



Charlotte County Transportation Disadvantaged Local Coordinating Board Regular Meeting



10:00 AM Thursday, September 3, 2026
Charlotte County Family Services
21500 Gibraltar Drive, Building A Port Charlotte, FL

**The meeting also will be available via Microsoft TEAMS®
(Please see the next page for details)**

1. **Call to Order & Roll Call**
2. **Pledge of Allegiance**
3. **Public Comments on Agenda Items**
4. **Consent Agenda:**
 - A. **Minutes: May 7, 2026, LCB Meeting**
 - B. **2027 LCB Calendar of Quarterly Meetings**
5. **Approval of Local Coordinating Board (LCB) Bylaws**
6. **PUBLIC MEETING: FY 2026/2027- FY 2030/2031 Transportation Disadvantaged Service Plan/Coordinated Public Transit-Human Services Transportation Plan TDSP/CPT-HSTP)**
7. **FY 2026/2027 Transportation Disadvantaged Trust Fund (TDTF) Trip and Equipment Grant**
8. **Annual Operating Report**
9. **Quarterly Report**

****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 Mark Yaxis at (941) 883-3535 or by writing to 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

Charlotte County Transportation Disadvantaged Local Coordinating Board Regular Meeting

Thursday, September 3, 2026



10. Member Presentations

- a. Maricela Morado – Area Agency on Aging for Southwest Florida
- b. Nicole Negron (Tabitha Larrauri) – Florida Department of Children and Families
- c. Suzanne Roberts – Local Medical Community

11. Public Comments

12. Staff Comments

13. Member Comments

14. Adjournment (NEXT MEETING – NOVEMBER 5, 2026, at the Charlotte County Family Services, 21500 Gibraltar Drive, Port Charlotte, FL 33952)

The Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) will hold a quarterly meeting on September 3, 2026 in person (with virtual participation also available). Please contact the MPO staff to obtain Microsoft TEAMS log-in information. Persons wishing to provide public comment still will be allowed to do so by alternative means. Written comments may be submitted by either emailing the comments to yaxis@ccpgmpo.gov or mailing the comments to MPO LCB Staff, 1050 Loveland Blvd, Box C, Port Charlotte, Florida, 33980. Comments must be received for the meeting by noon, September 2, 2026. The comments will be read by an MPO staff member during the meeting for that item to be placed on the record. More information regarding the LCB Agenda is available on the MPO website at www.ccpmpo.gov.

**SEPTEMBER 3, 2026
LCB MEETING**



SEPTEMBER 3, 2026
LCB MEETING

AGENDA ITEM # 4-A
APPROVAL OF MINUTES: MAY 7, 2026, LCB REGULAR MEETING

Purpose: To review and approve the Minutes of May 7, 2026, LCB Regular Meeting.

Presented by: MPO Staff

Discussion: To Be Determined

Recommendation: Motion to approve the minutes of the LCB Regular Meeting of May 7, 2026.

Attachment: [Minutes of May 7, 2026, LCB Regular Meeting](#)





CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED
LOCAL COORDINATING BOARD (LCB)
REGULAR MEETING
May 7, 2026

Minutes of the regular meeting held in a hybrid format on May 7, 2026, utilizing TEAMS remotely and in-person at the Charlotte County Family Services building on 21500 Gibraltar Dr. Building A, Port Charlotte, FL 33952.

MEMBERS' PRESENT IN-PERSON

Commissioner Ken Doherty, *Charlotte County Commissioner (LCB Chair)*
Suzanne Roberts, *Medical Community Representative (LCB Vice-Chair)*
Donna Fain, *Agency for Persons with Disabilities*
Maricela Morado, *Area Agency on Aging-Florida Department of Elder Affairs*
Michelle Peronto, *FDOT, District One Modal Development Office (alternate)*
Carmen Henry, *Regional Workforce Development*
Tony Conte, *Public Education-School Transportation*
Joseph Sabatino, *Citizen Advocate*

MEMBERS PRESENT REMOTELY

Dottie Fulton, *Citizen Advocate-User*
Mike Stahler, *Health Care Administration*

MEMBERS EXCUSED

Angela Hemstreet, *Economically Disadvantaged Representative*
Matthew McGee, *Veteran Services*

ABSENT MEMBERS

Cheryl Sytsma, *Disabled Interests Representative*
Pamela Jordan, *Representative for Elderly Interests*
Leigh Bellamy, *Division of Blind Services*
Tabitha Larrauri, *Department of Children & Families*
Lynn Dorler, *Children-at-Risk Representative*
Vacant, *Local Private-for-Profit Transportation Industry Representative*

