

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

**10:00 A.M., Thursday, November 16, 2023 (rescheduled date)**  
[Charlotte County Transit Facility](#)  
[545 Theresa Blvd, Port Charlotte, FL 33954](#)

**This meeting will be hybrid both in person at the Transit Facility and via Microsoft 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: September 7, 2023 Meeting**
- 5. Approval of LCB Grievance Procedures**
- 6. Quarterly Report**
- 7. Transit Development Plan (TDP) Update**
- 8. Public Comments**
- 9. Staff Comments**
- 10. Member Comments**
- 11. Adjournment**  
**(NEXT MEETING – January 3, 2024)**

***\*Please let us know if you or your alternate cannot attend\****

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 PO Box 494469, Port Charlotte, FL 33949-4469.

**CHARLOTTE COUNTY-PUNTA GORDA METROPOLITAN PLANNING ORGANIZATION**

18500 Murdock Circle, Building B, Suite 200, Port Charlotte, FL 33948

Telephone: (941) 883-3535 Fax: (941) 883-3534

The Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) will hold a quarterly hybrid meeting on November 16, 2023 both in person and via Microsoft TEAMS. Persons wishing to provide public comment may do so by alternative means, if desiring to do so. Written comments may be submitted by either emailing the comments to [office@ccmpo.com](mailto: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 9 a.m. November 15, 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](http://www.ccmpo.com).

NOVEMBER 16, 2023  
LCB MEETING

## CONSENT AGENDA ITEM #4

NOVEMBER 16, 2023 LCB MEETING

**AGENDA ITEM # 4-A**  
**APPROVAL OF MINUTES: SEPTEMBER 7, 2023 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 September 7, 2023 LCB Meeting

**Attachment:** Minutes of the September 7, 2023 LCB Meeting

**CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED**  
**LOCAL COORDINATING BOARD (LCB)**  
**MEETING**  
**SEPTEMBER 7, 2023**

Minutes of a regular meeting held in a hybrid format on September 7, 2023 utilizing TEAMS remotely and in-person at the Transit Facility, 545 Theresa Boulevard in Port Charlotte, FL 33954.

**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, Economically Disadvantaged Representative*  
**Maricela Morado**, *Area Agency on Aging-Florida Department of Elder Affairs*  
**Candice Monroy**, *FDOT, District One Modal Development Office*  
**M. Suzanne Roberts**, *Virginia B. Andes Volunteer Community Clinic - Medical Community Representative (LCB Vice Chair)*

**MEMBERS PRESENT REMOTELY**

**Leigh Ann Bellamy**, *Division of Blind Services*  
**Dottie Fulton**, *Citizen Advocate-User (encountered some technical issues)*  
**Ieashea Howard**, *Regional Workforce Development*  
**Michael Stahler**, *Agency for Health Care Administration (AHCA)*

**ABSENT MEMBERS**

**Vacant**, *Disabled Representative*  
**Vacant**, *Children-at-Risk Representative*  
**Jocene Henderson**, *Veterans Affairs-excused*  
**Tabitha Larrauri**, *Department of Children & Families*  
**Ryan Lybeck**, *Local Private-for-Profit Transportation Industry Representative*  
**Joseph Sabatino**, *Citizen Advocate-excused*  
**Duane Siegfried**, *Representative for Elderly Interests-excused*

**STAFF PRESENT IN-PERSON**

**Wendy Scott**, *MPO Planner*  
**Betty-Ann Sherer**, *MPO Planner*  
**Laks Gurram**, *MPO Principal Planner*  
**Heidi Maddox**, *Charlotte County Transit*  
**Eva Tomszak**, *Charlotte County Fiscal Services*  
**Shirley Ciampi**, *Charlotte County Transit*

**OTHERS IN ATTENDANCE IN-PERSON**

**Richard Weingarten, Citizen**

**1. Call to Order & Roll Call**

LCB Chair Ken Doherty called the regular LCB Meeting to order at 10:00 a.m. An in-person quorum was present.

**2. Pledge of Allegiance**

Prior to the recitation of the Pledge of Allegiance, at the request of LCB Vice Chair Suzanne Roberts, a moment of silence was held to remember the valued community contributions of Dr. David Klein.

**3. Public Comments on Agenda Items**

Rich Weingarten asked LCB Chair Doherty if he could defer his comments until Agenda Item #6. It was agreed that this was permissible.

