

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED
LOCAL COORDINATING BOARD (LCB)
REGULAR MEETING

CHARLOTTE COUNTY – PUNTA GORDA
METROPOLITAN PLANNING ORGANIZATION
Tel: (941) 883-3535

AGENDA

10:00 A.M., Thursday, May 4, 2023

Charlotte County Transit Facility

545 Theresa Blvd

Port Charlotte, Florida 33954

(also available online via TEAMS - *(Please see the next page for details)*)

1. Call to Order & Roll Call
2. Pledge of Allegiance
3. Public Comments on Agenda Items
4. Consent Agenda:
 - A. [Approval of Minutes: January 5, 2023 LCB Public Meeting Minutes](#)
 - B. [Approval of Minutes: January 5, 2023 Regular LCB Meeting Minutes](#)
 - C. [Florida Commission for the Transportation Disadvantaged \(CTD\) Annual Planning Grant to the MPO](#)
5. [Transportation Disadvantaged Trust Fund \(TDTF\) Trip and Equipment Grant](#)
6. [FY 2021/2022-FY 2025/2026 Transportation Disadvantaged Service Plan/Coordinated Public Transit-Human Services Transportation Plan \(TDSP/CPT-HSTP\) Annual Update Including Rate Model Calculations](#)
7. [2023 CTC Evaluation](#)
8. [Community Transportation Coordinator Quarterly Reports for October-December 2022 and January-March 2023](#)
9. [Section 5311 Grant Application Update](#)
10. Public Comments
11. Staff Comments
12. Member Comments
13. Adjournment (NEXT MEETING – SEPTEMBER 7, 2023)

**Please let us know if you or your alternate cannot attend. If participating, please let us know if it will be in person or virtual. Thank you!*

No stenographic record by a certified court reporter is made of these meetings. Accordingly, anyone seeking to appeal any decisions involving the matters herein will be responsible for making a verbatim record of the meeting/testimony and evidence upon which any appeal is to be based. (F.S. 286.0105)

IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT AND CHAPTER 286.26 FLORIDA STATUTES, PERSONS NEEDING SPECIAL ACCOMMODATIONS TO PARTICIPATE IN THIS PROCEEDING SHOULD CONTACT THE CHARLOTTE COUNTY-PUNTA GORDA METROPOLITAN PLANNING ORGANIZATION AT LEAST FORTY-EIGHT (48) HOURS PRIOR TO THE MEETING. CALL (941) 883-3535 BETWEEN 8:00 A.M. AND 4:00 P.M., MONDAY THROUGH FRIDAY.

The MPO's planning process is conducted in accordance with Title VI of the Civil Rights Act of 1964 and related statutes. Any person or beneficiary who believes he or she has been discriminated against because of race, color, religion, sex, age, national origin, disability, or familial status may file a complaint with the Charlotte County-Punta Gorda MPO Title VI Coordinator Wendy W. Scott at (941) 883-3535 or by writing her at the address below.

CHARLOTTE COUNTY-PUNTA GORDA METROPOLITAN PLANNING ORGANIZATION

Charlotte County Administration Center, 18500 Murdock Circle, Port Charlotte, FL 33948
Telephone: (941) 883-3535

The Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) will hold a quarterly meeting on May 4, 2023 in person (with virtual participation also available). Please contact the MPO staff to obtain TEAMS log-in information. Persons wishing to provide public comment still will be allowed to do so by alternative means, should they so desire. Written comments may be submitted by either emailing the comments to office@ccmpo.com or mailing the comments to MPO LCB Staff, 18500 Murdock Circle, Port Charlotte, Florida, 33948. Comments must be received for the meeting by noon, May 3, 2023. The comments will be read by an MPO staff member during the meeting for that item to be placed in the record. More information regarding the LCB Agenda is available on the MPO website at www.ccmpo.com.

MAY 4, 2023
LCB MEETING

CONSENT AGENDA ITEMS #4

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 4-A
APPROVAL OF MINUTES: JANUARY 5, 2023 LCB PUBLIC MEETING

Purpose: To review and approve the Minutes of the LCB Public Meeting.

Agenda Item Presented by: MPO Staff

Discussion: To Be Determined

Recommendation: Motion to approve the Minutes of the LCB Public Meeting

Attachment: [Minutes of the January 5, 2023 Annual Public Meeting](#)

**CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED
LOCAL COORDINATING BOARD (LCB) PUBLIC MEETING**

Minutes of a Public Meeting held in a hybrid format on January 5, 2023 at 10:00 a.m. utilizing Microsoft TEAMS remotely and in-person at the Transit Facility, 545 Theresa Blvd. in Port Charlotte, FL 33954. The Regular LCB Meeting was held immediately following the Public Meeting.

MEMBERS PRESENT IN-PERSON

Commissioner Ken Doherty, *Charlotte County Commissioner (LCB Chair)*
Tony Conte, *Public Education-School Transportation*
Donna Fain, *Agency for People with Disabilities*
Angela Hemstreet, *Goodwill, Children-at-Risk Representative*
Jocene Henderson, *Veterans Affairs*
Carmen Henry, *Regional Workforce Development*
Candice Monroy, *FDOT, District One Modal Development Office*
M. Suzanne Roberts, *Virginia B. Andes Volunteer Community Clinic (Medical Community Representative)*
Duane Siegfried, *Representative for Elderly Interests*
Michael Stahler, *Agency for Health Care Administration (AHCA), alternate*

MEMBERS PRESENT REMOTELY

Leigh Ann Bellamy, *Division of Blind Services*
Dottie Fulton, *Citizen Advocate-User*
Tabitha Larrauri, *Department of Children & Families*
Maricela Morado, *Area Agency on Aging-Florida Department of Elder Affairs*
Joseph Sabatino, *Citizen Advocate*

ABSENT MEMBERS

Vacant, *Disabled Representative*
Vacant, *Economically Disadvantaged Representative*
Ryan Lybeck, *Local Private-for-Profit Transportation Industry Representative*

STAFF PRESENT IN-PERSON

Wendy Scott, *MPO Planner*
Betty-Ann Sherer, *MPO Planner*
Rick Kolar, *Charlotte County Transit Operations Manager (CTC)*
Heidi Maddox, *Charlotte County Transit*

OTHERS IN ATTENDANCE IN-PERSON

Richard Weingarten, *Citizen*

OTHERS IN ATTENDANCE REMOTELY

Anne Tien, Charlotte County Fiscal

1. Call to Order & Roll Call

Chair Ken Doherty called the Public Meeting to order at 10:00 am, prior to the regular quarterly LCB Meeting. Wendy Scott reviewed the LCB hybrid meeting protocol. Betty-Ann Sherer provided an onscreen view of the agenda throughout the meeting. The roll call was taken.

2. Welcome to the Public

Chair Doherty conducted the annual Public Meeting in compliance with the requirements of the Florida Commission for the Transportation Disadvantaged (CTD).

Chair Doherty called for public comment. The citizen present did not wish to speak at that time.

3. Purpose of the Transportation Disadvantaged (TD) Program including the Transportation Disadvantaged Service Plan (TDSP) – CTD brochure

Wendy Scott gave a general overview of the Transportation Disadvantaged (TD) Program utilizing the Florida Commission for the Transportation Disadvantaged (CTD) brochure entitled *Need a Ride?* In particular, she reviewed the five (5) key elements listed in the brochure. She also noted the CTD Ombudsman Line. Ms. Scott encouraged participation in the TD Voluntary Dollar Program, available when annual vehicle registration renewals are paid either online or via mail. She commented that the numbers were variable each year.

Wendy Scott stated that more detailed information on the TD program would be provided to members during Agenda Item 6 - Overview of the LCB Process (Annual Training) at the regular quarterly LCB meeting which would begin immediately following the LCB Public Meeting. All were welcome to attend.

4. Public Comment Period on TD Program or TDSP

No member of the public wished to comment.

5. Adjourn

Chair Doherty adjourned the Public Meeting at 10:07 a.m. and proceeded to the regular quarterly Charlotte Local Coordinating Board Meeting.

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 4-B
APPROVAL OF MINUTES: JANUARY 5, 2023 REGULAR LCB MEETING

Purpose: To review and approve the Minutes of the previous LCB Meeting.

Agenda Item Presented by: MPO Staff

Discussion: To Be Determined

Recommendation: Motion to approve the Minutes of the January 5, 2023 LCB Meeting

Attachment: [Minutes of the January 5, 2023 LCB Meeting](#)

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED
LOCAL COORDINATING BOARD (LCB)
REGULAR MEETING
JANUARY 5, 2023

Minutes of a regular meeting held in a hybrid format on January 5, 2023 utilizing TEAMS remotely and in-person at the Transit Facility, 545 Theresa Blvd. in Port Charlotte, FL 33954. The Regular LCB Meeting was held immediately following the Public Meeting.

MEMBERS PRESENT IN-PERSON

Commissioner Ken Doherty, *Charlotte County Commissioner (LCB Chair)*
Tony Conte, *Public Education-School Transportation*
Donna Fain, *Agency for People with Disabilities*
Angela Hemstreet, *Goodwill, Children-at-Risk Representative*
Jocene Henderson, *Veterans Affairs*
Carmen Henry, *Regional Workforce Development*
Candice Monroy, *FDOT, District One Modal Development Office*
M. Suzanne Roberts, *Virginia B. Andes Volunteer Community Clinic (Medical Community Representative)*
Duane Siegfried, *Representative for Elderly Interests*
Michael Stahler, *Agency for Health Care Administration (AHCA), alternate*

MEMBERS PRESENT REMOTELY

Leigh Ann Bellamy, *Division of Blind Services*
Dottie Fulton, *Citizen Advocate-User*
Tabitha Larrauri, *Department of Children & Families*
Maricela Morado, *Area Agency on Aging-Florida Department of Elder Affairs*
Joseph Sabatino, *Citizen Advocate*

ABSENT MEMBERS

Vacant, *Disabled Representative*
Vacant, *Economically Disadvantaged Representative*
Ryan Lybeck, *Local Private-for-Profit Transportation Industry Representative*

STAFF PRESENT IN-PERSON

Wendy Scott, *MPO Planner*
Betty-Ann Sherer, *MPO Planner*
Rick Kolar, *Charlotte County Transit Operations Manager (CTC)*
Heidi Maddox, *Charlotte County Transit*

OTHERS IN ATTENDANCE IN-PERSON

Richard Weingarten, *Citizen*

OTHERS IN ATTENDANCE REMOTELY

Anne Tien, Charlotte County Fiscal

1. Call to Order & Roll Call

LCB Chair Ken Doherty called the regular LCB Meeting to order at 10:08 a.m. An in-person quorum was present.

2. Pledge of Allegiance

The Pledge of Allegiance was recited.

3. Public Comments on Agenda Items

There were no public comments.

4. Consent Agenda Item

A. Approval of Minutes: November 3, 2022 Quarterly LCB Meeting Minutes

Tony Conte made a motion to approve the Consent Agenda. Suzanne Roberts seconded the motion. The Consent Agenda was approved unanimously.

5. Election of the Vice-Chairperson

The LCB Bylaws require the election of a Vice-Chairperson during the first scheduled meeting of the calendar year. The Vice-Chairperson shall be elected by a majority vote of a quorum of the members of the Board present. The chosen LCB Member serves a term of one year starting with the first meeting after the election. The Vice-Chairperson may serve more than one term, and shall, during the absence of the Chair, have and exercise all the duties and powers of the Chair. The Vice-Chairperson shall also perform other such duties as may be assigned by the Chair.

LCB Chair Ken Doherty noted that Alan Skavroneck who had volunteered for many years as LCB Vice-Chairperson would no longer be serving on the LCB. At this point, Wendy Scott began chairing the meeting and asked for nominations for LCB Vice-Chairperson.

Commissioner Doherty nominated Suzanne Roberts in light of her years of experience on the LCB, as LCB Vice-Chairperson, and she consented to the nomination. There were no additional nominations, and Ms. Roberts was approved unanimously as LCB Vice-Chairperson.

Chair Doherty resumed chairing the meeting.

6. Overview of the LCB Process (Annual Training)

As described in the Commission for the Transportation Disadvantaged (CTD) annual planning grant executed with the Charlotte County-Punta Gorda MPO, planning staff members are required to annually “provide technical assistance and training for the local coordinating board.” This is accomplished at the January LCB meeting each year. In past years, staff utilized an instructional PowerPoint presentation. This year, it had been updated with new information and was part of the meeting packet. This year, staff also had developed an instructional video which made its debut at the meeting. The video’s information was derived from the PowerPoint. The video was well received from the LCB Members who requested a link to the presentation so that they could distribute it widely. LCB Members provided applause at the video’s end.

7. Review/Endorsement of Charlotte County’s Section 5310 Grant Applications

Federal transportation legislation includes the FTA Section 5310 (Operating and Capital) funding programs, which are aimed at enhancing mobility for seniors and the disabled. This year, Charlotte County Transit is applying for an operating Section 5310 grant.

Candice Monroy stated that she would be abstaining from voting on this item given her position at the Florida Department of Transportation (FDOT) in the grant review process.

Richard Weingarten inquired if additional narrative should have been included in the Section 5310 grant attachment for LCB Member review. Candice Monroy indicated that FDOT reviews the entire package, but the Application for Federal Assistance SF 424 Form provides a good general overview of the request. She noted that no FDOT review had yet begun on the grant application. When asked, Wendy Scott stated that LCB review was not required prior to action by the Board of County Commissioners (BCC) on the grant application. Commissioner Doherty commented that during his time as Chair in the recent past, these documents had been key to the LCB Members’ review, and the entire package was always available through public records. He recommended contacting MPO staff to obtain copies of all the grant materials if desired.

Tony Conte made a motion to endorse the Section 5310 Grant Applications, and Suzanne Roberts seconded the motion. The motion carried unanimously.

8. Quarterly Report

Given the timing of the holiday period and a very short turnaround time, the CTC Quarterly Report covering the October-December 2022 timeframe was not available for the January 5, 2023, LCB meeting. It will be reviewed along with the January-March 2023 report at the May 4, 2023, LCB meeting.

