

**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 2, 2024**

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 4, 2024 LCB Public Meeting Minutes
  - B. Approval of Minutes: January 4, 2024 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) Second Annual Update Including Rate Model Calculations
7. 2024 CTC Evaluation
8. Community Transportation Coordinator Quarterly Reports for October-December 2023 and January-March 2024
9. Transit Development Plan Update
10. Public Comments
11. Staff Comments
12. Member Comments
13. Adjournment (NEXT MEETING – SEPTEMBER 5, 2024)

*\*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**

1050 Loveland Blvd, Port Charlotte, FL 33980  
Telephone: (941) 883-3535

The Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) will hold a quarterly meeting on May 2, 2024 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@ccpgmpo.gov](mailto:office@ccpgmpo.gov) or mailing the comments to MPO LCB Staff, 1050 Loveland Blvd, Port Charlotte, FL 33980. Comments must be received for the meeting by noon on May 1, 2024. 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.ccpmpo.gov](http://www.ccpmpo.gov).

MAY 2, 2024  
LCB MEETING

## CONSENT AGENDA ITEMS #4

MAY 2, 2024  
LCB MEETING

**AGENDA ITEM # 4-A**  
**APPROVAL OF MINUTES: JANUARY 4, 2024 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:** [January 4, 2024 LCB Public Meeting Minutes](#)



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

Minutes of a Public Meeting held in a hybrid format on January 4, 2024 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)*  
**M. Suzanne Roberts**, *Virginia B. Andes Volunteer Community Clinic - Medical Community Representative (LCB Vice Chair)*  
**Lynda Faieta**, *Public Education-School Transportation (alternate)*  
**Donna Fain**, *Agency for Persons with Disabilities*  
**Pamela Jordan**, *Representative for Elderly Interests*  
**Maricela Morado**, *Area Agency on Aging-Florida Department of Elder Affairs*  
**Candice Monroy**, *FDOT, District One Modal Development Office*  
**Maryjane Nickerson**, *Goodwill, Economically Disadvantaged Representative (alternate)*  
**Joseph Sabatino**, *Citizen Advocate*

**MEMBERS PRESENT REMOTELY**

**Leigh Ann Bellamy**, *Division of Blind Services*  
**Jocene Henderson**, *Veterans Affairs*  
**Carmen Henry**, *Regional Workforce Development*  
**Tabitha Larrauri**, *Department of Children & Families*

**ABSENT MEMBERS**

**Vacant**, *Disabled Interests Representative*  
**Vacant**, *Local Private-for-Profit Transportation Industry Representative*  
**Lynn Dohler**, *Children-at-Risk Representative - excused*  
**Dottie Fulton**, *Citizen Advocate-User – excused (technical issues)*  
**Michael Stahler**, *Agency for Health Care Administration (AHCA) - 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*

**OTHERS IN ATTENDANCE IN-PERSON**

**Richard Weingarten**, *Citizen*

**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. The poster entitled *It Takes So Little To Help So Much!* was referenced. It states that 100% of all donations go to assist people in your community. Wendy Scott noted 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 10:14 a.m. and proceeded to the regular quarterly Charlotte County Transportation Disadvantaged LCB Meeting.*

MAY 2, 2024  
LCB MEETING

**AGENDA ITEM # 4-B**  
**APPROVAL OF MINUTES: JANUARY 4, 2024 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 4, 2024 LCB Meeting

**Attachment:** [January 4, 2024 LCB Meeting Minutes](#)

**CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED**  
**LOCAL COORDINATING BOARD (LCB)**  
**MEETING**  
**January 4, 2024**

Minutes of a regular meeting held in a hybrid format on January 4, 2024, 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)*  
**M. Suzanne Roberts**, *Virginia B. Andes Volunteer Community Clinic - Medical Community Representative (LCB Vice Chair)*  
**Lynda Faieta**, *Public Education-School Transportation (alternate)*  
**Donna Fain**, *Agency for Persons with Disabilities*  
**Pamela Jordan**, *Representative for Elderly Interests*  
**Maricela Morado**, *Area Agency on Aging-Florida Department of Elder Affairs*  
**Candice Monroy**, *FDOT, District One Modal Development Office*  
**Maryjane Nickerson**, *Goodwill, Economically Disadvantaged Representative (alternate)*  
**Joseph Sabatino**, *Citizen Advocate*

**MEMBERS PRESENT REMOTELY**

**Leigh Ann Bellamy**, *Division of Blind Services*  
**Jocene Henderson**, *Veterans Affairs*  
**Carmen Henry**, *Regional Workforce Development*  
**Tabitha Larrauri**, *Department of Children & Families*

**ABSENT MEMBERS**

**Vacant**, *Disabled Interests Representative*  
**Vacant**, *Local Private-for-Profit Transportation Industry Representative*  
**Lynn Dohler**, *Children-at-Risk Representative - excused*  
**Dottie Fulton**, *Citizen Advocate-User – excused (technical issues)*  
**Michael Stahler**, *Agency for Health Care Administration (AHCA) - excused*

**STAFF AND OTHERS 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*  
**Rich Weingarten**, *Citizen*

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

LCB Chair Ken Doherty called the regular LCB Meeting to order at 10:14 a.m. at the conclusion of the Annual Public Meeting.

**2. Pledge of Allegiance**

The Pledge of Allegiance was recited.

**3. Public Comments on Agenda Items**

Rich Weingarten inquired about the source of funding for the upcoming Transit Development Plan (TDP). Heidi Maddox stated that it would be conducted using the FTA Section 5307 grant.

**4. Consent Agenda**

**A. Approval of Minutes: [Approval of Minutes: November 4, 2023 LCB Meeting](#)**

LCB Chair Doherty appreciated LCB Vice Chair Roberts chairing the November meeting in his absence. She noted that it had been her pleasure to serve the LCB.

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

**5. [Election of LCB 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 serve a term of one year starting with the first meeting after the election. The Vice-Chairperson may serve more than one term. The Vice-Chairperson 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 Doherty requested that Wendy Scott chair the meeting for the election of the LCB Vice-Chairperson.

*Commissioner Doherty made a motion to nominate Suzanne Roberts to serve as LCB Vice-Chairperson. Joe Sabatino seconded the motion. There were no additional nominations, and the nominations were closed. The motion was approved unanimously.*

LCB 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. The annual LCB Member Training was conducted using the *Local Coordinating Board Transportation Disadvantaged Training Video*. LCB Members were then shown a graphic identifying the names of current LCB Members and what position they fill on the LCB.

#### 7. Review/Endorsement of Charlotte County’s Section 5310 and 5311 Grant Applications

Federal transportation legislation includes the Federal Transit Administration (FTA) Section 5310 and Section 5311 funding programs. Section 5310 is aimed at enhancing mobility for seniors and persons with disabilities, while rural residents benefit from Section 5311. Charlotte County Transit is applying for operating grants in both programs.

*Suzanne Roberts made a motion to endorse the Charlotte County FTA Section 5310 and 5311 Grant Applications. Maricela Morado seconded the motion. Candice Monroy abstained from voting due to her FDOT grant approval duties. The Consent Agenda was approved with one abstention.*

#### 8. Community Transportation Coordinator (CTC) Quarterly Report

*Given the timing of the holiday period and a very short turnaround time, the CTC Quarterly Report covering the October-December 2023 timeframe was not available for the January 4, 2024 LCB meeting. It will be reviewed along with the January-March 2024 report at the May 2, 2024 LCB meeting.*

#### 9. Transit Development Plan (TDP) Update

Transit Development Plans (TDPs) are required for transit grant program recipients in Section 341.052, F.S. A TDP is the provider's planning, development, and operational guidance document, based on a ten-year planning horizon and covers the year for which funding is sought and the nine subsequent years. Florida Administrative Code 14-73.001 Public Transportation further details TDP requirements. Substantial proposed changes to the current “TDP rule” are currently underway. These changes should promote better coordination between transit agencies and MPO planning efforts.

Heidi Maddox stated that the TDP scope had completed legal review. The vendor had been approved, and the document was awaiting BCC signature. The hard work would be commencing soon. A transit fare study, a transit marketing study and the feasibility of using alternate fuel vehicles would all be accomplished with the development of the TDP.

Wendy Scott raised the issue of the ongoing development of the new statewide Transit Development Plan rule and its potential impact to both the County’s next TDP and the MPO’s 2050 Long Range Transportation Plan (LRTP) development efforts. Timelines for both documents were a concern. Candice Monroy agreed to inquire with District One and FDOT Central Office staff regarding the latest developments with the TDP rule revisions. Heidi Maddox indicated that Transit would proceed with TDP development using the current rule until

notified otherwise. Currently, this would mean TDP submission to FDOT by September 1, 2024 under the existing TDP rule. LCB Chair Doherty expressed interest in having FDOT and other staff discuss the development of these studies further at a future MPO Board Meeting to keep all interested parties informed.

#### **10. Citizen Comments**

No public comments were given.

#### **11. Staff Comments**

Wendy Scott gave the following report:

- Thank you to everyone participating in the LCB Meeting.
- Welcome to Pamela Jordan as the representative for Elderly Interests.

Pamela Jordan discussed her previous 44-year career in Anne Arundel County, Maryland in various governmental roles, including County Americans with Disabilities Act Coordinator, Director of Aging & Disabilities and Deputy Chief Information Officer for Health & Human Services. She described her personal interest in advocating for individuals with disabilities due to a family member's health challenges. LCB Members welcomed her to the board.

- The representative for the Children-at-Risk position will be filled by Mr. Lynn Dorler who is the Executive Director of the Boys and Girls Clubs of Charlotte County. He was not at the meeting due to a scheduling conflict, but he expects to attend the next LCB meeting.
- Dottie Fulton, Citizen Advocate/Transit System User, had been approved by the MPO Board for another three-year term. This news was well-received by the LCB Members.
- There are currently two LCB vacancies: (1) a representative for disabled interests who is an individual with a disability, and (2) new – a representative of the local private-for-profit transportation industry. MPO staff had received some interest for the first position; but thus far, they had not received a completed application.
- TD Legislative Awareness Day will be held in Tallahassee at the Capitol Building on Thursday, January 18, 2024 (given this year's earlier legislative session). Vehicles and program advocates converge on the Capitol grounds to increase program awareness. You or your organizational representatives in the Panhandle area are invited to participate. Commissioner Doherty indicated that he would be in Tallahassee at that time with the Florida Association of Counties organization and might attend.
- MPO staff monitored the December 11, 2023 business meeting of the Florida Commission for the Transportation Disadvantaged which was held virtually. Just above 1.4 million trips were taken statewide in the past program year, as the program moves beyond the lean travel years of the pandemic period. A new County profile page will be part of the Commission's Annual Performance Report, and it is currently available on the Commission's website. (*Staff displayed the information on screen*). A major Commission goal this year is to implement the results of the Annual Operating Report (AOR) study conducted last year. Going forward a timeline for implementation and

guidance will be developed, resulting in the eventual shift from relying on each County's AOR report to the new data reporting material.

- MPO Staff was glad to participate with Transit and other County and human service agencies on December 14, 2023 at the Family Services Center in a holiday outreach event for Seniors, Veterans and Adults with Disabilities.

Betty-Ann Sherer also commented on the holiday outreach event. She provided flyers regarding an upcoming Team Punta Gorda-sponsored effort to replenish the Saint Vincent DePaul food pantry. It is a drive-through event on January 12, 2024 at the Charlotte County Community Foundation at 227 Sullivan Street from 9:00 a.m. – 1:00 p.m. Joe Sabatino noted that approximately 50-60 families are served weekly through the food pantry on Monday/Wednesday/Friday. Staff would also forward the flyers digitally post-meeting.

