiency. The agency plans to enhance or adopt new technologies that facilitate these improvements, positioning MT to better meet increasing demand.

MT remains dedicated to providing services that are safe, responsive, and aligned with the evolving needs of the County's transportation disadvantaged population or paratransit services, while ensuring coordination with other county transit paratransit for a seamless travel experience.

MT's goals, objectives and strategies are:

Goal 1: Ensure Rider and Operator Safety and High Service Quality

Objectives:

- Enhance Safety for riders and operators
- Reduce preventable accidents and incidents whenever possible
- Improve rider perception of safety
- All vehicles to receive regularly scheduled maintenance and daily inspections
- Maintain a high standard of safety across all services

Strategies:

- Provide regular safety and de-escalation training for staff
- Conduct regular ADA compliance and vehicle safety inspections
- Launch public education campaign on transit rules and rider conduct
- Ensure drivers are inspecting daily

- Ascertain qualified mechanics to diagnose and repair the buses on a maintenance schedule
- Provide drivers and staff with training on rider assistance, sensitivity, and emergency procedures

Goal 2: Expand services and access to underserved rural areas

Objectives:

- Increase the availability of paratransit options in rural and low-density areas
- Increase rural ridership

Strategies:

- Introduce flexible route deviation options
- Use demographic and land-use data to prioritize areas of greater need
- Establish rural mobility hubs or park-and-ride facilities

Goal 3: Align services to evolve with rider needs and demographic trends

Objectives:

- Stay responsive to changing needs among the TD community

Strategies:

- Monitor demographic and trip data to identify needs and adjust
- Hold meetings with human services, medical providers and community stakeholders for coordination and input

Goal 4: Improve regional coordination of services

Objectives:

- Build partnerships with neighboring counties to share resources and address transportation challenges
- Leverage private entities' innovation and resources
- Maintain continued coordination and collaboration

Strategies:

- Coordinate with adjacent counties trip eligibility, transfers, and schedules.
- Develop MOU's with partner agencies to formalize efforts
- Work to establish a mutual trust with other counties and/or entities
- Hold regional meetings to ensure seamless integration
- Share data and jointly plan solutions across jurisdictions

Goal 5: Improve rider convenience through faster scheduling

Objectives:

- Reduce lead times for scheduling rides to approach next-day service
- Enhance flexibility of the scheduling process

Strategies:

- Explore use of automated app-based scheduling systems (on-line mobile) to reduce dependence on phone-based reservations
- Provide customer support and training for riders transitioning to new booking system

Goal 6: Increase awareness and accessibility

Objectives:

- Improve public understanding of available paratransit services available
- Increase website traffic and app downloads

Strategies:

- Launch targeted outreach campaigns, especially for older adults and underserved communities
- Distribute printed and digital materials through community partners and service agencies
- Create visual service maps tailored to low-literacy populations

Goal 7: Build and maintain a competent workforce

Objectives:

- Recruit and retain qualified mission-driven staff
- Foster a culture of ongoing learning and professionalism
- Provide cross-training for staff to increase flexibility

Strategies:

- Offer competitive wages and benefits package
- Implement an internal leadership development program
- Partner with local workforce agencies and technical schools for recruitment and training
- Implement retention incentives with employee recognition programs, clear career paths, and promotion opportunities

Goal 8: Improve System Resilience

Objectives:

- Create and test a disaster and emergency response plan

Strategies:

- Develop contingency plans for severe weather, pandemics, and cyber threats
- Establish backup communication systems and mobile dispatch units
- Conduct routine system stress tests and simulation drills to ensure all staff is familiar with the process

These goals and strategies position MT for long-term success by emphasizing accessibility, technology, sustainability, partnerships, and workforce development, ensuring a resilient and responsive transit system for all residents.

Table 10 below provides the goals, objectives and strategies in a table format.

E. Implementation Plan

TABLE 10: IMPLEMENTATION PLAN

OBJECTIVE	STRATEGY	RESPONSIBLE PARTY	STATUS
Goal 1. Ensure rider and operator safety and high service quality.			
Enhance safety for riders and operators.	Provide regular safety and de-escalation training for staff. Conduct regular ADA compliance and vehicle safety inspections.	Mt, TPO	MT, reports to TDLCB
Improve rider perception of safety.	Launch public education campaign on transit rules and rider conduct.	Mt, TPO, and TDLCB	MT to monitor
All vehicles to receive regularly scheduled maintenance and daily inspections	Make sure drivers are inspecting daily. Ascertain qualified mechanics to diagnose and repair the buses on a maintenance schedule.	MT	MT to monitor
Maintain a high standard of safety across all services.	Provide drivers and staff with training on rider assistance, sensitivity, and emergency procedures.	MT	MT to monitor & report to TDLCB
Goal 2. Expand services and access to underserved rural areas.			
Increase the availability of paratransit options in rural and low-density areas.	Introduce flexible route deviation options. Use demographic and land-use data to prioritize areas of greater need.	MT	MT to monitor & report to TDLCB
Increase rural ridership	Establish rural mobility hubs or park-and -ride facilities.	MT, TDLCB	MT to monitor
Goal 3. Align services to evolve with rider needs and demographic trends.			
Stay responsive to changing needs among the TD community.	Monitor demographic and trip data to identify needs and adjust. Hold meetings with human services, medical providers and community stakeholders for coordination and input.	MT, TPO	MT to monitor, TPO Assist
Goal 4. Improve regional coordination of services.			
Build partnerships with neighboring counties to share resources and address transportation challenges.	Coordinate with adjacent counties trip eligibility, transfers and schedules. Develop MOU's with partner agencies to formalize efforts.	MT, TPO	MT to monitor
Leverage private entities innovation and resources	Work to establish a mutual trust with other counties and/or entities.	MT, TPO	MT to monitor
Maintain continued coordination and collaboration.	Hold regional meetings to ensure seamless integration. Share data and jointly plan solutions across jurisdictions.	MT, TPO	MT, TPO Assist

Goal 5. Improve rider convenience through faster scheduling.			
Reduce lead times for scheduling rides to approach next-day service.	Conduct a comprehensive operational analysis of current call-in, routing, and appointment systems. Reengineer scheduling workflows to eliminate redundancies and reduce manual handling. Implement improvements with clearly defined performance metrics.	MT	MT to monitor
Enhance flexibility of the scheduling process	Explore use of automated app-based scheduling systems (on-line mobile) to reduce dependence on phone-based reservations. Provide customer support and training for riders transitioning to new booking system.	MT	MT to monitor, report to TDLCB
Goal 6. Increase awareness and accessibility.			
Improve public understanding of available paratransit services.	Launch targeted outreach campaigns, especially for older adults and underserved communities.	MT, TPO	MT, TPO
Increase website traffic and app downloads	Create visual service maps tailored to low-literacy populations. Distribute printed and digital materials through community partners and service agencies.	MT, TPO, TDLCB	MT to monitor
Goal 7. Build and maintain a competent workforce.			
Recruit and retain qualified mission-driven staff.	Offer competitive wages and benefits package. Partner with local workforce agencies and technical schools for recruitment and training.	MT	MT to monitor
Provide cross-training for staff to increase flexibility.	Assess core function to cross train and overlaps and dependencies will be more readily obvious. Tie Cross-training with career development.	MT	MT to monitor
Foster a culture of ongoing learning and professionalism.	Implement retention incentives with employee recognition programs, career paths, and promotion opportunities.	MT	MT to monitor
Goal 8. Improve system resilience.			
Create a disaster and emergency response plan	Develop contingency plans for severe weather, pandemics, and cyber threats. Establish backup communication systems and mobile dispatch units.	MT	MT to monitor
Test the disaster and emergency plan	Conduct routine system stress tests and simulation drills to ensure all staff is familiar and comfortable with the protocol.	MT	MT to monitor

Section 2: Service Plan

A. 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:

- Medical Needs
- Life-Sustaining Activities
- Education
- Work
- Business
- 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 times. 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 (currently 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.