**4. Consent Agenda**

**A. Approval of Minutes: May 4, 2023 LCB Meeting**

**B. LCB 2024 Calendar of Quarterly Meetings**

*Suzanne Roberts made a motion to approve the Consent Agenda. Candice Monroy seconded the motion. The Consent Agenda was approved unanimously.*

**5. Approval of Local Coordinating Board (LCB) Bylaws**

The Commission for the Transportation Disadvantaged (CTD) requires that the LCB Bylaws be reviewed annually. Staff recommended the following non-substantive revisions to the LCB Bylaws:

- Cover page and document headers: Date change
- Page 8: Amend signature page with date change

*Tony Conte made a motion to approve the 2023 Local Coordinating Board (LCB) Bylaws. Suzanne Roberts seconded the motion. The motion was approved unanimously.*

**6. Annual Operating Report**

Pursuant to Florida Statutes, Chapter 427, and Rule 41-2 of the Florida Administrative Code, the Community Transportation Coordinator (CTC) provides the Florida Commission for the Transportation Disadvantaged (CTD) an Annual Operating Report (AOR) by September 15<sup>th</sup> of each year. This report identifies the coordinated services that were arranged or provided by the CTC during the past year. It contains an accounting of revenues and expenses, in addition to

other transportation disadvantaged program information. The draft AOR is typically forwarded in advance to CTD staff for review and comment prior to final submission.

Heidi Maddox responded to questions regarding the Annual Operating Report. LCB Chair Doherty focused his remarks on the final AOR summary page at the back of the document, noting that increasing ridership was still a goal. Discussion followed regarding how other regional transit agencies were addressing the issue, and Candice Monroy described the status of other systems (such as the return of Lee Tran's ridership and the development of new fixed route service in Hendry and Glades Counties). She noted that Charlotte County's unique geography can be a challenge given the County's widely dispersed nature. She stated that Lee Tran was having very good success with Doctor Office referrals. She also suggested that consideration be given by Charlotte County Transit to obtaining a Mobility Manager/Coordinator to give presentations regarding transit services and teach passengers how to access the system. Betty-Ann Sherer referenced a recent mobility management webinar.

Tony Conte discussed School Board and school bus information noted in the report and described coordination efforts with Heidi Maddox.

Rich Weingarten inquired about the downturn in Older American trips as noted under Elder Affairs sponsored trips. Heidi Maddox reported the trips to the senior congregate dining facilities had remained low ever since the Covid-19 pandemic. Maricela Morado discussed how the Senior Friendship Centers (C1 funded) were: (1) struggling with attendance and (2) having difficulty with hiring program management. Currently, there was a great demand for home delivered meals (C2 funding). This resulted in senior social isolation and loneliness, and efforts are underway to encourage older adults to go to the congregate dining sites instead. The three congregate dining sites served by Charlotte County Transit are: (1) the Rebecca Neal Owens Center in Harbor Heights, (2) the Verandas, and (3) the Charlotte Towers.

Leigh Ann Bellamy and Candice Monroy discussed resources available to provide orientation and mobility services training for the visually impaired at no charge. This was made available through a partnership with the Lighthouse for the Blind organization.

*Suzanne Roberts made a motion to approve the FY 2022-2023 Annual Operating Report which included providing staff with the ability to make adjustments based upon comments received from the CTD staff. Maricela Morado seconded the motion. The motion was approved unanimously.*

## 7. Quarterly Report

LCB Chair Doherty noted that trips were down by approximately 9800 starting from the time of Hurricane Ian's passage. Eva Tomszak stated that the FTA Section 5310 and FTA Section 5311 invoicing had been delayed and would be reflected at a later date. Heidi Maddox described how the trip totals for the Homeless Coalition coordinated partner program were low due to a driver vacation. She noted that life-enhancing trips included passenger travel to the bank, the library or the homes of family members.

Heidi Maddox clarified remarks made at the previous LCB Meeting regarding negotiated trips for alternate times in the Unmet Trips section of the report. These trips were not included in the report (as previously stated). She hoped that with the arrival of the upcoming new software improvements, Transit staff would be able to see peaks and valleys in passenger trip demand and be able to adjust and accommodate trip requests. She reviewed a new pie chart regarding the reasons for unmet trips and described each category. Currently drivers receive a full day manifest, but the new software will provide the ability to make schedule adjustments throughout the day based upon the number of ambulatory and wheelchair passengers.

Marketing and training efforts were reviewed. A new mobile cell phone app will allow passengers to book trips and see when the bus will arrive. Heidi Maddox noted that new staff member Shirley Ciampi will be the lead on the new software. Ms. Ciampi has been coordinating with the Virginia B. Andes Community Clinic to develop a pilot program for the center's portal.

LCB Chair Doherty requested that once the new transit application has been deployed, Transit staff should coordinate with County Administration to book a workshop, to brief the Board of County Commissioners with an application progress update.