Heidi Maddox described the wonderful opportunity that Transit staff now has in the post-pandemic period to do community outreach events. She described the increased number of contract drivers (17 on weekdays and 3 on Saturdays). She was pleased that the new software had resulted in a significant decrease in unmet trips and no-shows. With the new software, passengers were able to confirm or cancel trips the evening before travel, as well as receive "your bus in on the way" notices just prior to their pickups. She said that exciting data would be presented at the next meeting. She noted that there were currently 20 full time and 4 part time drivers in place. Full time drivers were being utilized as stand by drivers when needed to fill their 40-hour work week. She was happy that a number of same day and next day trips were being accommodated. LCB Chair Doherty requested that whenever Heidi Maddox was ready to brief the Board of County Commissioners (BCC) on recent transit accomplishments, she coordinate a BCC presentation through Gordon Burger and Emily Lewis. Ms. Maddox indicated that she would be pleased to do a BCC presentation regarding transit.

Heidi Maddox stated that Shirley Ciampi had been promoted to a new Mobility Manager position and would be involved with grants, procurement compliance and public outreach. Ms. Ciampi was working with Jocey Henderson at the Veterans Services Office to conduct public trainings on the mobile phone application and was also going to hold lunch-and-learn sessions with human services organizations. She was also updating the transit brochure.

Suzanne Roberts praised assistance received from Charlotte County Transit for transporting the 2024 Leadership Charlotte group. She had received a wonderful response from the participants, especially since over half of them were unaware of how Charlotte County Transit can support the community. She thanked the Transit Division for their assistance.

Heidi Maddox described the new mobile phone application and its registration process coordinated through Transit Dispatchers. She reviewed a slide of phone screen shots of scheduling enhancements for bookings, trip details and trip history information. The process was similar to that of booking an Uber trip. Commissioner Doherty asked about security for the phone application system. Heidi Maddox stated that it was cloud-based and had been thoroughly reviewed and approved by the County's IT Department regarding system security. It was noted that the rides are currently free, and the drivers are contracted through a private firm. Suzanne



Roberts thanked Transit staff for including the Virginia B. Andes Volunteer Community Clinic in a pilot program for testing the new software.

Laks Gurram congratulated Heidi Maddox on the selection of the Transit TDP consultant and stated that the MPO staff was happy to be working with Transit on the development of the document. He noted several upcoming MPO Board Meetings:

- Joint meeting with Sarasota/Manatee MPO Board on January 29, 2024, 11 a.m, Venice Community Center, 326 Nokomis Avenue S, Venice, FL
- Joint meeting with the Lee County MPO Board on February 16, 2024, 9:30 a.m, Burnt Store Road Presbyterian Church, Stewart Hall, 11330 Burnt Store Road, Punta Gorda, FL
- MPO Board Meeting on March 21, 2024 (new date/time), 9 a.m, Charlotte County Administration Center, 18300 Murdock Circle, Port Charlotte, FL

Betty-Ann Sherer noted that the information was available on the MPO's website: [Events from November 7 – March 7 – Charlotte County-Punta Gorda Metropolitan Planning Organization \(ccpgmpo.gov\)](https://ccpgmpo.gov)

## **12. Member Comments**

Maricela Morado stated that her agency still had robotic pets and funding assistance to seniors and adults with disabilities for Hurricane Ian expenses such as damaged appliances, windows, flooring and portions of roofs) without income verification. She urged interested parties to call the Southwest Florida Area Agency on Aging helpline for assistance.

Suzanne Roberts thanked all for their condolences to the Volunteer Community Clinic staff on the passing of Dr. David Klein and Dr. Mark Asperilla who had been instrumental in her organization's founding and growth. She was happy to announce that the Clinic's mobile medical bus would arrive in February 2024 and be presented to the Board of County Commissioners in March 2024 with a ribbon cutting and an opening event in the evening. The Clinic still needs a full-time driver, an Advanced Practice Registered Nurse (APRN) and a full-time coordinator.

Pamela Jordan stressed that the best language to use in recruiting a new LCB Member is to "do people first" (i.e., state "individual with a disability" or "person with a disability)."

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

- She is continuing to process grants for FY 2022 following delays from FDOT Central Office in getting the funding in place.
- She had received Charlotte County's two grant applications for the next cycle (as reviewed earlier in the meeting). The application process is closed and review is underway. Decisions would be forthcoming in May 2024, and no obstacles exist at this time.
- Triennial reviews (Round 3) are starting, beginning with small non-profit agencies.

Eva Tomszak inquired about how individuals qualified to be a patient of the Virginia B. Andes Volunteer Community Clinic. Suzanne Roberts responded that a patient must be at 200% or below poverty level income and a resident of Charlotte County including illegal residents. She noted that the mission is all about healthcare and saving people's lives. The non-profit Clinic is located at 21297 Olean Blvd. directly across from Fawcett Hospital. She invited all to visit Monday-Friday from 9 a.m. to 3 p.m. It has existed for 15 years, and she has been the Chief Executive Officer for the past 14 years. Information may be found here: [Virginia B. Andes Volunteer Community Clinic | Providing no cost volunteer medical, pharmacy and wellness services to the under-served in Charlotte County \(volunteercare.org\)](https://volunteercare.org)

Lynda Faieta stated that the School Board still needs drivers. She commented favorably on the LCB Member training video. She enjoys participating on the LCB.

LCB Chair Doherty described his pleasant holiday with generations of his family and hoped those present had experienced a wonderful holiday season, too. He looked forward to a good year full of much activity. Charlotte County has been experiencing tremendous growth with 300+ single family building permits issued each month. He noted that it still was important to maintain the area's quality of life. He characterized the LCB as a great group and appreciated each one's participation.

**13. Adjournment (Next Meeting – May 2, 2024) at the Charlotte County Transit Facility, 545 Theresa Blvd., Port Charlotte, FL 33954)**

The next LCB meeting is scheduled for Thursday, May 2, 2024, at the Transit Facility located at 545 Theresa Blvd. in Port Charlotte, FL 33954. The meeting was adjourned at 11:12 a.m.

MAY 2, 2024  
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 2024/2025 is \$26,437. These funds pay a portion of MPO staff salaries for work performed as the Official Planning Agency for the Charlotte County Transportation Disadvantaged program.

**Recommendation:** None (information only)

**Attachment:** None

MAY 2, 2024  
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 2024/2025

**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 2024/2025 Trip and Equipment Grant plus Voluntary Dollar funding (commencing July 1, 2024) is provided below:

Trip & Equipment Grant allocation	\$ 551,969
Local Match	<u>\$ 61,329</u>
Total Funding	\$ 613,298
Voluntary Dollar	\$ 94
Local Match	<u>\$ 10</u>
Total	104
Grand Total	\$ 613,402

**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) SECOND ANNUAL UPDATE INCLUDING**  
**RATE MODEL CALCULATIONS**

**Purpose:** Approval of the TDSP/CPT-HSTP Second 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 the second annual update to the current document and require approval by the LCB prior to submission to the CTC. Staff will revise Table of Contents page numbering if needed once updated materials are approved.

**Update Actions:**

- Revision of Cover Page with date of second annual update
- Change in grant used (from Section 5339 to Section 5307 CARES funding), pg. 11
- Change in vehicle information, pg. 12
- Mention of TDP currently under development, pg. 13
- Mention of the LRTP currently under development, pg. 14
- Revision to Public Participation (CTC Survey 2023 and 2024), pg. 16
- Note regarding graphic update upon 2025 TDP completion, pg. 17
- Mention of Hurricane Ian and Sunseeker Resort opening, pg. 21
- Trip Attractor corrections in Table I-1, pgs. 22-23 and 25
- Insertion of new 2024 Bus Transit System Annual Safety and Security Certification, (letter dated February 8, 2024), pg. 44
- Most recent CTC Evaluation date, pg. 58
- Insertion of new Transit brochure in Appendix A, pg. 61-62
- Insertion of new Transit Organizational Chart in Appendix B, pg. 63
- Insertion of new Missed Trips Policy to replace current No-Show Policy in Appendix C, pgs. 64-66
- Insertion of new Bus Inventory as Appendix G, pg. 77
- Insertion of new TD Rate Model 5-Year Comparison and Rate Model Calculations in Appendix H, pgs. 78-86
- Change MPO website address on the Charlotte County-Punta Gorda MPO Evaluation/Comment Form in Appendix I, pg. 87
- Insertion of Appendix J, 2024 CTC Evaluation, pg 89-98

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

**Recommendation:** Motion to approve the second annual update to 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 and other items per CTD staff guidance.

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



# **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**

**Second Annual Update 5/2/2024**





### New Transit Facility:

With funding from an FTA Section 5339 5307 CARES grant, a new centrally located transit facility was constructed off Veterans Blvd at 545 Theresa Blvd.



Initial work site shown in Charlotte County 2019-2020 *Capital Improvements Program* adopted September 24, 2019







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, and 3 1 administrative service vehicle.s and 2 vans.



#### **4. Consistency Review of Other Plans**

The TDSP is consistent, to the maximum extent possible, with the following documents:

##### **a. County & City Comprehensive Plans**

On July 20, 2010, Charlotte County adopted its *Smart Charlotte 2050 Comprehensive Plan* with an effective date of June 15, 2011. The City of Punta Gorda has its *Comprehensive Plan 2040*. These plans identify current transit programs and projected needs for the future.

##### **b. Southwest Florida Strategic Regional Policy Plan**

The 2011 Strategic Regional Policy Plan was produced by the Southwest Florida Regional Planning Council (SWFRPC). The Plan contains issues, goals and policies to help guide development in the southwest region of Florida. The SWFRPC is composed of Charlotte, Collier, Glades, Hendry, Lee and Sarasota counties. This Regional Plan is based largely on the long-range needs of the aggregated local parts of the region.

##### **c. Transit Development Plan**

The Charlotte County Board of County Commissioners approved the *Charlotte Rides 2020-2029 Transit Development Plan (TDP)* on July 9, 2019. The Charlotte County-Punta Gorda MPO endorsed the document on July 29, 2019. The document was developed by Tindale-Oliver and Associates (TOA) and was submitted to the Florida Department of Transportation (FDOT) for final approval. The document is a 10-year transit plan that is completed every 5 years with annual progress reports provided in years 2-5. In accordance with Chapter 14-73.001, F.S., the TDP identifies both funded and unfunded transit needs in Charlotte County. It is required by FDOT so that Charlotte County may receive eligible Federal and State transit grant funding. Data was obtained utilizing surveys of passengers and the general public, as well as the latest available census figures. Factors assessed include household density and income, transit propensity, work trips, age of passengers, availability of autos in households, trip purposes and travel alternatives. Public outreach was conducted at public transit workshops (held in South, Mid and West Charlotte County). **The next TDP is currently under development with Benesch.**

##### **d. Commission for the Transportation Disadvantaged Plans**

Both the Commission for the Transportation Disadvantaged 5 year plan and 20 year plan set forth goals, objectives, and a plan of action. The five-year plan identifies the need for services of the transportation disadvantaged, the costs of meeting that demand, forecasts of future funding for transportation disadvantaged services, and the approaches of balancing the supply and demand for those services. The twenty-year plan presents forecasts for Florida's Transportation Disadvantaged system. The forecasts include the transportation disadvantaged population, the demand for trips, the expected supply of those trips, the remainder of unmet trips, the expected operating expenses of the provided trips and the projected number and costs of the vehicles required to provide those trips.