Note: Passengers of the Transportation Disadvantaged program will be required to be transported to the closest facility, based on the rider's point of origin, that has availability to accommodate the customer's needs (if the closest location does not have the capacity to service the customer, then the next closest will be used). This includes all customers under all programs, except the Americans with Disabilities Act program.

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 provided by the rider. 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.

Administrative staff then verify trips using RouteMatch system and review paper manifest for notes to ensure accuracy and consistency. Appropriate trip rate is applied to each trip. Billing eligibility is verified by the administrative staff 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.

FIGURE 15: COORDINATION CONTRACTORS

NAME	CONTACT	ADDRESS	PHONE	AGREEMENT
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 nd Avenue, Ocala, FL	352-873-4700	Coordination Agreement
Bridge to Hope	Audrey Bell, Owner	631 NW 56 th 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 $\frac{3}{4}$ mile from a SunTran fixed bus route are directed to use the fixed-route bus system.

All SunTran vehicles are ADA accessible. To ensure that all citizens of Marion County are provided with equal access to public transportation, SunTran undergoes ADA certification; contracts with the Center for Independent Living of North Central Florida to assist with the rider certification/eligibility process.

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 daily via a mandatory pre and post-trip inspection performed by the driver. Safety issues identified during these inspections require the bus to be immediately placed out-of-service until the defect is 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. Buses are also equipped with tablets to communicate with dispatch as well as GPS to track trips. 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 may be provided if 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 is done using brochures, local newspapers, presenting at community meetings and on MT's website (www.mariontransit.org). All of MT's buses are marked with MT's name and phone number. MT's newer fleet include the words: "Call – Connect – Ride" and phone number 352-620-3071 in bold letters.

14. Service Standards

MT Service Standards established to provide oversight of the coordinated system are shown in **Table 11**.

TABLE 11: 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 must 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 2025 is \$2.00. Note: Fare waivers are available for riders who can 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.
Drugs - 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 TPO and the TDLCB have developed and implemented a policy for resolving complaints. A copy of this procedure has been provided in **Appendix C**.

Section 3: Quality Assurance

A. CTC Monitoring and Evaluation Process for Operators and Coordination Contractors

As part of its commitment to maintaining high standards of service and compliance, MT conducts an annual monitoring process for its operators and coordination contractors, utilizing evaluation criteria aligned with Florida Department of Transportation (FDOT) guidelines. This comprehensive review assesses operational performance, safety compliance, customer service, and adherence to contract requirements.

Upon completion of the monitoring process, MT provides each contractor with a detailed written report outlining findings, strengths, and any areas of concern. If deficiencies are identified and an unfavorable rating is issued, the contractor is required to submit and implement a corrective action plan within a designated timeframe. MT then schedules a follow-up review to verify that all necessary improvements have been made and that the contractor is operating in full compliance. This process ensures accountability, promotes continuous improvement, and safeguards the quality and reliability of transit services throughout Marion County.



1. Community Transportation Coordinator Evaluation

MT, as the designated CTC for Marion County, undergoes an annual performance evaluation conducted by the TPO in collaboration with the TDLCB. This evaluation is carried out in accordance with the FCTD Evaluation Workbook, ensuring a standardized and comprehensive assessment of the previous year's performance.

The evaluation thoroughly reviews each facet of MT’s operations, including service effectiveness, customer satisfaction, safety practices, and compliance with all applicable FCTD rules and guidelines to verify adherence to the FCTD regulations. The objective is to verify that MT continues to deliver high-quality, coordinated transportation services that align with both state mandates and local community needs.

In addition to the annual review, the FCTD performs a triennial Quality Assurance and Program Evaluation (QAPE). This in-depth review is conducted by an independent third party on behalf of the FCTD, using a detailed monitoring tool to assess system performance. The QAPE involves interviews with staff, review of system documentation, and on-site evaluations to ensure compliance with FCTD requirements, local standards, and the Americans with Disabilities Act (ADA). Results from the annual CTC evaluation are documented and included in **Appendix E**, supporting transparency and continuous improvement.

2. Cost Revenue Allocation and Rate Structure Justification

MT uses a standardized, consistent rate structure for all TD trips within the county. These rates are calculated using the FCTD rate model spreadsheet, which incorporates historical and projected data on operational costs and revenues specific to MT’s services.

Each year, MT updates the rate model to reflect changes in service expenses, funding levels, fuel prices, and other financial factors. The revised rates are reviewed and approved by both the TDLCB and the FCTD to ensure they are equitable, cost-effective, and sustainable.

Ongoing oversight is maintained by the TDLCB, which continuously monitors the rate structure to determine if adjustments are needed due to fluctuations in service demand or delivery costs. This proactive approach ensures that the fare structure remains fair for riders while maintaining financial viability for the transit system. The current rates are detailed in **Table 12** of this document.

TABLE 12: FCTD CALCULATED RATES

FCTD CALCULATED RATES	
Ambulatory (and Escort)	Trip Charge: \$ 36.31
Wheelchair	Trip Charge: \$ 62.25
Stretcher (Contracted)*	* 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 13** below.

TABLE 13: SUNTRAN FARE STRUCTURE/MT FARE STRUCTURE

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

The TDSP serves not only as a roadmap but also as a reaffirmation of MT's, the TPO's and TDLCB's, dedication to supporting the independence and well-being of the transportation disadvantaged in the community. It is an ongoing commitment to improving mobility, accessibility and quality of life for individuals who face transportation barriers due to age, disability, or income. Marion County will continue with collaboration and communication to provide a cohesive transportation network that is safe, efficient, and equitable, to ensure that no one is left behind.

This document is updated annually and revised as needed based on new transit-related information collected during the development of key planning documents such as the Long-Range Transportation Plan (LRTP), Transportation Improvement Plan (TIP), Public Participation Plan (PPP), Congestion Management Plan (CMP), and Safety Action Plan (SAP). These plans have been summarized in **Appendix A**.

APPENDIX A: SUMMARY REVIEW OF OTHER PLANS

Inserted

Summary of Local Government Comprehensive Plans

Marion County Comprehensive Plan 2045

The Marion County Comprehensive Plan 2045 is a long-range policy framework designed to manage population growth, land development, and infrastructure investment with a strong emphasis on transportation planning. The plan aims to promote sustainable and efficient development patterns while protecting the county's rural character, agricultural assets, and natural resources. Roads and transportation play a central role in how growth is directed, managed, and supported throughout the county.

Transportation infrastructure is used as a guiding tool to help shape development. The plan establishes an Urban Growth Boundary, where higher-density development is encouraged and where new public facilities, including roads, water, and sewer, will be prioritized. Transportation systems in these areas are expected to support walkability, mixed land uses, and reduced travel distances. Planned Service Areas are further identified to focus public investment and encourage compact, connected communities. The plan supports a variety of travel modes, encouraging multimodal transportation networks that include roads, sidewalks, trails, and bike lanes.

For new development, the County requires projects to include internal circulation systems, safe roadway connections, and consideration of impacts on the broader transportation network. Developers must design site access in a way that reduces congestion, avoids unsafe traffic conditions, and promotes shared access where possible. Subdivisions and commercial developments must be integrated into the existing road grid and designed to link with surrounding neighborhoods and activity centers. Additionally, stormwater runoff from roads must be managed through appropriate drainage systems to protect water quality.

In rural and environmentally sensitive areas, including the Farmland Preservation Area, transportation planning is more restrictive. Roadway design in these areas must align with context-sensitive design principles that preserve scenic views, natural topography, and rural landscapes. The expansion of existing roads is preferred over construction of new corridors, especially to avoid fragmenting farmland and natural habitats. Any new limited-access roads or expressways must be closely reviewed to avoid degrading the rural or equestrian character of the region and must be coordinated with county leadership.