Tony Conte described a new student system tracking system implemented this year in Charlotte County schools. Each student receives an ID card with a bar code which is used for bus travel, as well as attendance and lunch service. This is an enhanced security measure following the Marjory Stoneman Douglas High School tragedy. This new technology is helpful to verify ridership figures for funding purposes.

Laks Gurram pointed out needed corrections in the Unmet Trips pie chart, and Ms. Maddox stated that they would be corrected in the future. She noted that going forward Transit hoped to keep a dedicated bus for servicing the Englewood area.

Heidi Maddox introduced new Senior Fiscal Analyst Eva Tomszak who would be dealing with Transit's budget. Ms. Tomszak replaced Heidi Maddox in the Budget and Administrative Services Department's Fiscal Services unit.

Heidi Maddox noted that Transit is reaching out to the public at various events with brochures and other items. She discussed policy complaints centered around suspensions (with 3 of 9 complaints issued by the same individual). She described the policy for late cancellations (either within an hour of pickup or no show at the door): first time (white postcard), second time (yellow postcard), third time (red postcard) and fourth time (suspension letter). Regarding safety concerns, Ms. Maddox reported that complaints of speeding buses are checked on cameras.

Discussion of the new transit software and mobile phone app continued, including the fact that recent passenger surveys have shown requests for the phone app. A possible feature may allow for an evening prior reminder call to allow for voice message trip confirmation. It was noted that the elderly who possess the physical ability are becoming comfortable with using phone apps. Suzanne Roberts mentioned that a texting option would also be helpful for those clients who run out of phone minutes. Shirley Ciampi stated that training would be made available for texting, calling, etc.



## 8. Public Comments

No public comments were given.

## 9. Staff Comments

Wendy Scott gave the following report:

- Thank you to everyone participating in the LCB Meeting.
- There are currently two LCB vacancies: (1) a representative for disabled interests who is a disabled individual, and (2) a representative for Children-at-Risk (which, by definition, could reflect any number of juvenile concerns). LCB Members were asked to assist with recruiting efforts.
- Wendy Scott expressed a big thank you to everyone (LCB Members including LCB Chair Doherty, Transit staff and other County departments (*many having sent welcome bag donations*), Mayor Matthews/City, MPO Chair Commissioner Constance and all the MPO staff) who helped with welcoming the TD Commission entourage on June 14-15 for both a transit tour and CTD Business Meeting at the Event Center in Punta Gorda. This was the first time the group took their “show on the road” since the pandemic, and they repeatedly said that they were very impressed with everything they saw, heard and ate (“always local”)! Thanks to all the LCB Members who made the effort to participate in the Business Meeting (both in person and virtually resulting in a tremendous turnout) and to Suzanne Roberts who was invited over “no notice” to a dining table to give an impromptu speech on the Virginia B. Andes new mobile medical clinic partnership with Charlotte County Transit. *A door prize drawing was held which consisted of a welcome bag full of all the items found in the ones presented to the CTD visitors. Donna Fain’s name was drawn. All other LCB Members both in person, virtual or absent from the meeting have been offered a Charlotte County Transit bag now being used in an ongoing marketing campaign.*
- MPO Staff monitored the CTD Public Workshop on the Annual Operating Report via TEAMS on May 25, 2023. Also, on June 21, 2023, a partnership training on the joint efforts of County Transit and Fiscal staffs and the MPO staff was conducted to benefit new Transit hires and to serve as a refresher course for all other staff/update new initiatives.
- Due to Hurricane Idalia, the CTD Business Meeting and the Annual Workshop were cancelled. Staff awaits details on next steps.

Heidi Maddox announced Charlotte County Transit’s sponsorship of a Trunk or Treat event for the public to be held at the Port Charlotte Library on October 28, 2023. This event was part of a local Mobility Week initiative.

Eva Tomszak inquired about how her neighbor's father might contact the Senior Friendship Center to participate in the elder program. Maricela Morado stated that her agency's Elder Helpline should be contacted at (866) 413-5337. [The Elder Helpline – Area Agency on Aging for SWFL \(aaaswfl.org\)](http://www.aaaswfl.org)

#### **10. Member Comments**

Tony Conte discussed the ridership tracking system.

Suzanne Roberts stated that the Virginia B. Andes Community Clinic (VBA) mobile medical clinic vehicle delivery was delayed due to supply chain issues. She stated that a February/March 2024 delivery was now scheduled. She was happy that the Clinic would be partnering with Charlotte County Transit in a pilot project for the center's portal. She also mentioned that a memorial service honoring Dr. David Klein was tentatively scheduled for November 2023.