#### **e. MPO Long Range Transportation Plan**

The Charlotte County-Punta Gorda Metropolitan Planning Organization (MPO) 2045 Long Range Transportation Plan (LRTP) Update was adopted on October 5, 2020. Tindale-Oliver (TOA) was the project consultant. The purpose of the LRTP is to develop a multimodal system that includes public transportation. The plan assesses the needs for current and future transportation systems, establishes policy guidelines for use by staff and decision makers at all levels of government, and sets standards for the provision of public facilities. The Plan includes both short and long range planning strategies. The planning factors identified in federal transportation legislation are addressed through an integrated combination of goals, objectives and policies, project selection criteria, management systems, Traffic System Management (TSM) strategies, and analysis through a computerized travel demand model. Numerous public workshops were held to support development of the document with transit as a major topic of discussion. These efforts are discussed in the public participation narrative (#5) that follows. **The MPO's next LRTP (2050) is currently under development with Kimley-Horn as consultant.**

#### **f. Transportation Improvement Program**

The Transportation Improvement Program (TIP) is a staged five-year program of transportation improvement projects developed by the MPO as required by Section 339.175 Florida Statutes and current federal transportation legislation. The purpose of the TIP is to identify all transportation projects funded by Title 23 and the Federal Transit Act within Charlotte County and the City of Punta Gorda, including highways, transit, aviation, pedestrian and bicycle facilities, and transportation enhancement projects and to ensure coordination for transportation improvements by local, state and federal agencies. All projects listed in the TIP are consistent with the Charlotte County-Punta Gorda MPO Long Range Transportation Plan, the Charlotte County Comprehensive Plan (Smart Charlotte 2050), the Charlotte County Airport Master Plan and the County Capital Improvement Program (CIP).

### **5. Public Participation (CPT-HSTP)**

With the implementation of the current federal transportation legislation, there is a continuing federal emphasis on public participation in transportation planning. This has resulted in the requirement for a Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP) developed with public input in order for programs to receive funding under the Enhanced Mobility of Seniors and Individuals with Disabilities Grant Program (also known as FTA Section 5310).

As discussed in this document's foreward, public participation, including consultation with all public transit stakeholders in the development of the Transportation Disadvantaged Service Plan (TDSP), has been a long-term emphasis of the Transportation Disadvantaged (TD) program. Involved parties statewide include members and staff of the Commission for the Transportation Disadvantaged (CTD), various state agency personnel, local Community Transportation Coordinators (CTC), members of planning organizations and their staff, representatives of other local organizations (including governmental, civic, as well as private profit and non-profit groups), Local Coordinating Board members, and transit users. This is best exemplified in the TD Concept Chart (*Section I.A.3*).

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.

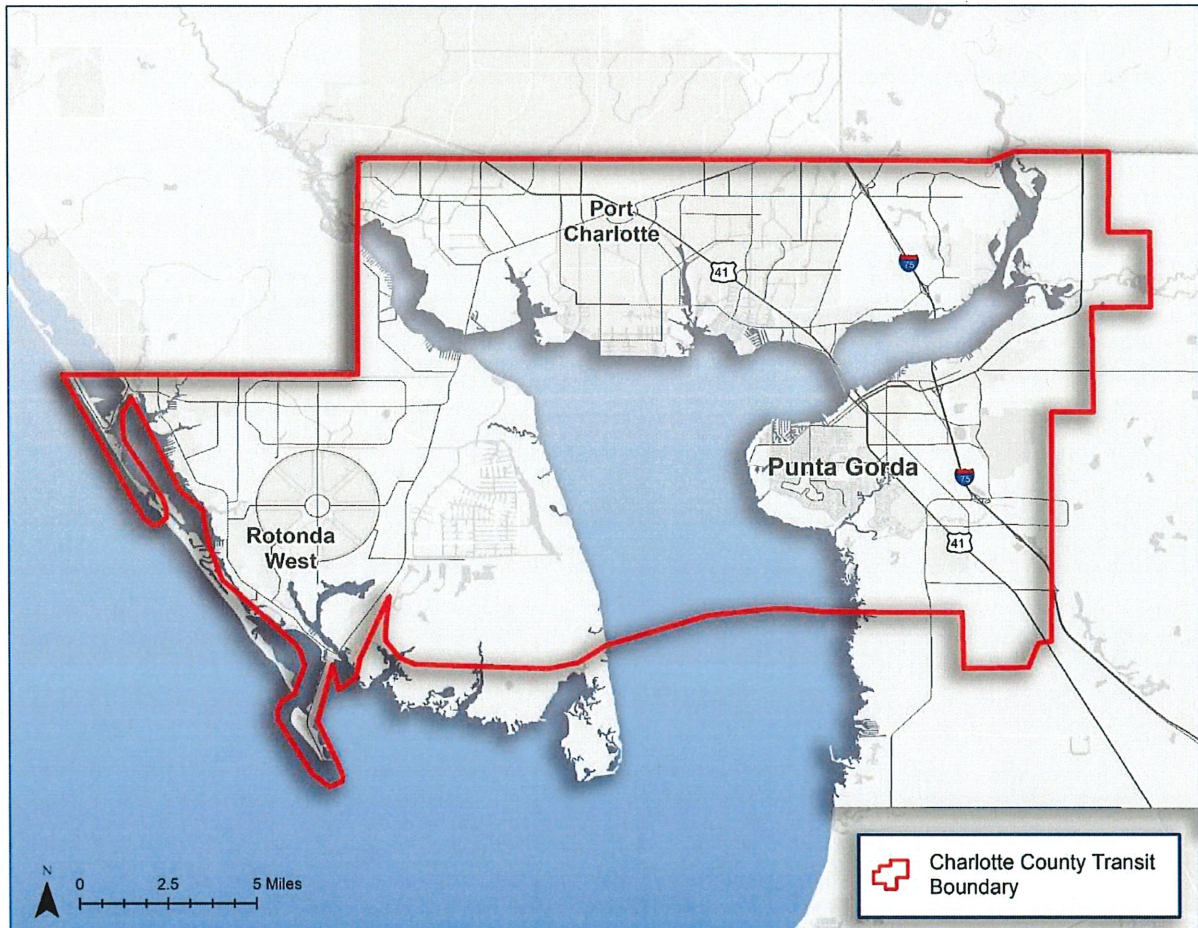
As part of the CTC Evaluations conducted on February 13-15, 2023 and February 5-7, 2024, TD passengers were surveyed.



## B. Service Area Profile and Demographics

### 1. General Service Area Description

Charlotte County's transportation service area is displayed in this table taken from the 2020 TDP Annual Progress Report (to be revised with the completion of the 2025 TDP now underway):



The County is located in southwest Florida and is bordered on the north by Sarasota and DeSoto Counties, on the east by Glades County, on the west by the Gulf of Mexico, and on the south by Lee County. According to the 2019 US Census Population Estimates (for July 1, 2019), Charlotte County's population was 188,910. The County is 858 square miles in total including water, with approximately 680 square miles covering land area.

[U.S. Census Bureau QuickFacts: Charlotte County, Florida; United States](#)

Charlotte County consists of Punta Gorda (the only incorporated city), Port Charlotte, Murdock, El Jobean, Placida, Grove City, and a portion of Englewood. Punta Gorda and Englewood have the following geographical obstacles: (1) remote areas of Punta Gorda are 15 miles from populated areas, and (2) Englewood is approximately 21 miles from the center of Port Charlotte.



In addition to the many beaches and parks located throughout the area, Charlotte County offers many recreational destinations that appeal to all ages. The Tampa Bay Rays Major League Baseball team began conducting Spring Training in 2009 at the Charlotte Sports Park.

#### Government Offices and Social Service Agencies

A variety of government offices and social service agencies are located in Charlotte County. The County Administrative Complex is located in Murdock. Many other governmental offices are housed in Punta Gorda (South County) and West County, which includes the Englewood area. In Port Charlotte on Loveland Boulevard off of Kings Highway, a campus contains the buildings of both the Health Department and many of the Human Services Department offices.

#### Health Care Facilities

Health care facilities, including hospitals and clinics, also serve as significant trip attractors for employees as well as clients. There are three major hospitals and one mental health clinic. There is a concentration of health care centers located along Harbor Boulevard and Olean Boulevard, in the Promenades area, along Tamiami Trail/US 41 in Port Charlotte, and along US 17 in the City of Punta Gorda.

#### Schools and Colleges

Schools and colleges also can be significant traffic attractors, both for the students who attend them as well as for the teachers and staff who work there. Table I-1 shows the locations of schools and colleges in the county. Florida SouthWestern State College is located at 26300 Airport Road and Florida Gulf Coast University has a branch in Charlotte County at the Herald Court Centre. In November 2019, AeroGuard Flight Training Center opened at the Punta Gorda Airport. By the nature of their pupil catchment areas, most public K-12 schools are scattered throughout the county.

#### Shopping Centers

As shown in Table I-1, there are numerous retail shopping areas in Charlotte County. In addition to attracting shoppers, retail centers also attract employees. Hence, these types of facilities generate considerable transportation needs. Most are located along Tamiami Trail (US 41), including the Port Charlotte Town Center, an indoor mall with a large movie theater and some shopping stores, although the property suffered many closures during the pandemic and was auctioned as part of a foreclosure sale on February 28, 2022. The property sold to the bond owners in exchange for wiping out existing debt. The future of the complex is yet to be determined.

#### Other Major Employer – Cheney Brothers, Inc.

Undergoing much economic development in the years following the 2004 landfall of Hurricane Charley followed by Hurricane Ian in 2022, the City of Punta Gorda boasts the Charlotte County Events Center, several hotels and restaurants, a municipal marina, and two mixed-use commercial/parking facilities. In Port Charlotte, multiple hotels have been constructed in the Kings Highway area and along US 41. Two Community Redevelopment Areas are: (1) the Parkside CRA in the medical arts area, and (2) the Charlotte Harbor CRA north of the US 41 bridges (with a planned Sunseeker Resort now underway after encountering delays attributable to the COVID-19 pandemic.) with Sunseeker Resort now open.

