



Charlotte County Transportation Disadvantaged Local Coordinating Board Regular Meeting



10:00 AM Thursday, November 6, 2025
Charlotte County Transit Facility
545 Theresa Blvd, Port Charlotte, FL 33954

1. Call to Order & Roll Call
2. Pledge of Allegiance
3. Public Comments on Agenda Items
4. Consent Agenda
 - A. [Approval of Minutes: September 4, 2025](#)
5. [Approval of LCB Grievance Procedures](#)
6. [Community Transportation Coordinator \(CTC\) Designation/Memorandum of Agreement \(MOA\)](#)
7. [Quarterly Report](#)
8. [FY 2026 Unified Planning Work Program \(UPWP\) Amendment – Transit Efficiency Study](#)
9. [Review of Transit Development Plan \(TDP\) Annual Update](#)
10. Public Comments
11. Staff Comments
12. Member Comments
 - A. Member Presentations: [Carmen Henry, CareerSource Southwest Florida](#)
13. Adjournment

Next Meeting: January 8, 2026

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

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

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

The MPO's planning process is conducted in accordance with Title VI of the Civil Rights Act of 1964 and related statutes. Any person or beneficiary who believes he or she has been discriminated against because of race, color, religion, sex, age, national origin, disability, or familial status may file a complaint with the Charlotte County-Punta Gorda MPO Title VI Coordinator Sierra "Ray" Scott at (941) 883-3535 or by writing her at 1050 Loveland Blvd, Box C, Port Charlotte, FL 33980.

CHARLOTTE COUNTY-PUNTA GORDA METROPOLITAN PLANNING ORGANIZATION
1050 Loveland Blvd., Box C, Port Charlotte, FL 33980
Telephone: (941) 883-3535



NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

CONSENT AGENDA # 4



NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

AGENDA ITEM # 4-A
APPROVAL OF MINUTES: SEPTEMBER 4, 2025, MEETING

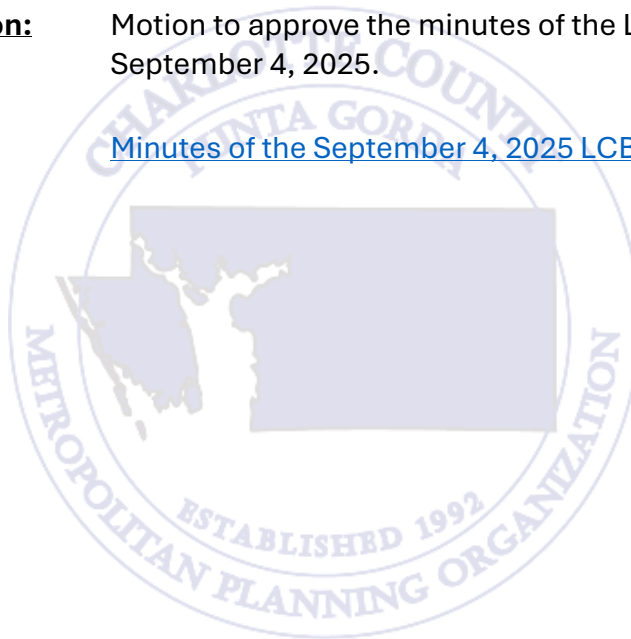
Purpose: To review and approve the minutes of the previous Local Coordinating Board (LCB) Meeting.

Presented by: MPO Staff

Discussion: To Be Determined

Recommendation: Motion to approve the minutes of the LCB Meeting of September 4, 2025.

Attachment: [Minutes of the September 4, 2025 LCB Meeting](#)



CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED
LOCAL COORDINATING BOARD (LCB)
MEETING
September 4, 2025

Minutes of a regular meeting held in a hybrid format on September 4, 2025 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*
Maricela Morado, *Area Agency on Aging-Florida Department of Elder Affairs*
Joseph Sabatino, *Citizen Advocate*
Michael Stahler, *Agency for Health Care Administration (AHCA)*
Shery Stahnke, *Goodwill, Economically Disadvantaged Representative (alternate)*
Cheryl Sytsma, *Disabled Interests Representative*
Pamela Jordan, *Representative for Elderly Interests*

MEMBERS PRESENT REMOTELY

Stacy Booth, *FDOT, District One Modal Development Office*
Carmen Henry, *Regional Workforce Development*
Tabitha Larrauri, *Department of Children & Families*

ABSENT MEMBERS

Leigh Ann Bellamy, *Division of Blind Services*
Matthew McGee, *Veteran Services Manager - excused*
Dottie Fulton, *Citizen Advocate-User - excused*
Lynn Dohler, *Children-at-Risk Representative - excused*
Vacant, *Local Private-for-Profit Transportation Industry Representative*

STAFF AND OTHERS PRESENT

Lakshmi N. Gurram, *MPO Director*
Mark Yaxis, *MPO Multimodal Planner*
Sierra "Ray" Scott, *MPO Senior Administrative Assistant*
Betty-Ann Sherer, *Charlotte County Transit*
Shirley Ciampi, *Charlotte County Transit*
Eva Tomszak, *Charlotte County Fiscal*

OTHERS PRESENT REMOTELY

Bekie Leslie, *MPO Administrative Services Coordinator*

1. Call to Order & Roll Call

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

2. Pledge of Allegiance

The Pledge of Allegiance was recited.

3. Public Comments on Agenda Items

There were no public comments on agenda items.

4. Consent Agenda

A. Approval of Minutes: May 1, 2025, LCB Public Meeting

B. LCB 2026 Calendar of Quarterly Meetings

Joe Sabatino made a motion to approve the Consent Agenda as presented. Suzanne Roberts seconded the motion, and it was approved unanimously.

5. Approval of Local Coordinating Board (LCB) Bylaws

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

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

The LCB Bylaws have been reviewed by the MPO's legal advisor.

Lakshmi N. Gurram briefly explained the changes above which are minor in nature.

Suzanne Roberts made a motion to approve the 2025 LCB Bylaws. Michael Stahler seconded the motion which passed unanimously.

6. Annual Operating Report

Pursuant to Florida Statutes, Chapter 427, and Rule 41-2 of the Florida Administrative Code, the Community Transportation Coordinator (CTC) provides the Florida Commission for the Transportation Disadvantaged (CTD) an Annual Operating Report (AOR) by September 15th of

each year. This report identifies the coordinated services that were arranged or provided by the CTC during the past year. It contains an accounting of revenues and expenses, in addition to other disadvantaged transportation program information. The draft AOR is typically forwarded in advance to CTD staff for review and comment prior to final submission.

Mr. Gurram introduced Charlotte County Staff to provide the update for the AOR. Betty-Ann Sherer explained that there was a decrease in trips since last year, which has been attributed to issues with staffing and maintenance of buses; Ms. Sherer explained this also increases the number of unmet trips. Unmet trips are now able to be counted and categorized by time of day or purpose of trip, making it easier for Transit to address these issues moving forward. Ms. Sherer also stated that there had been nearly a 50% decrease in no-show trips.

When looking at compliments and concerns, Mrs. Sherer stated that there is always someone available to take these calls and ensure any reports are moved forward and addressed as quickly as possible.

Para transit miles have gone up significantly, but it should be noted that the service area has been expanded 3 to 4 times just in the past year. A new vendor for drivers is to be established in October as well as the addition of two new buses. These changes will shift numbers in a positive manner.

Commissioner Ken Doherty pointed out that the data is a blend of total transit and transportation disadvantaged. He also wanted to know if there was a way to report exclusively one or the other. He focused briefly on Cost-Per-Trip both for Transportation Disadvantaged (TD) and for the county. Ms. Sherer stated that when compared to neighboring counties, Charlotte County is an anomaly as is it still fare-free for both regular trips and TD. Commissioner Doherty mentioned this as important for next year's reporting to ensure that there is clarity surrounding TD data. Commissioner Doherty also mentioned that the next commission meeting would include a marketing plan for transit that he stated looked good and he expected it to help with ridership.

Ms. Sherer took a moment to explain that there are now employees with transit who contact each new client to ensure that all who qualify will have access to TD rides. Transit believes this more personalized approach is an improvement from their previous system of sending a "Welcome Aboard" packet, which did include a TD application. However, they believe it was being overlooked due to the cumbersome nature of the packet.

***Maricela Morado** made a motion to approve the Annual Operating Report (including allowing staff to make minor technical adjustments per guidance from CTD staff). **Joe Sabatino** seconded the motion which passed unanimously.*

7. Quarterly Report

The quarterly report for April-June 2025 was presented as an informational item. The item described recent activities of the Community Transportation Coordinator (CTC.)

Mr. Gurram introduced county staff, Ms. Sherer, who presented. Ms. Sherer explained that numbers are looking good for the quarter with consistent improvements over the last several

months. Some numbers did go down after the peak of season, including cessation of Beach Cruiser rides, which Transit plans to monitor demand for future implementation.

Ms. Eva Tomszak, from the Fiscal department, took over the presentation to talk about revenues in more detail. Ms. Tomszak stated that there is some missing revenue on the FY 25 report due to some back and forth about the local match rules. There is a meeting on September 9th with FDOT to clarify and hopefully clear concerns and get the missing revenue properly distributed.

Ms. Sherer resumed to discuss trips by purpose for the quarter, stating that the top three have remained; employment, medical, and life enhancing. In regard to unmet trips, Ms. Sherer explained that the language for “Modified Trips” has been changed to “Renegotiated Trips.” This and other alterations have made it possible to see a snapshot of where needs are not being met. This also includes trips that have been altered to meet needs, such as shifting pick-up windows to suit the needs of the rider with Transit’s available resources. With this new data, Ms. Sherer believes Transit will be able to utilize the new driver contract to address some unmet needs.

Ms. Shirley Ciampi stepped in to go over the compliments and concerns section of the presentation. Ms. Ciampi explained that all concerns are taken seriously and investigated fully. Stating that she personally is the main contact for people wanting to report concerns.

As far as safety concerns go, each bus is outfitted with eight cameras, with four outside and four inside. This has allowed Transit to determine that four of the seven total safety concerns that were reported for the quarter were unfounded. The other three concerns were found and due to the availability of the cameras, corrective action was able to take place within days of the incidents. When referring to the “Rude Employee or Operator” section these numbers did go down by half since the previous quarter.

Commissioner Doherty asked if each of the concerns were different between quarters or if there was any overlap. Ms. Ciampi answered that they are unique due to each one being fully investigated in a timely fashion each quarter, leaving none to overflow into the next quarter. Ms. Ciampi explained that the investigation process has been streamlined and made easy for them to understand and act, if necessary.

Ms. Lynda Faieta had a question regarding whether the cameras on the buses are live. Ms. Ciampi explained that the cameras are live and used to ensure safety of the drivers and riders alike. Transit partnered with EcoLane and has utilized their many valuable features. One program, called “EcoVision”, uses AI to track movements of the drivers and rate their safety.

Moving on to the data for the Charlotte Rides mobile app, there have been 767 new accounts created since October of 2024. There was some slowdown on account creation during May and June due to staffing concerns that caused the outreach team to slow down, but there has been an uptick in July and August. Almost 6,000 trips have been booked through the Charlotte Rides app since October 1, 2024.

Ms. Ciampi took a moment to go over data regarding ridership and the ages of app users, stating the oldest user is 93 years and using the app themselves (rather than a family member booking

rides for them) and the youngest is 14 years. Transit has also pulled data on the age groups over several weeks and reported on where people were going. There was a suggestion from Ms. Roberts that some trips being taken by app users could be for volunteering, as several of her volunteers at the Virginia B. Andes Clinic are in their 70s and 80s. Ms. Ciampi agreed this was a question that could be posed by dispatchers when booking trips and that could help in categorizing trips further.

When going over the trips by age group, Ms. Sherer showed the trends shifting from 14–19-year-old riders as a majority going for employment and education, to the oldest rider group, 81 and older, having mostly medical, nutrition, and life enhancing trips. An interesting point Ms. Sherer noted about riders over the age of 81 was that 4% of them utilized the bus to go to employment. Transit investigated this number and discovered that this 4% was limited to only 5 riders and 22 trips out of 644 trips for that category. Commissioner Doherty thanked them for the information.

8. Public Comments

No public comments were received.

9. Staff Comments

Mr. Gurram provided staff comments for the MPO. He stated that all member vacancies on committees have been filled except for the Private-For-Profit industry on LCB. He thanked the members of the LCB for their continued engagement and support in helping to maintain a strong and active board.

Mr. Gurram reported that at the last MPO Board meeting held on August 4, 2025:

- Mr. Joe Sabatino was honored with the Peggy Walters Award for his outstanding contributions to citizen mobility, particularly within the transit system.
- Ms. Wendy Scott was recognized for her dedicated service as her last day was August 29th.
- The MPO Board approved the cost feasible portion of the 2050 Long Range Transportation Plan (LRTP), marking a major milestone in selecting fundable projects for the region.

On the state level, Mr. Gurram attended the Florida Commission for the Transportation Disadvantaged (CTD) Annual Training for the TD Planners, held in conjunction with the Florida Public Transit Association's Annual Conference at St. Petersburg Beach. During the sessions, several transit providers from across the state participated in discussions. One of the key questions posed to planners was: "How would you improve the Local Coordinating Board (LCB) experience?"

One recommendation that stood out was to offer each individual LCB member the opportunity to speak briefly about their agency and deliver a 5-minute PowerPoint presentation to the rest of the board. Mr. Gurram suggested that the Charlotte County LCB do this as well to foster greater understanding, collaboration, and appreciation for each member's role in supporting transit services. Ms. Maricela Morado shared that the Sarasota County LCB does this already in the

form of 15-minute presentations, one per meeting. Commissioner Doherty readily approved of the idea with the stipulation that that portion of the meeting be limited to 30 minutes or less, to keep the overall meeting time manageable.

Mr. Gurram also welcomed Mr. Mark Yaxis to the MPO team as a new planner, explaining that Mr. Yaxis will be taking a lead role in multimodal planning activities including LCB and transit. Additionally, Mr. Gurram reported that STTAR employee, Ms. Ray Scott, has been permanently placed in an MPO position and her focus is on administrative services including managing the MPO website and other activities as assigned.

Ms. Sherer shared that they used surveys sent out to transit riders to create a collage of words. The biggest word, the one used most often in peoples' responses, was "independence" thus creating the so called "[Independence Bus](#)." This image will be used for a mural on the wall of the conference room at the transit facility. They also plan to use the mural wall to display employee/staff accomplishments.