Maricela Morado noted that her organization still has Hurricane Ian relief funds available for the elderly and disabled. Assistance funding has been raised from \$1,500 to \$5,000. Regarding funding eligibility, applicants would be asked to provide income information, although there was no income cap. It was required that the request be one of "last resort" after having reached out to other funding sources. Interested parties should contact the elder helpline: (866) 413-5337 [The Elder Helpline – Area Agency on Aging for SWFL \(aaaswfl.org\)](http://www.aaaswfl.org) or (941) 955-2122.

Angela Hemstreet was happy to have the information provided at the meeting. Donna Fain was glad to be present and felt lucky to win the welcome bag.

Candice Monroy gave the FDOT report. She discussed the following topics:

- FDOT was in the process of generating new contracts for FTA Sections 5310, 5311 (off cycle) and 5339.
- A new grant workshop for these grants next cycle would be held on September 28, 2023 with an application due date of December 15, 2023
- Upcoming Training Events: APTA and FPTA conferences with week of October 8-11, 2023
- FDOT support for Mobility Week initiatives in October.

LCB Chair Doherty appreciated all the LCB Members who attended the meeting. He noted that the community was moving ahead positively if the weather would behave, and there was a great deal to accomplish. He noted that some citizens were feeling frustrated and believed that Hurricane Ian was being used as an excuse for delays. Additional challenges facing the County were 200 employee vacancies and housing issues. Many LCB members participating virtually expressed their appreciation. LCB Chair Doherty indicated that he might be absent from the next LCB Meeting, and Vice Chair Suzanne Roberts agreed to handle the meeting if need be.

#### **11. Adjournment (Next Meeting – November 9, 2023) at the Charlotte County Transit Facility, 545 Theresa Blvd., Port Charlotte, FL 33954)**

The next LCB meeting was scheduled for November 9, 2023, at the Transit Facility located at 545 Theresa Blvd. in Port Charlotte, FL 33954. The meeting was adjourned at 11:03 a.m.

NOVEMBER 16, 2023  
LCB MEETING

**AGENDA ITEM # 5**  
**APPROVAL OF GRIEVANCE PROCEDURES**

**Purpose:** To provide LCB members with a copy of the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) Grievance Procedures for annual review.

**Agenda Item Presented by:** MPO Staff and County Staff

**Discussion:**

According to the Planning Grant Agreement, the Commission for the Transportation Disadvantaged (CTD) requires that the LCB annually update and approve the Local Coordinating Board Grievance Procedures. These grievance procedures apply to customer service as provided on Charlotte County's Transportation Disadvantaged system, formerly known as Sunshine Ride. In the past, no grievances have ever gone forward to the LCB Grievance Board, but rather have been settled at the service provider or mediator level. Previously, MPO staff reached out to County Human Services staff regarding their ongoing commitment to provide any future mediation assistance if required. Thus far, response has been very favorable.

No substantive changes relating to the Grievance Procedures were made in the LCB Bylaws this year. At this time, staff is only recommending the following non-substantive changes to the LCB Grievance Procedures:

- document cover page, revise the date
- page 6, revise the signature page

**Recommendation:** Motion to approve the draft Charlotte County Transportation Disadvantaged Local Coordinating Board Grievance Procedures

**Attachment:** Draft Charlotte County Transportation Disadvantaged Local Coordinating Board Grievance Procedures

**CHARLOTTE COUNTY  
TRANSPORTATION DISADVANTAGED  
LOCAL COORDINATING BOARD  
GRIEVANCE PROCEDURES**

**NOVEMBER 16, 2023**

# **CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD GRIEVANCE PROCEDURES**

## **I. OBJECTIVE**

Establishment of a formal policy regarding the process by which a complaint becomes a formal grievance. This policy is intended to supplement the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) Bylaws pertaining to grievance procedures and to assist individuals and agencies in understanding their rights and responsibilities.

## **II. DEFINITIONS AND REFERENCES**

As used in this Grievance Procedures document the following words and terms shall have the meanings assigned therein. Additional program definitions can be found in Chapter 427, Florida Statutes (F.S.), Rule 41-2, Florida Administrative Code (FAC), and the Charlotte County Transportation Disadvantaged Coordinating Board Bylaws.

### **Agency -**

An official, officer, commission, authority, council, committee, department, division, bureau, board, section, or any other unit or entity of the state or of a city, town, municipality, county, or other local governing body or a private nonprofit entity providing transportation services as all or part of its charter.

### **Commission for the Transportation Disadvantaged (CTD) -**

The agency created by Chapter 427, Florida Statutes, whose purpose under law is to accomplish the coordination of transportation services provided to the transportation disadvantaged.