**TABLE I-1: TRIP ATTRACTORS**

<b>TYPE</b>	<b>FACILITY</b>	<b>LOCATION</b>
Attractions	Ann & Chuck Dever Memorial Regional Park at Oyster Creek	6791 San Casa Drive/ENG
Attractions	Babcock Wilderness Adventure	8000 State Road 31/PG
Attractions	Bayshore Live Oak Park	Bayshore Road/CH
Attractions	Boca Grande State Park	Gasparilla Island/ Lee County
Attractions	Carmalita Park	6905 Florida Street/PG
Attractions	Cedar Point Environmental Park	2300 Placida Road/ENG
Attractions	Charlotte County Council on Aging, Inc.	3456 DePew Avenue/PC
Attractions	Charlotte County Historical Center	514 East Grace Street/PG
Attractions	Charlotte Harbor Event & Conference Center	75 Taylor Street/PG
Attractions	Charlotte Performing Arts Center	1250 Cooper Street/PG
Attractions	Charlotte Sports Park & Tippecanoe Environmental Pk	2300 El Jobean/PC
Attractions	Charlotte Harbor Environmental Center	10941 S. Burnt Store Rd/ PG
Attractions	Englewood Beach at Chadwick Park	2100 N. Beach Road/ENG
Attractions	Englewood Charlotte Public Library	3450 McCall Road/ENG
Attractions	Gaines Jr. Veterans Memorial Park	20499 Edgewater Dr/PC
Attractions	Gilchrist Park	750 W. Retta Esplanade/PG
Attractions	Harbor Heights Park	3350 N. San Marino Dr/ PC
Attractions	Harold Avenue Recreation Center	23400 Harold Avenue/PC
Attractions	Larry Taylor Kiwanis Park	3100 Donora Street/PC
Attractions	Laishley Park	350 E. Marion Avenue/PG
Attractions	Mid-County Regional Library (closed for repairs)	2050 Forrest Nelson Blvd/PC
Attractions	North Charlotte Regional Park	1185 O'Donnell Blvd/PC
Attractions	Peace River Wildlife Center	3400 Ponce deLeon Pkwy/PG
Attractions	Port Charlotte Public Library	2280 Aaron Street/PC
Attractions	Port Charlotte Beach/Rec Center	4500 Harbor Boulevard/PC
Attractions	Punta Gorda Airport	28000 Airport Road/PG
Attractions	Punta Gorda Public Library	401 Shreve Street/PG
Attractions	Rebecca Neal Owen Congregate Meal Center	27420 Voyageur Drive/PC
Attractions	South County Regional Park/Rec Center	670 Cooper Street/PG
Attractions	Town Center 16 Regal Cinemas	1441 Tamiami Trail/PC
Attractions	Tringali Community Center	6900 Pennell Street/ENG
Attractions	Tringali Recreational Complex/Park	3460 N. Access Road/ENG
Government	CareerSource Southwest Florida	1032 Tamiami Trl Unit 9/PC
Government	Charlotte County Administration Center	18400 Murdock Circle/PC
Government	Charlotte County Cooperative Extension Service	1120 Centennial Blvd/PC
Government	Charlotte County – Englewood Annex	6868 San Casa Blvd/ENG
Government	Charlotte County Family Services Center	21450 Gibraltar Drive/PC
Government	Charlotte County Human Services Office	21450 Gibraltar Drive/PC
Government	Charlotte County Justice Center	350 E. Marion Ave/PG
Government	Charlotte County Old Courthouse/Elections Supervisor	226 Taylor Street/PG
Government	Charlotte County Public Works	70000 Florida Street/ PG
Government	Charlotte County Sheriff's Department	25500 Airport Road/PG
Government	Charlotte County – South County Annex	410 Taylor Street/PG
Government	Charlotte County – Tax Collector's Office/PC	21229 Olean Blvd, Ste B/PC



Government	Charlotte County Utilities/Customer Service	18400 Murdock Circle/PC
Government	Charlotte County Veterans Services	21450 Gibraltar Drive/PC
Government	Charlotte County-Punta Gorda Metro Plan Org (MPO)	1050 Loveland Blvd/PC
Government	City of Punta Gorda Police Department	1410 South Tamiami Trail/PG
Government	City of Punta Gorda – City Hall (closed for repairs)	326 W. Marion Ave/PG
Government	Department of Children & Families	14830 Tamiami Trail/North Port, Sarasota County
Government	US Social Security Administration	1600 Tamiami Trail #200/ PC
Health Care	Arbors at Port Charlotte	18480 Cochran Blvd/PC
Health Care	Brookdale Port Charlotte	18440 Cochran Blvd/PC
Health Care	Brookdale Punta Gorda Isles	250 Bal Harbor Blvd/PG
Health Care	Brookdale Rotonda	550 Rotonda Blvd W/ENG
Health Care	Brookdale South Port Square	23023 Westchester Blvd/PC
Health Care	Charlotte Behavioral Healthcare, Inc.	1700 Education Avenue/PG
Health Care	Chelsea Place Retirement Living	315 Addison Drive/PC
Health Care	Courtyard Retirement Center	26455 Rampart Blvd/PC
Health Care	Englewood Community Hospital	700 Medical Blvd/ENG -Sara
Health Care	Englewood Healthcare and Rehabilitation Center	1111 Drury Lane/ENG
Health Care	Florida Department of Health in Charlotte Co. - Main	1100 Loveland Blvd/PC
Health Care	Florida Department of Health in Charlotte Co. - WIC	6868 San Casa Drive/ENG
Health Care	Grand Villa of Englewood	925 S. River Road/ENG
Health Care	Harbor Home Care Services	23013 Westchester Blvd/PC
Health Care	Harbor View Acres Assisted Living	24450 Harbor View Rd/ PC
Health Care	HCA Florida Fawcett Hospital	21298 Olean Blvd/PC
Health Care	Lexington Manor Assisted Living	20480 Veterans Blvd/PC
Health Care	Life Care Center of Punta Gorda	450 Shreve Street/PG
Health Care	Magnolia Acres Assisted Living Facility	729 Crestwood Road/ENG
Health Care	Mariner Health Care of Port Charlotte	25325 Rampart Blvd/PC
Health Care	Northside Psychiatric Services	1032 Tamiami Trail, # 1/PC
Health Care	Best Care Senior Living at Punta Gorda, LLC	2295 Shreve Street/PG
Health Care	Parkside Assisted Living and Memory Cottage	2595 Harbor Blvd/PC
Health Care	Port Charlotte Rehabilitation Center	25325 Rampart Blvd/PC
Health Care	Riverside Behavioral Center	733 E. Olympia Avenue/PG
Health Care	Royal Palm Retirement Center	2500 Aaron Street/PC
Health Care	Sandhill Gardens Retirement	24949 Sandhill Blvd/ PC
Health Care	ShorePoint Health Port Charlotte - Hospital	2500 Harbor Blvd/ PC
Health Care	ShorePoint Health Punta Gorda - Hospital	809 E. Marion Avenue/PG
Health Care	Signature HealthCARE of Port Charlotte	4033 Beaver Lane/PC
Health Care	Singing Pines Adult Care	4410 US 17/Duncan Road/PG
Health Care	Solaris	4000 Kings Highway/PC
Health Care	Southern Heritage Home	509 Berry Street/PG
Health Care	Vick Street Manor Assisted Living	22332 Vick Street/PC
Health Care	Village Place Health and Rehabilitation Center	2370 Harbor Blvd/PC
Health Care	Village Place Retirement	18400 Cochran Blvd/PC
Health Care	Virginia B. Andes Volunteer Community Clinic	21297 Olean Blvd, Unit B/PC
School	Adult and Community Education	2280 Aaron Street/PC
School	AeroGuard Flight Training Center	8200 Skylane Way/PG
School	AMI Kids Crossroads	45991 Belmont Rd/PG
School	Baker Center	311 E. Charlotte Avenue/PG
School	Charlotte County School Board Administration	1445 Education Way/PG



Shopping	Port Charlotte Marketplace	19400 Cochran Blvd/PC
Shopping	Port Charlotte Town Center Mall ( <i>recently purchased following foreclosure</i> )	1441 Tamiami Trail/PC
Shopping	Promenades Mall	3280 Tamiami Trail/PC
Shopping	Punta Gorda Crossings	2310 Tamiami Trail/PG
Shopping	Rotonda Plaza	Placida Rd & Rotonda Blvd W/ENG
Shopping	School House Square	4300 Kings Highway/PC
Shopping	Target	1400 Tamiami Trail/PC
Shopping	Village Market Place Shopping Center	1825 Tamiami Trail/PC
Shopping	Wal-Mart Supercenter	4100 McCall Road/ENG
Shopping	Wal-Mart Supercenter	375 Kings Hwy/PC
Shopping	Wal-Mart Supercenter	19100 Murdock Circle/PC
Shopping	Wal-Mart Supercenter	5001 Taylor Road/ PG
Shopping	Winn Dixie Marketplace at Kings Crossing Shopping Ctr	2000 Kings Hwy/PC
Shopping	Winn-Dixie Marketplace	27680 Bermont Rd/PG
Other Major Employers	Cheney Brothers <b>Sunseeker Resort</b>	One Cheney Way/PG <b>5500 Sunseeker Way/CH</b>

PC = Port Charlotte, ENG=Englewood, PG=Punta Gorda, RT=Rotunda, **CH=Charlotte Harbor**

The development pattern of Charlotte County's Mid County and South County areas generally follows along the US 41 corridor. The Port Charlotte/Murdock and Punta Gorda areas serve as commercial anchors with a high concentration of generators and attractors. Also, these areas have the highest population densities in Charlotte County. In some areas, the commercial development along US 41 is located along the access roads. Areas where this condition is present would require further analysis as it relates to accessibility for public transportation. Many medical, government, and social service agencies are concentrated in the same areas. Educational facilities and area attractions are more dispersed throughout the county. In the future, the demographics and trip attractors in the two concentrated areas (Port Charlotte/Murdock and Punta Gorda) may provide an opportunity for some form of fixed route public transportation. Eventually, growth in the West County area might also support such service at some point in the future.

In 2013, a transit latent demand study jointly funded by the Charlotte County-Punta Gorda MPO and the Sarasota/Manatee MPO, explored whether or not there is demand for scheduled service between Parkside (including its medical district) and the City of North Port in southern Sarasota County. The data and its analysis recommended that there is sufficient latent demand to support a fixed route transit service in South Sarasota County and North Charlotte County. The results of this study were considered in the subsequent development of both Transit Development Plans for Charlotte County and Sarasota County.

#### **e. Inventory of Available Transportation Services**

Table I-2 (on the following two pages) is an inventory of available transportation services with two categories of providers: 1) coordinated transportation providers; and 2) non-coordinated

## 7. System Safety Program Plan Certification

A copy of the 2024 certification follows:



### Charlotte County Transit Bus System Annual Safety and Security Certification

Date: February 8, 2024

IN ACCORDANCE WITH FLORIDA STATUTE 341.061, THE BUS TRANSIT SYSTEM NAMED ABOVE HEREBY 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.

**Maddox,**  
Signature: **Heidi**  
Heidi Maddox, Transit Operations Manager  
Charlotte County Budget & Administration

Digitally signed by  
Maddox, Heidi  
Date: 2024.02.09 09:56:36  
-05'00'

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

#### NAME AND ADDRESS OF ENTITIES WHICH HAVE PERFORMED SAFETY INSPECTIONS:

Mr. Front End  
8251 Pascal Dr.  
Punta Gorda, FL. 33950

Charlotte County Fleet  
18000 Paulson Dr.  
Port Charlotte, FL. 33954

Desoto County Ford  
3039 SE Hwy 70  
Arcadia, FL. 34266

**Maddox,**  
Signature: **Heidi**  
Heidi Maddox, Transit Operations Manager  
Charlotte County Budget & Administration

Digitally signed by  
Maddox, Heidi  
Date: 2024.02.09  
09:56:50 -05'00'

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



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 CTC for final disposition. The most recent CTC Evaluation conducted February 5-7, 2024 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



### SERVICES PROVIDED

Charlotte County Transit is a shared ride, curb-to-curb public transportation service provided to the general public throughout Charlotte County. Service area includes Englewood, Port Charlotte and Punta Gorda.

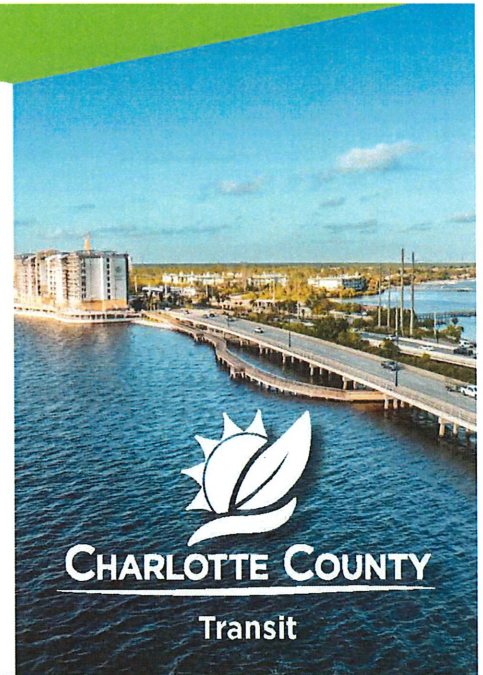
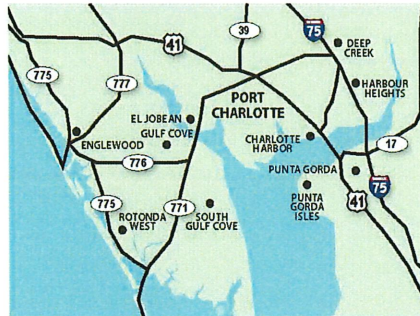
Charlotte County Transit is a first-come, first-served service operating Monday through Friday, 6:30 a.m. to 6:00 p.m. Saturday, from 9 a.m. to 6 p.m. Saturday service is restricted to a limited area. Transportation is not provided on Sunday or Charlotte County recognized holidays.