9. Public Comments

Rich Weingarten stated that the meeting was well done. Chair Doherty appreciated Mr. Weingarten’s attendance.

10. Staff Comments

Wendy Scott gave the following report:

(1) Thanks to everyone for participating in our LCB Meeting today. MPO Staff Members wished to express their gratitude to LCB Chair Doherty and other LCB Members and County staff who assisted with the development of the member training video by providing narration. Wendy Scott praised Betty-Ann Sherer, who managed to assemble the video before/during/after a Category 4 hurricane with an evacuated office. MPO staff has temporary quarters at the Murdock Administration Center Building B Annex, Room 200 (Real Estate Conference Room), but staff is often away at meetings or working remotely. D’Juan Harris and Laks Gurram are currently at other meetings this morning. If wishing to contact an MPO Staff Member, please email or phone, and staff will respond as soon as possible.

(2) There are currently two LCB vacancies: (1) a representative for disabled interests who is a disabled individual, and (2) a representative for the Economically Disadvantaged community (formerly held by Mike Mansfield of Habitat for Humanity).

(3) TD Legislative Day will be held in Tallahassee at the Capitol Building on March 16, 2023. Vehicles and program advocates converge on the Capitol grounds to increase program awareness. This is the same date that a Commission Business Meeting will be held at the nearby Burns Building Auditorium. You or your organizational representatives in the Panhandle area are invited to participate.

(End Staff Comments)

11. Member Comments

Leigh Ann Bellamy expressed her appreciation for the transit service received by her clients so that they could access work and appointments.

Dottie Fulton enjoyed the informative meeting, especially the training video, and wished all a blessed time until the next meeting.

Maricela Morado also enjoyed the training video. She noted that her agency still had incontinence supplies and robotic pets available for seniors. Betty-Ann Sherer commented on how much her mother-in-law was enjoying a robotic dog that she’d received from the organization. It was agreed that Maricela Morado and Joseph Sabatino would coordinate on donations that could be provided to citizens at community food pantry outreach efforts.

Candice Monroy covered the following FDOT topics (per these meeting points):

FDOT - Charlotte County LCB Points

Meeting date 01/05/2023 I Time 10:00 am I Charlotte County Transit Department, 545 Theresa Blvd., Port Charlotte, FL 33954

Topics:

Agenda topic Additional Grant funding Opportunities for (FFY) 21 I State Fiscal Year 2021/2022 and (FFY) 22 I State Fiscal Year 2022/2023

- **FTA Section 5310 and 5311 CRRSAA** (Coronavirus Response and Relief Supplemental Appropriations Act) **and ARP** (American Rescue Plan) **funding** - Programmed in State Fiscal Year 2021/2022 and State Fiscal Year 2022/2023.
- Public Transportation Grant Agreements for FY 21/22 have been executed. Public Transportation Grant Agreements for FY 22/23 are currently being drafted.

Agenda topic Grants for Federal Fiscal Year (FFY) 22 I State Fiscal Year 2022/2023

FTA Section 5310, 5311, and 5339 applications - Due date for applications was December 17, 2021. We received 20 applications. Recommendations letters were sent to all agencies. Public Transportation Grant Agreements will be sent to Agencies between October and March.

Agenda topic Grants for Federal Fiscal Year (FFY) 23 I State Fiscal Year 2023/2024

FTA Section 5310, 5311, and 5339 applications -The due date for applications was Friday, December 16, 2022. An update will be provided once Committee Meetings and recommendations have been made.

Agenda topic Triennial Reviews

Round 2 of the FDOT triennial reviews began in February 2021. We will begin with agencies that receive only FTA Section 5310 funding with the larger agencies to follow. There are currently 30 agencies to review.

The Consultants performing the Triennial Review on behalf of the FDOT are:

- Center Urban Transportation Research (CUTR) - for areas of Safety and Security and Maintenance
- Atkins - for all other review areas.

(End FDOT Report)

Angela Hemstreet described Goodwill facilities post-Ian:

- location in Port Charlotte at US 41 near Midway Blvd. was a total loss and closed now
- location in Englewood had less damage and was open
- location in Port Charlotte at Peachland Blvd. had only minor damage and was open (with many customers from the US 41 store migrating there to shop and donate
- location in Punta Gorda was undamaged and open

She provided handouts to LCB Members for distribution to their contacts regarding Computer Classes/Digital Training being offered at the Goodwill Community Resource Centers in Southwest Florida. The programs were designed to offer participants career navigation and

increased independence as part of Goodwill's Opportunity Accelerator program. They also help seniors acquiring skills needed to access the internet. Angela Hemstreet observed that she was available to transition over to the LCB Economically Disadvantaged representative position if this was an option. Wendy Scott and Betty-Ann Sherer agreed to coordinate her request to transfer positions.

Jocey Henderson thanked Angela Hemstreet for the information cards on Goodwill's digital training opportunities which could greatly benefit the clients of the County's Veterans Services Department. Jocey Henderson stated that she had been actively trying to recruit an LCB disabled representative and transit drivers from her client group.

Carmen Henry stated that CareerSource Southwest Florida had been dealing with Hurricane Ian recovery with the Charlotte office briefly shut due to damage. She noted that her organization had received an emergency grant through the National Dislocated Worker Program. It is designed to place people into temporary fairly long-term positions with costs covered by CareerSource Southwest Florida.

Suzanne Roberts thanked LCB Members for choosing her to be LCB Vice-Chairperson and stated that she was honored and looking forward to a wonderful LCB year. She expressed her pride in the Charlotte County BCC with their approval of the mobile medical bus through partnership with the Virginia B. Andes (VBA) Community Clinic. Charlotte County Transit was also partnering in the effort. It was hoped that the vehicle would be available by the third quarter from a Texas manufacturer. She noted that there had been a great deal of mention of the project in the newspaper and digital editions of the *Charlotte Sun-Herald*. Ms. Roberts also described ongoing hurricane recovery efforts at the VBA Clinic (including roof, air conditioning and generator improvements). She described how the entire medical community had been greatly impacted by Hurricane Ian. She requested that LCB Members refer new patients to the Clinic, which recently had been the recipient of a Gulf Coast Community Foundation grant. She noted that the storm had created some newly economically disadvantaged residents. She also provided members with a handout regarding an upcoming BINGO fundraiser event for the Clinic to be held on Friday, January 13, 2023.

Tony Conte provided a School Board hurricane recovery update. He noted that all shelters were now restored including roofs and interiors. Additionally, Port Charlotte Middle School was back online. All buses had fared well, since he had decided to pull them from the Englewood area prior to Hurricane Ian's impact. However, the Englewood maintenance garage including two lifts had been ruined, so all repairs were now being conducted out of the Punta Gorda facility.

Duane Siegfried expressed interest in working with MPO staff on efforts to coordinate with the elderly community.

LCB Chair Ken Doherty stated that he was looking forward to this year. Although repair and recovery will take a while to put the community back in order, he had observed lots of interesting, new things were happening in the area. As far as economic development, this was evidenced by the number of building permits and new resident arrivals. He was excited and optimistic for the future with some great things coming. LCB Chair Doherty also expressed his

pride in the community with all local governments working together to accomplish needed improvements. He urged all to remain optimistic and try not to get discouraged with the repair process. He felt it was going to be a great year.

12. Adjournment (Next Meeting – May 4, 2023) at the Charlotte County Transit Facility, 545 Theresa Blvd., Port Charlotte, FL 33954)

LCB Chair Ken Doherty stated that the next LCB meeting was scheduled for May 4, 2023 at the Transit Facility located at 545 Theresa Blvd. in Port Charlotte, FL 33954. The meeting was adjourned at 10:58 a.m.

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 4-C

FLORIDA COMMISSION FOR THE TRANSPORTATION DISADVANTAGED (CTD)
ANNUAL PLANNING GRANT TO THE MPO

Purpose: To provide LCB members with information on the CTD Planning Grant received by the Charlotte County-Punta Gorda Metropolitan Planning Organization (MPO)

Agenda Item Presented by: MPO Staff

Discussion:

The MPO annually receives a Transportation Disadvantaged Planning Grant from the Florida Commission for the Transportation Disadvantaged (CTD) starting on July 1 each year. The amount received for FY 2023/2024 will be approximately \$25,081.35. These funds pay a portion of MPO staff salaries for work performed as the Official Planning Agency for the Charlotte Transportation Disadvantaged program.

Recommendation: None (information only)

Attachment: None

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 5
TRANSPORTATION DISADVANTAGED TRUST FUND (TDTF)
TRIP AND EQUIPMENT GRANT

Purpose: To provide LCB members with information on the TDTF Trip and Equipment Grant for FY 2023/2024

Agenda Item Presented by: Charlotte County Staff

Discussion:

Each year, a portion of the State Transportation Disadvantaged Trust Fund (TDTF) is allocated to each Community Transportation Coordinator (CTC) to provide trips and equipment for non-sponsored TD service.

The funding amount for FY 2023/2024 Trip and Equipment Grant plus Voluntary Dollar funding (commencing July 1, 2023) is not yet available for packet distribution. An update will be provided at the May 4, 2023 LCB Meeting.

Here are last year's figures:

Trip & Equipment Grant allocation	\$ 544,101
Local Match	<u>\$ 60,455</u>
Total Funding	\$ 604,556
Voluntary Dollar	\$ 77
Local Match	<u>\$ 8</u>
Total	85
Grand Total	\$ 604,641

Recommendation: None

Attachment: None

AGENDA ITEM # 6
FY 2021/2022-FY 2025/2026 TRANSPORTATION DISADVANTAGED SERVICE
PLAN/COORDINATED PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION
PLAN (TDSP/CPT-HSTP) ANNUAL UPDATE INCLUDING
RATE MODEL CALCULATIONS

Purpose: Approval of the TDSP/CPT-HSTP First Annual Update (including the rate model calculations)

Agenda Item Presented by: Charlotte County and MPO staff

Discussion:

On March 30, 2021, the Commission for the Transportation Disadvantaged (CTD) designated the Charlotte County Board of County Commissioners (BCC) as the Community Transportation Coordinator (CTC) for Charlotte County for a five-year period commencing July 1, 2021. A new Transportation Disadvantaged Service Plan (TDSP) was approved by the LCB on September 9, 2021. This document also serves as the Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP) for purposes of Federal transportation legislation requirements. The attached change pages will serve as an update to the current document and require approval by the LCB prior to submission to the CTD. Staff will revise Table of Contents page numbering if needed once updated materials are approved.

Update Actions:

- Revision of Cover Page with date of first annual update
- Provide new contractor's name, pg 9
- Correction regarding conference room/deletion of charging station statement, pg 12
- Revision to Public Participation (CTC Survey 2023), pg. 16
- Mention of Hurricane Ian, Revision of Unemployment Figures, pg. 20
- Revision of Plaza Name, pg. 24
- Deletion of Amedittrans as driver and bus washer contractor/Addition of transportation provider, Comfort Travel, pg. 26
- Mention of Hurricane Ian's impact as a Barrier to Coordination, pg. 32
- Deletion of old contractor information/Insertion of new contractor information, pgs. 42-43
- Insertion of new 2022 Bus Transit System Annual Safety and Security Certification, (letter dated February 1, 2023), pg. 44
- Age change for Escorts and Children, pg. 51
- New terminology changing operators to drivers, pg. 53
- Most recent CTC Evaluation date, pg. 58
- Insertion of new Transit Organizational Chart in Appendix B, pg. 63
- Insertion of new Bus Inventory as Appendix G, pgs. 76-77
- Insertion of Appendix J, 2023 CTC Evaluation, pg 89-98
- Insertion of Appendix M, Web-based TD Application, pg. 110-117

These items were not available at time of packet distribution and will be emailed and posted to the MPO website when available:

- Insertion of new Charlotte County Transit Emergency Preparedness and Disaster Plan information, pgs. 46-49

(Note: The entire draft document will be available upon request and will be posted on the MPO website post-meeting approval.)

Recommendation: Motion to update the FY 2021-2022/FY 2025-2026 Transportation Disadvantaged Service Plan (TDSP) / Charlotte County Coordinated Public Transit – Human Services Transportation Plan (including the rate model calculations); allowing Transit staff to make minor technical adjustments to the rate model per CTD staff guidance.

Attachment: Attachment 1 [Draft FY 2021-2022/FY 2025-2026 Transportation Disadvantaged Service Plan \(TDSP\) / Charlotte County Coordinated Public Transit – Human Services Transportation Plan \(CPT-HSTP\) Update change pages](#)

Attachment 2 **04 26 2023 addition** - [New rate model calculations in Appendix H, pgs. 78-86](#)

Attachment 3 **05 02 2023 addition** - [TD Rate Model 5 Year Comparison](#)

Attachment 4 **05 02 2023 addition** - [New Charlotte County Transit No Show Policy in Appendix C, pgs. 64-65](#)

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED SERVICE PLAN & CHARLOTTE COUNTY COORDINATED PUBLIC TRANSIT-HUMAN SERVICE TRANSPORTATION PLAN

FY 2021/2022 – FY 2025/2026

9/9/2021

Approved by the Charlotte County Transportation Disadvantaged Local
Coordinating Board

As Amended 5/5/2022

First Annual Update 5/4/2023



I. DEVELOPMENT PLAN

A. Introduction to the Service Area

1. Background of the TD Program

The Charlotte County Board of County Commissioners became involved with provision of transit service under Chapter 427 F.S. in the mid-1980s, although comparable service had been offered by the County since 1976. In January 1986, FDOT and County officials met to discuss program implementation.

2. Community Transportation Coordinator (CTC) Designation Date/History

In early 1986, it was decided that the Charlotte County Social Services Department would develop a Transportation Section to act as Community Transportation Coordinator (CTC). By October 1986, a Transportation Supervisor was hired. In October of 1987, five (5) full-time drivers and one (1) part-time driver were transferred to the Transportation Section from the Senior Services Section of the Social Services Department. At this point, the Transportation Section officially became the CTC for Charlotte County under a sole source governmental selection process.