The plan discourages scattered or strip commercial development along highways by concentrating commercial uses at key intersections or within designated centers. This reduces random access points

on major roads, which helps maintain traffic flow and improves safety. The County also maintains strict policies around access management and land use compatibility to reduce conflicts between development and the transportation system.

Overall, transportation is not just a supportive element but a primary mechanism for achieving the County's planning goals. By directing infrastructure investment toward designated areas, ensuring development is linked to adequate transportation systems, and preserving rural character through thoughtful road design.

Ocala 2035 Vision

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 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. A completion date is scheduled by the fall of 2025.

Transit Development Plan

SunTran

The SunTran Fiscal Years 2023 to 2032 Transit Development Plan (TDP) outlines a strategic 10-year roadmap to improve public transportation services in Ocala and Marion County, Florida. The plan emphasizes enhancing mobility, increasing transit access, and better aligning services with current and future community needs. It builds on a detailed assessment of population, employment, land use, and travel patterns, with a focus on areas with high transit demand. The plan evaluates the performance of the existing transit system, identifies service gaps, and explores opportunities to expand and modernize SunTran's services, including the introduction of new routes and micro transit options.

Public input played a key role in shaping the plan's goals and recommendations, with community members expressing strong support for more frequent service, extended hours, and Sunday operations. The plan also recommends updates to infrastructure, technology improvements, and revised policies to

increase efficiency and rider satisfaction. A financial implementation strategy is included to guide investments and ensure sustainability, along with monitoring measures to track progress.

Overall, the TDP presents a forward-thinking vision to create a more connected, accessible, and user-friendly transit network over the next decade.

Commission for Transportation Disadvantaged Plans

Annual Performance Report (2024)

The 2024 Annual Performance Report by the Florida Commission for the Transportation Disadvantaged (CTD) details the state's efforts to provide coordinated transportation services to vulnerable populations, including individuals with disabilities, seniors, low-income residents, and at-risk children. Through the Transportation Disadvantaged (TD) Program, the CTD oversees a network of Community Transportation Coordinators (CTCs) and planning agencies to deliver critical mobility services across all 67 Florida counties. The Coordinated Transportation System facilitated over 13.4 million trips, serving more than 189,000 individuals, with vehicles traveling 79.1 million miles.

Key accomplishments included a \$2 million recurring budget increase, the launch of 12 Innovative Service Development (ISD) projects and the addition of a data analyst position to improve performance analytics. The CTD also completed a two-year study to enhance the accuracy and utility of the Annual Operating Report (AOR) by incorporating more detailed trip-level data. Legislatively, the passage of Senate Bill 1380 restructured the CTD board, introduced new reporting requirements for paratransit incidents outlined in **Appendix G**, and mandated a comprehensive FDOT evaluation of TD services. The CTD held five board meetings, hosted public workshops, and organized TD Awareness Day at the Capitol to increase visibility and stakeholder engagement.

The report also highlights performance by grant type.

- The Trip & Equipment Grant supported over 1.5 million paratransit trips
- The ISD Grant backed innovative services such as employment, focused transportation and partnerships with transportation network companies
- The Shirley Conroy Grant funded \$1.4 million in rural capital equipment purchases
- The Planning Grant supported 28 agencies in managing 58 Local Coordinating Boards.

Looking ahead to 2025, the CTD plans to develop a new 5-Year TD Strategic Plan, enhance safety monitoring, and continue using data to inform policy and improve service delivery for Florida's transportation disadvantaged population.

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,
- types of riders and purpose
- general expenses
- sources of revenues
- number of miles

There is various other TD transit 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 TPO serves as the federally designated metropolitan planning organization for Marion County. As mandated by federal law, the TPO must update a Long-Range Transportation Plan (LRTP) every five years. The LRTP serves as a strategic guide for shaping the county's transportation system over the next 20 years and beyond. The 2045 LRTP outlines planned service enhancements, including the addition of new routes and increased service frequency. However, the implementation of these projects depends on available funding, which determines which initiatives move forward and which are deferred. This plan update was reviewed for consistency with the current LRTP. The TPO is scheduled to adopt the 2050 LRTP in November 2025.

Transportation Improvement Program (TIP) FY 2026 to 2030

The Transportation Improvement Program (TIP) for Fiscal Years 2026 to 2030 outlines a comprehensive plan for transportation projects throughout Marion County, Florida. Developed by the TPO, the TIP includes projects funded through federal, state, and local sources and aligns with state and federal regulations.

It supports multimodal transportation development including highways, transit, bicycle-pedestrian infrastructure, freight, and aviation improvements. It prioritizes projects based on needs, available funding, and public input, ensuring that investments support the community's growth and transportation goals. The plan ensures financial feasibility and requires all listed projects to be fiscally constrained, with revenue expectations matching project costs. Most of the funds are allocated to highway and roadway improvements, with substantial investments also supporting transit and safety enhancements. Public involvement is emphasized through scheduled meetings and comment periods, and the TIP incorporates input from various advisory committees and partner agencies. Public and agency feedback are documented and responded to, and revisions to the TIP follow structured amendment procedures. Overall, the TIP serves as a five-year roadmap to implement strategic and impactful transportation improvements across Marion County.

Transportation Disadvantaged Service Plan (TDSP)

TPO Staff in conjunction with the Transportation Disadvantaged Local Coordinating Board (TDLCB) and the Community Transportation Coordinator (CTC) approved the latest TDSP annual update in June of 2025. However, the CTC was selected to serve another 5-year term. Requiring staff to conduct a major update, due by September 30, 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.

2024 Public Participation Plan (PPP)

The 2024 Public Participation Plan (PPP), adopted by the TPO on March 26, 2024, outlines how the organization involves the public in transportation planning and decision-making across Marion County. The plan ensures that all residents, including historically underserved populations, have equitable opportunities to engage in shaping transportation policies, programs, and projects. The PPP highlights the TPO's commitment to inclusive and accessible participation through a wide range of outreach

strategies, such as public meetings, surveys, digital engagement, social media, and partnerships with community organizations. The TPO works with a governing board and advisory committees like the Citizens Advisory Committee (CAC), Technical Advisory Committee (TAC), and the Transportation Disadvantaged Local Coordinating Board (TDLCB), all of which provide critical input. This document details public involvement procedures for core transportation plans, including the Long-Range Transportation Plan (LRTP), Transportation Improvement Program (TIP), and Unified Planning Work Program (UPWP). Each plan includes specific timelines for review, public notice, and opportunities for feedback.

In line with federal and state laws, the TPO emphasizes transparency, non-discrimination, and accessibility, including compliance with Title VI, ADA, and Environmental Justice regulations. Effectiveness is evaluated annually using measures such as participation levels, public feedback, and outreach performance.

Overall the PPP serves as a blueprint for ensuring that community voices are essential to the planning of a safe, efficient, and equitable transportation system in Marion County.

Commitment to Zero Action Plan

The Commitment to Zero Action Plan outlines a comprehensive strategy to eliminate serious injuries and fatalities from traffic crashes in Marion County. Centered on safety, equity, and forward-thinking planning, the plan utilizes data analysis and community feedback to identify current roadway challenges, particularly for high-risk areas and vulnerable road users like pedestrians, bicyclists, and motorcyclists. With a long-term goal of zero traffic deaths, the plan is built around five key focus areas: creating safer roadways, encouraging safer behaviors, managing speeds effectively, improving emergency response, and strengthening safety-related policies. Each area includes practical actions such as infrastructure upgrades, public awareness initiatives, enhanced enforcement, and improved post-crash care. The plan also includes timelines, performance metrics, and clearly defined responsibilities to ensure accountability and track progress.

Developed in partnership with local stakeholders and the public, the plan targets the most pressing safety issues and takes a system-wide approach to reducing risk. It serves as a roadmap for building a safer, more inclusive, and resilient transportation system for all residents of Marion County.