STAFF AND OTHERS PRESENT

Lakshmi N. Gurram, *MPO Director*
Mark Yaxis, *MPO Multimodal Planner*
Bekie Leslie, *MPO Administrative Services Supervisor*
Heidi Maddox, *Charlotte County Transit*
Betty-Ann Sherer, *Charlotte County Transit*
Aimee Shafran, *Charlotte County Fiscal Services*
Carrie Walsh, *Charlotte County Human Services*

1. Call to Order & Roll Call

LCB Chair Ken Doherty called the Regular LCB Meeting to order at 10:01 am. A roll call was taken and a 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: January 8, 2026, LCB Public Meeting**
- B. Approval of Minutes: January 8, 2026, LCB Regular Meeting**
- C. Florida Commission for the Transportation Disadvantaged (CTD) Annual Planning Grant to the MPO (2025/2026)**
- D. Review/Endorsement of Hope Hospice Funds**

Joseph Sabatino made a motion to approve the Consent Agenda as presented. Ken Doherty seconded the motion, and it was approved unanimously.

5. FY 2026/2027 Transportation Disadvantaged Trust Fund (TDTF) Trip and Equipment Grant

Mr. Gurram introduced the agenda item and explained that the State Transportation Disadvantaged Trust Fund (TDTF) is allocated annually to each Community Transportation Coordinator (CTC) to provide trips and equipment for non-sponsored TD service. He then invited Charlotte County Transit to provide additional details.

Ms. Maddox explained that the figures presented were draft FY 2026–2027 figures. She noted that Agenda Item 6 contains the approved rate model calculations on which the TDTF funds will be based.

This was an informational item, and no discussion occurred.

6. FY 2021/2022 – FY 2025-2026 Transportation Disadvantaged Service Plan / Coordinated Public Transit-Human Services Transportation Plan (TDSP/CPT-HSTP) Final Annual Update Including Rate Model Calculations.

Mr. Gurram introduced the agenda item and explained that this would be the final minor annual update to the TDSP before development of a new plan. He noted that on April 8,

2026, the Commission for the Transportation Disadvantaged (CTD) designated the Charlotte County Board of County Commissioners (BCC) as the Community Transportation Coordinator (CTC) for Charlotte County for the next five-year period beginning July 1, 2026.

Mr. Gurram stated that a new TDSP would be developed and presented at the September 3, 2026, LCB meeting for the next five-year cycle (FY 2027-2031). This update provided serves as the final annual update to the FY 2021/2022–FY 2025/2026 TDSP.

Mr. Yaxis reiterated that the final annual update is minor in nature. He explained that the annual update process includes collaboration between Charlotte County Transit, as the CTC, and the Charlotte County–Punta Gorda MPO, as the Designated Planning Agency, to ensure the document remains current and maintained as a “living” document throughout the five-year period. The following updates were presented to LCB members during the meeting.

- Pg 1 – Adjusted to include date of Fourth Annual Update.
- Pg 9 – Adjusted to reflect Transit now being under Human Services.
- Pg 10 - Adjusted to reflect that volunteer drivers are no longer utilized.
- Pg 17, 18, 19 – Updated current census information as well as current Transit service area.
- Pg 25 – Updated the list of trip attractors in the County.
- Pg 28 & 29 – Updated current Transportation Disadvantaged Population demographic data.
- Pg 30 – Updated current Critical Need Transportation Disadvantaged Population demographic data.
- Pg 31 – Included language surrounding fare-free service and updated language surrounding TDP 5-year update.
- Pg 37 – Removed COVID-19 guidelines language.
- Pg 43 – Updated to include new Transportation Operators and Coordination Contractor.
- Appendix B, Pg 64 – Transit Organization Chart updated to current.
- Appendix H, pgs. 81-92 – Included new draft rate model calculations. *(draft version received 4/2/2026 from Transit staff that has been submitted to CTD staff for review)*
- Minor spelling and grammatical changes throughout, and minor changes to better reflect the information conveyed as well as updated information from prior year(s). Includes deletion of information that is no longer relevant.

Ms. Maddox briefly reviewed the approved rate model calculations provided to the LCB members at the meeting. She noted that the calculations differed slightly from those included in the mailed packets and that the updated figures reflected the approved model.

Tony Conte asked whether rising fuel costs impacted the rate model calculations. Aimee Shafran explained that fuel is funded through the Section 5307 grant and is not included in the rate model.

Ken Doherty asked how the current rate model compares to the previous year. Heidi Maddox stated that the rates are slightly higher.