The change from Transportation Section to Transit Division was gradually implemented over the years in order to avoid confusion with the local road repair and construction function, and to better describe Transit's function as Charlotte County emerged as an urbanized area and the BCC studied commitment to general public transportation. Administrative support was changed from the Public Works Division to the Human Services Department. This relationship also provided chain of command for the Transit Division.

The Charlotte County Board of County Commissioners always has provided most local matching funds required for this operation and acts as the Board of Directors in capital acquisitions and operating matters. As of February 2014, the Transit Division and all County staff members supporting transit service are now housed under the County's Budget & Administrative Services Department.

3. Organization Chart

In 2015, Charlotte County's Sunshine Ride (Transportation Disadvantaged) and Dial-a-Ride (general public paratransit) services were merged into one system now branded Charlotte County Transit. County staff members perform all dispatch, budgetary and operational oversight functions. Drivers are contract employees working for **A&Associates**, which won the contract bid approved by the Board of County Commissioners ~~on September 24, 2019~~ for work commencing on October 1, ~~2019~~ **2022**.

A current organizational chart displaying Transit staff housed within Charlotte County's Budget and Administrative Services Department is located in Appendix B of this document.



The new facility at 545 Theresa Blvd. in Port Charlotte provides a central location for servicing passengers county-wide. The new location reduces the response time to reach customers. The new building contains open and private office spaces, a central dispatch control area, locker rooms for drivers, a fully-equipped breakroom, a large conference room for training and meetings, and a lobby for customer service needs. It also has surface/non-enclosed parking for at least 39 transit vehicles, 40 personal vehicles for drivers and staff, 3 administrative service vehicles and 2 vans ~~plus a charging area for six electric vehicles.~~



Commissioners on July 9, 2019. Also, as part of the TDP development, two series of workshops were conducted in all three geographic parts of Charlotte County to discuss service needs with all interested parties. In addition, rider surveys were a part of the most recent CTC Evaluation. The Transit Division also surveyed passengers in January 2016.

As part of the CTC Evaluation conducted on February ~~7-9, 2022~~ February 13-15, 2023, TD passengers were surveyed.

sustained on August 13, 2004 from Category 4 Hurricane Charley. As in the rest of Florida and most of the nation, the 2008 economic downturn and foreclosure crisis stalled growth locally for a time. As of 2021, the economic upswing has proven to be promising. The COVID-19 Pandemic has contributed to increased housing demand recently. **The impact of Category 4 Hurricane Ian sustained on September 28, 2022 is still being assessed.**

c. Employment

Per the *Charlotte Rides 2020-2029 Transit Development Plan (TDP)*, the largest service sector in Charlotte County includes educational services, healthcare and social services at 21% of the labor force. The second highest area is retail trade, which accounts for 17% of the employed population in Charlotte County. The third highest sector at 12% each is a tie between (1) arts, entertainment/recreation and accommodation and food services and (2) professional, scientific, and management/administrative and waste management services.

Labor force statistics include data relating to the number or percentage of persons in the labor force. With a large elderly retired population, traditionally the percentage of Charlotte County residents in the labor force has been lower than the statewide average. As a result of the COVID-19 pandemic, unemployment figures are still adjusting to the impact. As of ~~June 2021~~ **February 2023**, Charlotte County unemployment was at ~~5.7~~ **3.1%**; while national unemployment was ~~6.1~~ **3.6%** and Florida's unemployment was ~~5.7~~ **2.6%**. (source: www.floridajobs.org, Florida Department of Economic Opportunity, Agency for Workforce Innovation, not seasonally adjusted). A representative from CareerSource Southwest Florida has been appointed to the LCB representing regional workforce development concerns.

Cheney Brothers, Inc. opened a major food distribution center near the Punta Gorda Airport in October 2015. It has already brought approximately 500 additional jobs to the local area.

The FDOT-sponsored Commuter Services Program assists employees and employers with various work trip options. District One area-wide information may be found on the Internet at [District 1 Southwest Florida « Commuter Services](#) .

d. Major Trip Generators/Attractors

When analyzing the potential for developing or improving a public transit system, it is important to look at the spatial distribution of major trip attractors and generators. These areas usually attract a large number of people, resulting in a concentration of trips, which is more conducive to public transit use. Trip generators are associated with the origins of trips, normally people's homes. Distribution of transportation disadvantaged clients and their major generators are distributed throughout the urban service area of Charlotte County.

Six categories of trip attractors have been identified for Charlotte County: area attractions, government, health care, school, shopping and other major employer.

Area Attractions

School	Charlotte Harbor Center	22450 Hancock Ave/PC
School	Charlotte High School	1250 Cooper Street/PG
School	Charlotte Technical Center	18300 Toledo Blade Blvd/PC
School	Deep Creek Elementary School	26900 Harbor View Road/PC
School	East Elementary School	27050 N. Fairway Drive/PG
School	Florida SouthWestern State College	26300 Airport Road/PG
School	Florida Gulf Coast University/Herald Court Centre	117 Herald Court, Ste 211/PG
School	Kingsway Elementary School	23300 Quasar Blvd/PC
School	L.A. Ainger Middle School	245 Concord Road/RT
School	Lemon Bay High School	2201 Placida Road/ENG
School	Liberty Elementary School	370 Atwater Street/PC
School	Meadow Park Elementary School	7500 Essex Avenue/PC
School	Murdock Middle School	17325 Mariner Way/PC
School	Myakka River Elementary School	12650 Willmington Bl/ENG
School	Neil A. Armstrong Elementary School	22100 Breezeswept Ave/PC
School	Peace River Elementary School	22400 Hancock Ave/PC
School	Port Charlotte High School	18200 Toledo Blade Bl/PC
School	Port Charlotte Middle School	23000 Midway Blvd/PC
School	Punta Gorda Middle School	825 Carmalita Street/PG
School	Sallie Jones Elementary School	1221 Cooper Street/PG
School	Special Training and Rehabilitation, Inc	525 Bowman Terrace/PC
School	The Academy	18300 Cochran Blvd/PC
School	Vineland Elementary School	467 Boundary Blvd/RT
Shopping	Aldi's	1391 Tamiamia Trail/PC
Shopping	Aldi's	26279 Jones Loop Road/PG
Shopping	Bal Harbor Plaza	1133 Bal Harbor/PG
Shopping	BJ's Wholesale Club	19150 Quesada Ave/PC
Shopping	Charlotte Square Shopping Center	2200 Tamiami Trail/PC
Shopping	Cleveland Marketplace	27680 Bermont Rd/Cleveland
Shopping	Colonial Promenades	3941 Tamiami Trail/PG
Shopping	Cross Trail Shopping Center	615 Cross Street/PG
Shopping	Fishermans Village	1200 W Retta Esplanade/PG
Shopping	Harbor Square Shopping Center	4200 Tamiami Trail/PC
Shopping	Home Depot	12621 McCall Rd/ENG
Shopping	Home Depot	19690 Cochran Blvd/PC
Shopping	Home Depot	Tamiami Trail & Burnt Store Road/PG
Shopping	Kohls	19600 Cochran Blvd/PC
Shopping	Merchants Crossing of Englewood	1500 Placida Road/ ENG
Shopping	Murdock Carousel Shopping Center	2000 Tamiami Trail/PC
Shopping	Paradise Shoppes of Port Charlotte	Tamiami Trail & Cochran/PC
Shopping	Peachland Promenades	24051 Peachland Blvd/PC
Shopping	Port-Charlotte-Crossing Bayshore Village	4265 Tamiami Trail/PC

transportation providers. Coordinated transportation providers are those providers who operate as part of the transportation program coordinated by the CTC under the Florida Coordinated Transportation System. Non-coordinated providers are those service providers and agencies who do not have a coordination agreement with the CTC.

Table I-2

Inventory of Transportation Providers in Charlotte County

Provider	Phone Number	C=Coordinated/ N=Non-Coordinated	PP=Private for Profit PNP=Private Non-Profit G=Government
A Better Solution of Venice (866)	945-7973	N	PP
A Taxi of Charlotte County	467-2272	N	PP
A1 Royal Arpt Transp. & Limo Service (239)	369-8300	N	PP
AAA Taxi	451-3990	N	PP
ACC Medlink	693-9119	N	PP
Affordable Vintage Taxi	962-8294	N	PP
AllyRides Wheelchair/StretchTransport Svc	242-7433	N	PP
Ameditrans Medical Transportation	625-0117	C	PP (*CCT driver contract)
Astor Transport	624-4554	N	PP
Astro Transportation	468-1223	N	PP
Bluebird Taxi Company	343-8294	N	PP
Boys and Girls Club	575-9797	N	PNP
Center for Abuse & Rape Emergencies (C.A.R.E.)	639-5499	C	PNP
Cabbie's Taxi Service	391-5090	N	PP
Caring Hands Wheelchair Transport, Inc	416-8024	N	PP
Charlotte County Express Cab, Inc.	624-4311	N	PP
Charlotte County Homeless Coalition	627-4313	C	PNP
Charlotte County Transit Division (TD)	575-4000	C	G
Charlotte County Veteran's Council	575-4000	C	PNP
Charlotte Co. School Board	255-0808	N	G
Charlotte County Yellow Cab	743-2100	N	PP
Charlotte Limousine	232-2109	N	PP
Charlotte Shuttle Transportation	255-9117	N	PP
Checker Cab	629-7774	N	PP
Comfort Travel	249-7523	N	PP
Concierge Taxi Services	286-5085	N	PP
Doris Limousine Service	627-8056	N	PP

as Hurricane Irma in 2017 with its mass evacuations. **The landfall of Category 4 Hurricane Ian on September 28, 2022 presented the County's most recent transit challenge.** It is apparent that (1) dealing with the elements and the County's unique water-lined geography, (2) evacuating and returning the County's frail, least mobile and/or needy citizens and (3) planning for hazard mitigation are an ongoing reality for Charlotte County's coastal transit system.

Current economic realities are always a factor, with issues such as potential cuts to Florida's local governmental funding and fluctuating fuel costs as major concerns. Beyond these are less obvious, but related and significant barriers, such as (1) a lack of local bidders for driver services, (2) an increase in contractors' expenses for everything from driver salaries and insurance to maintenance costs, and (3) a shortage of both contract drivers, as well as volunteer drivers for Charlotte County non-profit organizations. The issue of driver shortages is an ongoing problem statewide/nationwide. ~~On September 24, 2019, the Charlotte County Board of County Commissioners approved a new driver contract with Ameditrans, Inc. of Port Charlotte, Florida for work commencing on October 1, 2019 for one year with renewal options for two additional one-year terms by mutual consent.~~ Just three days after the passage of Hurricane Ian, the new County contract for driver and bus washer services commenced with A&Associates.

The obvious impact that the COVID-19 Pandemic has had on transit service nationwide and globally must also be noted in any discussion of barriers to coordination.

Medical Center. As of June 5, 2021, SCAT announced after an 18-month evaluation of their operations, the closure of RT16 and RT26 and the inclusion of those areas in what is now called "OnDemand by Sarasota County"). Curb-to-curb rides for this new service is available 5 a.m. to 10 p.m. Monday through Saturday, and 6 a.m. to 9 p.m. on Sunday. Each ride costs \$1.25 and rides can be paid for using an online registration service, an app or paying cash to the driver. Reservations are required to use this service. Customers can request a ride via a mobile app, which is available in app stores for iPhone and Android devices, online at [scgov.net/OnDemand](https://www.mysuncoast.com/2021/05/28/scat-launch-on-demand-service-june/), or by calling a dedicated call center at 941-300-1553. Customers may also email questions to support-sarasota@ridewithvia.com.
<https://www.mysuncoast.com/2021/05/28/scat-launch-on-demand-service-june/>

3. Transportation Operators and Coordination Contractors

Charlotte County Veteran's Council (Coord Vol Op)
P.O. Box 380964
Port Charlotte, FL 33938
Joseph Oster, Coordinator (612)-807-7422

The Charlotte County Veteran's Council operates two (2) nine passenger commuter vans supplied by CCTD. The Transit Department has included the Veteran's Council in its capital replacement plan. The Transit Department provides all fuel, repairs, insurance, driver training as well as other operating supports to this operation. Hours of operation are Monday and Friday: Bay Pines and Cape Coral/Wednesday Cape Coral only – all trips have 8:00 am departure.

Charlotte County Homeless Coalition (Coor Vol Op)
1476 Kenesaw Street, Port Charlotte
P.O. Box 380157
Murdock, FL 33948
David Ramey, Director of Programs, (941) 627-4313, Ext.118

Homeless Coalition operates a 9- passenger van provided by the Transit Department, in the same fashion as the Veteran's Council, for their own programs. Hours of operation as needed.
Center for Abuse & Rape Emergencies (C.A.R.E.) (Coord Vol Op)
1501 Cooper Street
Punta Gorda, FL 33951
(941) 639-5499
Karen McElhaney

C.A.R.E. helps victims and survivors of domestic violence, sexual assault, and other violent crimes in Charlotte County using a 5-passenger van to provide trips as needed.

~~Ameditrans, Inc. (Contract Operator for Driver/Bus Washer Services)~~

~~4075 Tamiami Trail~~

~~Port Charlotte, FL 33952~~

*****COUNTY BID PROCESS*****

~~Charles Moreno (941)-625-0117~~

~~Ameditrans is an ambulatory and wheelchair service provider. They subscribe to the System Safety Plan developed by the CCTD. Ameditrans provides the County with driver services in County vehicles for Charlotte County Transit.~~

A&Associates (Contract Operator for Driver/Bus Washer Services – effective October 1, 2022)
(561) 880-4598
Annie Rueda
951 Sansbury's Way West Palm Beach, FL 33411

Quality Independence, Inc. (although a contract is in place it has not been utilized to date)
2826 Tamiami Trail, Suite 2 and 3B
Port Charlotte, FL 33952
(941) 249-9105
Angela Pennington

Quality Independence, Inc., is a nonprofit organization established in November 2018 that provides services to individuals with intellectual and development disabilities. The organization utilizes its own vehicles.