Transit will also be welcoming their new transit services supervisor next week, their new senior dispatcher will start on September 24th, and a new job posting will be listed soon for the Transit Safety Coordinator. They also wanted to share that their program coordinator, Ms. Jennifer Gregoire, was named employee of the month for May 2025.

10. Member Comments

Mr. Mike Stahler, Ms. Lynda Faeita, Ms. Shery Stahnke, and Ms. Suzanne Roberts all shared praise for the LCB and transit. Mr. Joe Sabatino stated that there is an increase in demand for workers and with that comes an increased demand for transportation.

Members who were attending virtually also shared their comments.

Ms. Stacy Booth shared the following:

Topics:

Agenda topic *Federal Grants for Federal Fiscal Year (FFY) 25 / State Fiscal Year 2025/2026*

FTA Section 5310, 5311, and 5339 applications – The due date to submit grant applications was Friday, December 13, 2024. Approximately 37 applications were received. An update will be provided once Committee Meetings and recommendations have been made.

Within this area, applications have been received by:

- 5311 – Charlotte County requested \$165,600. However, due to limited funding and multiple applications, we could only recommend \$134,536 to Central Office. We are still waiting their review and approval.

Agenda topic *Training Opportunities*

2025 Florida Public Transportation Association (FPTA) Annual Conference – Was just held this week in St. Petersburg.

Grant Management & Funding Opportunities Webinar – FDOT will be hosting the annual Grant Management Workshop on September 18, 2025. It is an opportunity to attend virtually, learn about how to apply for FFY26/SFY27 FTA grants, and have your questions answered. Invitations have been sent out.

Agenda topic *Triennial Reviews*

Round 3 of the FDOT triennial reviews began in 2024. We began with agencies that receive only FTA Section 5310 funding with the larger agencies to follow. There are currently 29 agencies to review throughout the District.

Reviews in Progress:

- Charlotte County received their final report on 7/31/25. We are working with them on any outstanding items to be completed.

Ms. Carmen Henry shared that her organization, CareerSource Southwest Florida, received their summer youth report. This year they had twenty participants in Charlotte County compared to thirteen last year.

Commissioner Ken Doherty encouraged those attending to watch the commission meeting next Tuesday. Every quarter a commissioner has the honor of selecting a Customer Service Award recipient. This quarter gave him the opportunity to choose Ms. Heidi Maddox, transit director, to receive it. Commissioner Doherty suggests that anyone who sees her congratulate her on this well-deserved award. Ms. Sherer pointed out that Ms. Maddox is also graduating from the Transit Leadership Program at the conference Ms. Maddox is currently attending. Commissioner Doherty mentioned the upcoming legislative session, future budgets, and the November ballot as well. Commissioner Doherty encourages everyone to keep knowledgeable and informed about upcoming ballot measures and to keep in mind what services are appropriate for our county and the city to provide.

12. Adjournment (Next Meeting – November 6, 2025) at the Charlotte County Transit Facility, 545 Theresa Blvd., Port Charlotte, FL 33954)

The next LCB meeting is scheduled for Thursday, November 6, 2025 at the Transit Facility located at 545 Theresa Blvd. in Port Charlotte, FL 33954. The meeting was adjourned at 11:04 a.m.

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

AGENDA ITEM # 5
APPROVAL OF GRIEVANCE PROCEDURES

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

Presented by: MPO Staff and County Staff

Discussion: According to the Planning Grant Agreement, the Commission for the Transportation Disadvantaged (CTD) requires that the LCB annually update and approve the Local Coordinating Board Grievance Procedures. These grievance procedures apply to service as provided on Charlotte County's Transportation Disadvantaged system, formerly known as Sunshine Ride. In the past, no grievances have ever gone forward to the LCB Grievance Board but rather have been settled at the service provider or mediator levels. The LCB's role under these procedures is advisory only.

Transit and MPO staff have completed a major review and revision of the Charlotte County LCB grievance procedures in accordance with the Local Grievance Guidelines for Transportation Disadvantaged Services. Recently, Charlotte County Transit has been tasked by a 2024 state law to report Adverse Incidents for Paratransit Riders, which is a separate, but sometimes could be a related, issue. The CTD held a workshop on August 27, 2024 regarding this requirement, and the PowerPoint is found here:

[20240827_adverse_incident_public_workshop_presentation.pptx \(live.com\)](#)

In developing the new draft LCB Grievance Procedures, Charlotte County Transit staff expressed the desire to address all formal grievances within the Transit Division through its Mobility Manager (instead of relying upon a County Human Services Department mediator). The attached draft LCB Grievance Procedures will only apply to Charlotte County Transit's Transportation Disadvantaged program. Separate procedures for

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MEETING

service funded through the general public paratransit (FTA Section 5307) service will be developed by Charlotte County Transit for in-house use and will not involve the LCB in hearing any grievances that might arise within that program. Those Community Transportation Coordinator's Grievance Procedures should ultimately end with the Board of County Commissioners which retains legal responsibility for Transit's actions.

Overall, the desire is to meet the needs of all Charlotte County Transit passengers (both TD sponsored and general public paratransit system riders) and other participants in these systems.

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

Attachment: [Draft Charlotte County Transportation Disadvantaged Local Coordinating Board Grievance Procedures](#)



CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD GRIEVANCE PROCEDURES

NOVEMBER 06, 2025

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD GRIEVANCE PROCEDURES

Objective

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

Definitions and References

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

Agency

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

Commission for the Transportation Disadvantaged (CTD)

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

Community Transportation Coordinator (CTC)

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

Mobility Manager

Performs responsible administrative and technical work associated with a specific, assigned area of discipline, requiring the exercise of judgment, and tact in day-to-day activities and in dealing with the public. Responsibilities include developing, organizing, coordinating, and implementing special events and/or programs, including the administration of departmental programs and projects that may significantly impact other County departments and/or the general public.

Formal Grievance

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

Grievance Board Membership

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

Local Coordinating Board (LCB)

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

Metropolitan Planning Organization (MPO)

The Charlotte County-Punta Gorda Metropolitan Planning Organization (MPO).

Official Planning Agency (OPA)

The body selected to plan for the Transportation Disadvantaged services in a given service area. The Charlotte County -Punta Gorda MPO functions as the OPA for Transportation Disadvantaged services.

Service Complaint

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

TD Helpline

This is a service of the CTD Ombudsman program (Toll free: 1.800.983.2435). The Ombudsman program can help persons find out where to go for assistance, can get answers to questions about TD programs, can assist to work out problems, and can find someone to listen to complaints and make things right. Operators are available from 8am to 5pm (Eastern Time) Monday through Friday.

Transportation Disadvantaged (TD) (User)

Those persons who because of physical or mental disability, income status, or age or who for other reasons are unable to transport themselves or to purchase transportation and are, therefore, dependent on others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are disabled or high risk or at-risk as defined in Section 411.202, F.S.

Transportation Operator

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

DIRECTIVES

Daily service complaints are routine in nature, occur once or several times in the course of a day's service, and are usually resolved immediately by the CTC Transit Program Coordinator. However, if unresolved, a routine, service complaint can emanate into a formal grievance.

The resolution to complaints will vary depending on each situation. Some complaints can be resolved while speaking with the client and others will require research to be resolved. The CTC Transit Program Coordinator investigates complaints received no more than 180 calendar days after the incident.

Service Complaints

All service complaints shall be recorded and reported to the CTC and reported to the LCB.

Service complaints may include but are not limited to:

- Missed Trips
- Wrong Time/Date of Service
- Rude Employee or Operator
- Late Ride or Early
- Safety Concern
- Policy Complaint
- Lone Phone Que
- Service Area Not Available

Formal Grievance

The grievant, in his/her formal complaint, should demonstrate or establish his/her concerns as clearly as possible. The formal grievance process shall be open to addressing complaints by agencies, users, transportation operators, potential users of the system and the CTC in the designated service area. Formal grievances may include, but are not limited to:

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

All formal grievances filed must be in writing on the attached form and contain the following information:

- Name and address of the grievant with date and time of incident.
- A statement of the grounds for the grievance and supplemented by supporting documentation, made in a clear and concise manner. This shall include a complete description of efforts taken by the grievant to resolve the complaint.
- An explanation of the relief or action desired by the complainant.
- The grievant shall have ten (10) working days from the initial receipt of the Grievance Procedures Package to fill out the form and return it to the appropriate agency.

Should the grievant not supply the above information to substantiate the grievance(s) or submit the information after the ten (10) calendar days deadline; no further action will be taken, and the matter will be closed.

The grievant shall first contact the CTC Transit Program Coordinator to resolve the complaint. The Transit Program Coordinator shall attempt to solve the problem within fifteen (15) working days of receiving the complaint. If unsuccessful in resolving the matter, the Transit Program Coordinator shall request that a meeting be scheduled using the Mobility Manager as the next step to resolve the grievance.

The Mobility Manager will make every effort to resolve the grievance, including arranging a meeting between the involved parties to assist them in reaching an amicable resolution, if necessary. Failing resolution at this juncture, if a grievant is a passenger who receives a trip that is funded, then that Funding Agency will be notified, by the Mobility Manager.

If a meeting is initiated, it shall take place within fifteen (15) working days following receipt of all evidence regarding the grievance. Evidence gathering shall be no longer than ten (10) working days from the CTC Transit Program Coordinator initially contacting the Mobility Manager to schedule a grievance resolution meeting. The OPA staff will receive copies of all grievance materials.

If the Mobility Manager is unsuccessful at mediating the grievance through the process outlined above, the Mobility Manager shall request that the grievance be heard by the LCB Grievance Committee. This request shall be made within fifteen (15) working days, from the Mobility Manager's meeting date and sent to the Chair and Vice-Chair of the LCB with copies sent to the CTC.

Upon receipt of the written grievance, the Chair of the Grievance Board shall have fifteen (15) working days to contact Grievance Board members and set a grievance hearing date. In all cases said hearing date shall be held within twenty (20) working days of the Chair's notification to schedule a Grievance Board hearing at the request of the Mobility Manager.

The grievant and all parties involved shall be notified at least seven (7) working days prior to the hearing date by mail.

The Grievance Committee shall have the authority to hold hearings, conduct investigations, and take testimony in all matters relating to complaints or grievances brought before the Grievance Committee by the grievant.

Each party, at their own expense, shall have the right to be represented by counsel, to call and examine witnesses, to introduce exhibits, and to examine opposing witnesses on any relevant matter.

The Grievance Committee shall review the material presented and issue a decision to all parties involved. Decisions shall be by majority vote.

All meetings and hearings shall be open to the public. Minutes shall be kept at each meeting.

The grievant may contact the CTD Ombudsman (toll free: 1.800.983. 2435) and request assistance at any time during the grievance process. Additionally, the grievant may appeal the decision of the Grievance Board to the CTD. A toll-free phone number for complaints for grievances shall be posted inside each vehicle.

Reviewed and adopted the 6th day of November 2025 by the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB).

Commissioner Ken Doherty, Chairman

Charlotte County Transportation
Disadvantaged Local Coordinating
Board

GRIEVANCE TRACKING FORM FOR OFFICE USE ONLY

STEP 1 INITIAL REPORT OF CONCERN

Name of Grievant: _____ Name of CTC Staff Assigned: _____

Date of Grievance: _____ Date Reported to CTC: _____

Date of Resolution: _____

Action Taken: _____

STEP 2 APPEAL MOVED TO MOBILITY MANAGER

Mobility Manager Name: _____ Date Received: _____

Date of Resolution: _____ Date reported to LCB: _____

Action Taken: _____

STEP 3 - APPEAL MOVED TO THE LCB

Date Received by the LCB : _____ Date of LCB Hearing: _____

Date of Resolution: _____ Date reported to the CTD: _____

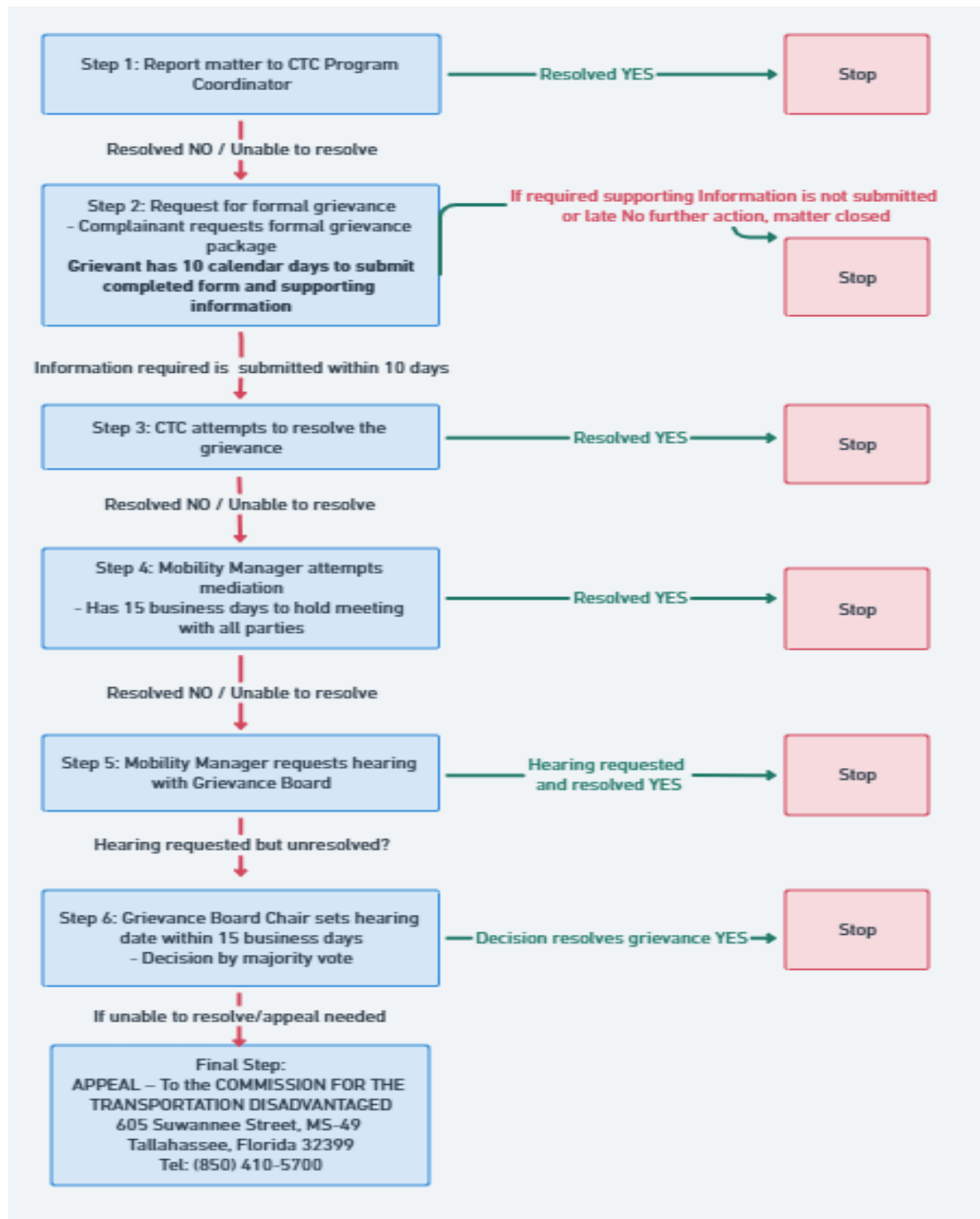
Action Taken: _____

FINAL STEP - APPEAL TO THE COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