Congestion Management Process (CMP)

The Congestion Management Process (CMP) serves as a structured approach to identifying and addressing traffic congestion throughout the region. Created by the TPO, the CMP aims to enhance traffic efficiency, safety, and reliability by focusing on improvements that do not depend solely on building new roads. It emphasizes strategies such as better traffic signal coordination, expanded use of alternative transportation options, and the application of intelligent transportation systems (ITS). The plan also incorporates tools for data collection and performance measurement to evaluate current congestion and monitor future improvements.

Overall, the CMP supports the area's long-term transportation goals by promoting practical, cost-effective, and sustainable ways to improve mobility for all travelers.

Summary

Transit and transportation planning documents mentioned were reviewed to strengthen the understanding of current initiatives and strategies related to public transportation in Marion County. This review provided essential context and informed the development of the updated Transportation Disadvantaged Service Plan (TDSP). The Comprehensive Plans of Marion County and the City of Ocala offered valuable insights into how land use and transportation planning are interconnected. Both jurisdictions have adopted policies to support the development of a more multimodal, transit-friendly and safe environment. They also incorporate transit considerations into the review of proposed developments to ensure alignment with existing and planned transit services. In addition, documents from the Commission for the Transportation Disadvantaged, SunTran, and Marion Transit were reviewed to maintain consistency with the goals and direction of this TDSP update.

APPENDIX B: MARION TRANSIT'S VEHICLE INVENTORY

Inserted

County	FDOT CONTROL NUMBER	AGENCY'S CONTROL NUMBER	Title Holder	VIN #	YEAR/MAKE	Model	VEHICLE LENGTH (FEET)	AMBULATORY (Seats)	WHEELCHAIR (Seats)	MAX WHEELCHAIR(Seats)	ADA Accessory (Lift, ramp, etc.)	Current Use	Current Condition	Location of Property	Year of Grant Award and Program Number	Acquisition Date	Cost of Property	% of Federal participation in the cost of the property	Expected Retirement Date	Current Mileage	Average Annual Mileage
Marion	TD	1205 (50)	TD	2C4RDBG4CR281275	2012/Dodge	Caravan	12	6	1	1	Ramp	Spare	Good	In-house	N/A	6/28/2012	\$45,752	0	2021	69,613	5,355
Marion	94585	1602 (09)	FDOT	1FDDE4FS8GDC03213	2016/Ford E-450	Glaval	23	10	3	6	Lift	Spare	Good	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	238,451	26,495
Marion	94586	1604 (20)	FDOT	1FDDE4FSXGDC03214	2016/Ford E-450	Glaval	23	10	3	6	Lift	Daily Use	Good	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	198,601	22,067
Marion	94584	1605 (21)	FDOT	1FDDE4FS6GDC03212	2016/Ford E-450	Glaval	23	10	3	6	Lift	Daily Use	Good	In-house	2015; Sec. 5310	9/30/2015	\$77,150	90	2022	207,043	23,005
Marion	95526	1701	FDOT	1FDVU4XG7HKA67565	2017/Ford/Transit	Nations	22	9	3	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	99,944	12,493
Marion	95527	1702	FDOT	1FDVU4XG9HKA67566	2017/Ford/Transit	Nations	22	9	3	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	111,631	13,954
Marion	95528	1703	FDOT	1FDVU4XG0HKA67567	2017/Ford/Transit	Nations	22	9	3	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	146,736	18,342
Marion	95525	1704	FDOT	1FDVU4XG2HKA67568	2017/Ford/Transit	Nations	22	9	3	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	138,983	17,373
Marion	95529	1705	FDOT	1FDVU4XG4HKA67569	2017/Ford/Transit	Nations	22	9	3	2	Lift	Daily Use	Excellent	In-house	2016; Sec. 5310	9/30/2017	\$70,424	90	2024	167,484	20,936
Marion	95556	1801	FDOT	1HA6GUBG2JN002324	2018/Chevrolet	Nations	24	11	3	4	Lift	Daily Use	Excellent	In-house	2017 Sec. 5310	9/30/2018	\$85,343	90	2026	121,823	17,403
Marion	50016	1802	FDOT	1HA6GUBG5JN002298	2018/Chevrolet	Nations	24	11	3	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	132,808	18,973
Marion	50014	1803	FDOT	1HA6GUBG1JN002394	2018/Chevrolet	Nations	24	11	3	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	167,706	23,958
Marion	50013	1804	FDOT	1HA6GUBG9JN002336	2018/Chevrolet	Nations	24	11	3	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	153,449	21,921
Marion	50015	1805	FDOT	1HA6GUBG9JN002403	2018/Chevrolet	Nations	24	11	3	4	Lift	Daily Use	Excellent	In-house	2017; Sec. 5310	9/30/2018	\$85,343	90	2026	126,292	18,042
Marion	50038	1900	FDOT	1FDDE4FS1KDC14093	2019/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	167,654	27,942
Marion	50041	1901	FDOT	1FDDE4FS5KDC27574	2019/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	165,889	27,648
Marion	50039	1902	FDOT	1FDDE4FS2KDC29671	2019/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	130,284	21,714
Marion	50040	1903	FDOT	1FDDE4FS4KDC29672	2019/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	168,369	28,062
Marion	50042	1904	FDOT	1FDDE4FS0KDC18264	2019/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2019; Sec. 5310	4/17/2019	\$80,883	90	2027	159,594	26,599
Marion	50093	2001	FDOT	1FDDE4FS3KDC66499	2020/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	109,508	21,902
Marion	50086	2002	FDOT	1FDDE4FS6KDC66500	2020/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	94,074	18,815
Marion	50091	2003	FDOT	1FDDE4FS8KDC66501	2020/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	120,882	24,176
Marion	50090	2004	FDOT	1FDDE4FSXKDC66502	2020/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	111,585	22,317
Marion	50094	2005	FDOT	1FDDE4FS1KDC66503	2020/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2020; Sec. 5310	3/31/2020	\$80,145	90	2028	112,844	22,569
Marion	50122	2101	FDOT	1FDDE4FN0MDC14258	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	12/1/2020	\$83,010	90	2028	112,759	28,190
Marion	50123	2102	FDOT	1FDDE4FN2MDC14259	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	12/1/2020	\$83,010	90	2028	130,636	32,659
Marion	50131	2103	FDOT	1FDDE4FN9MDC14260	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/1/2021	\$83,010	90	2028	120,411	30,103
Marion	50132	2104	FDOT	1FDDE4FN0MDC14261	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/1/2021	\$83,010	90	2028	97,861	24,465
Marion	50124	2105	FDOT	1FDDE4FN2MDC14262	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	12/1/2020	\$83,010	90	2028	116,248	29,062
Marion	50147	2106	FDOT	1FDDE4FN8MDC21801	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5311	5/7/2021	\$83,010	90	2028	83,461	20,865
Marion	50149	2107	FDOT	1FDDE4FN9MDC20401	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5311	4/8/2021	\$83,010	90	2028	82,851	20,713
Marion	50148	2108	FDOT	1FDDE4FN3MDC02752	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5311	5/7/2021	\$83,010	90	2028	83,509	20,877
Marion	50153	2109	FDOT	1FDDE4FN1MDC02748	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5311	5/28/2021	\$83,010	90	2028	106,974	26,744
Marion	50146	2110	FDOT	1FDDE4FN0MDC20402	2021/Ford E-450	Goshen	23	12	3	4	Lift	Daily Use	Excellent	In-house	2021; Sec. 5311	5/7/2021	\$83,010	90	2028	80,736	20,184
Marion	50139	2111	FDOT	1FDDE4FN4MDC20452	2021/Ford E-450	Goshen	25	14	2	2	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/25/2021	\$90,799	90	2028	86,741	21,685
Marion	50142	2112	FDOT	1FDDE4FN6MDC20453	2021/Ford E-450	Goshen	25	14	2	2	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	4/8/2021	\$90,799	90	2028	125,279	31,320
Marion	50211	2501	FDOT	1FDDE4FNXSD02263	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	11/4/2024	\$148,506	90	2034	8,316	8,316
Marion	50207	2502	FDOT	1FDDE4FN5SDD02445	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	11/25/2024	\$148,506	90	2034	11,436	11,436
Marion	50206	2503	FDOT	1FDDE4FN9SDD02383	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	10/29/2024	\$148,506	90	2034	13,512	13,512
Marion	50210	2504	FDOT	1FDDE4FN3SDD03190	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	11/4/2024	\$148,506	90	2034	10,841	10,841
Marion	50212	2505	FDOT	1FDDE4FN3SDD03173	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	11/4/2024	\$148,506	90	2034	15,107	15,107
Marion	50233	2506	FDOT	1FDDE4FN8SDD25623	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/28/2025	\$148,506	90	2034	1,929	1,929
Marion	50225	2507	FDOT	1FDDE4FN7SDD25631	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/10/2025	\$148,506	90	2034	6,726	6,726
Marion	50227	2508	FDOT	1FDDE4FN4SDD25778	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/12/2025	\$148,506	90	2034	4,010	4,010
Marion	50228	2509	FDOT	1FDDE4FN2SDD25567	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/25/2025	\$148,506	90	2034	1,777	1,777
Marion	50232	2510	FDOT	1FDDE4FN0SDD25650	2025/Ford E-450	Turtle Top	23	12	3	3	Lift	Daily Use	Excellent	In-house	2021; Sec. 5310	3/28/2025	\$148,506	90	2034	2,723	2,723