Each of the contract operators undergoes an annual System Safety/Contract Compliance review identical in format to the FDOT review. Copies of these reviews are available upon request.

4. Public Transit Utilization

Charlotte County has developed a general public transit paratransit system and service became available January 2, 2001. Charlotte County Transit public transit provides curb-to-curb service in all areas of Charlotte County. Much of the design of this service was based on the existing Transportation Disadvantaged system, and ADA complimentary trips are not an issue, because such trips are handled in mainstream service delivery. All vehicles are accessible, making this feasible. Prior to fare suspension during the COVID-19 Pandemic, fares were \$2.00 per one-way trip, and Transportation Disadvantaged clients were eligible for a \$1.00 discount.

A Charlotte County Transit brochure containing fares, policies, and giving a detailed description of the system is located in Appendix A.

5. School Bus Utilization

There is not a Joint Use School Bus Program existing between the Charlotte County Transit Division and the District School Board of Charlotte County.

6. Vehicle Inventory

The ~~August 2, 2021~~ **May 4, 2023** inventory for the Transportation Disadvantaged program is located in Appendix G of this document.

7. System Safety Program Plan Certification

A copy of the ~~2022~~ 2023 certification follows:



BUS TRANSIT SYSTEM ANNUAL SAFETY AND SECURITY CERTIFICATION

January 31, 2023

IN ACCORDANCE WITH FLORIDA STATUTE §41.061, THE BUS TRANSIT SYSTEM NAMED ABOVE HERBY CERTIFIES TO THE FOLLOWING:

1. The adoption of a System Safety Program Plan (SSPP) and a Security Program Plan pursuant to Florida Department of Transportation safety standards set forth in Rule 14-90, Florida Administrative Code.
2. Compliance with the adopted standards of the SSPP and Security Program Plan.
3. Performance of safety inspections on all buses operated in accordance with Rule 14-90.009 Florida Administrative Code.
4. The SSPP and Security Program Plan have been reviewed and updated as necessary.


Richard Kolar, Transit Operations Manager

2/1/23
Date

Name and Address of Entities Which Have Performed Safety Inspections:

Charlotte County Fleet, 18000 Paulson Drive, Port Charlotte, FL 33954
Mr. Front End, 8251 Pascal Dr., Punta Gorda, FL 33950


Richard Kolar, Transit Operations Manager

2/1/23
Date

Charlotte County Budget & Administrative Services
Transit Division
545 Theresa Blvd., Port Charlotte, FL 33948

941.833.6242
CharlotteCountyFL.gov

(5) Passenger Loading Assistance. Drivers may offer their forearm to steady a passenger.

(6) Smoking Policies. Drivers and passengers shall be prohibited from smoking on the vehicle. No Smoking signs are prominently placed in all vehicles.

(7) Passenger Property. It is the responsibility of the passenger to safely carry and restrain personal carry-on materials and property. This property shall be limited to those items which do not present a threat to the safety of the other passengers or to the safe operation of the vehicle.

(8) Child Restraints. Children of the required age shall be transported in appropriate and mechanically sound seats meeting all requirements. If the adult responsible for the child cannot provide such seating, it is the responsibility of the CTC or the contract operator to provide an appropriate seat.

(9) Consumer Comment Telephone Numbers. All coordinated and CTC vehicles contain prominently displayed laminated signage with telephone numbers for consumer commendations and complaints.

(10) Escorts and Children. All children under the age of ~~12~~ 13 are required to have one parent, guardian, or competent adult escort accompany them. If both parents wish to accompany the child, the second parent shall pay the full fare (if in effect). Parents who are passengers may bring their dependent children under the age of ~~12~~ 13 with them, as seats are available. Aides or medical escorts required for personal safety, health or well-being of passengers shall be transported without charge. Friends and relatives of passengers shall pay full fare (if in effect).

(11) Vehicle Transfer Points. All necessary transfer points will be located in a safe, comfortable and secure place which provides shelter.

(12) Rider/Trip Data. The CTC collects the name, telephone number, address, funding source eligibility and special requirements in a database on each passenger.

(13) Pick-up Windows. There is a 30 minute pick-up window for all trips within the service area. This equates to 15 minutes prior and 15 minutes after assigned pick up time.

(14) On-Time Performance. The CTC has adopted an internal policy for on-time performance. First time clients are advised accordingly when making arrangements. Dispatch is given latitude to adjust that 30 minute rule as time, geography, and client convenience dictate. Once the pickup time has been set, the driver has a 30 minute window of opportunity to make the pick-up.

If service seems to be beyond that window, a phone call from dispatch is triggered.

Dispatch will change county response to operator response, or operator response to county response if such action seems in the best interest of timeliness. The CTC established a

(23) Transit Clients with Medical Conditions. The Charlotte County Transit Division accepts TD clients who are ambulatory or in wheelchairs in a non-discriminatory manner. Every effort will be made to provide safe and dignified service.

(24) Vehicle Maintenance. Vehicles are to be cleaned weekly and to be checked on a regular basis for safety, passenger comfort, performance and appearance. If the safety of the vehicle is in doubt, the use of the vehicle will be suspended. Because of the COVID- 19 pandemic, sanitation measures on transit buses have been greatly enhanced.

(25) No-Show Policy. A TD client can cancel a trip up to one hour before the scheduled trip without being considered a no-show. However, if a client does not cancel a trip at least one hour prior to the scheduled trip, or is not at the appointed place of pick-up, and these circumstances occur three times in six months, the client may lose the privilege of TD services. Those clients utilizing the service for life-sustaining medical purposes will not be suspended for no-shows.

(26) Billing Requirements. Transit currently bills the various agencies in various formats prescribed by the agencies.

(27) Eating and Drinking. Consuming food or drinking any beverage is not allowed on Charlotte County transit vehicles, unless it is an approved reasonable modification.

(28) Two-way Communication. All Transit vehicles will be equipped with a two-way communication system in good working order.

(29) Air Conditioning/Heating. All Charlotte County Transit vehicles will be equipped with air conditioning and heating. Any vehicle not meeting this requirement will be scheduled for repair.

(30) First Aid and CPR. The Charlotte County Transit Division requires that all bus operators drivers, dispatchers and Transit Operations Coordinators maintain current CPR/First Aid certifications.

(31) Driver Criminal Background Screening. Transit and contract operators are in compliance with the FTA, FDOT, and the various funding agencies, as reflected in the System Safety Plan.

(32) Security Cameras. Charlotte County Transit vehicles are equipped with cameras.

final year of the MOA, when the LCB and MPO Board are involved with consideration of the recommendation of a CTC for the next five-year period.

The CTC is evaluated against the Charlotte County Transportation Disadvantaged Local Coordinating Board's locally established standards for service. Criteria used to develop these standards focus upon the following areas:

- Coordination of service
- Provision of service
- Resource management
- Marketing of service
- Safety
- Quality of service
- Identification and implementation of standards and policies

Included in the CTC Review are a bus or van ride and surveys of riders, contract operators and purchasing agencies. The information and findings are in a format that allows the LCB members to review performance and make appropriate decisions. The LCB analyzes the findings of the evaluation at a regularly scheduled LCB meeting. The CTC Evaluation is forwarded to the CTD for final disposition. The most recent CTC Evaluation conducted ~~February 3-5, 2020~~ **February 13-15, 2023** can be found in Appendix J.

Measurable standards included in this TDSP to which the CTC is held are those for accidents, roadcalls, and grievances. Evaluation is ongoing through quarterly reporting to the LCB at regular meetings (normally in January, May, September and November of each year). The Implementation Schedule is summarized in Section I. E. and is a continual evaluation tool.

- **FDOT Monitoring Procedures of CTC (including Contract Drivers and Coordination Partners)**

The CTC undergoes a System Safety and Contract Compliance review by FDOT. It contains fifteen records and items to be examined. The areas to be examined include general information, program plan files, bus safety inspection records, driver license records, driver training records, operational and safety procedures, driving hours and work periods, records of pre-employment exams, biennial driver medical examinations, vehicle maintenance records, daily vehicle inspection files, vehicle emergency and safety equipment inspection, and compliance with Drug Free Workplace Act.

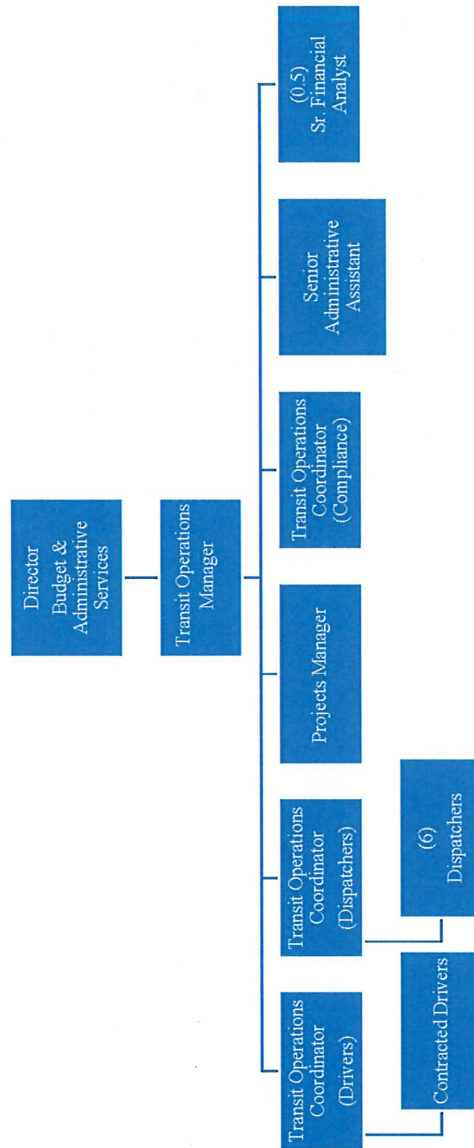
An additional system for monitoring passenger satisfaction with the CTC, including contract drivers and coordinated partners, is a passenger satisfaction survey and analysis. These surveys are administered on a random basis. The last CTC passenger satisfaction survey was conducted in January 2016.

- **Coordination Contract Evaluation Criteria**

All coordination contracts and evaluations of those contracts are performed by the CTC utilizing County and Commission standards for the evaluation. LCB members have the opportunity to

ORGANIZATION CHART

Transit Operations



CC Vehicle Number	Model Yr	Make	Model	Mileage	Funding Source	Owner
35632	2016	Taurus	Ford-Sedan	21,542	5307	Charlotte County BOCC
36242	2018	Ford	Transit Connect	101,860	5310	FDOT
36243	2018	Ford	Transit Connect	109,919	5310	FDOT
36249	2018	Ford	Transit Connect	95,614	5307	Charlotte County BOCC
36250	2018	Ford	Transit Connect	98,894	5307	Charlotte County BOCC
36328	2018	Ford	Transit Connect	104,573	5307	Charlotte County BOCC
36332	2018	Ford	Transit Connect	88,935	5307	Charlotte County BOCC
36336	2018	Ford	Transit Connect	103,296	5307	Charlotte County BOCC
36347	2018	Ford	Transit Connect	88,678	5307	Charlotte County BOCC
36348	2018	Ford	Transit Connect	84,196	5307	Charlotte County BOCC
36506	2018	Ford	Transit Connect	94,302	5310	FDOT
36806	2019	Ford	Transit Connect	87,416	5310	FDOT
37342	2019	Ford	Transit Connect	69,221	5339	Charlotte County BOCC
37343	2019	Ford	Transit Connect	85,677	5339	Charlotte County BOCC
37345	2019	Ford	Transit Connect	83,726	5339	Charlotte County BOCC
37437	2019	Ford	Transit Connect	59,284	5339	Charlotte County BOCC
37438	2020	Ford	Odyssey	63,585	5339	FDOT
37440	2019	Ford	Transit Connect	77,161	5339	Charlotte County BOCC

CC Vehicle Number	Model Yr	Make	Model	Mileage	Funding Source	Owner
37442	2019	Ford	Transit Connect	65,897	5339	Charlotte County BOCC
37443	2019	Ford	Transit Connect	51,486	5339	Charlotte County BOCC
37447	2019	Ford	Transit Connect	66,983	5339	Charlotte County BOCC
37450	2019	Ford	Transit Connect	64,348	5339	Charlotte County BOCC
37475	2020	Ford	Odyssey	48,369	5339	FDOT
37481	2020	Ford	Odyssey	92,788	5310	FDOT
37985	2021	Ford	Odyssey	56,657	5310	FDOT
37986	2020	Ford E-450	Turtle Top	37,023	5339	Charlotte County BOCC
37987	2020	Ford	Transit Connect	10,901	5307	Charlotte County BOCC
37998	2021	Ford E-450	Odyssey	35,037	5310	FDOT
37999	2020	Ford E-451	Turtle Top	36,483	5339	Charlotte County BOCC
38002	2020	Ford	Transit Connect	5,122	5307	Charlotte County BOCC
38003	2020	Ford	Transit Connect	1,396	5307	Charlotte County BOCC
38004	2020	Ford	Transit Connect	11,054	5307	Charlotte County BOCC
38005	2020	Ford	Transit Connect	6,807	5307	Charlotte County BOCC
38023	2021	Ford E-450	Turtle Top	8,157	5307	Charlotte County BOCC

CTC Review

Charlotte County Board of County Commissioners
Transit Division

Counties served: Charlotte

DRAFT

Date(s) of Review: February 13-15, 2023

PA Staff Assigned to Review: Wendy Scott and Betty-Ann Sherer
with LCB Member Maricela Morado

I. Records and Areas of Review

- A. General Information
- B. Chapter 427, F.S.
- C. Rule 41-2, F.A.C.
- D. Americans with Disabilities Act
- E. Bus/Van Ride
- F. Surveys
- G. Follow-up of previous QAPE Review
- H. Additional Observations
- I. Current Year Trip and Equipment Grant

II. Findings and Recommendations

A. General Information

WHAT TO DO:

- ☐ If applying for Transportation Disadvantaged (TD) based on age (60 or older) and unable to transport yourself or to purchase transportation:

- ☐ Complete Parts 1, 2, 3, and 5.
☐ Attach a copy of any identification with date of birth.