605 Suwannee Street, MS-49 Tallahassee, Florida 32399 **Tel:** (850) 410-5700

Grievance Package

STEPS IN THE GRIEVANCE PROCESS





GRIEVANCE FORM CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD

Grievant (s) Name:		Grievant (s) Address:	
Grievant (s) Phone Number:		Grievant (s) Email:	
Grievant (s) Representative's Name, Address, Phone Number and Relationship (e.g. friend, attorney, parent, etc.):			
Names of the Individual(s) Whom You Allege a Complaint Against (If known)			
Name and Address of Agency, Institution, or Department Whom You Allege a Complaint Against:			
Date of Incident:	Vehicle/ Person	Time of Incident	
Please list the name(s) and phone number(s) of any person, if known, that can be contacted for additional information to support or clarify your allegation(s):			
Please explain as clearly as possible WHO, WHAT, WHEN, WHERE AND HOW of the alleged complaint. Include as much information as possible. Additional pages may be attached if needed.			
Please indicate what you feel would be an acceptable resolution:			
Complainant(s) or Representatives Signature:		Date of Signature:	
Mail completed form and all supporting documents to: Charlotte County Transit 545 Theresa Boulevard Port Charlotte Florida 33958		(for Office Staff Only- Date Received)	

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

AGENDA ITEM # 6
COMMUNITY TRANSPORTATION COORDINATOR (CTC)
DESIGNATION/MEMORANDUM OF AGREEMENT (MOA)

Purpose: To provide information to the LCB members on the progress of the Community Transportation Coordinator (CTC) designation process and to review and approve the Memorandum of Agreement (MOA) for the next five-year period.

Presented by: MPO Staff and County Staff

Discussion: Chapter 427.0157, Florida Statutes, requires that the LCB review and approve the Memorandum of Agreement (MOA) that will be signed by the newly designated Community Transportation Coordinator (CTC) and the Florida Commission for the Transportation Disadvantaged (CTD) for the next five-year period. The draft document is attached. Currently, the Charlotte County Board of County Commissioners (BCC) through its Transit Division serves as the CTC for Charlotte County. On May 13, 2025, by resolution, the BCC expressed a willingness to serve in this role for the next five-year period commencing July 1, 2026. The most recent CTC Evaluation reflects Charlotte County Transit's ability to perform as CTC.

At the December 15, 2025 meeting, the MPO Board will consider recommending to the Florida Commission for the Transportation Disadvantaged (CTD) the designation of the Charlotte County area CTC for the next five-year period commencing July 1, 2026. As part of this recommendation process, the MPO Board will consider approving MPO Board Resolution #2025-03 for forwarding to the CTD.

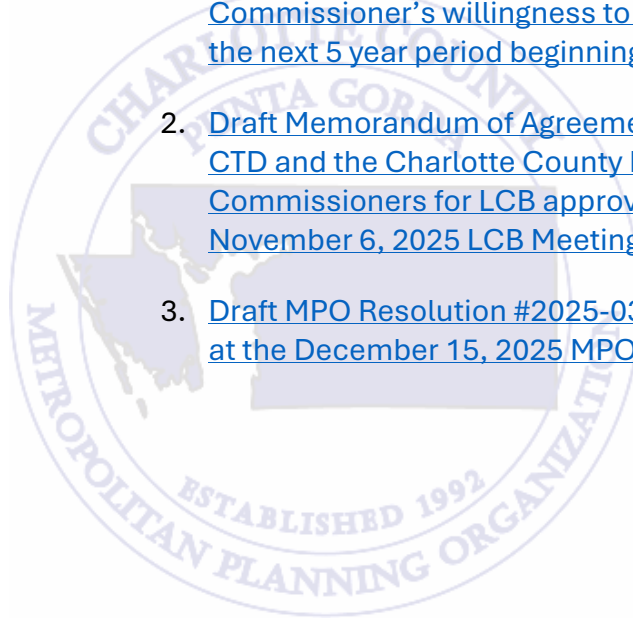
The final step in this CTC designation process will require a presentation by the Charlotte County-Punta Gorda MPO staff at a CTD business meeting in early 2026. Once the CTD approves the new Charlotte CTC

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

designation, the new MOA will be finalized and a new Transportation Disadvantaged Service Plan (TDSP) developed by Charlotte County Transit and MPO staff will be reviewed and approved at the September 3, 2026 LCB Meeting.

Recommendation: Motion to approve the Memorandum of Agreement and recommend MPO Board approval of MPO Resolution #2025-03 for submittal to the CTD.

- Attachments:**
1. [Letter and BCC Resolution #2025-161 received June 9, 2025 from Charlotte County Transit Operations Manager Heidi Maddox regarding the Charlotte County Board of County Commissioner's willingness to serve as CTC for the next 5 year period beginning July 1, 2026](#)
 2. [Draft Memorandum of Agreement between the CTD and the Charlotte County Board of County Commissioners for LCB approval at the November 6, 2025 LCB Meeting](#)
 3. [Draft MPO Resolution #2025-03 to be considered at the December 15, 2025 MPO Board Meeting](#)





June 9, 2025

Charlotte County- Punta Gorda
Metropolitan Planning Organization (MPO)
1050 Loveland Blvd., Box C
Port Charlotte, FL 33980

Re: Community Transportation Coordinator (CTC) Designation

Dear Chair and Honorable Members of the Board,

On May 13, 2025, the Charlotte County Board of County Commissioners approved Resolution 2025-161 that "recommends to the Charlotte County-Punta Gorda Metropolitan Planning Agency that Charlotte County Transit continue to serve as Charlotte County's Community Transportation Coordinator for another five-year term, commencing on July 1, 2026."

Accordingly, I request that the Charlotte County-Punta Gorda Metropolitan Planning Organization request that the Florida Commission for the Transportation Disadvantaged (CTD) continue to permit Charlotte County Transit to act as the Community Transportation Coordinator for an additional five-year term.

Thank you for your consideration and commitment to the transportation needs of Charlotte County and the City of Punta Gorda.

Sincerely,

Heidi E. Maddox
Transit Operations Manager

Enclosure

cc: Zinnia Vargas, Financial Manager, Budget & Administrative Services

ATTACHMENT 1

RESOLUTION
NUMBER 2025-161

A RESOLUTION OF THE BOARD OF COUNTY COMMISSIONERS OF CHARLOTTE COUNTY, FLORIDA PROVIDING FOR A RECOMMENDATION TO THE METROPOLITAN PLANNING ORGANIZATION THAT CHARLOTTE COUNTY TRANSIT, A DIVISION OF CHARLOTTE COUNTY, CONTINUE IN THE STATUS OF COMMUNITY TRANSPORTATION COORDINATOR FOR CHARLOTTE COUNTY.

RECITALS

WHEREAS, Section 427.015 (2), Florida Statutes, provides that each Metropolitan Planning Organization or designated official planning agency shall recommend to the Commission on the Transportation Disadvantaged ("Commission") a single community transportation coordinator; and

WHEREAS, Charlotte County Transit is currently the Community Transportation Coordinator for Charlotte County, which designation expires on June 30, 2026; and

WHEREAS, Section 287.057 (13), Florida Statutes, provides that contracts for service such as the Memorandum of Agreement between the Community Transportation Coordinator and the Commission may be renewed for a period that may not exceed five (5) years as provided in the contract; and

WHEREAS, Rule 41-2.010 (2), Florida Administrative Code, provides that the selection of Community Transportation Coordinators may be negotiated without competitive acquisition, upon the recommendation of the Metropolitan Planning Organization or designated official planning Agency that is in the best interest of the transportation disadvantaged; and

WHEREAS, the designation of Charlotte County Transit serving as the Community Transportation Coordinator continues to be in the best interest of the transportation disadvantaged.

NOW, THEREFORE, BE IT RESOLVED by the Board of County Commissioners of Charlotte County that:

1. The Charlotte County Board of County Commissioners recommends to the Charlotte County-Punta Gorda Metropolitan Planning Organization that Charlotte County Transit continue to serve as Community Transportation Coordinator for an additional five (5) year term, commencing on July 1, 2026.

2. This resolution shall be effective upon approval of the Charlotte County Board of County Commissioners.

PASSED AND DULY ADOPTED this 13th day of May 2025.

BOARD OF COUNTY COMMISSIONERS
OF CHARLOTTE COUNTY, FLORIDA

By: _____

Joseph M. Tiseo, Chairman

ATTEST:

Roger D. Eaton, Clerk of
Circuit Court and Ex-officio
Clerk of the Board of County
Commissioners

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY:

By: Kimberly Eaton
Deputy Clerk

By: Janette S. Knowlton
Janette S. Knowlton, County Attorney
LR25-0399 JSK

Contract # _____

Effective: _____ to _____

STATE OF FLORIDA
COMMISSION FOR THE TRANSPORTATION DISADVANTAGED
MEMORANDUM OF AGREEMENT

This Memorandum of Agreement is between the COMMISSION FOR THE TRANSPORTATION DISADVANTAGED, hereby referred to as the "Commission," and

Charlotte County Board of County Commissioners

the COMMUNITY TRANSPORTATION COORDINATOR, designated pursuant to Chapter 427, F.S., to serve the transportation disadvantaged for the community that includes the entire area of

Charlotte _____ county(ies), and hereafter referred to as the "Coordinator."

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

The Parties Agree:

I. The Coordinator Shall:

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

E. Accomplish this Project by:

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

F. Comply with Audit and Record Keeping Requirements by:

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

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

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

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

P. Comply with other requirements as follows:

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

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

II. The Commission Shall:

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

III. The Coordinator and the Commission Further Agree:

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

F. Notice and Contact:

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

Heidi Maddox, Transit Operations Manager, 545 Theresa Blvd., Port Charlotte, FL 33954

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

This document has been reviewed in its entirety and approved by the local Coordinating Board at its official meeting held on November 6, 2025

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

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

COMMUNITY TRANSPORTATION
COORDINATOR:

STATE OF FLORIDA, COMMISSION FOR
THE TRANSPORTATION DISADVANTAGED:

Charlotte County Board of County Commissioners

Agency Name
Hector Flores

Typed Name of Authorized Individual

Signature:

Title: County Administrator

Typed Name of Authorized Individual

Signature:

Title: Executive Director

Attest:

Roger D. Eaton, Clerk of the
Circuit Court and Ex-officio
Clerk of the Board of County
Commissioners

By:

Deputy Clerk

**APPROVED AS TO FORM AND
LEGAL SUFFICIENCY:**

Janette S. Knowlton, County Attorney



**RESOLUTION
NUMBER 2025-03**

A RESOLUTION OF THE CHARLOTTE COUNTY-PUNTA GORDA METROPOLITAN PLANNING ORGANIZATION (MPO) RECOMMENDING THAT THE CHARLOTTE COUNTY BOARD OF COUNTY COMMISSIONERS THROUGH THE CHARLOTTE COUNTY TRANSIT DIVISION CONTINUE TO SERVE AS COMMUNITY TRANSPORTATION COORDINATOR FOR CHARLOTTE COUNTY

RECITALS

WHEREAS, the Charlotte County Transit Division has successfully performed the duties of Community Transportation Coordinator (CTC) during the last contract period as evidenced by the Charlotte County Transportation Disadvantaged Local Coordinating Board's evaluation of the CTC; and

WHEREAS, the MPO Board has reviewed and approved the recommendation of the renewal of the Charlotte County Board of County Commissioners through the Charlotte County Transit Division as the Community Transportation Coordinator.

NOW THEREFORE, BE IT RESOLVED, by the Charlotte County-Punta Gorda Metropolitan Planning Organization that:

1. The MPO Board hereby endorses the renewal of the Charlotte County Transit Division as Charlotte County's Community Transportation Coordinator for another five-year term commencing July 1, 2026.
2. A copy of this Resolution shall be forwarded to the Florida Commission for the Transportation Disadvantaged.

PASSED AND DULY ADOPTED this 15th day of December, 2025.

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

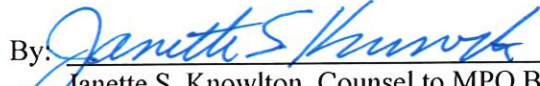
By:

Christopher G. Constance, Chairman

ATTEST:

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY:

By: _____
Lakshmi N. Gurram
Designated Clerk of the MPO Board

By: _____
Janette S. Knowlton, Counsel to MPO Board
LR 25-0792 JMK

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

AGENDA ITEM # 7
QUARTERLY REPORT

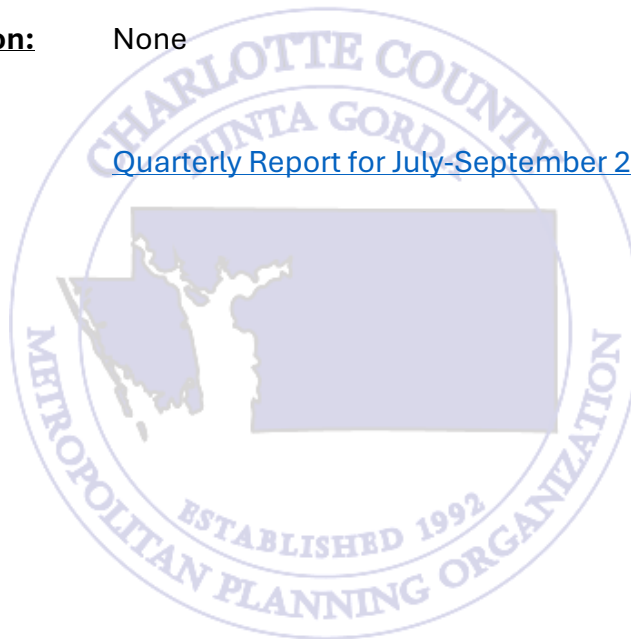
Purpose: To provide a quarterly report of Transportation Disadvantaged (TD) activities.