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 20th 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

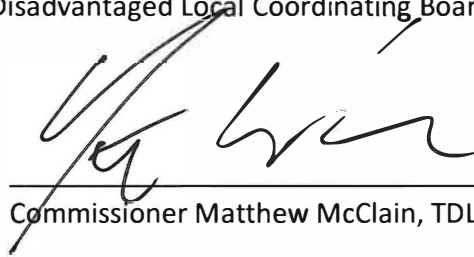
The Transportation Disadvantaged Local Coordinating Board Grievance Procedures may be amended by a two-thirds (2/3) vote of members present, if a quorum exists, and all Members have been notified of proposed changes at least seven (7) working days in advance of the meeting.

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 1st. Complaint: _____ Date of 1st. Resolution: _____

Action Taken (including date of letter): _____

APPEAL = COMPLAINT TO THE TDLCB GRIEVANCE SUBCOMMITTEE – STEP 2

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

Date of Subcommittee Hearing: _____

Action Taken (including date of letter): _____

APPEAL = COMPLAINT TO THE TDLCB – STEP 3

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

Date of TDLCB Hearing: _____

Action Taken (including date of letter): _____

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

Date sent: _____

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

July 22, 2025

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

Re: Marion Senior Services - System Safety Program Plan - Letter of Concurrence (2025)

Dear Mr. Murch:

The Department has completed a review of the Maion Senior Services System Safety Program Plan (SSPP). We find the SSPP to comply with the 2024 FDOT State Management Plan, FDOT Procedural Topic No. 725-030-009-j, and Florida Administrative Code (F.A.C.) Rule Chapter 14-90. Therefore, the Department is in concurrence with the Marion Senior Services SSPP.

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

If you have any questions, please do not hesitate to contact me directly at (321) 319-8173 or e-mail carlos.colon@dot.state.fl.us.

Sincerely,

DocuSigned by:

Carlos Colon

90462CF203F4435...

Carlos Colón, FCCM
Transit Project Coordinator
FDOT District Five

CC/ae

Attachment: SSPP Review Form – Marion Senior Services

Safety and Security Review Checklist



**Florida Department of Transportation District 5
Office of Modal Development**

System Safety and Security Review Checklist

The Department representative(s) and/or contractor/consultant(s) who conducted the review:

Agency Name: Marion Senior Services dba Marion Transit
SSPP Liaison:
Date of Review: March 17, 2025

FDOT representative(s) and/or consultant(s) conducting review:

Name:	James Burke	Title:	Transit Safety Planner
Phone:		Email:	jburke@vhb.com

Secondary reviewer:

Name:	Thee Perry	Title:	Senior Transit Planner
Phone:		Email:	tlperry@vhb.com

Bus System Safety and Security Review

(1) System Safety Program Plan (Section 14-90.004(1), FAC)

FDOT performed a comprehensive review of the contents of the System Safety Program Plan to ensure compliance with Section 14-90.004(1), FAC. The required elements of the SSPP include the following:

1. Safety policies and responsibilities
2. Vehicle and equipment standards and procurement criteria
3. Operational standards and procedures
4. Bus driver and employee selection
5. Driving requirements
6. Bus driver and employee training
7. Vehicle maintenance
8. Investigations of events
9. Hazard identification and resolution
10. Equipment for transporting wheelchairs
11. Safety data acquisition and analysis
12. A wireless communication plan and procedure
13. A policy on the use of a wireless communications device
14. Driver education program
15. Safety standards for private contract bus transit systems that provide continuous or recurring transportation services for compensation as a result of a contractual agreement with the bus transit system.

At a minimum, the SSPP appropriately addresses the following safety elements and requirements	Yes/No	Location of Element(s)
Approved System Safety Program Plan (SSPP) ☐ State Approval Date: Approved By:	Yes	Page 1-1. Approval date 11/13/2024.
Organizational chart	Yes	Page 5-1
Safety polices and responsibilities	Yes	Page 5-4
Vehicle and equipment standards and procurement criteria	Yes	Page 16-1
Operational standards and procedure	Yes	Page 15-1
Bus driver selection policies and procedures	Yes	Page 6-1

 Bus System Safety and Security Review

At a minimum, the SSPP appropriately addresses the following safety elements and requirements	Yes/No	Location of Element(s)
Driver hours of service policy/procedures (driving hours and work period's policy)	Yes	Page 15-1 to 15-2
Background check policy/procedures (level)	Yes	Page 6-1
Bus driver and employee training policies, procedures, and manuals (include list of courses and syllabuses)	Yes	Page 7-1
Copy of initial and refresher course syllabuses	Yes	Page 7-2 to 7-3
Vehicle maintenance	Yes	Page 10-1 to 10-4; Appendix C & D
Copy of accident/event investigation policies and procedures	Yes	Page 13-1, 13-2
Hazard identification and resolution	Yes	Page 12-1 to 12-2
License and MEC policy	Yes	Page 14-1
Safety data acquisition and analysis	Yes	Page 11-1
SSPP requirements for contractors	Yes	Page 5-4
Records retention	Yes	Page 8-1
Certification requirements	Yes	Page 18-1
Requirements for safety inspections of all operable transit buses at least annually	Yes	Page 10-2 to 10-4 Every 6,000 miles
Wireless communications plan (WCP) requirements	Yes	Page 15-3 to 15-4
SSPP flow-down requirements to subcontractors	Yes	Page 5-4 to 5-5

(2) Develop and Adopt Security Program Plan (Rule 14-90.004(2), FAC)

 Bus System Safety and Security Review

(3) Wireless Communication Plan (WCP) (Section 14-90.004(1)(a)12, FAC)

At a minimum, the WCP appropriately addresses the following safety elements and requirements	Yes/No	Location of Element(s)
Prohibits the use of a personal wireless communications device while the transit vehicle is in motion	Yes	Page 15-3
Plan requires that all personal wireless communications devices be turned off, with any earpieces removed from the operator's ear while occupying the driver's seat	Yes	Page 15-3
Contains a policy on the use of a wireless communications device issued to the operator by the transit system	Yes	Page 15-4
Has guidelines developed for the use of a wireless communications device in emergency situations (example: medical emergencies, family emergencies, and/or when regular issued equipment is inoperable during the emergency)	Yes	Page 15-3
Has a policy or procedure that, guarantees the use of a wireless communications device will not interfere the operator's safety related duties	Yes	Page 15-4
Has a wireless communications driver educational training program	Yes	Page 15-3 to 15-4
The driver educational program address's the proper use of a wireless communications device issued by the transit system	Yes	Page 15-3 to 15-4
The driver educational program addresses hazards (accidents/incidents) associated with the use of a wireless communications device	Yes	Page 15-3 to 15-4

Bus System Safety and Security Review

(4) Qualification, Selection and Training of Drivers (*Section 14-90.004(3), FAC*)

These requirements are summarized below and discussed in the subsequent section.