OR

- ☐ If applying for TD due to medical reasons and unable to transport yourself or to purchase transportation:

- ☐ Complete Parts 1, 2, 3, 4, 5, and 7.
☐ Read and sign Applicant's Authorization in Part 7, providing the applicant's authorized signature to release medical information.
☐ A currently Licensed Professional completes the rest of Part 7. See page 8 for a list of applicable professionals.

OR

- ☐ If applying for TD due to a total gross annual household income at or below 125% of the Federal Poverty Level and unable to transport yourself or to purchase transportation:

- ☐ Complete Parts 1, 2, 3, 5, and 6.
☐ Attach proof of income. Please send copies as proof of income will not be returned.

Acceptable forms of proof of income include current copies of:

- First page of your tax return
- Unemployment Compensation Income Verification
- DCF Benefit Letter
- Social Security Income Verification or Proof of Income Letter (includes SSI and SSDI)
- Minimum of (2) most recent pay stubs
- Retirement/Pension Statement (includes VA)

If no one in your household has income, you must attach proof of Food Stamp eligibility or a signed letter on agency letterhead verifying that you have no income.

- Incomplete forms will be returned; failure to completely fill out this application will delay your eligibility process
- The evaluation process normally takes up to maximum of three (3) weeks or 21 days from the receipt of the completed forms.
- If you have any questions, please call 941-833-6242
- Please return completed form to:

Charlotte County Transit Division
545 Theresa Blvd.
Port Charlotte, FL 33954

CHARLOTTE COUNTY TRANSIT TRANSPORTATION DISADVANTAGED APPLICATION Effective July 1, 2017

Charlotte County Transit includes transportation mandated by the Florida Commission for the Transportation Disadvantaged (TD). "Transportation disadvantaged" means "those persons 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 health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk" as defined in s. 411.202 per F.S. 427.

Please read the TD program qualifications and guidelines below. If you have any questions or need assistance, please call 941-833-6242. If by 21 days following the submission of a complete application, Charlotte County Transit has not decided of eligibility, the applicant shall be treated as eligible and provided service until and unless Charlotte County Transit denies the application. If you are denied TD eligibility and wish to appeal the decision, you may contact our office. The Transportation Disadvantaged Ombudsman helpline is: 1-(800)-983-2435.

Please print out the TD application from our website www.charlottecountyfl.gov or call 941-833-6242

Transportation Disadvantaged Grant Qualifications and Guidelines:

- Origin and destination locations can be anywhere in Charlotte County
- No other funding is available to pay for the requested trip
- Applicant must verify that they have one or more of the following:
 - Age 60 or older; or
 - A recognized disability (temporary or permanent) verified by an accepted medical professional; or
 - Applicant must verify that their gross annual household income does not exceed 125% of the Department of Health and Human Services poverty guidelines (Table I, page 7)
- Applicant must verify that they are unable to transport themselves or to purchase transportation
- Due to the availability of program funds, trips may be denied based on trip purpose. Trip priorities are ranked in descending order as follows: individual medical trips, group trips for groceries and congregate dining, trips for employment purposes, trips for adult education, social and non-essential shopping
- Call 941-575-4000 to schedule appointments Monday through Friday 7:00 AM to 4:00 PM
- TD Fare: \$1.00

PART 1: GENERAL INFORMATION

PLEASE PRINT CLEARLY OR TYPE

→ Complete every three (3) Years ←

Name:

Date:

Street Address:

Apartment/ Building #:

City:

State:

Zip Code:

Telephone # (Daytime):

Telephone # (Evening):

Date of Birth:

Social Security #:

Charlotte County Transit collects your Social Security number for the following purposes: identification, verification, as a unique identifier and for search purposes.

Are you participating in any of the following reduced bus fare programs? ☐ OAA ☐ Medicaid
☐ Charlotte County Transit TD

Primary Language: ☐ English ☐ Spanish ☐ Other:

1. Do you have a valid driver's license? ☐ YES ☐ NO

2. Do you have access to a vehicle? ☐ YES ☐ NO

If YES, why are you unable to use the vehicle? _____

If someone assisted you in completing this form and you would like them to also be informed of decisions regarding your eligibility, please provide us with that person's name, address, and phone number below:

Name: _____ Relationship: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: _____

Emergency Contact

Name: _____ Phone: _____

Relationship to Applicant: _____

PART 2: APPLICANT'S CERTIFICATION

I understand the purpose of this evaluation form is to determine if I am eligible for Transportation Disadvantaged. I understand that the information about my disability and income contained in this application will be kept confidential and shared only with professionals involved in evaluating my eligibility. I certify that, to the best of my knowledge, the information in this evaluation form is true and correct. I understand that providing false and misleading information could result in my eligibility status being reexamined as well as other actions by Charlotte County Transit.

(Applicant's Signature)

(Date)

PART 3: QUESTIONS ABOUT APPLICANT'S MOBILITY

1. Please check below if you use any of the following mobility aids or equipment and answer the additional questions that apply to your type of aid or equipment.

☐ Cane ☐ Walker ☐ Manual Wheelchair ☐ Power Wheelchair ☐ Power Scooter/Cart
☐ Oxygen CO2 ☐ Other: _____ ☐ I do not use aids or equipment.

2. If you use a mobility aid, please indicate below the size and weight:

- Is your wheelchair/scooter/cart more than 48" long? ☐ YES ☐ NO
- Is your wheelchair/scooter/cart more than 30" wide? ☐ YES ☐ NO
- Is your weight plus the weight of your wheelchair/scooter/cart more than 600 pounds?
☐ YES ☐ NO

***NOTE: Charlotte County Transit may not be able to accommodate you if your wheelchair, scooter, or cart is longer than 48 inches or wider than 30 inches or if your total weight with your wheelchair is more than 600 pounds.

3. Can you get on and off a bus that has a lift?

☐ YES
☐ NO →
☐ SOMETIMES →
☐ I don't know because I have never tried

Please check all that apply:

☐ My mobility aid will not fit on the lift
☐ I cannot steady myself when the lift is moving
☐ I do not feel secure on the lift
☐ Other: _____

4. Once inside a bus, can you get to a seat or wheelchair position by yourself?

☐ YES
☐ NO →
☐ SOMETIMES →

Please check all that apply:

☐ I need someone to help me ☐ I have trouble finding a seat
☐ I have a balance problem ☐ I cannot hold onto the handrails
☐ I need the seat nearest the door ☐ Other: _____

5. If you use a mobility aid, is your residence accessible (entrance, ramp, paved walkway, etc.)?

☐ YES

☐ NO → List the barriers: _____

6. Can you climb 3-12 inch steps without assistance? ☐ YES ☐ NO

7. Can you ambulate or operate a wheelchair up a ramp without assistance? ☐ YES ☐ NO

PART 4: INFORMATION ABOUT THE APPLICANT'S DISABILITY

1. What type or types of disabilities do you have?

☐

Physical Disability

☐

Visual Impairment/Blindness

☐

Developmental Disability

☐

Mental Illness

☐

Other

☐

None

Please describe your disability in more detail: _____

2. Is the disability temporary or permanent?

☐

TEMPORARY DISABILITY I expect it to last for another _____ months.

☐

PERMANENT DISABILITY

☐

I don't know

3. Do you use a service animal? If yes, please describe the type of animal.

☐

YES → Type of animal: _____

☐

NO

4. Do you travel with a Personal Care Attendant (PCA) who assists you with daily life functions? (Someone you need all or some of the time to assist you. A companion or guest is not considered a PCA).

☐

YES, always →

☐

YES, sometimes →

☐

NO

I need assistance with (check all that apply):

☐

Mobility

☐

Reading

PART 5: CURRENT TRAVEL INFORMATION

1. Please list two (2) of your most frequent trips and how you get there now.

1. Destination: _____

How do you get there now? ☐ Car ☐ Bus ☐ Van/Taxi ☐ Other _____

2. Destination: _____

How do you get there now? ☐ Car ☐ Bus ☐ Van/Taxi ☐ Other _____

2. What other means of transportation are available for you to use? _____

PART 6: HOUSEHOLD INCOME

1. Including all parents, caregivers, relatives, or others involved in your living functions, how many people reside at the address provided in Part I? _____
2. How many vehicles are in your household? _____
3. Including all wages, disability payments, Social Security payments, pensions, dividends, investments, etc., what is your total gross annual household income? Attach proof of income for you and all members of your household to this completed application. **Please provide copies as proof, they will not be returned.**
 - **Acceptable forms of proof of income include current copies of:** the first page of your tax return, Unemployment Compensation Income Verification, DCF Benefit Letter, Social Security Income Verification or Proof of Income Letter (includes SSI and SSDI), minimum of (2) most recent pay stubs, Retirement/Pension Statement (includes VA) and Food Stamp eligibility.

Tax Return _____ W2 _____ SSI _____ SSDI _____

Pension _____ Interest/Dividends _____ Work Comp _____

Relatives _____ Other _____

4. Is your total gross annual household income at or below the 125% of the Federal Health and Human Services Guidelines for low household income? (See Table I, below)

☐ YES ☐ NO

Table I: 125% of the Department of Health and Human Services Poverty Guidelines 2022

The following totals represent 125% of the Federal Health and Human Services Guidelines for low household income and are updated annually. To qualify for the TD transportation program, household income may not exceed these guidelines:

Household/ Family Size	125%
1	\$16,100
2	\$21,775
3	\$27,450
4	\$33,125
5	\$38,800
6	\$44,475
7	\$50,150
8	\$55,825

PART 7: PROFESSIONAL VERIFICATION

NOTE: This part must be completed by one of the following currently licensed professionals before returning the application to our office: Physician (M.D. or D.O. or D.C.), Audiologist, Psychologist, Ophthalmologist, Registered Nurse, Clinical Social Worker, Independent Living Specialist, Occupational Therapist, Psychiatrist, Physical Therapist, or Rehabilitation Specialist.

APPLICANT'S AUTHORIZATION

I hereby authorize the following named professional to provide information about my disability and abilities to travel to Charlotte County Transit and/or persons assisting Charlotte County Transit to determine my eligibility for Transportation Disadvantaged. I understand that this information will be used solely for the purpose of determining my eligibility for Transportation Disadvantaged and that all medical information about my disability will be kept confidential.

Applicant's Signature: _____ Date: _____

Dear Medical Professional,

In order to process this applicant's request for Charlotte County Transit Transportation Disadvantaged eligibility, we require this form to be completed.

Please review the information provided by the applicant in Parts 1 - 5 of this application and answer the following questions in Part 7. (For Licensed Professional Only)

Thank you in advance.

1. Has the applicant been diagnosed with a cognitive, mental, physical or other disability? *Please list disabilities.*

2. The applicant's disability is

☐ PERMANENT

☐ TEMPORARY..... Expected duration? Years _____ Months _____

3. Does the applicant require the assistance of a Personal Care Attendant (PCA) or Escort when traveling on a public vehicle?

☐ YES ☐ NO

MEDICAL PROFESSIONAL

Professional's Signature: _____ Date: _____

Print or Type Name and Title: _____

State of Florida or Other State if applicable () License No.: _____

Business Address: _____ Phone No.: _____

City: _____ State: _____ Zip Code: _____

CHARLOTTE COUNTY TRANSIT OFFICE USE ONLY

☐ Applicant Approved ☐ Applicant Denied

updated 2/8/2023

TD Rate Model 5 Year Comparison

	FY 20	FY 21	FY22	FY23	FY24
Ambulatory	\$ 15.15	\$ 16.68	\$ 18.24	\$ 20.44	\$ 30.37
Wheel Chair	\$ 25.97	\$ 28.59	\$ 31.27	\$ 35.03	\$ 52.06
Group per passenger	\$ 7.86	\$ 8.74	\$ 9.50	\$ 10.69	\$ 14.64
Total Expenditures per rate calc	\$ 1,249,962.00	\$ 1,457,542.00	\$ 1,114,122.00	\$ 1,212,116.00	\$ 1,083,312.00
Budgeted Operating Rate Subsidy Revenue	\$ 351,184.00	\$ 362,750.00	\$ 234,252.00	\$ 182,800.00	\$ 100,000.00
Projected Passenger Miles	604,653	555,461	499,758	375,734	\$ 200,000
Projected Passenger Trips	57,586	51,271	47,596	45,846	\$ 30,000
Avg Passenger Trip Length miles	10.5	10.8	10.5	8.2	6.70
Group Load Rate persons	\$ 3.10	\$ 3.00	\$ 3.06	\$ 3.01	\$ 4.00
Rate per passenger trip if not subsidized	\$ 21.71	\$ 28.43	\$ 23.41	\$ 26.44	\$ 36.53

Note: This report is used for informational purposes only and is not submitted as part of the rate model.

Preliminary Information Worksheet

Version 1.4

CTC Name: Charlotte County Transit (CCT)

County (Service Area): Charlotte

Contact Person: H

Phone # 94

Provide the name and phone number of the contact person knowledgeable about the CTC's services and financial data used in this Rate Calculation Model.

Check Applicable C

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: Charlotte County Transit (CCT)
County: Charlotte

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

This spreadsheet has the ability to accurately calculate both a "subsidized" & "unsubsidized" price for services. However, in certain situations it can NOT do both perfectly IF you have included Expense, Revenue, and trip/mile projections related to services that are priced different than what is calculated by this spreadsheet.

Ideally, you should have a "documented" cost/revenue allocation plan that relates to each functional activity or differently priced service; and each differently priced service would have its own rate model spreadsheet. In reality it is not uncommon to have certain purchased transportation services priced minutely different than what this rate model has calculated. It is important to know, in these situations the calculated rate will be subsidizing the transportation services which have a special price, OR vice versa.