Presented by: Charlotte County Staff

Discussion: The quarterly report will be presented to describe recent activities of the Community Transportation Coordinator (CTC).

Recommendation: None

Attachment: [Quarterly Report for July-September 2025](#)



CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED AND PUBLIC TRANSPORTATION TRIP REPORT FISCAL YR 25

Month	Enhanced Mobility for Seniors & Individuals with Disabilities (5310)	Senior Friendship Center	Transportation Disadvantaged Commission	Coordinated Partners	Rural (5311)	Public Transit	FY 24/25 Total Trips	FY23/24 Total Trips	Variance
October	176	140	1,008	37	153	4,984	6,498	6,443	55
November	163	154	1,070	35	57	5,424	6,903	4,863	2,040
December	162	198	1,036	18	59	5,436	6,909	5,186	1,723
January	174	209	1,325	36	80	6,029	7,853	6,408	1,445
February	165	190	1,330	18	84	5,616	7,403	6,280	1,123
March	173	292	1,357	0	61	5,750	7,633	6,775	858
April	157	250	1,298	0	52	5,769	7,526	7,123	403
May	136	178	1,256	0	60	4,800	6,430	7,404	(974)
June	134	178	1,194	0	21	4,273	5,800	6,789	(989)
July	129	0	1,307	0	67	4,216	5,719	7,344	(1,625)
August	131	0	1,349	0	86	4,365	5,931	7,422	(1,491)
September	101	0	1,402	0	78	3,673	5,254	5,874	(620)
Total	1,801	1,789	14,932	144	858	60,335	79,859	77,911	1,948
Q1 No Shows:	745					Not reflected in FY23/24 Totals:			
Q2 No Shows:	766						FY 23/24 Waterfest	trips: 4,950	
Q3 No Shows:	665						FY23/24 Air Show	trips: 2,258	
Q4 No Shows:	582								

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED REVENUE REPORT FISCAL YR 25					
Month	Senior Friendship Center	Transportation Disadvantaged Commission	Enhanced Mobility for Seniors & Individuals with Disabilities (5310)	Rural (5311)	Total Revenue
October	\$ 1,739.70	\$ 24,566.38	\$ -	\$ -	\$ 26,306.08
November	\$ 1,981.16	\$ 26,543.61	\$ -	\$ -	\$ 28,524.77
December	\$ 2,564.07	\$ 24,880.90	\$ 16,186.35	\$ 16,187.01	\$ 59,818.33
January	\$ 2,680.21	\$ 33,534.29	\$ -	\$ -	\$ 36,214.50
February	\$ 2,437.12	\$ 32,560.45	\$ -	\$ -	\$ 34,997.57
March	\$ 2,414.16	\$ 33,674.11	\$ -	\$ -	\$ 36,088.27
April	\$ 2,811.46	\$ 31,927.84	\$ -	\$ -	\$ 34,739.30
May		\$ 29,939.80	\$ -	\$ -	\$ 29,939.80
June	\$ -	\$ 27,610.16	\$ -	\$ -	\$ 27,610.16
July	\$ -	\$ -	\$ -	\$ -	\$ -
August	\$ -	\$ -	\$ -	\$ -	\$ -
September	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ 16,627.88	\$ 265,237.54	\$ 16,186.35	\$ 16,187.01	\$ 314,238.78

CHARLOTTE COUNTY TRANSIT NON PROFIT COORDINATED PARTNERS TRIPS REPORT FISCAL YR 25				
Month	C.A.R.E.	Homeless Coalition	Vets	Total
October	22	19	0	41
November	16	19	0	35
December	14	4	0	18
January	20	16	0	36
February	15	3	0	18
March	0	0	0	0
Total	87	61	0	148

CHARLOTTE COUNTY TRANSIT QUARTERLY PURPOSE REPORT FISCAL YR 25

One-Way Trips By Trip Purpose	Q1	Total One-way Trips	Percent	Q1
Disaster	468	468	2%	
Medical	4,644	4,644	23%	
Nutritional	1,400	1,400	7%	
Education/Training	3,256	3,256	16%	
Employment	6,169	6,169	30%	
Life-Enhancing	4,373	4,373	22%	
Trip Purpose Totals	20,310	20,310	100%	
One-Way Trips By Trip Purpose	Q2	Total One-way Trips	Percent	Q2
Disaster	10	478	1%	
Medical	5,205	9,849	23%	
Nutritional	1,992	3,392	8%	
Education/Training	3,614	6,870	16%	
Employment	7,262	13,431	31%	
Life-Enhancing	4,806	9,179	21%	
Trip Purpose Totals	22,889	43,199	100%	
One-Way Trips By Trip Purpose	Q3	Total One-way Trips	Percent	Q3
Medical	4,617	14,466	23%	
Nutritional (Meal site + Grocery only)	2,113	5,505	9%	
Education/Training	2,773	9,643	15%	
Employment	6,190	19,621	31%	
Life-Enhancing	4,063	13,242	21%	
Trip Purpose Totals	19,756	62,477	100%	
One-Way Trips By Trip Purpose	Q4	Total One-way Trips	Percent	Q4
Disaster		478	0	
Medical	4,205	18,671	23%	
Nutritional (Meal site + Grocery only)	2,117	7,622	10%	
Education/Training	2,258	11,901	15%	
Employment	5,077	24,698	31%	
Life-Enhancing	3,247	16,489	21%	
Trip Purpose Totals	16,904	79,859	100%	

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

Grocery is Publix, Winn-Dixie, Aldi, Walmart

CHARLOTTE COUNTY TRANSIT UNMET TRIPS REPORT FISCAL YR 25							
Unmet Trips FY25 Q1 October-December 2024	Medical	Employment	Education - Training	Nutritional	Life Enhancing	Total	Renegotiated Trips
October	17	66	18	3	22	126	95
November	13	46	3	5	35	102	97
December	34	54	30	6	41	165	113
Quarterly Totals	64	166	51	14	98	393	305
Unmet Trips FY25 Q2 January-March 2025	Medical	Employment	Education - Training	Nutritional	Life Enhancing	Total	Renegotiated Trips
January	38	105	11	3	60	217	130
February	39	76	7	5	39	166	131
March	39	107	20	10	53	229	151
Quarterly Totals	116	288	38	18	152	612	412
Unmet Trips April-June 2025	Medical	Employment	Education - Training	Nutritional	Life Enhancing	Total	Renegotiated trip
April	12	53	27	6	23	121	452
May	5	100	16	7	33	161	415
June	6	70	6	4	29	115	227
Quarterly Totals	23	223	49	17	85	397	1,094
Unmet Trips July-September 2025	Medical	Employment	Education - Training	Nutritional	Life Enhancing	Total	Renegotiated Trips
July	19	96	11	12	88	226	861
August	17	51	0	36	21	125	554
September	14	108	56	7	39	224	795
Quarterly Totals	50	255	67	55	148	575	2,210
Unmet Trip: a trip in which the initial time or date request was unavailable						-	
Renegotiated trip: reflects the attempts to satisfy requests						-	
Life Enhancing includes Recreation						-	

CHARLOTTE COUNTY TRANSIT FEEDBACK REPORT FISCAL YR 25		
FY25 Q1		
Type of Issue	Previous Quarter	This Quarter
Missed Trip	0	5
Wrong Time/Date of Service	0	0
Rude Employee or Operator	0	3
Late Ride or Early	0	1
Safety Concern	0	7
Policy Complaint	0	1
Phone- Long que (wait) time	0	0
Total Concerns	0	17
Total Compliments	0	13
FY25 Q2		
Type of Issue	Previous Quarter	This Quarter
Missed Trip	5	1
Wrong Time/Date of Service	0	0
Rude Employee or Operator	3	6
Late Ride or Early	1	3
Safety Concern	7	7
Policy Complaint	1	2
Phone- Long que (wait) time	0	1
Total Concerns	17	20
Total Compliments	13	3
FY25 Q3		
Type of Issue	Previous Quarter	This Quarter
Missed Trip	1	2
Wrong Time/Date of Service	0	0
Rude Employee or Operator	6	5
Late Ride or Early	3	2
Safety Concern	7	11
Policy Complaint	2	0
Phone- Long que (wait) time	1	0
Total Concerns	20	20
Total Compliments	3	12
FY25 Q4		
Type of Issue	Previous Quarter	This Quarter
Missed Trip	2	0
Wrong Time/Date of Service	0	1
Rude Employee or Operator	5	3
Late Ride or Early	2	2
Safety Concern	11	1
Policy Complaint	0	4
Phone- Long que (wait) time	0	3
Other- Request for Information	0	0
Total Concerns	20	14
Total Compliments	12	8

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

AGENDA ITEM # 8
FY 2026 UNIFIED PLANNING WORK PROGRAM (UPWP) AMENDMENT
– TRANSIT EFFICIENCY STUDY

Purpose: Review and endorse the FY 2026 Unified Planning Work Program (UPWP) amendment, which adds \$50,000 for Transit planning activities to conduct an Efficiency Study for Charlotte County Transit under Task 8 - Transit & Transportation Disadvantaged (TD).

Presented by: MPO Staff and Charlotte County Staff

Discussion: In accordance with federal requirements, the Unified Planning Work Program (UPWP) must be amended when revisions occur to the approved Federal Highway Administration (FHWA) budget as reflected in the adopted UPWP.

The Charlotte County–Punta Gorda Metropolitan Planning Organization (MPO) is requesting an amendment to the FY 2026 UPWP to incorporate additional funding received by Charlotte County Transit.

The study is funded by Federal Transit Administration (FTA) Section 5307 Operating and Capital Assistance in the amount of \$50,000 to procure consulting services for the completion of a Transit Efficiency Study.

The study will evaluate transit operations, identify opportunities for new or improved services, and analyze the use of high-capacity vehicles to enhance long-term efficiency and sustainability.

Recommendation: Motion to endorse the amendment of the FY 2026 Unified Planning Work Program (UPWP) to include the following updates:

- Add additional allocation of \$50,000 from FTA Section 5307 for Charlotte County Transit to conduct

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

an Efficiency Study under Task 8 – Transit & Transportation Disadvantaged (TD) Planning.

- Endorsing the MPO task description and funding Tables to reflect all new funding changes. This motion allows for transmittal of the amendment pages and all supporting documentation to be transmitted to FDOT/FHWA. This motion allows staff to make any changes and adjustments based upon input received from FDOT.

Attachments:

1. [Proposed and adopted Task 8 pages and tables for Task Transit & Transportation Disadvantaged \(TD\)](#)
2. [FDOT UPWP Revision Form](#)



Task 8 Transit & Transportation Disadvantaged (TD) Planning

Purpose:

Support existing transit programs and assist in implementing recommendations of the Transit Development Plan (TDP) and the Transportation Disadvantaged Service Plan (TDSP), as well as utilize staff /consultant services in the development of the 2050 Long Range Transportation Plan (LRTP).

Previous Work:

- Assisted with annual progress reports for the *Charlotte Rides* 2019 Transit Development Plan (TDP) (utilizing only the County's FTA Section 5307 funds)
- Staffing of the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) quarterly
- Training of LCB membership in January 2024
- Attendance at the annual Commission for the Transportation Disadvantaged (CTD) state training and technology conference (except for 2023 due to Hurricane Idalia cancellation/alternative training provided Spring 2024)
- Assistance with Charlotte Transit marketing and planning activities
- Adopted new TDSP in September 2021 and amended it in May 2022, 2023 and 2024
- Provided support and assistance to Sarasota County Area Transit (SCAT) and Charlotte County Transit in improving transit opportunities for the North Port and Englewood areas
- Assisted with the LCB's annual evaluation of the CTC in May 2024
- Appointment of Charlotte County Board of County Commissioner (BCC) to continue as the Community Transportation Coordinator (CTC) for Charlotte County in April 2021 for next five-year period
- Developed LCB Bylaws – September 2023
- Developed LCB Grievance Procedures – November 2023

Required Activities:

- Assist with a marketing plan and a fare study for Charlotte County Transit, as well as FTA Section 5310 and 5311 programs review (ongoing)
- Coordinate with the LCB in planning for TD services with the cooperation of the CTC, including the planning and review of transit operations (ongoing)
- Advise on improved security, safety, and accessibility issues with the Charlotte County Transit Division (ongoing)
- Coordinate and assist in modifying regional transit routes with Sarasota, DeSoto and Lee Counties (ongoing)
- Update the Transportation Disadvantaged Service Plan (TDSP)/Coordinated Public Transit — Human Services Transportation Plan (CPT-HSTP) in May 2025 in cooperation with Charlotte County Transit Division
- Recommend the CTC for the next five-year period and coordinate agenda items for Charlotte County BCC, LCB and MPO Board. In conjunction with the Charlotte County Transit Division and the LCB, develop the next Memorandum of Agreement between Charlotte County and the Florida Commission for the Transportation Disadvantaged prior to July 1, 2026.
- Commence development of new TDSP document for next five-year period.
- Execute FTA Section 5305 (d) Consolidated Planning Grant (CPG) FY 2025 – FY 2026
- Utilize General Planning Consultant services as needed i.e., 2050 Long Range Transportation Plan (LRTP) or any other transit-related studies (See Appendix H)
- Establish performance-based planning in accordance with the Moving Ahead for Progress in the 21st Century (MAP-21) Federal Transportation Act/Fixing America's Surface Transportation (FAST) and subsequent federal transportation - Ongoing
- Assist Charlotte County Transit with development of the 2024 Transit Development Plan
- Review Charlotte County Transit Public Transportation Agency Safety Plan (PTASP) as needed
- Review Charlotte County Transit Asset Management (TAM) targets as needed
- Develop LCB Bylaws – September 2024 and September 2025

- Develop LCB Grievance Procedures – November 2024 and November 2025

End Products:

- FTA Section 5305 (d) Consolidated Planning Grant (CPG) FY 2025 – FY 2026
- Attendance at USDOT, FDOT and Florida Commission for the Transportation Disadvantaged (CTD) approved training courses, and the procurement of educational materials as provided
- CTC Evaluation May 2025
- TDSP/CPT-HSTP Annual Updates in May 2025 and May 2026
- Coordinate with Charlotte County Transit on new Charlotte County TDP (target date: September 2024) and any subsequent annual progress report as required
- LCB Bylaws – September 2024 and September 2025
- LCB Grievance Procedures – November 2024 and November 2025
- 2050 Long Range Transportation Plan (LRTP) Update – October 2025
- Procurement for consulting services to prepare a cost analysis study for Charlotte County Transit. Target completion date: September 2026
- Procurement for consulting services to prepare a Charlotte County Transit Efficiency Study – September 2026 & 2027
- Other special transportation planning studies, as needed

Responsible Agency: Charlotte County-Punta Gorda MPO

Funding Sources:	Year 1 – FFY 2025	FHWA (PL)	\$ 82,845
	Year 1 – FY 2025	FTA Section 5307(County)	\$ 306,946
	Year 1 – FY 2025	TD Planning Grant	<u>\$ 26,437</u>
		TOTAL	\$416,228
	Year 2 –FY 2026	FHWA (PL)	\$88,845
	Year 2 – FY 2026	FTA Section 5307 (County)	\$148,029 \$198,029
	Year 2 – FY 2026	TD Planning Grant	<u>\$27,291</u>
		TOTAL	-\$264,165 \$314,165

FY 2026 UPWP Amendment: This amendment adds \$50,000 from FTA Section 5307 for Charlotte County Transit to conduct an Efficiency Study. Corresponding language will be included under Task 8 – Transit & Transportation Disadvantaged (TD) Planning.