The bus transit system has established the following criteria for the selection and qualification of all drivers	Yes/ No	Location of Element(s)
Standards for driver qualifications and criteria for background checks	Yes	Page 6-1 to 6-2
Driver and criminal background checks for all new drivers	Yes	Page 6-1 to 6-2
Verification and documentation of valid driver licenses for employees who drive buses	Yes	Page 6-1 to 6-2
The bus transit system has a driver training program that provides explicit instructional and procedural training and testing in the following areas:		
Bus transit system safety and operational policies and procedures	Yes	Page 15-1
Operational bus and equipment inspections	Yes	Page 10-1 to 10-4
Bus equipment familiarization	Yes	Page 7-1
Basic operations and maneuvering	Yes	Page 7-1
Specific instructions to the bus driver on how to safely approach and depart from a transit bus stop to avoid contact with pedestrians and other hazards	Yes	Page 7-1
Boarding and alighting passengers	Yes	Page 16-2
Operations of wheelchair lifts and other special equipment	Yes	Page 16-2
Defensive driving	Yes	Page 7-1
Passenger assistance and securement	Yes	Page 7-1
Handling of emergencies and security threats	Yes	Page 7-1
Security & threat awareness	Yes	Page 7-1 to 7-3
Driving conditions	Yes	Page 7-1

Bus System Safety and Security Review

(5) Operational and Safety Procedures (*Section 14.90.004(3)(e), FAC*)

The specific location of these required elements are provided in the following table.

Bus transit system provides the following written operational and safety procedures	Yes/No	Location of Element(s)
Communication & handling of hazards, unsafe conditions, security threats, and emergencies.	Yes	Page 6-1
Familiarization and operation of safety and emergency equipment, wheelchair lift equipment and restraining devices.	Yes	Page 6-1
Agency must adopt a safety policy that contains emergency evacuation procedures which specifically address wheelchair evacuation for vehicles with more than three (3) wheelchair positions	No	Did not see an evacuation procedure that specifies more than 3 wheelchair positions.
Agency must conduct a hazard analysis to assess the level of risk the seating capacity and configuration could pose if a vehicle needed to be evacuated in an emergency situation for vehicles with more than three (3) wheelchair positions	No	
Application and compliance with all applicable federal and state laws, rules, and regulations.	Yes	Page 6-1 and 8-1
Requirements for drivers to complete and submit a daily inspections report. (Rule 14-90.006, F.A.C.)	Yes	Page 15-2
A requirement for buses to be operated at all times in compliance with applicable traffic regulations, ordinances, and laws of the jurisdiction in which they are being operated	Yes	Page 15-1

Bus System Safety and Security Review

(6) Records Maintenance, Retention and Distribution (Section 14-90.004(3), FAC)

Records of bus driver background checks and qualifications, driver training, driver duty status (including total days worked and reporting on/off duty times) are maintained in with Section 14-90.004(3)(g), FAC, as summarized in the table below.

The bus transit system maintains the following records for at least four years	Yes/No	Location of Element(s)
Driver Records Rule 14-90.004(3)(g), FAC		
Policy for records of bus drivers background checks and qualifications	Yes	Page 8-1
Detailed description of training administered & completed by each driver	Yes	Page 8-1
Policy that identifies how each bus driver's daily duty status: total days worked, on-duty hours, driving hours and time reporting on and off duty	Yes	Page 8-1
Event and Incident Reporting and Investigation Records Rule 14-90.004(7), F.A.C.		
Policy for notification and investigation reports, findings, causal factors, corrective action plans, supporting documents	Yes	Page 8-1
Medical Records Rule 14-90.0041(4), F.A.C.		
Process to maintain the required proof of biennial, pre-employment, and any follow-up medical exams of employee bus drivers	Yes	Page 8-1
SSPP & SPP Review and Revision Rule 14-90.010(d), F.A.C.		
A statement that reviews of the SSPP and SPP have been conducted to ensure they are up-to-date	Yes	Page 1-1

Bus System Safety and Security Review

(9) Event Investigation (*Section 14-90.004(5), FAC*)

Compliance with event investigation requirements consistent with Section 14-90.004(5), F.A.C.

A summary of this segment is provided in the table below.

Bus transit systems address investigation of events as follows	Yes/No	Location of Element(s)
Bus transit system has written investigation policy or procedure(s) for any event involving a bus or taking place on the bus transit system	Yes	Page 13-1
Investigation is conducted for a fatality or where an individual is confirmed dead within 30 days of a bus transit event	Yes	Page 13-1
Investigation is conducted for injuries involving medical attention away from the scene for two or more individual	Yes	Page 13-1
Investigation is conducted for property damage over \$1,000 to transit system buses, non-bus transit system vehicles, other bus system property or facilities, or any other property	Yes	Page 13-1
Investigation is conducted for evacuation of bus due to life safety event, where there is imminent danger to the passengers	Yes	Page 13-1
Events are investigated and documented in a final report that includes a description of the investigation activities, identified causal factors and any identified corrective actions	Yes	Page 13-1
Are there established guidelines, procedures, or formal training to determine preventability	Yes	Page 13-1
Corrective action plans are developed by the bus transit system that will identify planned actions and schedule for implementation	Yes	Page 13-1

Bus System Safety and Security Review

Bus transit systems address investigation of events as follows	Yes/No	Location of Element(s)
Does agency monitor and tracks the implementation and completion of each corrective action	Yes	Page 13-1
Does the agency have a follow-up procedure in place to ensure that the corrective action is working?	Yes	Page 13-1
Does the agency have a method in place to review accidents/incidents?	Yes	Page 13-1
Is there an accident/incident review committee, how often does it meet?	No	
Does the committee determine whether the accident/incident was an organizational issue?	N/A	
How does the agency determine if accident is an organizational issue, does agency document and address this issue?	Yes	Page 13-1
Does the agency conduct annual/periodic safety and hazard analysis of data?	Yes	Page 12-1

(10) Medical Examinations for Bus Transit System Drivers (Section 14-90.0041, FAC)

The requirements for medical examinations for bus transit system drivers is provided in Section 14-90.0041, FAC. This section includes:

14-90.0041 Medical Examinations for Bus Transit System Drivers.

(1) Bus transit systems shall establish medical examination requirements for all applicants to driver positions and for existing drivers. The medical examination requirements shall include a pre-employment examination for applicants, an examination at least once every two years for existing drivers, and a return to duty examination for any driver prior to returning to duty after having been off duty for 30 or more days due to an illness, medical condition, or injury.

(2) Medical examinations shall be performed and recorded according to qualification standards adopted by the bus transit system, provided the medical examination qualification standards adopted by the bus transit system meet or exceed those provided in Department Form Number 725-030-11, Medical Examination Report for Bus Transit System Driver, Rev. 05/09, hereby incorporated by reference.

(3) Medical examinations shall be performed by a Doctor of Medicine or Osteopathy, Physician Assistant, or Advanced Registered Nurse Practitioner licensed or certified by the State of Florida. If medical examinations

Bus System Safety and Security Review

are performed by a Physician Assistant or Advanced Registered Nurse Practitioner, they must be performed under the supervision or review of a Doctor of Medicine or Osteopathy. . .