For more information, please call Charlotte County Transit 941.575.4000, visit [CharlotteCountyFL.gov/transit](http://CharlotteCountyFL.gov/transit) or download our mobile app.



### MISSION

The mission of Charlotte County Transit Division is to provide safe, high quality, convenient, efficient, and affordable transportation to the general public in Charlotte County.



### Where Can You Go?

- Bank
- Beach
- Medical Appointments
- Hospitals
- Work
- Airport
- Area Attractions
- Library
- Grocery Stores
- Restaurants
- College
- Shopping
- Meal Site

### PUBLIC TRANSPORTATION

Make the Connection to destinations throughout Charlotte County. Enjoy the freedom of curbside transportation to and from your destination. Leave the worries and high costs of driving behind.

**Reliable | Safe | Friendly**

**CharlotteCountyFL.gov**  
**941.575.4000**

APPENDIX A (brochure is also available in Spanish) ~~and French-Creole~~





## Transit

### RESERVATIONS

Charlotte County Transit is a first-come, first-served service. Reservations are taken Monday through Friday from 7 a.m. to 5 p.m.

To request a trip with Charlotte County Transit please call 941.575.4000 option #1. Please be ready to answer the following:

- Name first and Last
- Date of Travel
- Number of passengers (names)
- Destination arrival time
- Pick up location and destination name and address

The dispatcher will provide you with a 30 minute pick up window time based upon your requested destination arrival time.

### TRANSIT RIDES

General Public.....	FREE
Transportation Disadvantaged.....	FREE
Child (under 12) traveling w/ an adult.....	FREE
Attendant.....	FREE

### CONNECT

To reserve a trip, call: 941.575.4000 select Option #1.

Reserve a trip by using the Charlotte Rides Mobile App



For compliments or concerns please call: 941.833.6296

### CANCEL RESERVATIONS

It is requested you cancel your reservation at least 1 hour in advance of the scheduled pick up window. If you do not cancel the reservation at least 1 hour in advance it will be recorded as a "Missed Trip".

***Please See The Passenger Rules And Missed Trip Policy.***

### ACCESSIBLE VEHICLES

All vehicles are fully accessible. Our ramps make it easy to board in a wheelchair, scooter, with a walker or stroller.

### TRANSPORTATION DISADVANTAGED

Individuals, who are physically or otherwise disabled, 60 years of age or older, or qualify as low income, may be eligible for the Transportation Disadvantages program service. To apply for the Transportation Disadvantaged service, dial 941.833.6233 and request an application or the application can be found on our website [CharlotteCountyFL.gov/transit](http://CharlotteCountyFL.gov/transit)

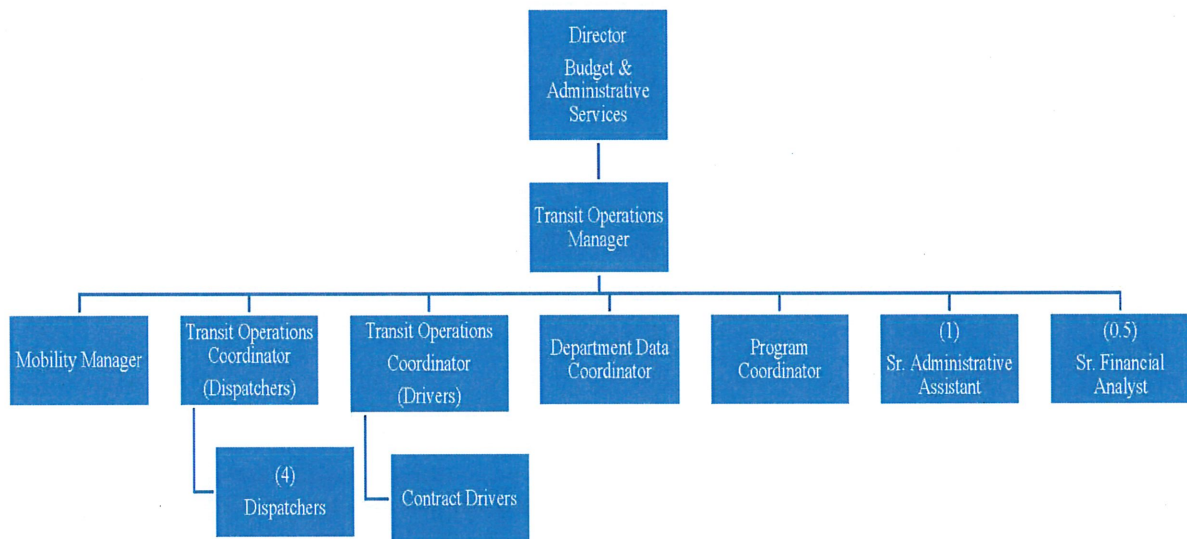
Transportation Disadvantaged Ombudsman dial: 1.800.983.2435

Accordance with Title VI of the Civil Rights Act of 1964, Charlotte County Transit provides Services and Operates it's Programs without Regard to Race, Color, or National Origin.

*Spanish translation available upon request.*

## ORGANIZATION CHART

### Transit Operations



*Proposed: 1.11.2024*

## APPENDIX B

## Charlotte County Transit Missed Trip Policy

Charlotte County Transit provides a public curb-to-curb transportation service to individuals. These passengers are required to reserve specific pickup and drop-off times by calling our reservation line at **941.575.4000 (Option 1)** or through our Charlotte Rides Mobile App. This allows Charlotte County Transit to effectively plan trips during operating hours providing services to as many passengers as possible.

On occasion, a passenger is not able utilize a scheduled trip. When this occurs, the passenger is required to notify Charlotte County Transit they no longer want the trip. Additionally, Charlotte County Transit recognizes that emergency situations occur and may cause the passenger to give a short cancellation notice or no notice at all. When a no-show or a late cancellation occurs, this places a strain on Charlotte County Transit services because a vehicle and driver will make a non-productive trip that could have gone to another passenger. Charlotte County Transit recognizes this is normally a rare event that may occur with any passenger.

However, when a passenger repeatedly misses trips it places a serious strain on Charlotte County Transit services. To prevent this, Charlotte County Transit established this process to warn or suspend passengers who show as a pattern or practice of missing scheduled trips on a regular basis and a method of determining whether a missed trip is beyond a passenger's control.

Charlotte County Transit will record each passenger's no-show, late cancellation, and cancel at door as a missed trip classified by the definitions below. Passengers with excessive missed trips may be suspended from services for a reasonable period of time. This policy applies to both advance reservation and subscription trips. A no-show due to Charlotte County Transit error does not count as a missed trip.

### Terms and Definitions:

- **Trip:** any scheduled demand-response or subscription service ride between one pick-up location and one drop-off location.
- **Standing Order Trip:** are trips with the same pick-up time, pick-up location, and destination.
- **No-Show:** a passenger fails to board the Charlotte County Transit vehicle after the vehicle arrives for a scheduled trip during the thirty (30) minute pick-up time window. Drivers will wait three minutes after they arrive before recording the passenger as a no-show.
- **Late Cancellation:** the passenger or their representative calls to cancel a scheduled trip less than one (1) hour prior to the pickup time.
- **Cancel at Door:** when the vehicle arrives at the pick-up location for a scheduled trip within the thirty (30) minute pick up window and the passenger or their representative notifies the driver at that time that they no longer need the scheduled trip. As Charlotte County Transit cannot determine the passenger's needs, the driver will not cancel any other trips booked for the passenger that day; this is the passenger's responsibility.
- **Missed Trips:** any no-show, late cancellation, or cancel at door trips.



- **Missed Trips Beyond a Passenger's Control:** This is when a trip is missed for reasons beyond the passengers control. These include events such as a sudden illness, a family or personal emergency, an appointment delay, or another unforeseen reason where it is not possible to call Charlotte County Transit to cancel the trip in time or to take the trip when the driver arrives as scheduled. passenger should still make every effort to cancel scheduled trips in a timely manner. It is the passenger 's responsibility to provide Charlotte County Transit the reason for not canceling a trip as soon as possible. Missed trips beyond a passenger's control will not be considered missed trips. If a missed trip is due to a passenger receiving life-sustaining treatment, such as kidney dialysis, Charlotte County Transit will not consider the trip a missed trip.

1. **Cancelling Scheduled Trip:**

- a. Passengers are responsible for cancelling any trips they no longer want or need.
- b. Passengers will call **941.575.4000 (Option 2)** for cancellations or use the Charlotte Rides Mobile App at least one (1) hour prior to the scheduled pick-up time window to cancel a trip.
- c. Charlotte County Transit schedules pick-up and return trips separately and assumes all scheduled return trips are needed unless told otherwise told by the passenger or their representative.
- d. If a pick-up trip is a no-show, late cancellation, or cancel at door, Charlotte County Transit will cancel other trips for that passenger on the same day unless told not to do so by the passenger. Drivers are not allowed, by policy, to cancel future trips; the passenger must contact Charlotte County Transit by phone **941.575.4000 (Option 2)** or use the Charlotte Rides Mobile App. If the return trip is also a no-show, the passenger will be assessed two (2) no-shows that day.

2. **Pattern or Practice of Missed Trips:** A passenger who accumulates four (4) no-shows in six (6) months or less on their service record, may lose the privilege of ride services under the following progressive measures:

- Four (4) no shows in six (6) months will result in a thirty (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 thirty (30) days.

**Subscription Missed Trips:** Will generate a standing order suspension after three (3) cancellations in two (2) weeks. Continuous cancellations will result in suspension **per #3** of this policy.



**3. Suspension or Termination of services due to a Pattern or Practice of Missed Trips:**

**First Warning:** After the first missed trip, passenger will receive a notice via USPS containing the missed trip date.

**Second Warning:** After the second missed trip, passenger will receive a yellow notice via USPS containing the missed trip dates.

**Final Warning:** After the third missed trip, passenger will receive a final red notice via USPS containing the missed trip dates.

**Suspension Letter:** Suspension letter will be mailed via USPS Certified Mail to the passenger containing missed trip dates and dates of suspension from service.

**4. Notification and Right to Appeal:** The grievance process is available to any passenger wishing to appeal the decision of Charlotte County Transit. This process is described in the Transportation Disadvantaged Service Plan (TDSP) and available online: [www.CharlotteCountyFL.gov/transit/](http://www.CharlotteCountyFL.gov/transit/).

- a) Suspensions go into effect the date of the fourth (4<sup>th</sup>) missed trip. The suspension letter will state the missed trip dates and the thirty (30) calendar days that the passenger is suspended.
- b) The appeal letter must be received in writing by Charlotte County Transit at least seven (7) calendar days following the missed trip notification and/or suspension letter.
- c) In the appeal letter, the passenger must list their name, address, phone number, and date of birth. The passenger should explain why they believe the suspension or termination was given in error, or why they should be excused from serving the suspension or termination. The passenger should include any documentation supporting their case.
- d) If a passenger requires assistance with the appeal process, they can contact Charlotte County Transit at **941.575.4000 (Option 4)**. If a Charlotte County Transit staff member helps the passenger write the appeal letter, the passenger must sign the letter before Charlotte County Transit will accept it.
- e) The passenger must mail or hand-deliver the appeal to:

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

- f) Upon receipt of the appeal letter, the Transit Operations Coordinator or his/her designee, will respond to the passenger within five (5) calendar days by USPS Certified Mail.