Michelle Peronto asked whether Hope Hospice was included in the TDSP following its receipt of transportation grant funding, noting the FTA's preference that funded organizations be listed. Heidi Maddox stated that Hope Hospice is not currently included, but efforts are underway to add them.

Lakshmi N. Gurram noted that the funding will not be available until July 1, 2026, and asked whether inclusion should occur in the current or next TDSP update. Michelle Peronto emphasized the importance of listing funded organizations separately from Transit services

Suzanne Roberts made a motion to update the FY 2021/2022 – FY 2025/2026 Transportation Disadvantaged Service Plan (TDSP)/Charlotte County Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP) Fourth and Final Annual Update change pages (including the rate model calculations provided); allowing Transit staff as well as MPO staff to make minor technical adjustments per CTD guidance. **Ken Doherty** seconded the motion, and it was approved unanimously.

7. Community Transportation Coordinator Quarterly Reports for October-December 2025 and January-March 2026

Ms. Sherer presented the 2 quarterly reports. Her presentation provided at the meeting can be found [here](#).

Discussion followed regarding clarification of the “concern” and “complaint” categories within the data provided. Ms. Sherer and Ms. Maddox explained that these categories include any concerns or complaints received from riders. Examples included complaints about a bus passing a rider or the bus air conditioning being set too high. Mr. Doherty noted that Transit staff review each issue to determine the appropriate classification. He also stated that, while complaints and concerns were reported, compliments had nearly doubled since the previous report.

Mr. Gurram asked Transit staff whether the Lake Suzy area, which is within the MPO planning area, is currently served by Charlotte County Transit. Ms. Maddox explained that staff have not identified a need to expand service into the area at this time.

8. Member Presentations

As discussed at the September 4, 2025, LCB meeting, members are invited to present their roles outside of the LCB during each regular meeting to provide insight into their work, foster a better understanding of each member's role on the LCB, and encourage cooperation and coordination. The following presentations were given at this meeting.

1. Michelle Peronto – Florida Department of Transportation

Michelle Peronto presented on behalf of Emily Black who was unable to attend the meeting. Her presentation can be found [here](#). Ms. Peronto's presentation highlighted the role FDOT takes on as a partner to transit agencies and manager of FTA funding.

2. Tony Conte – Charlotte County Public Schools Transportation Operations

Tony Conte presented from his presentation, which can be found [here](#). Mr. Conte's presentation highlighted the role Charlotte County Public Schools take for transporting children to school safely as well as the grant funding received for such.

There was discussion on safety training for bus operators receiving grant funding and the role that FDOT Traffic Incident Management (TIM) Team meetings and Community Traffic Safety Team (CTST) meetings that are held regularly have in providing safety training opportunities.

3. Donna Fain – Florida Agency for Persons with Disabilities

Donna Fain presented from her presentation, which can be found [here](#). Ms. Fain's presentation highlighted the role the Agency for Persons with Disabilities takes in ensuring all Floridians, regardless of ability, have equal access to quality outcomes.

9. Public Comments

No public comments were received.

10. Staff Comments

MPO Director, Lakshmi N. Gurram, provided staff comments.

MPO staff are seeking nominations for the Peggy Walters Citizens Transportation Planning Award, which recognizes individuals or groups that have made significant contributions to

improving mobility in Charlotte County. Additional information and nomination instructions are available on the MPO website.

11. Member Comments

The following members provided comments.

Tony Conte offered his thanks for coordination with Donna Fain at the Agency for Persons with Disabilities.

Michelle Peronto noted that FDOT is hosting a professional development workshop for transit agencies on June 8-10, 2026 in Tampa.

Dottie Fulton thanked everyone for the presentations and noted the helpful information shared.

Mike Stahler also thanked the presenters at the meeting for their information.

Ken Doherty also thanked the presenters at the meeting as well as the other members. He noted that the Florida Legislature is set to begin the state budget process and a special session is scheduled in June for discussions on property tax reform. It was noted that ad-valorem property taxes make up around 57% of the total revenue for the County's annual budget, and losing this revenue source would be detrimental to the work the county does.

12. Adjournment (Next Meeting – September 3, 2026)

There being no further business, the Transportation Disadvantaged Local Coordinating Board adjourned at 11:33 am. The next LCB meeting is a regular meeting scheduled for Thursday, September 3, 2026, at the Charlotte County Family Services building, 21500 Gibraltar Dr. Building A, Port Charlotte, FL 33952 at 10:00 am.

SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 4-B
2027 LCB CALENDAR OF QUARTERLY MEETINGS

Purpose: To provide LCB members with a proposed schedule of LCB meeting dates for 2027.