### **Community Transportation Coordinator (CTC) -**

A transportation entity recommended by an Official Planning Agency, to ensure that coordinated transportation services are provided to serve the Transportation Disadvantaged (TD) population in a designated service area. Currently, the CTC is the Charlotte County Transit Division of the Charlotte County Board of County Commissioners.

### **Department of Human Services (DHS)-**

The Charlotte County Department of Human Services assists Charlotte County citizens in need of various social services and provides mediation services prior to formally elevating a grievance to the LCB level.

### **Formal Grievance -**

A written complaint to document any concerns or an unresolved service complaint regarding the operation and administration of TD services by the Transportation Operator, CTC, or LCB.

**Grievance Board Membership -**

Membership in the Grievance Board shall be the same as the membership of the voting members of the LCB. The Vice Chair of the LCB will serve as the Chair of the Grievance Board. Transportation operators may submit a grievance to the LCB Grievance Board. In the event a local grievance resolution cannot be found, the Commission for the Transportation Disadvantaged (CTD) may act as the final grievance resolution body. A quorum shall be present for any official action. Meetings shall be held at such times as the Grievance Board may determine or as requested by the LCB.

**Local Coordinating Board (LCB) -**

Is defined under Section 427.011(7), F.S., as “an advisory” entity in each designated service area composed of representatives appointed by the Official Planning Agency (OPA), to provide assistance to the Community Transportation Coordinator (CTC) relative to the coordination of transportation services.

**Metropolitan Planning Organization (MPO) -**

The Charlotte County-Punta Gorda Metropolitan Planning Organization (MPO) functions as the OPA for Transportation Disadvantaged services.

**Official Planning Agency (OPA) -**

The body selected to plan for the Transportation Disadvantaged services in a given service area.

**Service Complaint -**

Incident that may occur on a daily basis and is reported to the driver or dispatcher or to other individuals involved with the daily operations, as limited by the policies and directives of the Charlotte County Board of County Commissioners, and is resolved within the course of a reasonable time period suitable to the complainant. Local service complaints are driven by the inability of the CTC or transportation operators to meet local service standards established by the CTC and LCB.

**TD Helpline -**

This is a service of the CTD Ombudsman program (Toll free: 1-800-983-2435). The Ombudsman program can help persons find out where to go for assistance, can get answers to questions about TD programs, can assist to work out problems, and can find someone to listen to complaints and make things right. Operators are available from 8am to 5pm (Eastern Time) Monday through Friday.

**Transportation Disadvantaged (TD) (User) -**

Those persons who because of physical or mental disability, income status, or age or who for other reasons are unable to transport themselves or to purchase transportation and are, therefore, dependent on others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining

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

**Transportation Operator -**

One or more public, private for-profit or private nonprofit entities engaged by the Community Transportation Coordinator (CTC) to provide service to transportation disadvantaged persons pursuant to a Transportation Disadvantaged Service Plan (TDSP).

**III. DIRECTIVES**

- A. Daily service complaints are routine in nature, occur once or several times in the course of a day's service, and are usually resolved immediately by the CTC. However, if unresolved, a routine, service complaint can emanate into a formal grievance.
- B. The resolution to complaints will vary depending on each situation. Some complaints can be resolved while speaking with the client and others will require research in order to be resolved.
- C. Service Complaints: All service complaints should be recorded and reported to the CTC, and reported to the LCB as requested and outlined in the CTC Uniform Service Reporting, January 1996.
- D. Service complaints may include but are not limited to:
  - Late trips (late pickup and/or late drop off)
  - No show by the transportation operator
  - No-show by client
  - Client behavior
  - Passenger discomfort
  - Service denial (refused service to client without an explanation as to why)
- E. Formal Grievance. The grievant, in his/her formal complaint, should demonstrate or establish his/her concerns as clearly as possible. The formal grievance process shall be open to addressing complaints by agencies, users, transportation operators, potential users of the system and the Community Transportation Coordinator in the designated service area. Formal grievances may include, but are not limited to:



- Recurring or unresolved service complaints
- Violation of specific laws governing the provision of transportation disadvantaged services (i.e., Chapter 427, F.S. and Rule 41-2, FAC)
- Coordination disputes
- Agency compliance
- Conflicts of interest
- Billing and/or accounting procedures.

F. All formal grievances filed must be written and contain the following:

- Name and address of the complainant with date and time of incident;
- A statement of the grounds for the grievance and supplemented by supporting documentation, made in a clear and concise manner. This shall include a complete description of efforts taken by the complainant to resolve the complaint.
- An explanation of the relief or action desired by the complainant.
- The grievant shall have 21 calendar days from the initial receipt of the Grievance Package to fill out the form and return it to the appropriate agency.