# APPENDIX G

Charlotte County Transit  
Transit Rolling Stock as of 4/16/24

County Asset Number	Model Year	Body By	Chassis	Model	VIN	Mileage	Fiscal Replacement Year	Purchased w/Grant	License Plate	State Property Number	Fuel Type	Feet	WVC	Seals	Ult
35632	2016	Sealair	Ford	Transit	1F4PH2H66G33832	22,264	2028	5307 TE3404			Gas			5	N
35747	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1-D2X2C202A336706	113,009	2025	5317 CJ175786			Gas	20		2	7-Y-80C
35243	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1-D2X2C202A336707	115,774	2025	5315 QD2287			Gas	20		2	7-Y-80C
35245	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1-D2X2C202A336710	113,461	2024	5307 QCL C236			Gas	20		2	7-Y-80C
35320	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1-D2X2C202A336708	127,431	2024	5307 CE C177			Gas	20		2	7-Y-80C
35328	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FD2X2C202A336712	114,470	2024	5307 CE C372			Gas	20		2	7-Y-80C
35332	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FD2X2C202A336705	106,059	2024	5307 TE3423			Gas	20		2	7-Y-80C
35347	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FD2X2C202A336712	96,359	2027	5307 TE3474			Gas	20		2	7-Y-80C
35348	2018	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FD2X2C202A336712	96,352	2027	5307 TE3475			Gas	20		2	7-Y-80C
35506	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311346	123,388	2025	5315 CHX6500			Gas	22		2	9-Y-80C
35806	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311652	104,575	2025	5315 CJ7 4494			Gas	22		2	9-Y-80C
37342	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311555	96,202	2028	5339 T-6576			Gas	22		2	9-Y-80C
37343	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311554	11,336	2024	5339 T-6576			Gas	22		2	9-Y-80C
37345	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311556	105,752	2024	5339 T-6577			Gas	22		2	9-Y-80C
37437	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311556	87,591	2029	5339 T-6526			Gas	22		2	9-Y-80C
37438	2020	Cullway	Ford	Chessey	1FDPE4F5K3C343871	74,702	2032	5339 T-6051			Gas	23		3	12-Y-1000
37440	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311556	107,352	2024	5339 T-6047			Gas	22		2	9-Y-80C
37442	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311557	102,313	2024	5339 T-6046			Gas	22		2	9-Y-80C
37443	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311556	70,034	2024	5339 T-6548			Gas	22		2	9-Y-80C
37447	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311556	91,955	2024	5339 T-6536			Gas	22		2	9-Y-80C
37450	2019	M n-Bus	Ford	Transit Connect (350 Mr. Passenger Wagon)	1FDVU4XV6K311551	87,272	2024	5339 T-6048			Gas	22		2	9-Y-80C
37475	2020	Cullway	Ford	Chessey	1FDTC4T59C343872	65,234	2024	5315 T-6552			Gas	23		3	12-Y-1000
37461	2020	Cullway	Ford	Chessey	1FDPE4F5K3C345346	105,905	2024	5315 T-6553			Gas	23		3	12-Y-1000
37465	2021	M n-Bus	Ford	Chessey	1FDPE4F5K3C345346	80,114	2033	5315 T-6544			Gas	23		3	12-Y-1000
37566	2020	Cullway	Ford E-450	Turtle Top	1FDPE4F5K3C345346	62,053	2028	5339 T-6566			Gas	23		3	12-Y-1000
37567	2020	Cullway	Ford	Transit Connect (30 Transit 15C Wagon)	1D2K1C24LKA16912	3,489	2026	5307 T-6159			Gas	18		0	9-N
37568	2020	Cullway	Ford E-450	Chessey	1FDPE4F5K3C345346	50,904	2026	5315 T-6263			Gas	23		3	12-Y-1000
37569	2020	Cullway	Ford E-450	Chessey	1FDPE4F5K3C345346	61,181	2028	5339 T-6265			Gas	23		3	12-Y-1000
38002	2020	M n-Bus	Ford	Transit Connect (30 Transit 15C Wagon)	1FD2K1C24LKA16915	7464	2026	5307 T-6200			Gas	18		0	9-N
38003	2020	M n-Bus	Ford	Transit Connect (30 Transit 15C Wagon)	1FD2K1C24LKA16913	13855	2026	5307 T-6197			Gas	18		0	9-N
38004	2020	M n-Bus	Ford	Transit Connect (30 Transit 15C Wagon)	1FD2K1C24LKA16916	2035	2026	5307 T-6198			Gas	18		0	9-N
38005	2020	M n-Bus	Ford	Transit Connect (30 Transit 15C Wagon)	1FD2K1C24LKA16910	11526	2026	5307 T-6201			Gas	18		0	9-N
38023	2021	Cullway	Ford E-450	Turtle Top	1FDPE4F5K3C345346	18260	2033	5307 T-6307			Gas	23		3	12-N

## RATE MODEL CALCULATIONS (adopted May 2, 2024)

Fiscal Services-Grants Section/Transit  
Charlotte County Transit TD Rate Comparison

### TD Rate Model 5 Year Comparison

	FY 21	FY22	FY23	FY24	FY25
Ambulatory	\$ 16.68	\$ 18.24	\$ 20.44	\$ 30.37	\$ 32.48
Wheel Chair	\$ 28.59	\$ 31.27	\$ 35.03	\$ 52.06	\$ 55.68
Group per passenger	\$ 8.74	\$ 9.50	\$ 10.69	\$ 14.64	\$ 15.66
 Total Expenditures per rate calc	 \$ 1,457,542.00	 \$ 1,114,122.00	 \$ 1,212,116.00	 \$ 1,083,312.00	 \$ 1,195,479.00
Budgeted Operating Rate Subsidy Revenue	\$ 362,750.00	\$ 234,252.00	\$ 182,800.00	\$ 182,800.00	\$ 182,800.00
Projected Passenger Miles	555,461	499,758	375,734	\$ 200,000	200,920
Projected Passenger Trips	51,271	47,596	45,846	\$ 30,000	30,000
Avg Passenger Trip Length miles	10.8	10.5	8.2	6.7	6.7
Group Load Rate persons	\$ 3.00	\$ 3.06	\$ 3.01	\$ 4.00	\$ 4.00
Rate per passenger trip if not subsidized	\$ 28.43	\$ 23.41	\$ 26.44	\$ 36.53	\$ 39.85

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

<b>CTC Name:</b>	Charlotte County Transit (CCT)
<b>County (Service Area):</b>	Charlotte
<b>Contact Person:</b>	Heidi Maddox
<b>Phone #</b>	941.833.6234

Check Applicable Characteristic:

**ORGANIZATIONAL TYPE:**

- ☒ Governmental
- ☐ Private Non-Profit
- ☐ Private For Profit

**NETWORK TYPE:**

- ☐ Fully Brokered
- ☒ Partially Brokered
- ☐ Sole Source

***Once completed, proceed to the Worksheet entitled  
"Comprehensive Budget"***

# Comprehensive Budget Worksheet

Version 1.4

CTC: Charlotte County Transit (CCT)  
County: Charlotte

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

	Prior Year's ACTUALS from Oct 1st of 2022 to Sept 30th of 2023	Current Year's APPROVED Budget, as amended from Oct 1st of 2023 to Sept 30th of 2024	Upcoming Year's PROPOSED Budget from Oct 1st of 2024 to Sept 30th of 2025	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

## REVENUES (CTC/Operators ONLY / Do NOT include coordination contractors!)

### Local Non-Govt

Farebox					
Medicaid Co-Pay Received					
Donations/ Contributions					
In-kind, Contributed Services					
Other	\$ 5,756			-100.0%	
<b>Bus Pass Program Revenue</b>					

### Local Government

District School Board						County cash includes matchfor 5310, 5311, TD, and unfunded expenses.
Compl. ADA Services						
County Cash	\$ 380,690	\$ 517,022	\$ 587,679	35.8%	13.7%	
County In-kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash						
Other In-kind, Contributed Services						
<b>Bus Pass Program Revenue</b>						

### CTD

Non-Spons. Trip Program	\$ 405,301	\$ 400,000	\$ 400,000	-1.3%	0.0%
Non-Spons. Capital Equipment					
Rural Capital Equipment					
Other TD (specify in explanation)					
<b>Bus Pass Program Revenue</b>					

### USDOT & FDOT

49 USC 5307					
49 USC 5310					
49 USC 5311 (Operating)	\$ 60,809	\$ 82,800	\$ 82,800	36.2%	0.0%
49 USC 5311 (Capital)					
Block Grant					
Service Development					
Commuter Assistance					
Other DOT (specify in explanation)	\$ 53,328	\$ 100,000	\$ 100,000	87.5%	0.0%
<b>Bus Pass Program Revenue</b>					

### AHCA

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

### DCF

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

### DOH

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

### DOE (state)

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

### AWI

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

### DOEA

Older Americans Act					
Community Care for Elderly					
Other DOEA (specify in explanation)	\$ 18,973	\$ 25,000	\$ 25,000	31.6%	0.0%
<b>Bus Pass Program Revenue</b>					

### DCA

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



CTC: Charlotte County Transit (CCT)  
County: Charlotte

	Prior Year's <b>ACTUALS</b> from Oct 1st of <b>2022</b> to Sept 30th of <b>2023</b>	Current Year's <b>APPROVED</b> Budget, as <b>amended</b> from Oct 1st of <b>2023</b> to Sept 30th of <b>2024</b>	Upcoming Year's <b>PROPOSED</b> Budget from Oct 1st of <b>2024</b> to Sept 30th of <b>2025</b>	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.
1	2	3	4	5	6	7
						Explain Changes In Column 6 That Are > ± 10% and Also > ± \$50,000

APD						
Office of Disability Determination						
Developmental Services						
Other APD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
DJI						
(specify in explanation)						
<b>Bus Pass Program Revenue</b>						
Other Fed or State						
xxxx						
xxxx						
xxxx						
<b>Bus Pass Program Revenue</b>						
Other Revenues						
Interest Earnings						
xxxx						
xxxx						
<b>Bus Pass Program Revenue</b>						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue Is Short By =						
	None	None				
<b>Total Revenues =</b>	<b>\$924,857</b>	<b>\$1,124,822</b>	<b>\$1,195,479</b>	<b>21.6%</b>	<b>6.3%</b>	

Operating Expenditures					
Labor	\$ 249,892	\$ 236,764	\$ 246,193	-5.2%	4.0%
Fringe Benefits	\$ 112,345	\$ 143,051	\$ 145,433	27.3%	1.7%
Services	\$ 36,996	\$ 49,000	\$ 49,000	32.5%	0.0%
Materials and Supplies	\$ 60	\$ 1,000	\$ 1,000	1566.7%	0.0%
Utilities	\$ 36,472	\$ 39,437	\$ 39,931	11.2%	1.3%
Casualty and Liability	\$ 4,351	\$ 17,953	\$ 18,861	312.6%	5.0%
Taxes					
Purchased Transportation:					
Purchased Bus Pass Expenses					
School Bus Utilization Expenses					
Contracted Transportation Services	\$ 318,566	\$ 468,166	\$ 492,095	47.0%	5.1%
Other	\$ 7,721			-100.0%	
Miscellaneous	\$ 359	\$ 2,500	\$ 2,500	596.4%	0.0%
Operating Debt Service - Principal & Interest					
Leases and Rentals	\$ 5,481	\$ 8,762	\$ 8,762	59.9%	0.0%
Contrib. to Capital Equip. Replacement Fund					
In-Kind, Contributed Services	\$ -	\$ -	\$ -		
Allocated Indirect	\$ 153,634	\$ 158,179	\$ 191,704	3.0%	21.2%
<b>Capital Expenditures</b>					
Equip. Purchases with Grant Funds					
Equip. Purchases with Local Revenue					
Equip. Purchases with Rate Generated Rev.					
Capital Debt Service - Principal & Interest					
Total Expenditures =	\$924,857	\$1,124,822	\$1,195,479	21.6%	6.3%

See NOTES Below.