The prelude to putting any expense and revenue information into this pricing spreadsheet is to determine the portion of such expense and revenues attributable to the services being priced, and to do so in accordance with your documented cost/revenue allocation plan. Your cost/revenue allocation plan should be available for review by auditing agencies.

ected as a system subsidy VS
e at a unit price.

re > ± 10% and Also > ± \$50,000

REVENUES (CTC/Operators ONLY / Do

Local Non-Govt

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

Local Government

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

County cash includes matchfor 5310, 5311, TD, and unfunded expenses.

CTD

Non-Spons. Trip Program	\$	335,579	\$	400,000	\$	400,000	19.2%	0.0%	Estimated revenue based on anticipated ridership not actual allocation.
Non-Spons. Capital Equipment									
Rural Capital Equipment									
Other TD (specify in explanation)									
Bus Pass Program Revenue									

USDOT & FDOT

49 USC 5307									
49 USC 5310									
49 USC 5311 (Operating)	\$						%		
49 USC 5311(Capital)									
Block Grant									
Service Development									
Commuter Assistance									
Other DOT (specify in explanation)	\$						%		
Bus Pass Program Revenue									

Other DOT = 5310 Operating

EXPLAIN whether the 5311 operating revenue is generated as an overall system operating expense subsidy OR being paid at the per unit trip or mile rates generated by this or prior spreadsheets. This will determine where to place the revenue in the following Budgeted Rate Base sheet.

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)	\$	26,215	\$	25,000	\$	25,000	-4.6%	0.0%	
Bus Pass Program Revenue									

Other DOE = Senior Friendship

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									

CTC: Charlotte County Transit (CCT)
County: Charlotte

re $> \pm 10\%$ and Also $> \pm \$50,000$

6 Attachment 2 2023-2024 Charlotte Rate Model Approved: Comprehensive Budget

Budgeted Rate Base Worksheet

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

	Upcoming Year's BUDGETED Revenues
	from
	Oct 1st of 2023
	to Sept 30th of 2024
1	2

REVENUES (CTC/Operators ONLY)

Local Non-Govt

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

Local Government

District School Board	\$	-
Compl. ADA Services	\$	-
County Cash	\$	488,192
County In-Kind, Contributed Services	\$	-
City Cash	\$	-
City In-Kind, Contributed Services	\$	-
Other Cash	\$	-
Other In-Kind, Contributed Services	\$	-
Bus Pass Program Revenue	\$	-

CTD

Non-Spons. Trip Program	\$	400,000
Non-Spons. Capital Equipment	\$	-
Rural Capital Equipment	\$	-
Other TD	\$	-
Bus Pass Program Revenue	\$	-

USDOT & FDOT

49 USC 5307	\$	-
49 USC 5310	\$	-
49 USC 5311 (Operating)	\$	82,800
49 USC 5311(Capital)	\$	-
Block Grant	\$	-
Service Development	\$	-
Commuter Assistance	\$	-
Other DOT	\$	100,000
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	\$	25,000
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	\$	-

Purpose: The Budgeted Rate Base worksheet determines the BASE funding amount that will be divided by the upcoming fiscal year's projected passenger miles and trips. The initial rate base is the amount of expenditures that must be funded with rate-generated revenues.

Revenues EXcluded from the rate base will fund the remaining proposed expenditures. Excluded revenues include operating system subsidies and grants (including their match) that have been included in the proposed budget.

In this worksheet projected revenues are further differentiated between being generated: through the purchase of service at the unit price calculated in this spreadsheet (rate base); or as a system operating subsidy; or for purchasing capital equipment.

Unless otherwise reconciled, the initial rate base may be adjusted upward or downward starting in the 3rd year of using the Rate Calculation Model. If necessary, appropriate and justified, the adjustment amount is based on program income (including unapproved profit) or losses from the prior year's "actual" and auditable figures.

A shift of Budgeted Rate Subsidy Revenue from column 4 to this column RAISES your rate.

A shift of Actual Rate subsidy revenue from column 4 to this column RAISES your rate. The amount of revenue that is generated for Transportation Services provided at the approved rate per unit. Also, include the amount of funds that are earmarked for local match for Transportation Services and not Capital Equipment purchases.

funds are earmarked as

?

funds are earmarked as

transportation service grant?

on the right. Revenues

for match is typically

bsidy in column 4, unless

nt of revenue that is generated

nt of revenue that is

the funding source for

Transportation Services

provided at the

approved rate per unit. Also, include the

amount of funds that are earmarked for local

match for Transportation Services and

not Capital Equipment purchases.

cal match req.

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

BLUE cells
Should be funds generated by rates in this spreadsheet

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

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.

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

Unless otherwise reconciled, the initial rate base may be adjusted upward or downward starting in the 3rd year of using the Rate Calculation Model. If necessary, appropriate and justified, the adjustment amount is based on program income (including unapproved profit) or losses from the prior year's "actual" and auditable figures.

APD	
Office of Disability Determination	\$ -
Developmental Services	\$ -
Other APD	\$ -
Bus Pass Program Revenue	\$ -
DJJ	
DJJ	\$ -
Bus Pass Program Revenue	\$ -
Other Fed or State	
xxxx	\$ -
xxxx	\$ -
xxxx	\$ -
Bus Pass Program Revenue	\$ -
Other Revenues	
Interest Earnings	\$ -
xxxxx	\$ -
xxxxx	\$ -
Bus Pass Program Revenue	\$ -
Balancing Revenue to Prevent Deficit	
Actual or Planned Use of Cash Reserve	\$ -
Total Revenues =	\$ 1,095,992

[illegible]

Labor	\$	236,764
Fringe Benefits	\$	132,378
Services	\$	49,000
Materials and Supplies	\$	1,000
Utilities	\$	39,437
Casualty and Liability	\$	4,351
Taxes	\$	
Purchased Transportation:		
Purchased Bus Pass Expenses	\$	-
School Bus Utilization Expenses	\$	-
Contracted Transportation Services	\$	468,166
Other	\$	-
Miscellaneous	\$	2,500
Operating Debt Service - Principal & Interest	\$	-
Leases and Rentals	\$	8,762
Contrib. to Capital Equip. Replacement Fund	\$	-
In-Kind, Contributed Services	\$	-
Allocated Indirect	\$	153,634
Capital Expenditures		
Equip. Purchases with Grant Funds	\$	-
Equip. Purchases with Local Revenue	\$	-
Equip. Purchases with Rate Generated Rev.	\$	-
Capital Debt Service - Principal & Interest	\$	-
	\$	-
	\$	-
Total Expenditures =	\$	1,095,992
minus EXCLUDED Subsidy Revenue =	\$	182,800
Budgeted Total Expenditures INCLUDED in		
Rate Base =	\$	913,192
Rate Base Adjustment ¹ =		
Adjusted Expenditures Included in Rate	Base =	\$ 913,192

Amount of Budgeted
Operating Rate
Subsidy Revenue

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

2021 - 2022

Page 2 of 2

Worksheet for Program-wide Rates

CTC: Charlotte County T Version 1.4
County: Charlotte

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 relate
- Do **NOT** include trips or miles for services provided to the general
- Do **NOT** include escort activity as passenger trips or passenger mi
- Do **NOT** include fixed route bus program trips or passenger miles!

UNLESS, you are pricing their services with this spreadsheet and you have included their respective revenue and expenses in the compreh

UNLESS, you are pricing their services with this spreadsheet and you have included their respective revenue and expenses in the comprehensive budget! If so, you must enter their revenue as LOCAL NON-GOVT "OTHER" or "OTHER REVENUES", and explain in the respective section.

Fiscal

2023 - 2024

g. Passenger Trip Length = 6.7 Miles

This worksheet inputs the CTC's total projected passenger miles and total projected passenger trips related to the projected expenses & revenues entered into this spreadsheet. A program-wide rate per passenger mile and rate per passenger trip will be computed for comparison purposes only. The total projected passenger miles and passenger trips on this worksheet are automatically carried over and used in the following worksheet (Multiple Service Rates) where the rates are further differentiated by ambulatory, wheelchair, stretcher, and group services.

In addition to displaying the program-wide rates, the worksheet also calculates what those program-wide rates would need to be in order to generate enough revenue to balance the CTC's proposed budget if all grants and operating subsidies were eliminated.

This spreadsheet calculates both a "subsidized" & "unsubsidized" price for services. However, in certain situations it can NOT do both perfectly IF you have included Expense, Revenue, and trip/mile projections related to services that are priced different than what is calculated by this spreadsheet.

Ideally, you should have a "documented" and consistently applied cost/revenue allocation plan that relates to each functional activity or differently priced service; and each differently priced service would have its own rate model spreadsheet. In reality it is not uncommon to have certain purchased transportation services priced minutely different than what this rate model has calculated. It is important to know, in these situations the calculated rate will be subsidizing the transportation services which have a special price, OR vice versa.

The prelude to putting any expense and revenue information into this pricing spreadsheet is to determine the portion of such expense and revenues attributable to the services being priced, and to do so in accordance with your documented cost/revenue allocation plan. Your cost/revenue allocation plan should be available for review by auditing agencies.

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: **Charlotte County** Version 1.4
County: **Charlotte**

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

SECTION I: Services Provided

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

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

SECTION II: Contracted Services

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

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

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

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

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

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

Worksheet for Multiple Service Rates

CTC: **Charlotte Count** Version 1.4
County: **Charlotte**

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 Go to Section IV
2. If you answered Yes to #1, do you want to charge the fee per passenger trip OR
per passenger mile?.....

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

SECTION IV: Group Service Loading

1. If the message "**You Must Complete This Section**" appears to the right, what is the projected total
number of Group Service Passenger Miles? (otherwise leave blank)..... 40,000
You Must Complete This Section!
- And what is the projected total number of Group Vehicle Revenue Miles? 10,000
Loading Rate **4.00** to 1.00

SECTION V: Rate Calculations for Multiple Services:

1. Input Projected Passenger Miles and Passenger Trips for each Service in the GREEN cells and the Rates for each Service will be calculated automatically

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

		RATES FOR FY: 2023 - 2024			
		Ambul	Wheel Chair	Stretcher Leave Blank	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	200,000	= <input type="text"/> 134,000	+ <input type="text"/> 26,000	+ <input type="text"/>	+ 40,000
Rate per Passenger Mile =		\$4.62	\$7.91	\$0.00	\$2.23 \$8.90 per passenger per group
		Ambul	Wheel Chair	Stretcher Leave Blank	Group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	30,000	= <input type="text"/> 18,000	+ <input type="text"/> 5,100	+ <input type="text"/>	+ <input type="text"/> 6,900
Rate per Passenger Trip =		\$30.37	\$52.06	\$0.00	\$14.64 \$58.57 per passenger per group
		Combination Trip and Mile Rate			
		Ambul	Wheel Chair	Stretcher Leave Blank	Group
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> \$0.00
Rate per Passenger Mile for Balance =		\$4.62	\$7.91	\$0.00	\$2.23 \$8.90 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
\$5.54	\$9.50	\$0.00	\$2.67 \$10.68
		per passenger	per group

Ambul	Wheel Chair	Stretcher	Group
\$36.45	\$62.48	\$0.00	\$17.57 \$70.29
		per passenger	per group

Program These Rates Into Your Medicaid Encounter Data

CHARLOTTE COUNTY TRANSIT

CANCELLATION AND NO-SHOW POLICY

I. OBJECTIVE

Establishment of a formal policy regarding transportation services cancellations and no-shows, thereby minimizing the costs and scheduling inefficiencies. The objective of this policy is to reduce customer cancellations and no-shows, while giving the Community Transportation Coordinator (CTC) the flexibility to handle these situations on a case-by-case basis.

II. DEFINITIONS AND REFERENCES

- A. Customer is defined as the trip requester.
- B. A TD customer refers to anyone who satisfies the guidelines outlined in Chapter 427, Florida Statutes - "Transportation Disadvantaged" means those persons 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 health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk as defined in s. 411.202.
- C. An Advanced cancellation occurs when a customer calls to give advance notice more than one (1) hour prior to the operation of a trip.
- D. A No-show is defined as when a customer who called for a pick-up is not at the scheduled time and did not call-in advance to cancel (more than one (1) hour before scheduled pick-up time).
- E. Community Transportation Coordinator (CTC) is a transportation entity recommended by a Metropolitan Planning Organization (MPO), or by the appropriate designated official planning agency, as approved for in F.S. 427.011-427.017 to ensure that coordinated transportation services are provided to the transportation disadvantaged population in the designated service area. In Charlotte County, the CTC is Charlotte County Transit.

III. DIRECTIVES

- 1. Dispatcher shall verbally inform all customers, at time of initial reservation of no-show and cancellation policy and will mail a copy of the Policy.
- 2. Dispatch will automatically cancel a scheduled return trip when (origination trip) is a no-show.
- 3. A passenger who accumulates four (4) no-shows in six (6) months or less (January-June or July-December) on their service record, may lose the privilege of ride services under the following progressive measures:

- 4 no shows in 6 months, 30-day suspension.
- Each additional no show after initial 30-day suspension will result in an additional 30-day suspension
- Falsifying one's identity during a no-show suspension will result in permanent suspension
- Attempting to be a guest during a no-show suspension will increase a passenger's suspension time another 30 days

All progressive measures may be on a case-by-case basis and can be subject to extended suspensions or termination of services.

First Warning: After first no-show or late cancellation, passenger will receive a notice in the mail containing the no-show or late cancellation date.

Second Warning: After second no-show or late cancellation, passenger will receive a Warning notice in the mail containing the no-show or late cancellation dates.

Final Warning: After the third no-show or late cancellation, passenger will receive a Final Warning notice in the mail containing the no-show or late cancellation dates.

Suspension Letter: Suspension letter will be mailed to customer containing no-show or late cancellation dates and dates of suspension from service.