Should the grievant not supply the above information to substantiate the grievance(s), or submit the information after the twenty-one calendar day deadline; no further action will be taken.

G. The grievant shall first contact the CTC to deal with the complaint. The CTC will attempt to mediate and solve the problem. If the complaint directly affects the CTC, or if mediation with the CTC is not successful, the CTC shall request that a hearing be scheduled using the designee of the Charlotte County Human Services Director as mediator to resolve the grievance.

H. The Human Services Director designee will make every effort to resolve the grievance up to and including arranging a meeting between the involved parties in an attempt to assist them in reaching an amicable resolution. Failing resolution at this juncture, the appropriate funding agency will be notified of the grievance by the Human Services designee. If a meeting is initiated, it shall take place within fifteen (15) working days following receipt of all evidence regarding the grievance. Evidence gathering shall be no longer than ten (10) working days from the CTC initially contacting the Human Services Department to schedule a grievance resolution meeting. The OPA staff will receive copies of all grievance materials.

- I. If the Human Services Department is unsuccessful at mediating the grievance through the process outlined in Section H above, the Human Services Director designee shall request that the grievance be heard by the Grievance Board. This request shall be made within fifteen (15) working days, from the Human Services meeting date and sent to the Chair and Vice-Chair of the LCB with copies sent to the CTC.
- J. Upon receipt of the written grievance, the Chair of the Grievance Board shall have fifteen (15) working days to contact Grievance Board members and set a grievance hearing date. In all cases said hearing date shall be held within twenty (20) working days of the Chair's notification to schedule a Grievance Board hearing at the request of the Human Services Department.
- K. The grievant and all parties involved shall be notified at least seven (7) working days prior to the hearing date by mail.
- L. The Grievance Board shall have the authority to hold hearings, conduct investigations, and take testimony in all matters relating to complaints or grievances brought before the Grievance Board by the grievant.
- M. Each party, at their own expense, shall have the right to be represented by counsel, to call and examine witnesses, to introduce exhibits, and to examine opposing witnesses on any relevant matter.
- N. The Grievance Board shall review the material presented and issue a decision to all parties involved. Decisions shall be by majority vote.
- O. All meetings and hearings shall be open to the public. Minutes shall be kept at each meeting.
- P. The grievant may contact the CTD Ombudsman (toll free: 1-800-983-2435) and request assistance at any time during the grievance process. Additionally, the grievant may appeal the decision of the Grievance Board to the CTD. A toll-free phone number for complaints for grievances shall be posted inside each vehicle. Additionally, rider brochures or other documents provided will be available to potential users and shall provide information about the complaint and grievance process. These shall be available in accessible format.
- Q. When a grievant is a passenger who receives a trip that is funded by a Funding Agency, then that Funding Agency will be notified in the event that a grievant's complaint moves beyond the level of initial CTC resolution phase.

Reviewed and adopted the 16th day of November, 2023 by the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB).

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Commissioner Ken Doherty, Chair  
Charlotte County Transportation Disadvantaged Local Coordinating Board

## STEPS IN THE GRIEVANCE PROCESS

<p>Complaint to CTC: if the CTC cannot resolve the complaint to the complainant's satisfaction, the complainant may request a grievance packet.</p>
<p>Grievant has 21 calendar days after receiving the packet to file the grievance information including date and time of incident.</p>
<p>CTC is to attempt to resolve the grievance. If CTC cannot resolve the grievance, then...</p>
<p>...CTC may request that the designee of the Director of the Human Services Department attempt to resolve the grievance. The Human Services Department has 15 working days to hold the meeting with all parties. If the Human Services Department cannot resolve the grievance, then...</p>
<p>...Human Services may request a hearing with the Grievance Board to be held within 20 working days of Grievance Board Chair's notification of a hearing request. The Grievance Board Chair will notify all parties within 15 working days and set the hearing date. The Board's decision will be by majority vote. If there is no resolution then...</p>
<p>...the grievant may contact the CTD for final resolution for appeal of the Grievance Board decision.</p>



NOVEMBER 16, 2023  
LCB MEETING

**AGENDA ITEM # 6**  
**QUARTERLY REPORT**

**Purpose:** To provide a quarterly report of Transportation Disadvantaged (TD) activities

**Agenda Item Presented by:** Charlotte County Staff

**Discussion:**

The quarterly report will be presented to describe recent activities of the Community Transportation Coordinator. This is an informational item.