(4) Bus transit systems shall have on file a completed and signed medical examination certificate or a signed letter from the medical examiner attesting to the completion of a medical examination for each bus driver, dated within the past 24 months

Bus transit system has established the following medical examination requirements for all applicants to driver positions and for existing drivers	Yes/No	Location of Element(s)
Medical examination requirements are established using Form Number 725-030-011, effective 05/09, or an equivalent form that meets or exceeds standards	Yes	Page 14-1
Medical examinations are completed for new drivers	Yes	Page 14-1
Bus transit system has a policy for maintaining on file a completed and signed medical examination certificate (signed by medical examiner and driver) for each bus driver, dated within the past 24 months	Yes	Page 14-1
A return to duty examination is completed for any driver prior to returning to duty after having been off duty for 30 or more days due to an illness, medical condition or injury	Yes	Page 14-1

(11) Operating and Driving Requirements (*Section 14-90.006, FAC*)

Bus transit system has established the following medical examination requirements for all applicants to driver positions and for existing drivers	Yes/No	Location of Element(s)
A requirement for buses to be operated at all times in compliance with applicable traffic regulations, ordinances, and laws of the jurisdiction in which they are being operated	Yes	Page 15-1

 Bus System Safety and Security Review

Bus transit system has established the following medical examination requirements for all applicants to driver positions and for existing drivers	Yes/No	Location of Element(s)
A procedure for a bus transit system driver to report the suspension or revocation of a license to operate a motor vehicle immediately or no later than the end of the business day following the day he or she received the notice	Yes	Page 15-1
A process for tracking and monitoring on duty and driving hours compliant with the driving and on-duty hours standards of Rule 14-90.006, F.A.C.	Yes	Page 15-1
A driver that has been required to drive for 12 hours in a 24-hour period or a driver that has been on duty for 16 hours in a 24-hour period has had 8 hours off duty prior to returning to duty	Yes	Page 15-2
A driver that has been on duty for 72 hours in any period of seven consecutive days has had 24 consecutive hours off duty prior to returning to duty	Yes	Page 15-2
Pre-operational or daily inspections and reporting are required for drivers to identify defects and deficiencies	Yes	Page 15-2
A process or procedure exists to address and resolve deficiencies and record corrective actions for inspection findings	Yes	Page 15-2
Inspections address the following parts and devices to ascertain that they are in safe condition and good working order: service brakes, parking brakes, tire and wheels, steering, horn, lighting devices, windshield wipers, rear mirrors, passenger doors, exhaust system, equipment for transporting wheelchairs, and safety, security, and emergency equipment	Yes	Page 10-1 and 15-2

 Bus System Safety and Security Review

Bus transit system has established the following medical examination requirements for all applicants to driver positions and for existing drivers	Yes/No	Location of Element(s)
Requirement that a bus with any passenger door in the open position shall not be operated with passengers aboard	Yes	Page 15-2
During darkness, interior lighting and lighting in stepwells on buses shall be sufficient for passengers to enter and exit safely	Yes	Page 15-2
Prohibition against passengers occupying the stepwell or any area forward of the standee line while the bus is in motion	Yes	Page 15-2
Prohibitions for fueling buses in closed building or refueling while passengers are on-board	Yes	Page 15-2
Requirement for the driver to be properly secured to the driver's seat with a restraining belt at all times while the bus is in motion	Yes	Page 15-2
Requirement that buses shall not be left unattended with passengers aboard for longer than 15 minutes	Yes	Page 15-3
Requirement that buses shall not to be left unattended in an unsafe condition with passengers aboard at any time	Yes	Page 15-3

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



Community Transportation Coordinator Annual Evaluation Certification

CERTIFICATION

The undersigned hereby certifies that he/she is the Chairperson of the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board and that the foregoing is a full, true and correct copy of the Community Transportation Coordinator Annual Evaluation of this Local Coordinating Board as adopted by the Ocala Marion TPO Transportation Disadvantaged Local Coordinating Board on the 6th day of March, 2025.

Commissioner Matt McClain, TDLCB Board Chair

Robert Balmes, TPO Director



March 7, 2025

Mr. Clayton Murch
Marion Transit Services
1101 SW 20th 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

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



March 7, 2025

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

Re: CTC ANNUAL EVALUATION – MARION TRANSIT

Dear Ms. Mitchell:

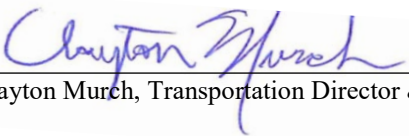
Marion Transit, the current Community Transportation Coordinator (CTC) for Marion County, recently completed a review conducted by the Ocala Marion Transportation Planning Organization (TPO).

We have received the 2025 Performance Evaluation letter. Thank you for taking the time to review our processes. We appreciate the feedback.

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

Thank you,

Sincerely,



Clayton Murch, Transportation Director & CTC

APPENDIX F: FCTD RATE MODEL CALCULATION SPREADSHEETS

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 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

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						
Bus Pass Program Revenue						

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						
Bus Pass Program Revenue						

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)						
Bus Pass Program Revenue						

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)						
Bus Pass Program Revenue						

AHCA

Medicaid						
Other AHCA (specify in explanation)						
Bus Pass Program Revenue						

DCF

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

DOH

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

DOE (state)

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

AWI

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

DOEA

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

DCA

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

Comprehensive Budget Worksheet

Version 1.4

CTC: Marion Senior Services, Inc.
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
	2025
	to
	Dec 31st of
	2025
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	\$ -
Bus Pass Program Revenue	\$ -

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	\$ -
Bus Pass Program Revenue	\$ -

CTD

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

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	\$ -
Bus Pass Program Revenue	\$ -

AHCA

Medicaid	\$ -
Other AHCA	\$ -
Bus Pass Program Revenue	\$ -

DCF

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

DOH

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

DOE (state)

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

AWI

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

DOEA

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

DCA

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

\$ 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)	
\$ -	\$ 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 = 1,075,000

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
☒ Yes ☐ No	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ 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
☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ 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
☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ 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).....
..... And what is the projected total number of Group Vehicle Revenue Miles? Loading Rate
0.00 to 1.00

Do NOT
Complete
Section IV

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	
		Leave Blank	Leave Blank	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) = 1,075,000 = + + +				
Rate per Passenger Mile = \$2.77 \$4.75 \$0.00 \$0.00 \$0.00				
per passenger per group				
		Leave Blank	Leave Blank	
Projected Passenger Trips (excluding totally contracted services addressed in Section II) = 82,000 = \$2,600 + 29,400 + +				
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	
		Leave Blank	Leave Blank	
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) = \$0.00				
Rate per Passenger Mile for Balance = \$2.77 \$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 Services
County: Marion

Program These Rates Into Your Medicaid Encounter Data

APPENDIX G: ADVERSE INCIDENTS

Inserted

UNUSUAL INCIDENTS INVOLVING CLIENTS

1.0 Purpose

1.1. This document spells out proper procedures for any unusual incidents involving a client in the custody of Marion Transit. Since the majority of our customers/clients have some type of disability, we must take special precautions and ensure that drivers are familiar with how to respond to various incidents that may occur. **Note:** *This policy and documentation is intended for incidents that are not a result of a traffic accident which has its own reporting procedure/policy.*

2.0 Roles and Responsibilities

2.1 Supervisors - responsible for ensuring that incidents are reviewed and measures are taken to prevent similar incidents from occurring again. Ensuring that medical personnel have been notified by the driver and/or dispatcher. Notifying the Transportation Director and/or Executive Director for any serious injuries.

2.2 Drivers – responsible for assisting the clients to prevent further unnecessary injuries or accidents from occurring. This includes our policy of assisting the client from door to door during transportation services. Immediately notify dispatch of any unusual incident followed up by notifying the duty supervisor. Provide comfort and/or assistance to mitigate further injuries to the client until relieved by medical personnel. Complete all necessary documentation of the incident utilizing the Client Incident Report.