4. Cancellation at the door, or less than one (1) hour prior to your scheduled pickup time is considered a no-show.
5. Upon arrival of the bus, if a passenger does not board within three (3) minutes, the driver will leave, the passenger will be marked as a no-show and will need to reschedule. *Reasonable Modifications may be made for individuals with disabilities.*
6. Excessive advanced cancellations will generate a standing order suspension after 6 cancellations in 2 weeks. Continuous cancellations will result in suspension per #3 of this policy. Additionally, the following conditions apply:
 - Standing orders are defined as same pickup time, location, and destination daily and can be scheduled up to one month at a time.
 - Individual trips:
 - Schedule up to three (3) per phone call
 - An individual trip can be scheduled up to one month in advance
7. The grievance process is available to any customer wishing to appeal the decision of the CTC. This process is described in the Transportation Disadvantaged Service Plan (TDSP) and available online: www.charlottecountyfl.gov/transit/.

Florida Law and Title VI of the Civil Rights Act of 1964 Prohibits Discrimination in:
Public accommodation on the basis of race, color, religion, sex, national origin, handicap, or of marital status. Persons believing they have been discriminated against on these conditions may file a complaint with the Florida Commission on Human Relations at 850.488.7082 or 800.342.8170 (voice messaging).

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 7
COMMUNITY TRANSPORTATION COORDINATOR (CTC) EVALUATION

Purpose: To review the Charlotte County CTC Evaluation

Agenda Item Presented by: MPO Staff

Discussion:

Pursuant to Florida Statutes, Chapter 427, and Florida Administrative Code, Rule 41-2, the Local Coordinating Board (LCB), with the assistance of the Official Planning Agency (OPA), conducts an annual performance evaluation of the Community Transportation Coordinator (CTC). In Charlotte County, the designated CTC is the Charlotte County Board of County Commissioners (BCC), the governing board of the County Transit Division. This year, the CTC Evaluation was conducted on February 13-15, 2023 by MPO Staff and LCB Member Maricela Morado.

The CTC Evaluation document was developed utilizing sections of the CTC Evaluation Workbook and sample materials provided by the Florida Commission for the Transportation Disadvantaged (CTD). This year's review involved a bus inspection and ride-along, as well as examination of documentation provided by Transit Division staff. Additionally, surveys of riders and a vendor were conducted.

Recommendation: Motion to approve the Draft Annual CTC Evaluation

Attachment: [Draft 2023 Charlotte County CTC Evaluation](#)

CTC Review

Charlotte County Board of County Commissioners
Transit Division

Counties served: Charlotte

DRAFT

Date(s) of Review: February 13-15, 2023

PA Staff Assigned to Review: Wendy Scott and Betty-Ann Sherer
with LCB Member Maricela Morado

I. Records and Areas of Review

- A. General Information
- B. Chapter 427, F.S.
- C. Rule 41-2, F.A.C.
- D. Americans with Disabilities Act
- E. Bus/Van Ride
- F. Surveys
- G. Follow-up of previous QAPE Review
- H. Additional Observations
- I. Current Year Trip and Equipment Grant

II. Findings and Recommendations

A. General Information

In October 1987, the Charlotte County Board of County Commissioners (BCC) through its Transit Division was designated by the Florida Commission for the Transportation Disadvantaged (CTD) as the Community Transportation Coordinator (CTC) for Charlotte County. This relationship has continued to this day. On March 30, 2021, the CTD designated the BCC as the CTC for the next 5-year period. The Charlotte County Transit Division operates a governmental system in a small urbanized area.

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: None

CTC Review

Charlotte County Board of County Commissioners Transit Division

B. Chapter 427, F.S.

The CTC complies with Chapter, 427, F.S., by fulfilling the requirements specified in 427.0155, F.S. This includes assuming full responsibility for the delivery of transportation services for the transportation disadvantaged. Another task achieved is executing contracts for driver and bus washer services, disaster stretcher services and non-profit operators serving as volunteer organizational partners. A new contract for driver and bus washer services took effect on October 1, 2022 with a new provider. The CTC also collects annual operating data and reviews all applications for local, state (including transportation disadvantaged) and federal (including Section 5310) grant funding, and develops cost-effective and efficient coordination strategies.

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: None

C. Rule 41-2, F.A.C.

The CTC fully complies with Rule, 41-2, F.A.C. These requirements further refine those stated in Chapter 427, F.S. A key requirement is possession of an awareness of all transportation disadvantaged resources available or planned in the Charlotte County service area. Equipped with this knowledge, the CTC plans, coordinates and implements the most cost-effective system possible under existing conditions including funding constraints. The CTC performs this task very well, enhancing travel opportunities for TD passengers by offering discounted fares for general paratransit service (life enhancing trips beyond life sustaining TD trips), during normal times. However, due to the COVID-19 pandemic, the BCC began providing free fares for all riders, whether the trips were TD or Section 5307 grant funded. Following a November 4, 2016 Compliance Monitoring (CM) review, Charlotte County Transit staff developed an excellent Transportation Disadvantaged application (effective July 1, 2017) in order to document rider eligibility and improve record retention. It has been used as a model for other CTCs. Additionally, inclusion of required language in operator contracts has also resulted from the CM review recommendations.

Area of Observation: None

Recommendation: None

Timeline for Compliance: None

D. Americans with Disabilities Act

The CTC follows all guidelines required by the Americans with Disabilities Act. Charlotte County transit service is a "paratransit only" (door-to-door) system and meets the needs of all disabled TD clients.

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: None

CTC Review

Charlotte County Board of County Commissioners Transit Division

E. Bus/Van Ride

On February 13, 2023, MPO staff and LCB Member Morado participated in a Mid-County TD trip. The trip was conducted with three passengers (two of whom were TD clients) and Driver Deborah Richards using a Charlotte County Transit vehicle to transport riders to and from the DAVITA Dialysis Center, 4300 Kings Hwy, Unit 406 in Charlotte Harbor, FL. A full discussion of the trip is attached.

Areas of Noncompliance: Bus safety item

Recommendation: Repair, remove or replace a loose headrest adjacent to the bus passenger side entrance. It was observed that passengers used this headrest to assist with bus entry. Additionally, the driver's tablet was malfunctioning and required a swap out at the Transit Facility mid-day.

Timeline for Compliance: Address the headrest issue as soon as possible. Driver tablet issue was immediately resolved.

F. Surveys (see attachment)

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: None

G. Follow-up of previous QAPE/CM Review (if applicable)

Previous Area of Noncompliance: The last QAPE/CM Review was conducted by Thomas Howell Ferguson, P.A. and CTD staff on April 29, 2019 for the July 1, 2017 – June 30, 2018 fiscal year.

Status: Completed.

Timeline for Compliance: None

CTC Review

Charlotte County Board of County Commissioners Transit Division

H. Additional Observations

As CTC, the Charlotte County BCC has performed the delivery of TD services in Charlotte County for more than three decades, handling the transportation needs of the County's most transit dependent populations. A portion of this work is achieved with volunteer programs, where the County provides the vehicles, while the participating organizations furnish volunteer drivers. All types of trips are accomplished including rides to out-of-county veterans' medical facilities. Also, the CTC has obtained several grants to assist local passengers. These include funding from Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) and in some years, Section 5311 (Rural Area Formula) Grants.

The Transit Division utilizes the County's website, [Transit Services | Charlotte County, FL \(charlottecountyfl.gov\)](https://www.charlottecountyfl.gov/transit-services), to provide information to citizens desiring to use transit services. Passengers may download a TD Services application. There are also links to the Florida Commission for the Transportation Disadvantaged and the Florida Commuter Services websites. Passenger informational brochures are available on the website or in hard copy in both English and Spanish.

I. Current Year Trip and Equipment Grant (if applicable)

The Trip and Equipment Grant for Charlotte County currently runs from July 1, 2022 through June 30, 2023.

Area of Noncompliance: None

Recommendation: None

III. Conclusion

The Charlotte County Transit Division is doing a commendable job of fulfilling its Transportation Disadvantaged program mission. This is especially true as it emerges from the COVID-19 pandemic, only to deal with Category IV Hurricane Ian's direct hit to the community. Driver and County staff shortages have added to the challenge of service provision. The only required corrective action is the repair, removal or replacement of the loose passenger headrest discovered in the vehicle used in the trip to the dialysis facility.

It is also recommended that in addition to the County's website (where the fare is correctly displayed), the County's current "free transit fare" policy be marketed to the public through all means possible (including newspaper advertisements, promotional brochures, business cards, CC-TV 20 broadcasts, etc. with updated fare information.) This enhanced marketing recommendation has been discussed at recent LCB Meetings.

CTC Review

Charlotte County Board of County Commissioners
Transit Division

The upcoming development of the County's 10-Year Transit Development Plan will afford the opportunity to Charlotte County Transit to publicize the current transit service and to consider service upgrades. This document is due to FDOT by September 2024.

The passage of Hurricane Ian may offer an opportunity to serve Charlotte County's storm victims who soon will be housed in some collective FEMA trailer sites. As was done after Hurricane Charley, Charlotte County Transit may have the opportunity to provide scheduled shuttle service to nearby groceries, pharmacies and stores, as well as medical appointments from these locations.

LCB Chairman: _____
Commissioner Ken Doherty

County: Charlotte

Date: May 4, 2023

CTC Review

Charlotte County Board of County Commissioners
Transit Division

ATTACHMENT

1. BUS/VAN RIDE

On February 13, 2023, MPO staff and LCB Member Morado ("the Evaluation Team") accompanied Driver Deborah Richards and three passengers on a regularly scheduled Monday morning trip to and from the DAVITA Dialysis Center, 4300 Kings Hwy Unit 406 in Charlotte Harbor, FL. The Evaluation Team boarded the bus at the new Transit Facility at 545 Theresa Blvd. prior to passenger pickup. Ms. Richards was wearing the black uniform shirt and displayed her ID badge. She was very attentive in providing boarding and exiting assistance to passengers based upon their levels of need and desires. All passengers were ambulatory. Both the Transit Division's comment/complaint line and TD Ombudsman Helpline signage were posted. The vehicle's air conditioning, heat and two-way communication device were all in working order. The bus seats were clean and in good condition.

Noteworthy driver performance: Deborah Richards performed her job very professionally, especially in assisting the passengers with their baggage. She also escorted them to the facility door and assured that they were receiving assistance from facility staff. Given the regularly scheduled residential and dialysis destinations, she was familiar with the riders and had a good understanding of their needs. The atmosphere was very cordial both amongst passengers and with their driver. It was evident that friendships had been formed. There was a great deal of concern over the absence of two usual riders who were not present due to illness.

2. RIDER SURVEYS

A County-wide survey of TD passengers who rode on February 13, 2023 was conducted on February 14, 2023 via telephone from the Transit Facility. Passenger average use of the Transportation Disadvantaged services was 3-5 times per week (100%). These figures reflect an increase in usage for the 3-5 times per week category (tied to dialysis, congregate dining and work commute trips). Trip purposes were for medical (75% of riders), employment (13%), nutritional (25%), educational/training/adult day care (0%), and life-sustaining/other (12.5%). Average satisfaction with the service on a scale of 1 to 10 (10 being most satisfied) was 8.875, an increase of .435 points from the last CTC Evaluation, which was conducted in 2021 (part of the pandemic period). During the stressful time prior to and during Hurricane Ian's passage, one customer encountered difficulty with scheduling needed dialysis treatments. This issue has been resolved satisfactorily.

CTC Review

Charlotte County Board of County Commissioners Transit Division

Comments received regarding "What does transportation mean to you?":

"This transportation means everything. It means life (*due to dialysis needs*)."

"The transit service helps with obtaining dialysis."

"The driver takes good care of us and helps me to the door. She asks about the temperature in the vehicle and checks on my comfort."

"It is good to get out of the house and go somewhere, especially shopping."

"This transportation means independence. I would love an online platform to book a bus ride. I also would love to be able to book one month in advance. The drivers are fantastic, and my usual driver reminds me to book my next rides. It would be wonderful to receive a text if the bus is running late, so passengers wouldn't have to wait outside in the heat. The transportation helps me get to work, so transportation is everything."

"Charlotte County Transit is great and allows me the freedom to get around. I would love consistency with pickup times. The drivers are really helpful. I would love the ability to have a standing appointment or be able to schedule service months in advance."

"Most drivers are very helpful and pleasant. This program is wonderful. Uber is so expensive. I would love to have Saturday service and a more consistent pickup time."

"Charlotte County Transit is so much nicer than any other service. I love to meet my friends on the bus, go to the meal site and enjoy the activities. The new bus driver is very nice, pleasant, helpful and patient."

3. CONTRACT OPERATOR SURVEYS

The CTC currently has a new contract operator (providing bus driver and bus washing services) effective October 1, 2022. For the evaluation AOR timeframe, the old provider was Ameditrans. The new contractor is A&Associates. CTD staff directed MPO staff to survey the new contractor for this CTC Evaluation.

CTC Review

Charlotte County Board of County Commissioners Transit Division

- **Do the riders contact your facility directly to cancel a trip?**
The contractor stated "no," because the County handles these arrangements. Her firm only provides contract drivers and bus washers.
- **Do the riders/beneficiaries call your facility directly to issue a complaint?** The contractor stated "no," because the County handles these arrangements. Her firm only provides contract drivers and bus washers.
- **Do you have a toll-free phone number for a rider/beneficiary to issue commendations and/or complaints posted on the interior of all vehicles that are used to transport TD riders? If yes, is the phone number posted the CTC's?**
The contractor stated that her drivers utilized County vehicles that have the posted signage.
- **Are the invoices you send to the CTC paid in a timely manner?**
The operator responded "yes."
- **Does the CTC give your facility adequate time to report statistics?**
The operator responded "yes."
- **Have you experienced problems with the CTC?**
The operator responded "no."

4. PURCHASING AGENCY SURVEYS

The only purchaser of non-sponsored services from the CTC is the CTD; therefore, the purchasing agency survey was not applicable. (This is in keeping with the procedures established by the firm of Thomas Howell Ferguson at the time of the previous QAPE/CM conducted November 4, 2016).