**Recommendation:** None

**Attachment:** Quarterly Report for July-September 2023

**CHARLOTTE COUNTY TRANSPORATION DISADVANTAGED AND PUBLIC TRANSPORTATION TRIP REPORT FISCAL YR 22/23**

Month	Enhanced Mobility	SFC	TD	Coordinated Partners	Rural	Public Transit	FY 22/23 Total Trips	FY21/22 Total Trips	FY 20/21 Variance
October	78	96	1,155	78	47	1,487	2,941	7,969	(5,028)
November	103	134	1,351	61	53	6,438	8,140	12,160	(4,020)
December	112	120	1,491	60	78	2,137	3,998	4,657	(659)
January	116	66	1,644	100	80	2,211	4,217	4,242	(25)
February	117	108	1,533	73	77	2,230	4,138	4,405	(267)
March	152	140	1,722	134	85	2,883	5,116	4,957	159
April	156	123	1,590	59	81	2,959	4,968	4,776	192
May	175	135	1,719	76	128	3,333	5,566	4,648	918
June	171	134	1,685	53	104	3,243	5,390	4,725	665
July	134	124	1,581	32	112	2,547	4,530	4,255	275
August	148	140	1,665	41	167	2,817	4,978	5,048	(70)
September	148	114	1,626	83	160	2,806	4,937	3,743	1,194
<b>Total</b>	<b>1,611</b>	<b>1,434</b>	<b>18,762</b>	<b>850</b>	<b>1,172</b>	<b>35,091</b>	<b>58,920</b>	<b>65,586</b>	<b>(6,666)</b>
Q1 No Shows: 535									-
Q2 No Shows: 540									
Q3 No Shows: 526									
Q4 No Shows: 520									
November Waterfest Trips: 4,481									

Enhanced Mobility: Enhanced Mobility for Seniors and Individuals with Disabilities

SFC: Senior Friendship Centers

TD: Transportation Disadvantaged Commission

Coordinated Partners: Non Profit Coordinated Trips

Rural: Rural Areas

**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	\$ 1,739.70	\$ 34,257.58	\$ 21,438.83	\$ 25,424.31	\$ 82,860.42
Apr-23	\$ 1,653.04	\$ 31,108.45	\$ -	\$ -	\$ 32,761.49
May-23	\$ 2,112.85	\$ 33,502.56	\$ -	\$ -	\$ 35,615.41
Jun-23	\$ 2,044.56	\$ 32,228.76	\$ 8,991.69	\$ 10,805.35	\$ 54,070.36
Jul-23	\$ 1,996.86	\$ 44,232.63	\$ -	\$ -	\$ 46,229.49
Aug-23	\$ 2,057.30	\$ 49,185.49			\$ 51,242.79
Sep-23	\$ 1,552.16	\$ 46,375.04	\$ 22,897.13	\$ 24,579.38	\$ 95,403.71
<b>Total</b>	\$ 20,475.53	\$ 406,942.52	\$ 53,327.65	\$ 60,809.04	\$ 541,554.74



**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	17	22	20	59
May-23	21	31	24	76
Jun-23	10	23	20	53
Jul-23	20	-	12	32
Aug-23	9	20	12	41
Sep-23	4	21	58	83
<b>Total</b>	<b>259</b>	<b>204</b>	<b>387</b>	<b>850</b>

**CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 22/23**

**FY23 Q1**

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

**FY23 Q2**

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

**FY23 Q3**

<b>One-Way Trips By Trip Purpose</b>	<b>Q3</b>	<b>Total One-way Trips</b>	<b>Percent</b>	<b>Q3</b>
Medical	4,113	11,487		27%
Nutritional (Meal site + Grocery only)	856	2,952		7%
Education/Training	2,039	5,713		14%
Employment	4,385	12,049		29%
Life-Enhancing	3,061	10,016		24%
<b>Trip Purpose Totals</b>	<b>14,454</b>	<b>42,217</b>		<b>100%</b>

**CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 22/23  
FY23 Q4**

<b>One-Way Trips By Trip Purpose</b>	<b>Q4</b>	<b>Total One-way Trips</b>	<b>Percent Q4</b>
Medical	3,877	15,364	<b>27%</b>
Nutritional (Meal site + Grocery only)	837	3,789	<b>7%</b>
Education/Training	2,124	7,837	<b>14%</b>
Employment	4,640	16,689	<b>29%</b>
Life-Enhancing	2,956	12,972	<b>23%</b>
<b>Trip Purpose Totals</b>	<b>14,434</b>	<b>56,651</b>	<b>100%</b>