3.0 Procedures

3.1 For incidents where the client may be injured, 911 should be notified. Comfort or first aid depending on the situation and driver training should be considered until medical personnel arrive. Note: Clients may refuse medical attention, however, this must be documented.

3.2 Drivers will complete the “Client Incident Report” and submit it to your respective supervisor by the end of shift and ensure the client agrees with the report and signs it if able. If not note why.

3.3 Supervisors will review the incident and based on the review drivers may be subject to having a performance improvement plan initiated for not addressing deficiencies that may have mitigated the incident.

3.4 Reports will be kept on file per SSPP Records Management retention plan.

COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

RECEIVING AND INVESTIGATING REPORTS OF ADVERSE INCIDENTS RELATED TO PARATRANSIT SERVICES PROVIDED TO PERSONS WITH DISABILITIES MODEL PROCEDURES

INTRODUCTION

Section 427.021, Florida Statutes, directs the Commission for the Transportation Disadvantaged (CTD) to establish “model procedures” for local governments and transportation service providers to receive and investigate reports related to adverse incidents that occur during the provision of paratransit services. This document provides a model to assist local governments and their contracted transportation service providers in developing and implementing procedures within their own paratransit operations.

STATUTORY LANGUAGE

Chapter 2024-171, Laws of Florida, creates Section 427.021, Florida Statutes, which provides:

- (1) For purposes of this section, the term “transportation service provider” means an organization or entity that contracts with a local government to provide paratransit services to persons with disabilities. This term does not apply to the department.¹
- (2) The Commission for the Transportation Disadvantaged shall establish model procedures for transportation service providers to receive and investigate reports related to adverse incidents during the provision of services to persons with disabilities. The procedures must include a periodic review of ongoing investigations and documentation of final outcomes thereof. At a minimum, the investigation of an adverse incident must commence within 48 hours after receipt of the report.
- (3) Reports of adverse incidents received by the local government or the transportation service provider shall be submitted on a quarterly basis to the Commission for the Transportation Disadvantaged.

Section 427.011(9), Florida Statutes, defines “paratransit” as “those elements of public transit which provide service between specific origins and destinations selected by the individual user with such service being provided at a time that is agreed upon by the user and provider of the service. Paratransit service is provided by taxis, limousines, ‘dial-a-ride,’ buses, and other demand-responsive operations that are characterized by their nonscheduled, nonfixed route nature.”

¹ “Department” refers to the Florida Department of Transportation

PROCEDURES GUIDANCE

Pursuant to s. 427.021, F.S., each transportation service provider (henceforth referred to as “provider”) should develop and implement procedures regarding the receipt and investigation of adverse incidents that occur during the provision of paratransit services to persons with disabilities. The procedures should:

1. Describe the reporting mechanisms the public can utilize to report adverse incidents to the provider.
2. Describe the process used by the provider to monitor those reporting mechanisms for incoming reports. The provider should ensure that reporting mechanisms are monitored regularly to allow the provider to begin an investigation of an adverse incident as soon as possible.
3. Describe how the reporting mechanism is promoted to the public, including, at a minimum, to be displayed on the provider’s website and displayed on vehicles.
4. Describe the provider’s expectations of personnel (i.e., drivers, operators, leadership, etc.) when a report of an adverse incident is received, including documenting and internally sharing the report.
5. Identify how the provider trains its personnel to receive, document, share, investigate, and follow-up on reports of adverse incidents. The provider should document the content of the training, who receives the training and when, and maintain that documentation for a set period of time. The provider should assess the need for periodic refresher training.
6. Identify how a provider stores documentation related to reports, including the assigning of a tracking number for each report of an adverse incident and the retention period of documentation.
7. Identify the provider’s personnel (such as an “Adverse Incident Manager”) responsible for investigating reports of adverse incidents, documenting the investigation, reviewing the investigation, closing the investigation, and transmitting the reports to the CTD on a quarterly basis.
8. Include a statement that an investigation must commence within 48 hours of receipt of the report and include a requirement that the provider periodically review ongoing investigations.
9. Include a policy that requires the provider to review any available video, recordings, or photographs to establish facts surrounding a reported adverse incident.

10. Require the identification of causal and contributing factors that led to an adverse incident. Causal and contributing factors should be documented in the investigation report.
11. Require that the provider identify, and document mitigations taken to eliminate factors that contributed or caused an adverse incident.
12. Require that the provider document actions taken by the provider's personnel during and after the adverse incident.
13. Require the provider document any corrective actions and their timelines that the provider identifies in response to an adverse incident.

REQUIRED QUARTERLY REPORTING:

The provider must compile documentation and summarize information for each reported adverse incident and complete the Commission for the Transportation Disadvantaged Adverse Incident Report form (attached). Exclude names and personal information, providing only information regarding the incident and any following action as needed. An Adverse Incident Report must be submitted for each qualifying incident.

Adverse Incident Report forms must be submitted to the CTD no later than the last day of the month following the end of the quarter. The first report due is for the quarter of January 1 through March 31, 2025, which must be submitted to the CTD no later than April 30, 2025. Reports should be emailed to: FLCTDAdverseIncidentReport@dot.state.fl.us

+++ END +++

COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

**ADVERSE INCIDENT REPORT FORM
RELATED TO PARATRANSIT SERVICES PROVIDED TO PERSONS WITH DISABILITIES**

This form must be completed by a transportation service provider upon receipt of a report of an adverse incident. The form must be submitted to the Commission for the Transportation Disadvantaged for each incident no later than the last day of the month following the end of the quarter, beginning January 1, 2025. Reports should be emailed to: FLCTDAdverseIncidentReport@dot.state.fl.us.

REPORT STATUS:

☐ Preliminary Report	☐ Under Investigation	☐ Investigation Closed
---	--	---

TRANSPORTATION SERVICE PROVIDER INFORMATION:

Organization Name:	
Local Government Name: (Contracting for Paratransit Services)	
Name of Person Completing Report:	
Phone Number:	
Email Address:	
Date of Report:	

DESCRIPTION OF ADVERSE INCIDENT:

Who, what, when, where, how, injury(ies). Exclude names and personal information, providing only information regarding the incident.

FOLLOWUP ACTIONS:

Briefly describe follow-up measures taken, including mitigation or corrective actions. At a minimum, this description must include a summary of investigation activities taken by the transportation service provider.

12/11/2024

Unusual Client Incidents | Marion Transit

Rev. 12/2024

MARIONTRANSIT
A Division of Marion Senior Services
CLIENT INCIDENT REPORT

Incidents are defined something that occurs where a client is potentially injured. They are to be reported to a supervisor immediately via radio or phone call. The Incident Report should be completed and submitted by the end of shift by the employee.

Date/Time: _____ Occurrence Address: _____

Incident location: _____

Subject Name: _____ DOB: _____ Phone#: _____

Address: _____ City: _____ State: _____ Zip: _____

Synopsis of incident: _____

(Use additional sheets if more information is needed to explain incident)

What was done with ill or injured client: _____

Was 911 called to respond? Yes or No (reason): _____
(circle)

Hospital if transported: _____

Notifications (if any): Name / Phone #: _____

Relationship: Family - Friend - Other: _____
(circle one)

Name, address, phone # of witnesses/passenger's present: _____

Subject Signature: _____ Date: _____

Subject refused treatment (initial): _____
(Have subject initial only if they refused treatment)

Employee Signature: _____ Date/Time: _____

Supervisor Signature: _____ Date/Time: _____

Director Signature: _____ Date/Time: _____

MARIONTRANSIT
A Division of Marion Senior Services
CLIENT INCIDENT REPORT

Subject Name: _____ DOB: _____

Describe any injuries, where and how they occurred: _____