Task 8 Transit & Transportation Disadvantaged (TD) Planning

Purpose:

Support existing transit programs and assist in implementing recommendations of the Transit Development Plan (TDP) and the Transportation Disadvantaged Service Plan (TDSP), as well as utilize staff /consultant services in the development of the 2050 Long Range Transportation Plan (LRTP).

Previous Work:

- Assisted with annual progress reports for the *Charlotte Rides* 2019 Transit Development Plan (TDP) (utilizing only the County's FTA Section 5307 funds)
- Staffing of the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) quarterly
- Training of LCB membership in January 2024
- Attendance at the annual Commission for the Transportation Disadvantaged (CTD) state training and technology conference (except for 2023 due to Hurricane Idalia cancellation/alternative training provided Spring 2024)
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- Assisted with the LCB's annual evaluation of the CTC in May 2024
- Appointment of Charlotte County Board of County Commissioner (BCC) to continue as the Community Transportation Coordinator (CTC) for Charlotte County in April 2021 for next five-year period
- Developed LCB Bylaws – September 2023
- Developed LCB Grievance Procedures – November 2023

Required Activities:

- Assist with a marketing plan and a fare study for Charlotte County Transit, as well as FTA Section 5310 and 5311 programs review (ongoing)
- Coordinate with the LCB in planning for TD services with the cooperation of the CTC, including the planning and review of transit operations (ongoing)
- Advise on improved security, safety, and accessibility issues with the Charlotte County Transit Division (ongoing)
- Coordinate and assist in modifying regional transit routes with Sarasota, DeSoto and Lee Counties (ongoing)
- Update the Transportation Disadvantaged Service Plan (TDSP)/Coordinated Public Transit — Human Services Transportation Plan (CPT-HSTP) in May 2025 in cooperation with Charlotte County Transit Division
- Recommend the CTC for the next five-year period and coordinate agenda items for Charlotte County BCC, LCB and MPO Board. In conjunction with the Charlotte County Transit Division and the LCB, develop the next Memorandum of Agreement between Charlotte County and the Florida Commission for the Transportation Disadvantaged prior to July 1, 2026.
- Commence development of new TDSP document for next five-year period.
- Execute FTA Section 5305 (d) Consolidated Planning Grant (CPG) FY 2025 – FY 2026
- Utilize General Planning Consultant services as needed i.e., 2050 Long Range Transportation Plan (LRTP) or any other transit-related studies (See Appendix H)
- Establish performance-based planning in accordance with the Moving Ahead for Progress in the 21st Century (MAP-21) Federal Transportation Act/Fixing America's Surface Transportation (FAST) and subsequent federal transportation - Ongoing
- Assist Charlotte County Transit with development of the 2024 Transit Development Plan
- Review Charlotte County Transit Public Transportation Agency Safety Plan (PTASP) as needed
- Review Charlotte County Transit Asset Management (TAM) targets as needed
- Develop LCB Bylaws – September 2024 and September 2025

- Develop LCB Grievance Procedures – November 2024 and November 2025

End Products:

- FTA Section 5305 (d) Consolidated Planning Grant (CPG) FY 2025 – FY 2026
- Attendance at USDOT, FDOT and Florida Commission for the Transportation Disadvantaged (CTD) approved training courses, and the procurement of educational materials as provided
- CTC Evaluation May 2025
- TDSP/CPT-HSTP Annual Updates in May 2025 and May 2026
- Coordinate with Charlotte County Transit on new Charlotte County TDP (target date: September 2024) and any subsequent annual progress report as required
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- LCB Grievance Procedures – November 2024 and November 2025
- 2050 Long Range Transportation Plan (LRTP) Update – October 2025
- Procurement for consulting services to prepare a cost analysis study for Charlotte County Transit. Target completion date: September 2026
- Other special transportation planning studies, as needed

Responsible Agency: Charlotte County-Punta Gorda MPO

Funding Sources:	Year 1 – FFY 2025	FHWA (PL)	\$ 82,845
	Year 1 – FY 2025	FTA Section 5307(County)	\$ 306,946
	Year 1 – FY 2025	TD Planning Grant	<u>\$ 26,437</u>
		TOTAL	\$416,228
	Year 2 –FY 2026	FHWA (PL)	\$88,845
	Year 2 – FY 2026	FTA Section 5307 (County)	\$148,029
	Year 2 – FY 2026	TD Planning Grant	<u>\$27,291</u>
		TOTAL	\$264,165

Task 8: Estimated Budget Detail For “Planning Task”

Task 8 TRANSIT AND TRANSPORTATION DISADVANTAGED (TD) PLANNING													
2025													
Funding Source		FHWA			CTD			FTA 5307			FY 2025 Total		
Contract Number		G2W22			G2Z96			xxxxx					
Source Level													
Lookup Name		2025 FHWA			2025 CTD G2Z96			2025 FTA 5307			2025 FTA 5307		
		G2W22 (PL)			(State)			xxxxx (Federal)			xxxxx (Total)		
		Total			Total			Total			Total		
Personnel (salary and benefits)	\$	-	\$	79,445	\$	26,437	\$	-	\$	306,946	\$	-	\$
Consultant	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$
Travel	\$	-	\$	1,500	\$	-	\$	-	\$	-	\$	-	\$
Direct Expenses	\$	-	\$	1,900	\$	-	\$	-	\$	-	\$	-	\$
2025 Totals	\$	-	\$	82,845	\$	26,437	\$	-	\$	306,946	\$	-	\$
2026													
Funding Source		FHWA			CTD			FTA 5307			FY 2026 Total		
Contract Number		G2W22			G3C95			xxxxx					
Source													
MPO Budget Reference													
Lookup Name		2026 FHWA			2026 CTD G3C95			2026 FTA 5307			2026 (Total)		
		G2W22 (Total)			(Total)			xxxxx (Total)					
Personnel (salary and benefits)	\$	84,445	\$	27,291	\$	27,291	\$	-	\$	-	\$	-	\$
Consultant	\$	-	\$	-	\$	-	\$	198,029	\$	-	\$	-	\$
Travel	\$	2,000	\$	-	\$	-	\$	-	\$	-	\$	-	\$
Direct Expenses	\$	2,400	\$	-	\$	-	\$	-	\$	-	\$	-	\$
2026 Totals	\$	88,845	\$	27,291	\$	27,291	\$	198,029	\$	-	\$	-	\$
FY 2025 & 2026 TOTAL													
Personnel (salary and benefits)	\$	217,618											
Consultant	\$	504,975											
Travel	\$	3,500											
Direct Expenses	\$	4,300											
Total	\$	730,393											

Task 8: Estimated Budget Detail For “Planning Task”

Task 8 TRANSIT AND TRANSPORTATION DISADVANTAGED (TD) PLANNING											
2025											
Funding Source	FHWA			CTD			FTA 5307			FY 2025 Total	
Contract Number	G2W22			G2Z96			xxxxx				
Source Level											
Lookup Name	Federal			State			Federal			Total	
	2025 (Federal)	2025 (Total)	2025 FHWA G2W22 (PL)	2025 FHWA G2W22 (Total)	2025 CTD G2Z96 (State)	2025 CTD G2Z96 (Total)	2025 FTA 5307 xxxxx (Federal)	2025 FTA 5307 xxxxx (Total)	2025 FTA 5307 xxxxx (Total)		
Personnel (salary and benefits)	\$ -	\$ -	\$ 79,445	\$ 79,445	\$ 26,437	\$ 26,437	\$ -	\$ -	\$ -	\$ 105,882	
Consultant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 306,946	\$ 306,946	\$ 306,946	\$ 306,946	
Travel	\$ -	\$ -	\$ 1,500	\$ 1,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,500	
Direct Expenses	\$ -	\$ -	\$ 1,900	\$ 1,900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,900	
2025 Totals	\$ -	\$ -	\$ 82,845	\$ 82,845	\$ 26,437	\$ 26,437	\$ 306,946	\$ 306,946	\$ 306,946	\$ 416,228	
2026											
Funding Source	FHWA			CTD			FTA 5307			FY 2026 Total	
Contract Number	G2W22			G3C95			xxxxx				
Source											
MPO Budget Reference	PL			State			Federal			Total	
Lookup Name	2026 FHWA G2W22 (PL)	2026 FHWA G2W22 (Total)	2026 CTD G3C95 (State)	2026 CTD G3C95 (Total)	2026 FTA 5307 xxxxx (Federal)	2026 FTA 5307 xxxxx (Total)	2026 FTA 5307 xxxxx (Federal)	2026 FTA 5307 xxxxx (Total)	2026 FTA 5307 xxxxx (Total)		
Personnel (salary and benefits)	\$ 84,445	\$ 84,445	\$ 27,291	\$ 27,291	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 111,736	
Consultant	\$ -	\$ -	\$ -	\$ -	\$ 148,029	\$ 148,029	\$ -	\$ -	\$ -	\$ 148,029	
Travel	\$ 2,000	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000	
Direct Expenses	\$ 2,400	\$ 2,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,400	
2026 Totals	\$ 88,845	\$ 88,845	\$ 27,291	\$ 27,291	\$ 148,029	\$ 148,029	\$ -	\$ -	\$ -	\$ 264,165	

FY 2025 & 2026	
TOTAL	
Personnel (salary and benefits)	\$ 217,618
Consultant	\$ 454,975
Travel	\$ 3,500
Direct Expenses	\$ 4,300
Total	\$ 680,393

Task 8 TRANSIT AND TRANSPORTATION DISADVANTAGED (TD) PLANNING

2025									
Funding Source			FHWA		CTD		FTA 5307		FY 2025 Total
Contract Number	G2W22		G2Z96		XXXXX				
Source Level	Federal	Total	PL	Total	State	Total	Federal	Total	
Lookup Name	2025 (Federal)	(Total)	2025 FHWA G2W22 (PL)	FHWA G2W22 (Total)	2025 CTD G2Z96 (State)	CTD G2Z96 (Total)	2025 FTA 5307 XXXXX (Federal)	FTA 5307 XXXXX (Total)	
Personnel (salary and benefits)									
Salaries, Benefits and other deductions	\$ 79,445	-	\$ 79,445	-	\$ 26,437	-		-	\$ 185,327
Personnel (salary and benefits)	\$ 79,445	\$ 79,445	\$ 79,445	\$ 79,445	\$ 26,437	\$ 26,437	\$ -	\$ -	\$ 185,327
Consultant									
TDP Major Update/Progress Report		-		-		-	\$ 306,946	-	\$ 306,946
Consultant Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 306,946	\$ 306,946	\$ 306,946
Travel									
Travel for Staff and LCB Board Member for trainings, meetings and conference	\$ -	-	\$ 1,500	-		-		-	\$ 1,500
Travel Subtotal	\$ -	\$ -	\$ 1,500	\$ 1,500	\$ -	\$ -	\$ -	\$ -	\$ 1,500
Direct Expenses									
Advertising Costs	\$ -	-	\$ 1,000	-		-		-	\$ 1,000
Registrations, training and conference	\$ -	-	\$ 900	-		-		-	\$ 900
Direct Expenses Subtotal	\$ -	\$ -	\$ 1,900	\$ 1,900	\$ -	\$ -	\$ -	\$ -	\$ 1,900
Total	\$ 79,445	\$ 79,445	\$ 82,845	\$ 82,845	\$ 26,437	\$ 26,437	\$ 306,946	\$ 306,946	\$ 495,673
2026									
Funding Source	FHWA		CTD		FTA 5307				FY 2026 Total
Contract Number	G2W22		G3C95		XXXXX				
Source Level	PL	Total	State	Total	Federal	Total	Total		
Lookup Name	2026 FHWA G2W22 (PL)	FHWA G2W22 (Total)	2026 CTD G3C95 (State)	CTD G3C95 (Total)	2026 FTA 5307 XXXXX (Federal)	FTA 5307 XXXXX (Total)	(Total)		
Personnel (salary and benefits)									
Salaries, benefits and other deductions	\$ 84,445	-	\$ 27,291	-		-		-	\$ 111,736
Personnel (salary and benefits)	\$ 84,445	\$ 84,445	\$ 27,291	\$ 27,291	\$ -	\$ -	\$ -	\$ -	\$ 111,736
Consultant									
TDP Major Update/Progress Report & Other planning activities		-		-	\$ 198,029	-	\$ -	-	\$ 198,029
Consultant Subtotal	\$ -	\$ -	\$ -	\$ -	\$ 198,029	\$ 198,029	\$ -	\$ -	\$ 198,029
Travel									
Travel for Staff and LCB Board Member for trainings, meetings and conference	\$ 2,000	-		-		-		-	\$ 2,000
Travel Subtotal	\$ 2,000	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000
Direct Expenses									
Advertising Costs	\$ 1,000	-		-		-		-	\$ 1,000
Registrations, training and conference	\$ 1,400	-		-		-		-	\$ 1,400
Direct Expenses Subtotal	\$ 2,400	\$ 2,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,400
Total	\$ 88,845	\$ 88,845	\$ 27,291	\$ 27,291	\$ 198,029	\$ 198,029	\$ -	\$ -	\$ 314,165

FY 2026 UPWP Amendment: This amendment adds \$50,000 from FTA Section 5307 for Charlotte County Transit to conduct an Efficiency Study. Corresponding language will be included under Task 8 – Transit & Transportation Disadvantaged (TD) Planning.