Presented by: MPO Staff

Discussion: Below are the proposed 2027 LCB Meeting Dates. A minimum of four meetings must be held each year, with at least one held in every calendar quarter.

All meetings will be held in person at the Charlotte County Family Services Center, 21500 Gibraltar Drive, Port Charlotte, Florida 33952 (with the possibility of virtual attendance through TEAMS). Please note: Only **LCB Members participating in person count toward achieving a voting quorum**.

MPO staff from neighboring LCBs shall be notified of these dates to minimize scheduling conflicts for LCB members serving on multiple boards.

- Quarter I: January 7, 2027
- Quarter II: May 6, 2027
- Quarter III: September 2, 2027
- Quarter IV: November 4, 2027

Recommendation: Informational item (for placement on personal calendars)

Attachment: None

SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 5

APPROVAL OF LOCAL COORDINATING BOARD (LCB) BYLAWS

Purpose: To provide the Draft revised LCB Bylaws for annual review and consideration

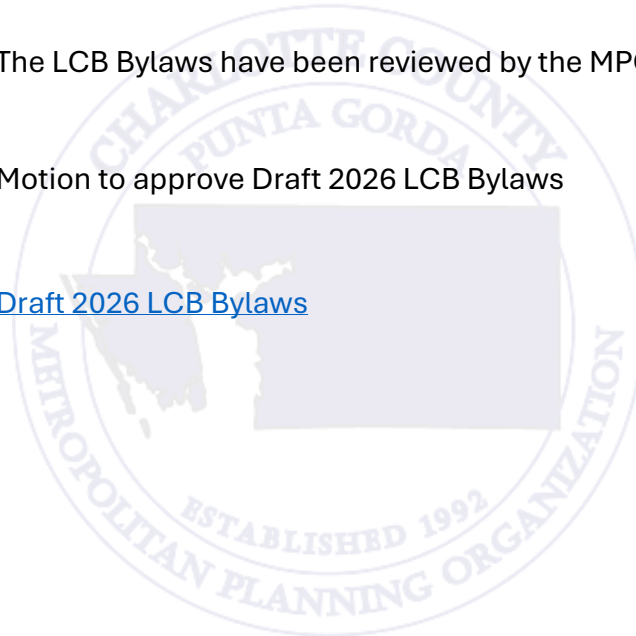
Presented by: MPO Staff

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

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

Recommendation: Motion to approve Draft 2026 LCB Bylaws

Attachment: [Draft 2026 LCB Bylaws](#)



CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED

LOCAL COORDINATING BOARD (LCB)

BYLAWS

ADOPTED

NEW DATE

~~SEPTEMBER 4, 2025~~ SEPTEMBER 3, 2026

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

BYLAWS

1. PURPOSE

The purpose of the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) is to confer with and advise the Community Transportation Coordinator (CTC) on the coordinated transportation in Charlotte County.

Other functions of the LCB shall include, but are not limited to the following:

- (a) To find solutions to enhance the CTC operations to provide for a cost effective, rider convenient, viable and reliable method of transportation.
- (b) To provide a focal point for transportation disadvantaged information that shall ~~can~~ be used and coordinated with other planning efforts.
- (c) To provide a forum for development, discussion, and interchange of ideas to be utilized for the provision of transportation disadvantaged services.
- (d) To make recommendations regarding any grievances pertaining to transportation disadvantaged services which are not resolved by the CTC, and to assist in resolving those grievances as required.
- (e) To identify and develop responses to local service needs.

2. DEFINITIONS

CCTD	Charlotte County Transit Division of the Charlotte County Human Services Department of the Board of County Commissioners (BCC).
CPT-HSTP	Coordinated Public Transit-Human Services Transportation Plan – a plan developed using the core TDSP and enhanced with additional information as required for service delivery of Federal Section 5310 and Section 5311 programs.
CTC	Community Transportation Coordinator - The Charlotte County Board of County Commissioners (BCC) through the CCTD, shall functions as the CTC for Charlotte County.
CTD	Commission for the Transportation Disadvantaged - The Agency created by Chapter 427 F.S., whose purpose under law is to accomplish the coordination of transportation services provided to the transportation disadvantaged.