CTC Review

Charlotte County Board of County Commissioners
Transit Division

5. ANNUAL QA SELF CERTIFICATION



BUS TRANSIT SYSTEM ANNUAL SAFETY AND SECURITY CERTIFICATION

January 31, 2023

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

1. The adoption of a System Safety Program Plan (SSPP) and a Security Program Plan pursuant to Florida Department of Transportation safety standards set forth in Rule 14-90, Florida Administrative Code.
2. Compliance with the adopted standards of the SSPP and Security Program Plan.
3. Performance of safety inspections on all buses operated in accordance with Rule 14-90.009 Florida Administrative Code.
4. The SSPP and Security Program Plan have been reviewed and updated as necessary.


Richard Kolar, Transit Operations Manager

2/1/23
Date

Name and Address of Entities Which Have Performed Safety Inspections:

Charlotte County Fleet, 18000 Paulson Drive, Port Charlotte, FL 33954
Mr. Front End, 8251 Pascal Dr., Punta Gorda, FL 33950


Richard Kolar, Transit Operations Manager

2/1/23
Date

Charlotte County Budget & Administrative Services
Transit Division
545 Theresa Blvd., Port Charlotte, FL 33948

941.833.6242

CharlotteCountyFL.gov

Note from MPO Staff: Thanks to Laura Richards and Heidi Maddox in the Charlotte County Transit Division for their assistance in conducting this year's CTC Evaluation.

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 8
COMMUNITY TRANSPORTATION COORDINATOR (CTC) QUARTERLY REPORTS
FOR OCTOBER-DECEMBER 2022 AND JANUARY-MARCH 2023

Purpose: To provide two quarterly reports of TD transit activities

Agenda Item Presented by: Charlotte County Staff

Discussion:

These quarterly reports are presented to describe recent activities of the Community Transportation Coordinator (CTC). This is an informational item.

Recommendation: None

Attachment: [October-December 2022 and January-March 2023 CTC Quarterly Reports](#)

CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 22/23

FY23 Q1

One-Way Trips By Trip Purpose	Q1	Total One-way Trips	Percent	Q1
Medical	3,222	3,222		25%
Nutritional (Meal site + Grocery only)	1,032	1,032		8%
Education/Training/Daycare	1,654	1,654		13%
Employment	3,394	3,394		27%
Life-Sustaining/Other	3,440	3,440		27%
Trip Purpose Totals	12,742	12,742		100%

FY23 Q2

One-Way Trips By Trip Purpose	Q2	Total One-way Trips	Percent	Q2
Medical	4,152	7,374		27%
Nutritional (Meal site + Grocery only)	1,064	2,096		8%
Education/Training/Daycare	2,020	3,674		13%
Employment	4,270	7,664		28%
Life-Sustaining/Other	3,515	6,955		25%
Trip Purpose Totals	15,021	27,763		100%

CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 22/23

FY23 Q3

One-Way Trips By Trip Purpose	Q3	Total One-way Trips	Percent	Q3
Medical	-	7,374		26%
Nutritional (Meal site + Grocery only)	-	7,374		26%
Education/Training/Daycare	-	2,096		7%
Employment	-	3,674		13%
Life-Sustaining/Other	-	7,664		27%
Trip Purpose Totals	-	28,182		100%

FY23 Q4

One-Way Trips By Trip Purpose	Q4	Total One-way Trips	Percent	Q4
Medical	-	7,374		26%
Nutritional (Meal site + Grocery only)	-	7,374		26%
Education/Training/Daycare	-	2,096		7%
Employment	-	3,674		13%
Life-Sustaining/Other	-	7,664		27%
Trip Purpose Totals	-	28,182		100%

Nutritional: Anyone transported for reasons of receiving a meal, nutritional benefits or grocery shopping.

Nutritional: Grocery is Publix, Winn-Dixie, Aldi

Life-Sustaining/Other: Anyone transported for the purpose of conducting personal business (e.g. banks, social service offices, visiting spouse/parent in nursing home); shopping (excluding grocery shopping) social, or recreational reasons.

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED REVENUE REPORT FISCAL YR 22/23

Month	Senior Friendship Center	Transportation Disadvantaged Commission	Enhanced Mobility for Seniors & Individuals with Disabilities (5310)	Rural (5311)	Total Revenue
Oct-22	\$ 1,275.74	\$ 23,092.80	\$ -	\$ -	\$ 24,368.54
Nov-22	\$ 2,044.56	\$ 24,912.55	\$ -	\$ -	\$ 26,957.11
Dec-22	\$ 1,723.70	\$ 28,546.61	\$ -	\$ -	\$ 30,270.31
Jan-23	\$ 815.04	\$ 30,465.52	\$ -	\$ -	\$ 31,280.56
Feb-23	\$ 1,460.02	\$ 29,034.53	\$ -	\$ -	\$ 30,494.55
Mar-23	\$ -	\$ -	\$ -	\$ -	\$ -
Apr-23	\$ -	\$ -	\$ -	\$ -	\$ -
May-23	\$ -	\$ -	\$ -	\$ -	\$ -
Jun-23	\$ -	\$ -	\$ -	\$ -	\$ -
Jul-23	\$ -	\$ -	\$ -	\$ -	\$ -
Aug-23	\$ -	\$ -	\$ -	\$ -	\$ -
Sep-23	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ 7,319.06	\$ 136,052.01	\$ -	\$ -	\$ 143,371.07

Note, 5310 & 5311 Q1 & Q2 requests for reimbursement will be submitted together in April.

CHARLOTTE COUNTY TRANSIT NON PROFIT COORDINATED PARTNERS TRIPS REPORT FISCAL

YR 22/23

Month	C.A.R.E.	Homeless Coalition	Vets	Total
Oct-22	31	20	27	78
Nov-22	6	5	50	61
Dec-22	21	-	39	60
Jan-23	53	4	43	100
Feb-23	35	6	32	73
Mar-23	32	52	50	134
Apr-23				-
May-23				-
Jun-23				-
Jul-23				-
Aug-23				-
Sep-23				-
Total	178	87	241	506

4

CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 22/23

FY23 Q1

One-Way Trips By Trip Purpose	Q1	Total One-way Trips	Percent	Q1
Medical	3,222	3,222		25%
Nutritional (Meal site + Grocery only)	1,032	1,032		8%
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Employment	3,394	3,394		27%
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Trip Purpose Totals	12,742	12,742		100%

FY23 Q2

One-Way Trips By Trip Purpose	Q2	Total One-way Trips	Percent	Q2
Medical	4,152	7,374		27%
Nutritional (Meal site + Grocery only)	1,064	2,096		8%
Education/Training/Daycare	2,020	3,674		13%
Employment	4,270	7,664		28%
Life-Sustaining/Other	3,515	6,955		25%
Trip Purpose Totals	15,021	27,763		100%

CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 22/23

5

FY23 Q3

One-Way Trips By Trip Purpose	Q3	Total One-way Trips	Percent	Q3
Medical	-	7,374		26%
Nutritional (Meal site + Grocery only)	-	7,374		26%
Education/Training/Daycare	-	2,096		7%
Employment	-	3,674		13%
Life-Sustaining/Other	-	7,664		27%
Trip Purpose Totals	-	28,182		100%

FY23 Q4

One-Way Trips By Trip Purpose	Q4	Total One-way Trips	Percent	Q4
Medical	-	7,374		26%
Nutritional (Meal site + Grocery only)	-	7,374		26%
Education/Training/Daycare	-	2,096		7%
Employment	-	3,674		13%
Life-Sustaining/Other	-	7,664		27%
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Nutritional: Anyone transported for reasons of receiving a meal, nutritional benefits or grocery shopping.

Nutritional: Grocery is Publix, Winn-Dixie, Aldi

Life-Sustaining/Other: Anyone transported for the purpose of conducting personal business (e.g. banks, social service offices, visiting spouse/parent in nursing home); shopping (excluding grocery shopping) social, or recreational reasons.

CHARLOTTE COUNTY TRANSIT UNMET TRIPS REPORT FISCAL YR 22/23

Unmet Trips October-December 2022	Medical	Nutritional	Education - Training	Employment	Other - Life Sustaining	Total
October			2	3	23	28
November	34			4	37	75
December	15		3	7	38	63
Quarterly Totals	49	-	5	14	98	166
Unmet Trips January-March 2023	Medical	Nutritional	Education - Training	Employment	Other - Life Sustaining	Total
January	30	1	1	41	36	109
February	40		3	49	26	118
March	47	2	2	43	26	120
Quarterly Totals	117	3	6	133	88	347
Unmet Trips April-June 2023	Medical	Nutritional	Education - Training	Employment	Other - Life Sustaining	Total
April						-
May						-
June						-
Quarterly Totals	-	-	-	-	-	-
Unmet Trips July-September 2023	Medical	Nutritional	Education - Training	Employment	Other - Life Sustaining	Total
July						-
August						-
September						-
Quarterly Totals	-	-	-	-	-	-

7

CHARLOTTE COUNTY TRANSIT COMPLAINT REPORT FISCAL YR 22/23

1st Quarter as of 12/30/2022

Type of Issue	Previous Quarter	This Quarter
Policy Complaint	-	6
Q1 Total Issues	-	6

2nd Quarter as of 3/31/2023

Type of Issue	Previous Quarter	This Quarter
Wrong Time/Date of Service	-	1
No Timeslot available	-	1
Safety Complaint	-	2
Policy Complaint	6	5
Q2 Total Issues	6	9

3rd Quarter as of 6/30/2023

Type of Issue	Previous Quarter	This Quarter
Wrong Time/Date of Service	-	-
No Timeslot available	-	-
Late Ride or Early	-	-
Missed Ride	-	-
Safety Complaint	-	-
Policy Complaint	-	-
Q3 Total Issues	-	-

4th Quarter as of 9/30/2023

Type of Issue	Previous Quarter	This Quarter
Wrong Time/Date of Service	-	-
No Timeslot available	-	-
Late Ride or Early	-	-
Missed Ride	-	-
Safety Complaint	-	-
Policy Complaint	-	-
Q4 Total Issues	-	-

MAY 4, 2023
LCB MEETING

AGENDA ITEM # 9
SECTION 5311 GRANT APPLICATION

Purpose: To provide Local Coordinating Board (LCB) members an opportunity to review/endorse Charlotte County's "Off-Cycle" FFY 2020/2021 Section 5311 (Operating) Grant Application for Rural Areas.

Agenda Item Presented by: Charlotte County Staff

Discussion:

Federal transportation legislation includes the FTA Section 5311 (Rural) funding program, which is aimed at enhancing mobility for transit passengers located in non-urbanized areas. Charlotte County Transit has applied in April 2023 for an operating Section 5311 grant at the invitation of the FDOT Transit Office, since there is unused funding available for Federal Fiscal Year 2020/2021. This opportunity was not offered during the normal cycle of grant funding (so it is termed "off cycle.").

Recommendation: Motion to endorse the Section 5311 Grant Application

Attachment: [Charlotte County Transit Section 5311 Grant Application](#)

Application for Federal Assistance SF-424

*** 1. Type of Submission:**

- ☐ Preapplication
☒ Application
☐ Changed/Corrected Application

*** 2. Type of Application:**

- ☒ New
☐ Continuation
☐ Revision

*** If Revision, select appropriate letter(s):**

*** Other (Specify):**

*** 3. Date Received:**

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

State Use Only:

6. Date Received by State:

7. State Application Identifier:

1001

8. APPLICANT INFORMATION:

*** a. Legal Name:** Charlotte County Board of County Commissioners

*** b. Employer/Taxpayer Identification Number (EIN/TIN):**

59-6000541

*** c. UEI:**

W8YJZF4NSQL1

d. Address:

*** Street1:** 545 Theresa Blvd.

Street2:

*** City:** Port Charlotte

County/Parish:

*** State:** FL: Florida

Province:

*** Country:** USA: UNITED STATES

*** Zip / Postal Code:** 33954-0000

e. Organizational Unit:

Department Name:

Budget & Administrative Serv

Division Name:

Transit

f. Name and contact information of person to be contacted on matters involving this application:

Prefix: *** First Name:** Richard

Middle Name:

*** Last Name:** Kolar

Suffix:

Title: Transit Operations Manager

Organizational Affiliation:

*** Telephone Number:** 941-833-6242

Fax Number:

*** Email:** Richard.Kolar@charlottecountyfl.gov

Application for Federal Assistance SF-424

* 9. Type of Applicant 1: Select Applicant Type:

B: County Government

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

* 10. Name of Federal Agency:

Federal Transit Administration

11. Catalog of Federal Domestic Assistance Number:

20.509

CFDA Title:

Formula Grants for Rural Areas

* 12. Funding Opportunity Number:

* Title:

13. Competition Identification Number:

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

Add Attachment

Delete Attachment

View Attachment

* 15. Descriptive Title of Applicant's Project:

5311 Operating: Continue to provide transit service in rural areas of Charlotte County where public services are unavailable.

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424**16. Congressional Districts Of:**

* a. Applicant

17

* b. Program/Project

17

Attach an additional list of Program/Project Congressional Districts if needed.

Rural Map.pdf

Add Attachment

Delete Attachment

View Attachment

17. Proposed Project:

* a. Start Date:

10/01/2023

* b. End Date:

09/30/2024

18. Estimated Funding (\$):

* a. Federal

82,800.00

* b. Applicant

* c. State

* d. Local

82,800.00

* e. Other

* f. Program Income

* g. TOTAL

165,600.00

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**☐ a. This application was made available to the State under the Executive Order 12372 Process for review on☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.☒ c. Program is not covered by E.O. 12372.*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**☐ Yes☒ No

If "Yes", provide explanation and attach

Add Attachment

Delete Attachment

View Attachment

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)**

☒ ** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix:

* First Name:

Hector

Middle Name:

* Last Name:

Flores

Suffix:

* Title:

County Administrator

* Telephone Number:

941-743-1321

Fax Number:

* Email:

Hector.Flores@charlottecountyfl.gov

* Signature of Authorized Representative:

* Date Signed:

**Charlotte County Rural Areas
(outlined in gray)**