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

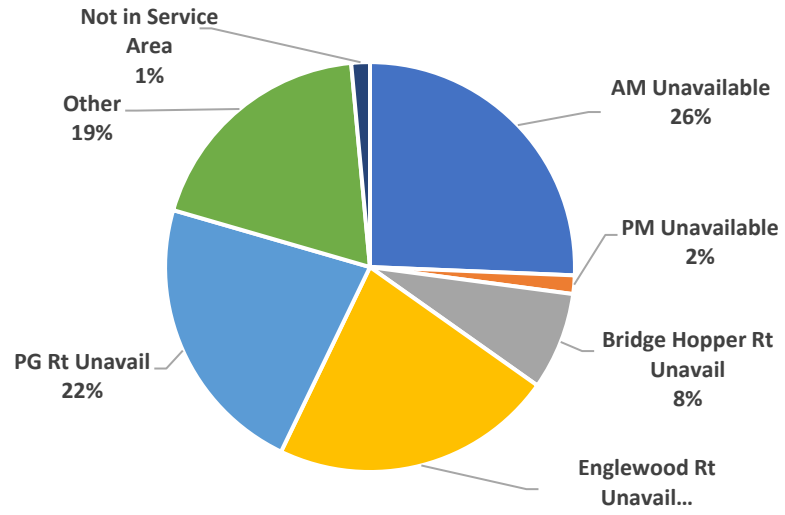
Nutritional: Grocery is Publix, Winn-Dixie, Aldi

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**

<b>Unmet Trips October-December 2022</b>	<b>Medical</b>	<b>Nutritional</b>	<b>Education - Training</b>	<b>Employment</b>	<b>Life Enhancing</b>	<b>Total</b>
October			2	3	23	28
November	34			4	37	75
December	15		3	7	38	63
Quarterly Totals	<b>49</b>	-	<b>5</b>	<b>14</b>	<b>98</b>	<b>166</b>
<b>Unmet Trips January-March 2023</b>	<b>Medical</b>	<b>Nutritional</b>	<b>Education - Training</b>	<b>Employment</b>	<b>Life Enhancing</b>	<b>Total</b>
January	30	1	1	41	36	109
February	40		3	49	26	118
March	47	2	2	43	26	120
Quarterly Totals	<b>117</b>	<b>3</b>	<b>6</b>	<b>133</b>	<b>88</b>	<b>347</b>
<b>Unmet Trips April-June 2023</b>	<b>Medical</b>	<b>Nutritional</b>	<b>Education - Training</b>	<b>Employment</b>	<b>Life Enhancing</b>	<b>Total</b>
April	52	3	5	56	15	131
May	50	1	-	48	6	105
June	30	4	3	41	17	95
Quarterly Totals	<b>132</b>	<b>8</b>	<b>8</b>	<b>145</b>	<b>38</b>	<b>331</b>
<b>Unmet Trips July-September 2023</b>	<b>Medical</b>	<b>Nutritional</b>	<b>Education - Training</b>	<b>Employment</b>	<b>Life Enhancing</b>	<b>Total</b>
July	24	-	-	31	20	75
August	27	2	17	29	16	91
September	27	8	10	22	4	71
Quarterly Totals	<b>78</b>	<b>10</b>	<b>27</b>	<b>82</b>	<b>40</b>	<b>237</b>

### FY23 Q4 Unmet Trips



**CHARLOTTE COUNTY TRANSIT FEEDBACK REPORT FISCAL YR 22/23**

1st Quarter as of 12/30/2022

Type of Issue	Previous Quarter	This Quarter
Policy Complaint	-	6
<b>Q1 Total</b>	-	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
<b>Q2 Total</b>	6	9

3rd Quarter as of 6/30/2023

Type of Issue	Previous Quarter	This Quarter
Wrong Time/Date of Service	1	-
No Timeslot available	1	-
Late Ride or Early	-	-
Missed Ride	-	3
Safety Complaint	2	4
Policy Complaint	5	9
<b>Q3 Total</b>	9	16

4th Quarter as of 9/30/2023

Type of Issue	Previous Quarter	This Quarter
Wrong Time/Date of Service	-	3
No Timeslot available	-	-
Late Ride or Early	-	2
Missed Ride	3	4
Safety Complaint	4	4
Policy Complaint	9	7
Compliments	-	1
<b>Q4 Total</b>	16	21

NOVEMBER 16, 2023  
LCB MEETING

**AGENDA ITEM # 7**  
**TRANSIT DEVELOPMENT PLAN (TDP) UPDATE**

**Purpose:** To provide an update on the Charlotte County Transit Development Plan (TDP) now underway

**Agenda Item Presented by:** Charlotte County Staff

**Discussion:**

On October 10, 2023, the Charlotte County Board of County Commissioners approved the selection of Benesch (formerly Tindale Oliver) to develop Charlotte County Transit's TDP. Staff will provide an update on the latest developments in the TDP effort. This is an informational item.

**Recommendation:** None

**Attachment:** None