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Page 3 of 8



# Budgeted Rate Base Worksheet

Version 1.1

CTC: Charlotte County Transit (CCT)

County: Charlotte

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

Upcoming Years BUDGETED Revenues		What amount of the Expected Revenue Excluded from the Rate Base?		What amount of the Subsidy Revenue Excluded from the Rate Base?	
2024	2025	3	4	5	6
1	2	3	4	5	6
<b>APD</b>					
Office of Disability Determination	\$ -	\$ -	\$ -	\$ -	\$ -
Environmental Services	\$ -	\$ -	\$ -	\$ -	\$ -
Other APD	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Bus Pass Program Revenue</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>DJI</b>					
CU	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Bus Pass Program Revenue</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Other Fed or State</b>					
302	\$ -	\$ -	\$ -	\$ -	\$ -
302	\$ -	\$ -	\$ -	\$ -	\$ -
302	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Bus Pass Program Revenue</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Other Revenues</b>					
Market Earnings	\$ -	\$ -	\$ -	\$ -	\$ -
302	\$ -	\$ -	\$ -	\$ -	\$ -
302	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Bus Pass Program Revenue</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Balancing Revenue to Prevent Deficit</b>					
Actual or Planned Use of Cash Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Revenues =</b>	<b>\$ 1,186,479</b>	<b>\$ 1,012,679</b>	<b>\$ 182,800</b>	<b>\$ -</b>	<b>\$ -</b>

## EXPENDITURES (CTC/Operators ONLY)

<b>Operating Expenditures</b>	
Lease	\$ 248,190
Energy Receipts	\$ 45,628
Salaries	\$ 43,000
Materials and Supplies	\$ 1,000
Utilities	\$ 2,223
Capital and Liability	\$ 18,881
Taxes	\$ -
Purchased Transportation	\$ -
Purchased Bus Pass Expenses	\$ -
State Use Utilization Expenses	\$ -
Contracted Transportation Services	\$ 402,026
Other	\$ -
Miscellaneous	\$ 2,500
Operating Debt Service - Principal & Interest	\$ -
Accounts Payable	\$ 9,754
Contrib to Capital Equip. Replacement Fund	\$ -
Interest, Contributed Services	\$ -
Allocated Interest	\$ 191,731
<b>Capital Expenditures</b>	
Equip. Purchases with Grant Funds	\$ -
Equip. Purchases with Local Revenue	\$ -
Equip. Purchases with State Revenue	\$ -
Equip. Purchases with Private Revenue	\$ -
Capital Debt Service Principal & Interest	\$ -
<b>Total Expenditures =</b>	<b>\$ 1,186,479</b>
Revenue EXCLUDED from Rate Base	\$ 182,800
Assigned Total Expenditures INCLUDED in Rate Base	\$ 1,012,679
Rate Base Adjustment <sup>1</sup>	\$ -
<b>Adjusted Expenditures Included in Rate Base =</b>	<b>\$ 1,012,679</b>

\$ 182,800

Amount of Budgeted  
Operating Rate  
Subsidy Revenue

### <sup>1</sup> Rate Base Adjustment Cell

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, excess gains may also be adjusted 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.

<sup>1</sup> The Difference between Expenses and Revenues for Fiscal Year

2022 - 2023

Once Completed, Proceed to the Worksheet entitled "Program-wide Rates"



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

### PROGRAM-WIDE RATES

Total Projected Passenger Miles = 200,920

Rate Per Passenger Mile = \$ 5.04

Total Projected Passenger Trips = 30,000

Rate Per Passenger Trip = \$ 33.76

Fiscal Year

2024 - 2025

Avg. Passenger Trip Length = 6.7 Miles

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

Rate Per Passenger Mile = \$ 5.95

Rate Per Passenger Trip = \$ 39.85

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

#### Vehicle Miles

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

#### Vehicle Revenue Miles (VRM)

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

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

#### Passenger Miles (PM)

The cumulative sum of the distances ridden by each passenger.

# Worksheet for Multiple Service Rates

CTC: 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 checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No	<input checked="" type="radio"/> No	<input type="radio"/> No
Go to Section II for Ambulatory Service	Go to Section II for Wheelchair Service	STOP! Do NOT Complete Sections I - 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 type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No	<input checked="" type="radio"/> No	<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 checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No	<input checked="" type="radio"/> No	<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 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 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 ☐ Pass. Mile Leave Blank
3. If you answered Yes to # 1 and completed # 2, for how many of the projected Passenger Trips / Passenger Miles will a passenger be accompanied by an escort? Leave Blank
4. How much will you charge each escort? Leave Blank

## SECTION IV: Group Service Loading

1. If the message "You Must Complete This Section" appears to the right, what is the projected total number of Group Service Passenger Miles? (otherwise leave blank) 42,800  
You Must Complete This Section  
Loading Rate 4.89 to 1.00  
And what is the projected total number of Group Vehicle Revenue Miles? 10,700

## SECTION V: Rate Calculations for Multiple Services:

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

		RATES FOR FY: 2024 - 2025			
		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	200,920	\$2,222	75,888	Leave Blank	42,800
Rate per Passenger Mile =		\$4.35	\$7.45	\$0.00	\$2.10 \$3.38
					per passenger per group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	30,000	18,000	8,000	Leave Blank	8,000
Rate per Passenger Trip =		\$12.18	\$55.68	\$0.00	\$15.68 \$32.64
					per passenger per group
2. If you answered # 1 above and want a COMBINED Rate per Trip PLUS a per Mile add-on for 1 or more services, ...		Combination Trip and Mile Rate			
		Ambul	Wheel Chair	Stretcher	Group
... INPUT the Desired Rate per Trip (but must be less than per trip rate above) =				Leave Blank	\$0.00
Rate per Passenger Mile for Balance =		\$4.35	\$7.45	\$0.00	\$2.10 \$3.38
					per passenger per group

		Rates if No Revenue Funds Were Identified As Subsidy Funds			
		Ambul	Wheel Chair	Stretcher	Group
Rate per Passenger Mile =		\$5.13	\$8.80	\$0.00	\$2.47 \$9.90
					per passenger per group
Rate per Passenger Trip =		\$38.34	\$55.73	\$0.00	\$18.40 \$33.95
					per passenger per group

Program These Rates Into Your Medicaid Encounter Data

## Charlotte County-Punta Gorda MPO Evaluation/Comment Form



### Charlotte County-Punta Gorda MPO Evaluation/Comment Form

Title of Event/Workshop/Meeting: \_\_\_\_\_

Place: \_\_\_\_\_

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

{1} By attending this event were your questions and concerns addressed?

☐ Yes ☐ No

If not, what additional information do you need?

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{2} Was the meeting location and time appropriate for this participation event?

☐ Yes ☐ No

If not, please suggest location and time options \_\_\_\_\_

{3} How did you hear about this Public Participation event?

☐ Newspaper ☐ From another person

☐ Invitation/Mail ☐ Other \_\_\_\_\_

{4} Please share your concerns and ideas. Be assured that all your comments are read, reviewed and will be considered. Thank you for your time, participation, and help.

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[www.ccpmpo.gov](http://www.ccpmpo.gov)

APPENDIX I

**UPON APPROVAL AT THE MAY 2, 2024 LCB MEETING, THIS DOCUMENT WILL BE  
INSERTED AS APPENDIX J (PAGES 89-98)**

# **CTC Review**

Charlotte County Board of County Commissioners  
Transit Division

Counties served: Charlotte

Date(s) of Review: February 5-7, 2024

PA Staff Assigned to Review: Wendy Scott and Betty-Ann Sherer

## **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



MAY 2, 2024  
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 5-7, 2024.

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:** [2024 CTC Evaluation](#)

# CTC Review

Charlotte County Board of County Commissioners  
Transit Division

Counties served: Charlotte

Date(s) of Review: February 5-7, 2024

PA Staff Assigned to Review: Wendy Scott and Betty-Ann Sherer

## 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 Sections 5310 and 5311) grant funding. The CTC also 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 TD clients with disabilities.

**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 5, 2024, two MPO staff members participated in a Mid-County TD trip. The trip was conducted with eight passengers and Driver Troy Peterson 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:** None

**Recommendation:** None

**Timeline for Compliance:** N/A

## F. Surveys (see attachment)

**Area of Noncompliance:** One complaint received while surveying (*regarding a different driver/not Mr. Peterson*)

**Recommendation:** Immediately discussed with Transit Manager who has taken action to address the situation.

**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 Federal Transit Administration (FTA) Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) and FTA 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. Mobile phone Transit app training is commencing.

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

The Trip and Equipment Grant for Charlotte County currently runs from July 1, 2023 through June 30, 2024.

**Area of Noncompliance:** None

**Recommendation:** None

## **III. Conclusion**

The Charlotte County Transit Division is doing an excellent 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. Resulting contract driver and County staff shortages had added to the challenge of service provision, but recent steps largely have corrected this issue. The only required corrective action was follow-up to a surveyed passenger's complaint, and the Transit Manager immediately took action on the situation. When surveying passengers, twice riders expressed surprise that they could use the transit services for more than one purpose/destination. Outreach could be done to educate current system users on all their destination options.

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

# CTC Review

Charlotte County Board of County Commissioners  
Transit Division

public through all means possible (including newspaper advertisements, promotional brochures, business cards, CC-TV 20 broadcasts, etc. with updated fare information.) The development of the County's 10-Year Transit Development Plan (TDP) 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. Part of this effort will include a fare study and a marketing plan, as well as an assessment of alternative fuel vehicles. Results also will be beneficial in developing the MPO's 2050 Long Range Transportation Plan (LRTP).

**LCB Chairman:** \_\_\_\_\_  
**Commissioner Ken Doherty**

**County:** Charlotte  
**Date:** May 2, 2024

# CTC Review

Charlotte County Board of County Commissioners  
Transit Division

## **ATTACHMENT**

### **1. BUS/VAN RIDE**

On February 5, 2024, MPO staff accompanied Driver Troy Peterson and eight passengers on a regularly scheduled Monday morning trip to and from the DAVITA Dialysis Center, 4300 Kings Hwy, Unit 406 in Charlotte Harbor, FL. An LCB Member had planned to participate, but she was unable to ride due to illness. MPO Staff boarded the bus at the Transit Facility at 545 Theresa Blvd. prior to passenger pickup. Mr. Peterson was wearing a bright yellow safety vest with the name of the contractor on the back. He 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, along with additional informational signage (service suspension for upcoming holiday, grocery bag limits, etc). The vehicle's air conditioning, heat and two-way communication devices were all in working order. The entire bus was immaculate, including the seats which were clean and in good condition. Several passengers commented on how comfortable the seats were in the 16-passenger vehicle.