Task 8 TRANSIT AND TRANSPORTATION DISADVANTAGED (TD) PLANNING										
2025										
Funding Source			FHWA		CTD		FTA 5307		FY 2025 Total	
Contract Number			G2W22		G2Z96		XXXXX			
Source Level	Federal	Total	PL	Total	State	Total	Federal	Total		
Lookup Name	2025 (Federal)	(Total)	2025 FHWA G2W22 (PL)	FHWA G2W22 (Total)	2025 CTD G2Z96 (State)	CTD G2Z96 (Total)	2025 FTA 5307 XXXXX (Federal)	FTA 5307 XXXXX (Total)		
Personnel (salary and benefits)										
Salaries, Benefits and other deductions	\$ -	-	\$ 79,445	-	\$ 26,437	-		-	\$ 105,882	
Personnel (salary and benefits)	\$ -	\$ -	\$ 79,445	\$ 79,445	\$ 26,437	\$ 26,437	\$ -	\$ -	\$ 105,882	
Consultant										
TDP Major Update/Progress Report		-		-		-	\$ 306,946	-	\$ 306,946	
Consultant Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 306,946	\$ 306,946	\$ 306,946	
Travel										
Travel for Staff and LCB Board Member for trainings, meetings and conference	\$ -	-	\$ 1,500	-		-		-	\$ 1,500	
Travel Subtotal	\$ -	\$ -	\$ 1,500	\$ 1,500	\$ -	\$ -	\$ -	\$ -	\$ 1,500	
Direct Expenses										
Advertising Costs	\$ -	-	\$ 1,000	-		-		-	\$ 1,000	
Registrations, training and conference	\$ -	-	\$ 900	-		-		-	\$ 900	
Direct Expenses Subtotal	\$ -	\$ -	\$ 1,900	\$ 1,900	\$ -	\$ -	\$ -	\$ -	\$ 1,900	
Total	\$ -	\$ -	\$ 82,845	\$ 82,845	\$ 26,437	\$ 26,437	\$ 306,946	\$ 306,946	\$ 416,228	
2026										
Funding Source	FHWA		CTD		FTA 5307		FY 2026 Total			
Contract Number	G2W22		G3C95		XXXXX					
Source	PL	Total	State	Total	Federal	Total				Total
Lookup Name	2026 FHWA G2W22 (PL)	FHWA G2W22 (Total)	2026 CTD G3C95 (State)	CTD G3C95 (Total)	2026 FTA 5307 XXXXX (Federal)	FTA 5307 XXXXX (Total)				(Total)
Personnel (salary and benefits)										
Salaries, benefits and other deductions	\$ 84,445	-	\$ 27,291	-		-		-	\$ 111,736	
Personnel (salary and benefits)	\$ 84,445	\$ 84,445	\$ 27,291	\$ 27,291	\$ -	\$ -	\$ -	\$ -	\$ 111,736	
Consultant										
TDP Major Update/Progress Report		-		-	\$ 148,029	-	\$ -	-	\$ 148,029	
Consultant Subtotal	\$ -	\$ -	\$ -	\$ -	\$ 148,029	\$ 148,029	\$ -	\$ -	\$ 148,029	
Travel										
Travel for Staff and LCB Board Member for trainings, meetings and conference	\$ 2,000	-		-		-		-	\$ 2,000	
Travel Subtotal	\$ 2,000	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000	
Direct Expenses										
Advertising Costs	\$ 1,000	-		-		-		-	\$ 1,000	
Registrations, training and conference	\$ 1,400	-		-		-		-	\$ 1,400	
Direct Expenses Subtotal	\$ 2,400	\$ 2,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,400	
Total	\$ 88,845	\$ 88,845	\$ 27,291	\$ 27,291	\$ 148,029	\$ 148,029	\$ -	\$ -	\$ 264,165	
FY 2026 UPW Amendment: This amendment includes an additional \$6,000 in FHWA (PL) 5305(d) funds, an added allocation of \$854 from the Commission for the Transportation Disadvantaged (CTD) and \$100,000 in Section 5307 Transit funds to support consulting services for a cost analysis comparing in-house drivers to contracted services.										

Table 1: Agency Funding Source Table FY 2025- FY 2026

Funding Source
December 15, 2025

Contract	Funding Source	Source Level	2025			2026			FY 2025 Funding Source			FY 2026 Funding Source				
			State	Federal	Soft Match	State	Federal	Soft Match	State	Federal	Soft Match	State	Federal	Soft Match	State	Local
G2Z96	CTD	State	\$ 26,437	\$ -	\$ -	\$ 26,437	\$ -	\$ -	\$ 26,437	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		CTD G2Z96 TOTAL	\$ 26,437	\$ -	\$ -	\$ 26,437	\$ -	\$ -	\$ 26,437	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		State	\$ -	\$ -	\$ -	\$ 27,291	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,291	\$ -
G3C95	CTD	State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
G2W22	FHWA	State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		CTD G3C95 TOTAL	\$ -	\$ -	\$ -	\$ 27,291	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,291	\$ -
		PL	\$ 680,585	\$ 634,248	\$ 150,106	\$ 680,585	\$ -	\$ -	\$ -	\$ -	\$ 139,886	\$ 634,248	\$ -	\$ -	\$ -	\$ -
G2W22	FHWA	PL CS*	\$ 22,989	\$ 15,556	\$ 5,070	\$ 22,989	\$ -	\$ -	\$ -	\$ 3,431	\$ 15,556	\$ -	\$ -	\$ -	\$ -	\$ -
		PL Deobligation	\$ 215,984	\$ -	\$ 47,636	\$ 215,984	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		SL	\$ 102,547	\$ -	\$ 22,617	\$ 102,547	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
XXXXX	FTA 5307	FHWA G2W22 TOTAL	\$ 1,022,105	\$ 649,804	\$ 225,429	\$ 1,022,105	\$ -	\$ -	\$ 143,317	\$ 649,804	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Federal	\$ 306,946	\$ 198,029	\$ -	\$ 306,946	\$ -	\$ -	\$ -	\$ -	\$ 198,029	\$ -	\$ -	\$ -	\$ -	\$ -
		FTA 5307 XXXXX TOTAL	\$ 306,946	\$ 198,029	\$ -	\$ 306,946	\$ -	\$ -	\$ -	\$ -	\$ 198,029	\$ -	\$ -	\$ -	\$ -	\$ -
XXXXX	FTA Other	Federal	\$ 195,372	\$ -	\$ -	\$ 195,372	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Local	\$ 48,968	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 48,968	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		FTA Other TOTAL	\$ 244,340	\$ -	\$ -	\$ 195,372	\$ -	\$ -	\$ 48,968	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	Local TOTAL	\$ 16,569	\$ 16,569	\$ -	\$ 16,569	\$ -	\$ -	\$ 16,569	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,569	\$ 16,569	

12-15-25 FY 2026 UPWP Amendment: This amendment adds \$50,000 from FTA Section 5307 for Charlotte County Transit to conduct an Efficiency Study.
Corresponding language will be included under Task 8 – Transit & Transportation Disadvantaged (TD) Planning.
*These funds satisfy the requirements for the 2.5% PL set aside for Complete Streets planning.
[§ 11206(b)] 2.5% of the total PL allocation for FY 2024/2025 is \$22,989 and for FY 2025/2026 is \$15,556.

Table 2: Agency Participation Table FY 2025 – FY 2026

Agency Participation
December 15, 2025

Funding Source Contract	CTD G2256 2025	CTD G3C95 2026	FHWA G2W22		FTA 5307 XXXX		FTA Other		Local	
			2025	2026	2025	2026	2025	2026	2025	2026
Total Budget	\$ 26,437	\$ 27,291	\$ 1,022,105	\$ 649,804	\$ 306,946	\$ 198,029	\$ 195,372	\$ 198,029	\$ 65,537	\$ 16,569
Task 1 ADMINISTRATION										
Personnel (salary and benefits)	\$ -	\$ -	\$ 320,994	\$ 259,418	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ 4,000	\$ 5,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Expenses	\$ -	\$ -	\$ 76,520	\$ 79,320	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Supplies	\$ -	\$ -	\$ 2,000	\$ 2,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equipment	\$ -	\$ -	\$ 1,000	\$ 1,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 404,514	\$ 347,938	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Task 2 DATA COLLECTION, ANALYSIS AND MAPPING										
Personnel (salary and benefits)	\$ -	\$ -	\$ 45,273	\$ 42,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 45,273	\$ 42,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Task 3 PUBLIC PARTICIPATION PLAN (PPP)										
Personnel (salary and benefits)	\$ -	\$ -	\$ 25,000	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 25,000	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Task 4 LONG RANGE TRANSPORTATION PLAN (LRTP)										
Personnel (salary and benefits)	\$ -	\$ -	\$ 48,953	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Consultant	\$ -	\$ -	\$ 318,531	\$ 31,465	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 367,484	\$ 61,465	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Task 5 TRANSPORTATION IMPROVEMENT PROGRAM (TIP)										
Personnel (salary and benefits)	\$ -	\$ -	\$ 30,000	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 30,000	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Task 6 SPECIAL PROJECT PLANNING										
Personnel (salary and benefits)	\$ -	\$ -	\$ 25,000	\$ 25,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Consultant	\$ -	\$ -	\$ 22,989	\$ 15,556	\$ -	\$ -	\$ 195,372	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 47,989	\$ 40,556	\$ -	\$ -	\$ 195,372	\$ -	\$ -	\$ -
Task 7 REGIONAL PLANNING AND COORDINATION										
Personnel (salary and benefits)	\$ -	\$ -	\$ 19,000	\$ 19,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 19,000	\$ 19,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Task 8 TRANSIT AND TRANSPORTATION DISADVANTAGED (TD) PLANNING										
Personnel (salary and benefits)	\$ 26,437	\$ 27,291	\$ 79,445	\$ 84,445	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Consultant	\$ -	\$ -	\$ -	\$ -	\$ 306,946	\$ 198,029	\$ -	\$ -	\$ 48,968	\$ -
Travel	\$ -	\$ -	\$ 1,500	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Expenses	\$ -	\$ -	\$ 1,900	\$ 2,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ 26,437	\$ 27,291	\$ 82,845	\$ 88,845	\$ 306,946	\$ 198,029	\$ -	\$ -	\$ 48,968	\$ -
Task 9 AGENCY EXPENDITURE USING LOCAL FUNDS										
Personnel (salary and benefits)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,450	\$ 13,450
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 700	\$ 700
Direct Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,419	\$ 2,419
Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,569	\$ 16,569
TOTAL PROGRAMMED	\$ 26,437	\$ 27,291	\$ 1,022,105	\$ 649,804	\$ 306,946	\$ 198,029	\$ 195,372	\$ 198,029	\$ 65,537	\$ 16,569

FY 2026 UPWP Amendment: This amendment adds \$50,000 from FTA Section 5307 for Charlotte County Transit to conduct an Efficiency Study. Corresponding language will be included under Task 8 – Transit & Transportation Disadvantaged (TD) Planning.

*These funds satisfy the requirements for the 2.5% PL set aside for Complete Streets planning. [§ 11206(b)] 2.5% of the total PL allocation for FY 2024/2025 is \$22,989 and for FY 2025/2026 is \$15,556.

Table 2: Agency Participation Table FY 2025 - FY2026

Agency Participation
August 4, 2025

Funding Source	CTD G2256	CTD GECBS	FWHA G2W22	FTA 5307 XXXX	FTA Other	Local
Fiscal Year	2025	2026	2025	2025	2025	2026
Task 1 ADMINISTRATION						
Personnel (salary and benefits)	\$ -	\$ -	\$ 320,994	\$ 259,418	\$ -	\$ -
Travel	\$ -	\$ -	\$ 4,000	\$ 5,500	\$ -	\$ -
Direct Expenses	\$ -	\$ -	\$ 76,520	\$ 79,320	\$ -	\$ -
Supplies	\$ -	\$ -	\$ 2,000	\$ 2,200	\$ -	\$ -
Equipment	\$ -	\$ -	\$ 1,000	\$ 1,500	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 404,514	\$ 347,938	\$ -	\$ -
Task 2 DATA COLLECTION, ANALYSIS AND MAPPING						
Personnel (salary and benefits)	\$ -	\$ -	\$ 45,273	\$ 42,000	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 45,273	\$ 42,000	\$ -	\$ -
Task 3 PUBLIC PARTICIPATION PLAN (PPP)						
Personnel (salary and benefits)	\$ -	\$ -	\$ 25,000	\$ 20,000	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 25,000	\$ 20,000	\$ -	\$ -
Task 4 LONG RANGE TRANSPORTATION PLAN (LRTP)						
Personnel (salary and benefits)	\$ -	\$ -	\$ 48,953	\$ 30,000	\$ -	\$ -
Consultant	\$ -	\$ -	\$ 318,531	\$ 31,465	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 367,484	\$ 61,465	\$ -	\$ -
Task 5 TRANSPORTATION IMPROVEMENT PROGRAM (TIP)						
Personnel (salary and benefits)	\$ -	\$ -	\$ 30,000	\$ 30,000	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 30,000	\$ 30,000	\$ -	\$ -
Task 6 SPECIAL PROJECT PLANNING						
Personnel (salary and benefits)	\$ -	\$ -	\$ 25,000	\$ 25,000	\$ -	\$ -
Consultant	\$ -	\$ -	\$ 22,989	\$ 15,556	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 47,989	\$ 40,556	\$ -	\$ -
Task 7 REGIONAL PLANNING AND COORDINATION						
Personnel (salary and benefits)	\$ -	\$ -	\$ 19,000	\$ 19,000	\$ -	\$ -
Sub Total	\$ -	\$ -	\$ 19,000	\$ 19,000	\$ -	\$ -
Task 8 TRANSIT AND TRANSPORTATION DISADVANTAGED (TD) PLANNING						
Personnel (salary and benefits)	\$ 26,437	\$ 27,291	\$ 79,445	\$ 84,445	\$ -	\$ -
Consultant	\$ -	\$ -	\$ -	\$ 306,946	\$ 148,029	\$ -
Travel	\$ -	\$ -	\$ 1,500	\$ 2,000	\$ -	\$ -
Direct Expenses	\$ -	\$ -	\$ 1,500	\$ 2,400	\$ -	\$ -
Sub Total	\$ 26,437	\$ 27,291	\$ 82,845	\$ 306,946	\$ 148,029	\$ -
Task 9 AGENCY EXPENDITURE USING LOCAL FUNDS						
Personnel (salary and benefits)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,450
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 700
Direct Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,419
Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,569
TOTAL PROGRAMMED	\$ 26,437	\$ 27,291	\$ 1,022,105	\$ 649,804	\$ 306,946	\$ 148,029
8-4-25 -UPWP Amendment: adding \$36,630 PL Carry-Forward and \$6,951 in CPG 5305(d) PL funds to FY 2026. Also, added allocation of \$854 from the Commission for the Transportation Disadvantaged (CTD) in Task 8 - Transit & Transportation Disadvantaged (TD) Planning and \$100,000 in Section 5307 Transit funds to support consulting services for a cost analysis comparing in-house drivers to contracted services.						
*These funds satisfy the requirements for the 2.5% PL set aside for Complete Streets planning.						
[§ 11.206(d)] 2.5% of the total PL allocation for FY 2024/2025 is \$22,989 and for FY 2025/2026 is \$15,556.						

MPO: Charlotte County-Punta Gorda MPO

Revision #: 6

Reason:

Adding \$50,000 under Task 8 - Transit & Transportation Disadvantaged (TD) Planning to support the Charlotte County Transit Efficiency Study , funded through the FTA Section 5307 grant.

Fiscal Year: FY 2025-2026

Contract #:

Fund: FTA - 5307

Form: 1

of: 1

FUNDING CHANGES

Part of a De-Ob:

Revision Type: Amendment (Non-Financial)

<i>Task #</i>	<i>Task Name</i>	<i>Original \$</i>	<i>Proposed \$</i>	<i>Difference</i>
8	Transit & Transportation Disadvantaged (TD) Planning	\$ 148,029.00	\$ 198,029.00	\$ 50,000.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
	TOTAL FUNDING CHANGE	\$ 148,029.00	\$ 198,029.00	\$ 50,000.00
FTA - 5307	Total Budget Amount for FY FY 2025-2026	\$ 148,029.00	\$ 198,029.00	\$ 50,000.00

OTHER UPWP CHANGES (NON-FINANCIAL)

Task #	Task Name	Task Description	Amendment Type
			Change in key person

Modification Required Documentation (to be appended with UPWP Revision Signature Form). All must be selected for a UPWP Modification.

- | | |
|---|---|
| ☐ Task Pages (including task budget tables)-Current & Proposed | ☐ Signed Cost Certification |
| ☐ Agency Participation Budget Table-Current & Proposed | ☐ Fund Summary Budget Table-Current & Proposed |

Amendment Required Documentation (to be appended with UPWP Revision Signature Form). All must be selected for a UPWP Amendment.

- | | |
|--|---|
| ☒ Task Pages (including task budget tables)-Current & Proposed | ☒ Signed Cost Certification |
| ☒ Agency Participation Budget Table-Current & Proposed | ☒ MPO Meeting Agenda |
| ☒ Fund Summary Budget Table-Current & Proposed | |

Additional Amendment Documentation (if needed, to be appended with UPWP Revision Signature Form).

- ☐ TIP Revision
☐ Amended FDOT/MPO Agreement

Non-Financial Amendment Required Documentation (to be appended with UPWP Revision Signature Form). All must be selected for a Non-Financial UPWP Amendment.

- ☐
- Task Pages (if a change occurs) - Current & Proposed

Reviewing Action

Agency	Reviewer:	Comments:
FDOT	Reviewer: [Redacted] Action: [Redacted]	Comments: [Redacted]
FHWA	Reviewer: [Redacted] Action: [Redacted]	Comments: [Redacted]
FTA	Reviewer: [Redacted] Action: [Redacted]	Comments: [Redacted]

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

AGENDA ITEM # 9
REVIEW OF TRANSIT DEVELOPMENT PLAN (TDP) ANNUAL UPDATE

Purpose: To brief LCB members on the annual TDP update.

Presented by: Charlotte County Staff

Discussion: Charlotte County Transit and MPO staff will present the FY 2026 TDP annual update required by State TDP Rule 14-73.001. The update summarizes progress on adopted TDP initiatives, recent performance metrics (ridership, revenue hours, cost per passenger), status of capital projects, proposed service adjustments, and priority actions for the coming year. Staff will request Board concurrence to transmit any required documentation to the Florida Department of Transportation and to authorize any minor administrative revisions necessary to maintain funding eligibility.

This is an informational item only.

Recommendation: None

Attachment: [TDP Annual Update](#)



Charlotte County Annual Transit Development Plan Update

December 2025

Presentation Overview

- What is an Annual TDP Update?
- Existing Service & Technology
- Employee Survey | 2025
- Schedule of Projects | 2026-2035
- Priority Projects & Timeline



What is an Annual Transit Development Plan Update?

Annual TDP Update is ...

What the Annual TDP Update is NOT:

- *Budget*
- *Capital Improvement Program (CIP)*
- *Binding agreement*



Updates vision for transit



Updates financial plan

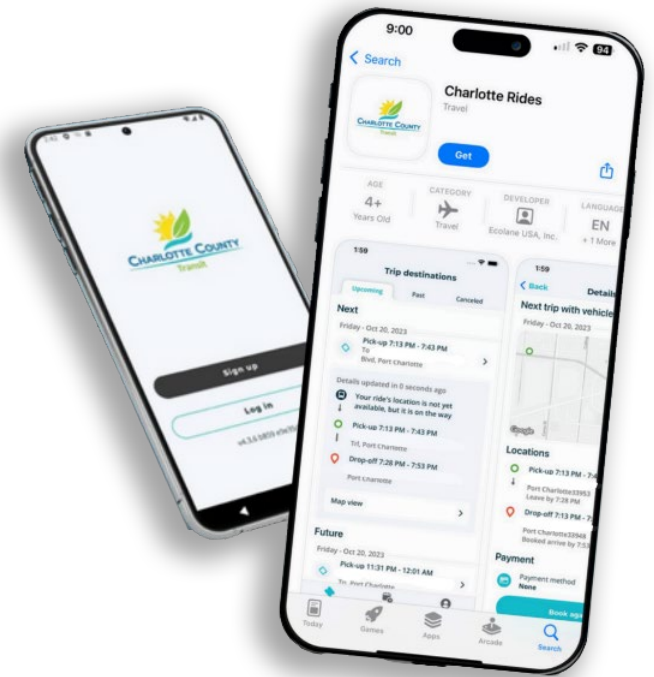
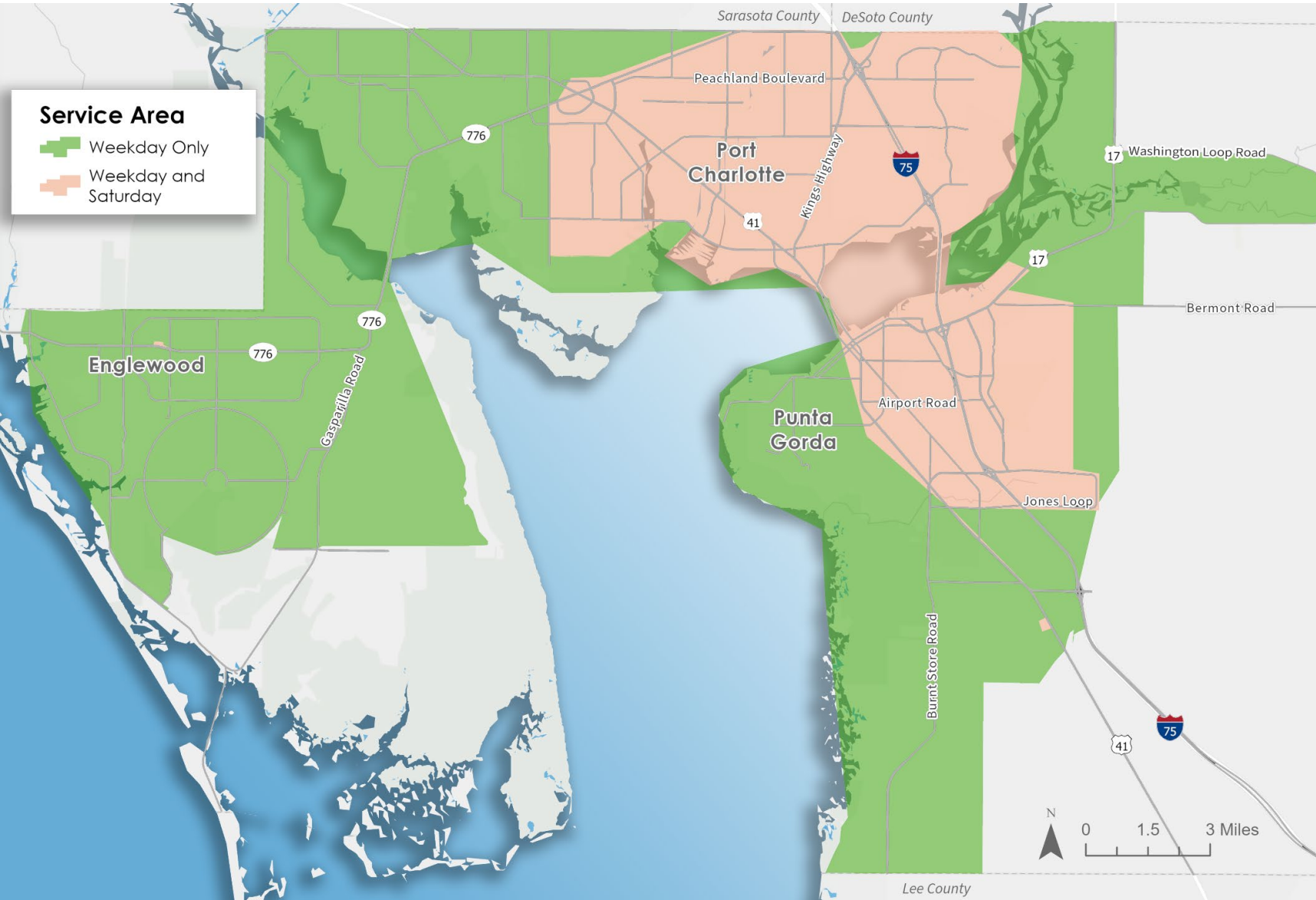