Noteworthy driver performance: Troy Peterson performed his job very professionally, especially in assisting the passengers with their baggage (which was often cumbersome given items normally taken to dialysis including pillows, blankets, etc). For arriving passengers, he also escorted them to the facility door and assured that they were receiving assistance from facility staff. For those passengers arriving back to their residences, he waited until he observed them safely gaining entry. Given the regularly scheduled residential and dialysis destinations, he 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 discussion over the absence of one regular rider. One passenger informed the driver that the absent passenger was currently residing out-of-state. The driver took action to note the no-show status of the passenger and verify the fact that the regularly scheduled ride would need to be discontinued. The driver was also notified by dispatch of a backpack that had been left behind on an early morning trip. As soon as possible, Mr. Peterson personally retrieved the backpack from the passenger section and secured it in the driver portion of the vehicle to ensure its safe return. He also deserves high praise for his attention to adhering to his schedule, so that arrivals and departures occur promptly while being mindful of all traffic regulations.



# CTC Review

## Charlotte County Board of County Commissioners Transit Division

### **2. RIDER SURVEYS**

A County-wide survey of TD passengers who rode on February 5, 2024 was conducted on February 5-6, 2024 via telephone from the Transit Facility. Passenger average use of the Transportation Disadvantaged services was 3-5 times per week (89%) and 1-2 times per week (11%). These figures reflect frequent usage (tied to dialysis, congregate dining and work commute trips). Trip purposes were for medical (67% of riders), employment (22%), nutritional (22%), educational/training/adult day care (0%), and life-sustaining/other (11%). Average satisfaction with the service on a scale of 1 to 10 (10 being most satisfied) was 9, an increase of .25 points from the last CTC Evaluation.

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

"This transportation is everything. It's my freedom. I can take care of all my needs and not rely on anyone else. Driver Kathy is great. She changed routes and is no longer my driver. All of the drivers have been great and very helpful."

"This transportation is very important. I cannot afford a car. This is the only way I can get to appointments."

"This transportation means that I am getting to dialysis and back. Hurricane Ian totaled my car, and I lost my house. I am living in a hotel. I've learned to be ready in plenty of time, and the hotel front desk staff has helped to alert me. The transportation works fine. There are great drivers, especially Debra."

"This transportation is convenient. It allows me to get to my appointments on time. It is a great service."

"Some drivers are good, but some drivers are rude. This transportation is a must-have necessity. The buses are very clean and seem to run well." (*rudeness complaint was relayed to Transit Manager for driver retraining*)

From adult son (caregiver): "My mom initially was scared when going to the adult meal site, since she had never ridden a taxicab or bus in her life. Now, after experiencing it, she is very happy to take the trip/visit with other clients, and she loves the service which we rate 12+++ . We are new to the area and anxious to learn about all the places where she can go. I appreciate the service alerting the family to bus pick up and drop off times. It is wonderful to have warning of her arrival time, so I can make ready to greet and assist her."

# CTC Review

## Charlotte County Board of County Commissioners Transit Division

"I am unable to drive. The transit service is reliable. The drivers are great, and I've never had a problem using this service. I take the bus Monday through Friday for work. I couldn't be independent without this service."

"Sometimes the rides are a little long, but I understand the need to pick up others, so it's okay. This is freedom. I use a wheelchair. The drivers are awesome!"

### **3. CONTRACT OPERATOR SURVEYS**

The CTC's current contract operator (providing bus driver and bus washing services) was hired effective October 1, 2022. For the evaluation AOR timeframe, the old provider was Ameditrans through September 30, 2022. The new contractor is A&Associates. MPO staff surveyed the current contractor for this CTC Evaluation.

- **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**



#### **Charlotte County Transit Bus System Annual Safety and Security Certification**

Date: February 8, 2024

IN ACCORDANCE WITH FLORIDA STATUTE 341.061, THE BUS TRANSIT SYSTEM NAMED ABOVE HEREBY 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.

**Maddox,**  
Signature: **Heidi**  
Heidi Maddox, Transit Operations Manager  
Charlotte County Budget & Administration

Digitally signed by  
Maddox, Heidi  
Date: 2024.02.09 09:56:36  
-05'00'

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

NAME AND ADDRESS OF ENTITIES WHICH HAVE PERFORMED SAFETY INSPECTIONS:

Mr. Front End  
8251 Pascal Dr.  
Punta Gorda, FL. 33950

Charlotte County Fleet  
18000 Paulson Dr.  
Port Charlotte, FL. 33954

Desoto County Ford  
3039 SE Hwy 70  
Arcadia, FL. 34266

**Maddox,**  
Signature: **Heidi**  
Heidi Maddox, Transit Operations Manager  
Charlotte County Budget & Administration

Digitally signed by  
Maddox, Heidi  
Date: 2024.02.09  
09:56:50 -05'00'

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

Charlotte County Budget & Administrative Services  
Transit Division  
545 Theresa Blvd., Port Charlotte, FL 33954

941.833.6234  
CharlotteCountyFL.gov

*Note from MPO Staff: Thanks to Heidi Maddox, Laura Richards, Shirley Ciampi and Jennifer Gregoire (Charlotte County Transit Division) and Troy Peterson (A&Associates) for their assistance in conducting this year's CTC Evaluation.*

MAY 2, 2024  
LCB MEETING

**AGENDA ITEM # 8**  
**COMMUNITY TRANSPORTATION COORDINATOR (CTC) QUARTERLY REPORTS**  
**FOR OCTOBER-DECEMBER 2023 AND JANUARY-MARCH 2024**

**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 2023 and January-March 2024 Quarterly Reports](#)



**CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED AND PUBLIC TRANSPORTATION TRIP REPORT FISCAL YR 23/24**

Month	Enhanced Mobility	SFC	TD	Coordinated Partners	Rural	Public Transit	FY 23/24 Total Trips	FY22/23 Total Trips	Variance
October	134	86	1,858	10	22	4,353	6,463	2,941	3,522
November	153	54	1,512	12	16	10,332	12,079	8,140	3,939
December	107	72	1,427	136	27	3,444	5,213	3,998	1,215
January	134	120	1,690	135	41	4,329	6,449	4,217	2,232
February	134	90	1,583	126	37	4,347	6,317	4,138	2,179
March	144	120	1,688	158	32	4,665	6,807	5,116	1,691
April				-			-	4,968	(4,968)
May				-			-	5,566	(5,566)
June				-			-	5,390	(5,390)
July				-			-	4,530	(4,530)
August				-			-	4,978	(4,978)
September				-			-	4,937	(4,937)
Total	806	542	9,758	577	175	31,470	43,328	58,920	(15,592)
Q1 No Shows:	656								-
Q2 No Shows:	774								
Q3 No Shows:									
Q4 No Shows:									
November Waterfest Trips:		4,950							
November Air Show Trips:		2,258							
Enhanced Mobility: 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 23/24**

Month	Senior Friendship Center	Transportation Disadvantaged Commission	Enhanced Mobility for Seniors & Individuals with Disabilities (5310)	Rural (5311)	Total Revenue
Oct-23	\$ 1,307.44	\$ 50,041.84	\$ -	\$ -	\$ 51,349.28
Nov-23	\$ 1,364.62	\$ 40,246.25	\$ -	\$ -	\$ 41,610.87
Dec-23	\$ 1,145.38	\$ 37,660.55	\$ 7,522.11	\$ 5,772.73	\$ 52,100.77
Jan-24	\$ 1,942.05	\$ 44,000.52	\$ -	\$ -	\$ 45,942.57
Feb-24	\$ 1,214.56	\$ 46,778.81	\$ -	\$ -	\$ 47,993.37
Mar-24	\$ 1,944.42	\$ 46,142.10	\$ 10,020.62	\$ 10,071.19	\$ 68,178.33
Apr-24			\$ -	\$ -	\$ -
May-24			\$ -	\$ -	\$ -
Jun-24					\$ -
Jul-24			\$ -	\$ -	\$ -
Aug-24					\$ -
Sep-24					\$ -
Total	\$ 8,918.47	\$ 264,870.07	\$ 17,542.73	\$ 15,843.92	\$ 307,175.19

**CHARLOTTE COUNTY TRANSIT NON PROFIT COORDINATED PARTNERS TRIPS REPORT FY23/24**

Month	C.A.R.E.	Homeless Coalition	Vets	Total
Oct-23	-	2	8	10
Nov-23	-	10	2	12
Dec-23	16	115	5	136
Jan-24	11	113	11	135
Feb-24	22	100	4	126
Mar-24	19	115	24	158
Apr-24				-
May-24				-
Jun-24				-
Jul-24				-
Aug-24				-
Sep-24				-
<b>Total</b>	<b>68</b>	<b>455</b>	<b>54</b>	<b>577</b>

# CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 23/24

## Q1

One-Way Trips By Trip Purpose	Q1	Total One-way Trips	Percent	Q1
Education/Training	3,283	3,283	14%	
Employment	5,430	5,430	23%	
Life-Enhancing	2,461	2,461	11%	
Medical	3,698	3,698	16%	
Nutritional	946	946	4%	
Recreational	7,527	7,527	32%	
Trip Purpose Totals	23,345	23,345	200%	

## Q2

One-Way Trips By Trip Purpose	Q2	Total One-way Trips	Percent	Q2
Education/Training	3,246	6,529	15%	
Employment	6,558	11,988	28%	
Life-Enhancing	3,742	6,203	14%	
Medical	4,743	8,441	19%	
Nutritional	1,187	2,133	5%	
Recreational	507	8,034	19%	
Trip Purpose Totals	19,983	43,328	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 TRANSIT UNMET TRIPS REPORT FISCAL YR 23/24**

<b>Unmet Trips Q1</b>	<b>Medical</b>	<b>Employment</b>	<b>Education - Training</b>	<b>Nutritional</b>	<b>Life Enhancing</b>	<b>Total</b>
October	25	52	11	1	22	111
November	20	28	5	3	9	65
December	20	28	4	-	8	60
Quarterly Totals	<b>65</b>	<b>108</b>	<b>20</b>	<b>4</b>	<b>39</b>	<b>236</b>
<b>Unmet Trips Q2</b>	<b>Medical</b>	<b>Employment</b>	<b>Education - Training</b>	<b>Nutritional</b>	<b>Life Enhancing</b>	<b>Total</b>
January	16	39	7	2	16	80
February	29	34	7	1	19	90
March	40	64	3	3	34	144
Quarterly Totals	<b>85</b>	<b>137</b>	<b>17</b>	<b>6</b>	<b>69</b>	<b>314</b>

## CHARLOTTE COUNTY TRANSIT FEEDBACK REPORT FISCAL YR 23/24

### Q1

Type of Issue	Previous Quarter	This Quarter
Phone- Long que (wait) time	-	1
Missed Trip	-	3
Service Area Not Available (Out of County)		1
Other Concern	-	1
Compliments	-	2
Total Concerns	-	6
Total Compliments	-	2

### Q2

Type of Issue	Previous Quarter	This Quarter
Missed Trip	3	8
Wrong Time/Date of Service	-	2
Rude Employee or Operator	-	2
Late Ride or Early	-	2
Safety Complaint	-	3
Policy Complaint		4
Phone- Long que (wait) time	1	-
Service Area Not Available (Out of County)	1	-
Other	1	2
Compliment	2	1
Total Concerns	6	23
Total Compliments	2	1

MAY 2, 2024  
LCB MEETING

**AGENDA ITEM # 9**  
**TRANSIT DEVELOPMENT PLAN (TDP) UPDATE**

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

**Agenda Item Presented by:** Kayla Huetten, Benesch and Charlotte County Transit Staff

**Discussion:**

The TDP Consultant and Transit staff will provide an update on the latest developments in the TDP effort. This is an informational item, and there will be an opportunity for LCB Members to provide comments.

**Recommendation:** None

**Attachment:** [Power Point Presentation](#)