Updates Charlotte County Transit service/capital priorities



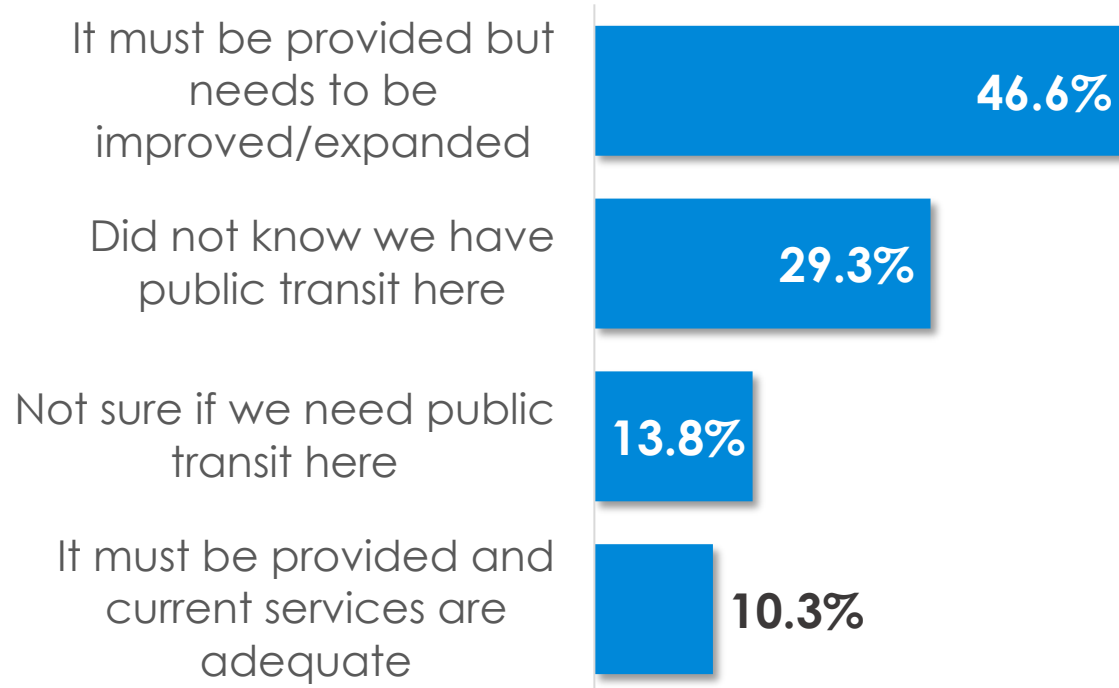
Updated every year

Existing Service & Technology

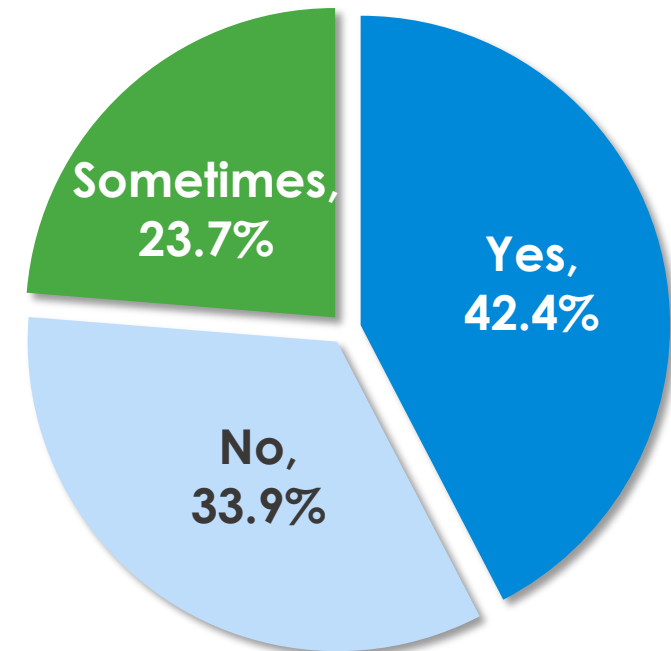


Employee Survey | 2025

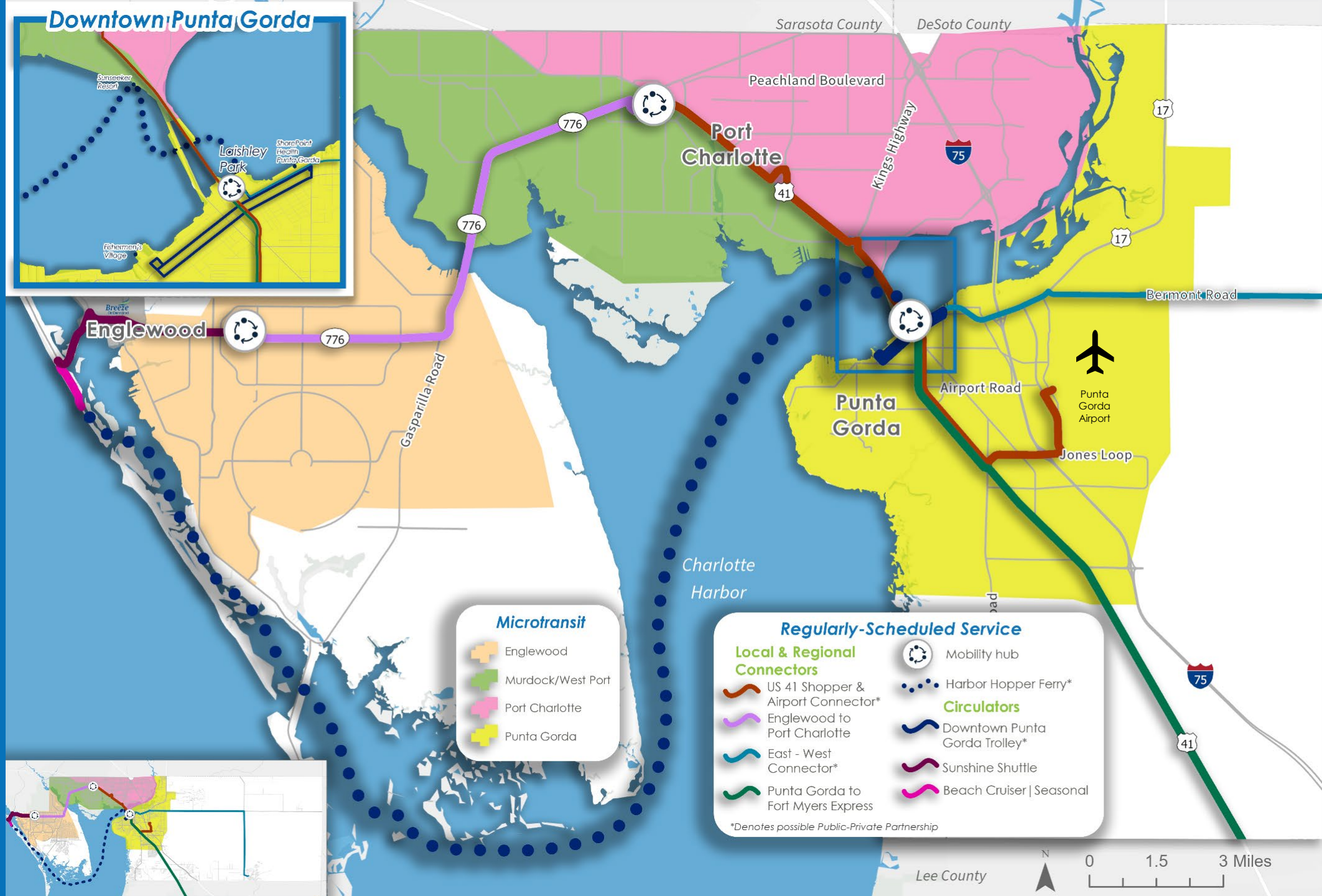
Existing Charlotte County Transit



I would use transit to get to work...



Schedule of Projects (2026-2035)

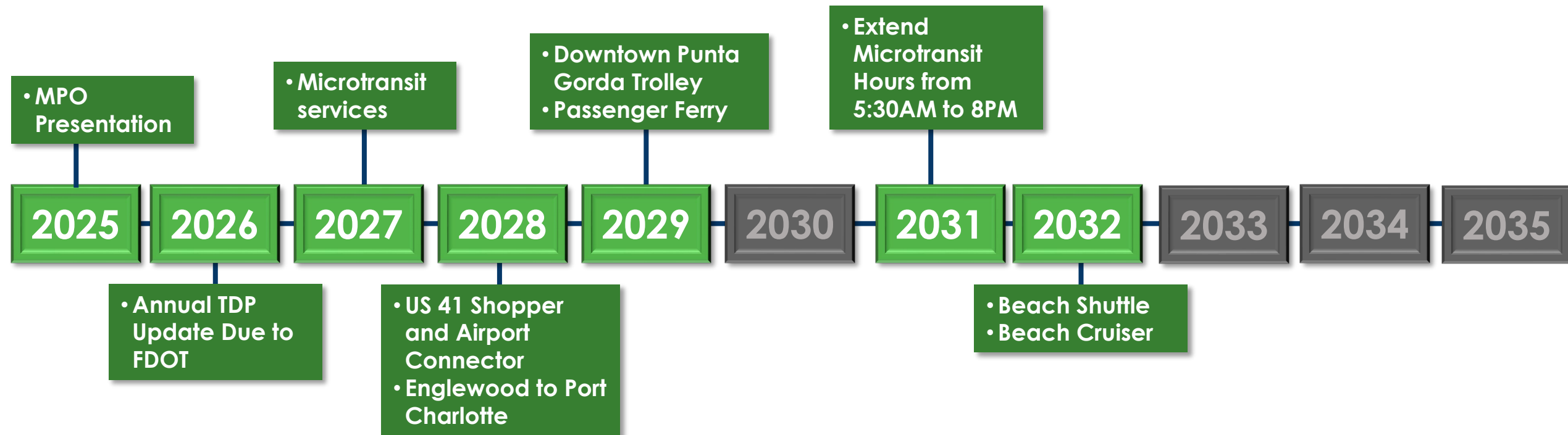


Schedule of Projects | Capital

- Transit Efficiency Study
- Mobility Hubs
- System Re-branding
- Expanded Marketing/ Education Program
- TSP/Queue Jumps
- Ferry Feasibility Study



Priority Projects & Timeline





10-Year Transit Needs

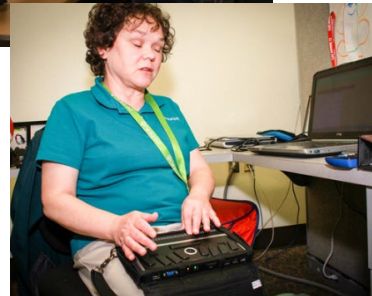
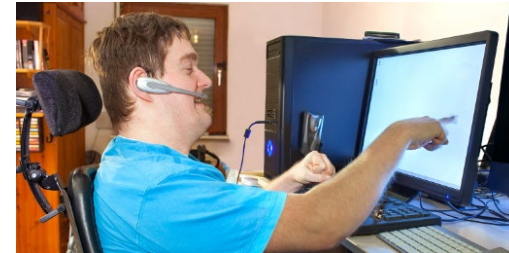
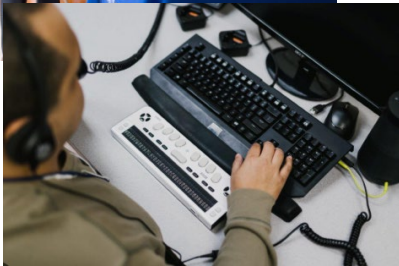


Questions & Comments

NOVEMBER 6, 2025
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD (LCB)
MEETING

MEMBER COMMENTS # 12

Member Presentation:
Carmen Henry, CareerSource Southwest
Florida



Locations

Serving Charlotte, Collier, Glades, Hendry, Lee and Monroe Counties

- ❑ **6800 Shoppes at Plantation Dr. Suite. 170, Ft Myers, FL 33912 (239-931-8200)**
- ❑ **3050 Horseshoe Drive Building A Suite 110, Naples Florida 34104 (239-436-4301)**
- ❑ **750 South 5th Street, Immokalee, FL 34142 (239-658-3300)**
- ❑ **3745 Tamiami Trail, Port Charlotte, FL 33952 (941-235-5900)**
- ❑ **205 W C Owen Ave., Clewiston, FL 33440 (863-983-6138)**
- ❑ **870 W Hickpochee Ave., Labelle FL 33935 (863-675-1412)**
- ❑ **92300 Overseas Hwy. Suite. 201-202, Tavernier, FL 33070 (305-849-2237)**
- ❑ **1111 12th St. Suite 312, Key West, FL 33040 (305-849-6371)**

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. CareerSource Southwest Florida is the direct service provider for various workforce programs which are fully supported by the U.S. Department of Labor, Health and Human Services, and Agriculture as part of awards totaling \$15.3 million. All statements, press releases, requests for proposals, bid solicitations, public statements, social media, toolkits, resource guides, website, and visual presentations are fully funded with federal money

A Proud Partner of the American Job Center Network.



Employer Services

- Job Postings and Recruitment
- Hiring Events
- Pre-screening candidates based on job requirements
- Private interviewing offices and conference rooms
- Wi-Fi access and computers available for applicants
- Labor Market Information
- Professional Career Network

Job Seeker Services

- Resume, Interviewing and Job Search Assistance
- Job Referrals, Placement Opportunities
- Job Development
- Federal Bonding Assistance
- Occupational and Work Based Training



Occupational Training (WIOA)

Offering training opportunities through the Workforce Innovation and Opportunity Act

- Adults/Dislocated Workers -18 yrs. of age or older
- Youth 15 to 24 yrs. of age (under 18, must be accompanied by a parent or guardian)
- Occupational skills training – choose from a variety of programs and schools listed on the eligible training provider list found at <http://careersourcesouthwestflorida.com/occupations-in-demand/>

Work Based Training (WIOA/TANF)

- On-the-Job training (OJT) – earn while you learn the skills necessary to successfully do the job.
 - Paid internships in chosen career pathway.
 - Paid work experience in chosen career pathway.
- 

Veteran Services

The Florida Department of Economic Opportunity DEO Veterans' program promote and maximize the employment of Florida's veteran population, especially those with significant barriers to employment.

- The Region is staffed with professional Disabled Veteran Outreach Program (DVOP) Specialists and Local Veteran Employment Representatives (LVER).
- Provide intensive case management services.
- Outreach to employers and community agencies to increase employment opportunities.



Disaster Temporary Employment (NDWG)

Temporary Jobs and Training

National Disaster Recovery Grants (DWG)s provide disaster-relief and humanitarian assistance employment, and employment and training services to minimize the employment and economic impact of declared disasters and emergency situations, in disaster declared areas.

Assist customers who

- Are temporarily or permanently laid off
- Are unable to reach your place of employment
- Were scheduled to begin work but no longer have a job
- Have become a primary provider due to the death or incapacity of the head of household

CareerSource Southwest Florida can provide assistance to public (government) and non-profit agencies by using National Dislocated Worker Disaster Grant (NDWG) funds to operate disaster relief temporary employment programs to assist with humanitarian and clean-up efforts after an emergency declared event.

Prior Disaster Relief Employment Positions

- | | |
|-------------------------------------|-------------------------------|
| *Disaster Relief Resource Navigator | *Crisis Relief Specialist |
| *Disaster Recovery Team Member | *Crisis Relief Supervisor |
| *Disaster Recovery Supervisor | *Disaster Resource Supervisor |
| *Disaster Relief Supervisor | *Disaster Relief Specialist |



Disability Navigator

Ticket To Work – Employment Network

Individualized Services

- Job Seeker Services
- Placement, Retention and Advancement Career Counseling
- Develop and review resume, Job Training and Job Placement Assistance
- Referrals to Community Resource Partners
- Employment Advocacy
- Occupational and Work Based Training

Employment Network - What is the Ticket to Work Program

- Free voluntary program
- Protection from continuing disability reviews
- Work and maintain your benefits

Who is eligible for the Ticket to Work Program

- Between the ages of 18 & 64, AND
- Want to explore returning to the workforce to become financially independent, AND
- Receiving Disability Benefits (SSI or SSDI)



Technology at Work

- Desktop height provides Wheelchair access
- Trackball Mouse accommodates users with limited dexterity
- Screen reading software - JAWS (Job Access With Speech)
- Oversized Keyboard lettering accommodates low vision users.
- UBI DUO - 2 Way texting & communication device for individuals with hearing impairments; available upon request with notice.
- Resource Room Attendants are available to assist with print, fax, telephone or virtual service requests.
- Interpreters available upon request and prescheduling
 - Individual Appointments
 - Workshops
 - Hiring Events



Success Story -2025 Achievement Award Winner

With the support of the Ticket to Work Program & WIOA Work Experience, Jack discovered his passion working at as a valued member of the Animal Care Team.



Jack Burke
Animal Care Team

"I really like my job. I love all the animals. I've learned a lot about the how to take care of them.

I like the people I work with, and I hope that I can keep working here.

I feel bad for the dogs in the kennels. They really need a forever home."



2025 Achievement Award Winner



Samara Alexander
Human Resources
Director

"Jack is so nice, polite and attentive. If only all my new hires could be that kind!

He's doing SO well! He's assimilated with the team and it's so nice to see them all getting along.

His attitude is great and that's something I really need on that team."



Developing partnerships today that can help guide us into a better tomorrow.



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