LCB	Charlotte County Transportation Disadvantaged Local Coordinating Board - defined under Section 427.011(7), F.S., as “an advisory entity in each designated service area composed of representatives appointed by the Metropolitan Planning Organization (MPO) Board, or Official Planning Agency (OPA), to provide assistance to the Community Transportation Coordinator (CTC) relative to the coordination of transportation services.”
MOA	Memorandum of Agreement - The state contract included in the Transportation Disadvantaged Service Plan (TDSP) for transportation disadvantaged service purchased by federal, state, or local government transportation disadvantaged funds.
MPO	The Charlotte County-Punta Gorda Metropolitan Planning Organization - The MPO functions as the OPA for Transportation Disadvantaged Services in Charlotte County.
OPA	Official Planning Agency - The body selected to plan for Transportation Disadvantaged Services in a given service area, including staffing the LCB.
TDSP	Transportation Disadvantaged Service Plan - A five-year implementation plan, with annual updates developed by the CTC and the MPO which contains the provisions of service delivery in the coordinated transportation system.

3. MEMBERSHIP

In accordance with Section 427.0157, F.S., all members of the LCB shall be appointed by the MPO Board. In making these appointments, the MPO Board shall attempt to appoint individuals who have positions of responsibility within their agency at a level high enough to allow them to adequately represent their agency during Board discussions and when votes are being taken.

A. Voting Members

In addition to the Chair, the following agencies or other groups shall be represented on the Board as voting members:

1. A local representative of the Florida Department of Transportation;
2. A local representative of the Florida Department of Children and Families (DCF) ~~Family Services~~;
3. A local representative of the Public Education Community which could include, but not be limited to, a representative of the District School Board, School Board Transportation Office, or Headstart Program in areas where the School District is responsible;

4. A local representative of the Florida Division of Vocational Rehabilitation or the Division of Blind Services, representing the Florida Department of Education;
5. A person who is recognized by the Florida Department of Veterans Affairs as a representative of the veterans in the county;
6. A person who is recognized by the Florida Association for Community Action (FACA) (~~President~~), representing the economically disadvantaged in the county;
7. A person over sixty (60) years of age representing the elderly in the county;
8. A person with a disability representing individuals who are disabled in the county;
9. Two (2) citizen advocate representatives in the county; one of whom ~~must~~ shall use the transportation service(s) of the system as a primary means of transportation;
10. A local representative for children at risk;
11. A local representative of the Florida Department of Elder Affairs (through the Area Agency on Aging);
12. An experienced representative of the local private for profit transportation industry;
13. A local representative of the Florida Agency for Health Care Administration;
14. A local representative of the Agency for Persons with Disabilities
15. A representative of the Regional Workforce Development Board established in Chapter 445, F.S.; and
16. A representative of the local medical community which may include, but not be limited to kidney dialysis centers, long term care facilities, assisted living facilities, hospitals, local health department or other home and community-based service.

Additional non-voting members may be appointed by the MPO Board. The public mass transit operator shall be appointed as a non-voting member to the Board. The representative of the local private sector shall refrain from voting on any agenda item pertaining to contracts with operators, grievances filed against operators or such items as may be construed as a conflict of interest. No employee of the CTC shall serve as a voting member of the LCB.

B. Alternates

Each voting agency member of the LCB may name alternates who may vote in the absence of that member on a one-vote-per-member basis.

4. OFFICERS

A. Chair

The MPO Board shall appoint an elected official from any governmental entity in the county, to serve as the official Chair to preside at all LCB meetings. The Chair shall serve until his/her elected term of office has expired or he/she is replaced by the MPO Board.

The Chair shall preside at all meetings and shall be responsible for the conduct of all meetings. The Chair shall be responsible for pertinent Committee correspondence and information releases. The Chair shall also serve as a liaison between the LCB and the CTC whenever the need arises. Authority not specifically designated in these Bylaws shall be exercised in a manner consistent with Chapter 427, F.S., Rule 41-2, F.A.C., and direction of the MPO Board. ~~this document is reserved to the Chair.~~

B. Vice Chair

The Board may hold an organizational meeting each year during the first scheduled meeting of the calendar year for the purpose of electing Vice Chair. The Vice Chair shall be elected by a majority vote of a quorum of the members of the Board present and vote at the organizational meeting. The Vice Chair shall serve a term of one year starting with the first meeting after the election. The Vice Chair may serve more than one term.

The Vice Chair shall, during the absence or inability of the Chair to serve, exercise all duties and powers of the Chair and shall perform such other duties as assigned by the Chair.

~~The Vice Chair shall, during the absence of the Chair or his/her inability to serve, have and exercise all of the duties and powers of the Chair. The Vice Chair shall also perform such other duties as may be assigned him/her by the Chair.~~

If both the Chair and Vice Chair are absent ~~from a meeting~~, the meeting may be chaired by a voting member selected by majority vote of the members present.

5. TERMS OF APPOINTMENT

Except for the Chair and agency representatives, the members of the LCB shall be appointed for three years. ~~Individuals can~~ Members may be reappointed for more than one term.

6. ATTENDANCE

The MPO may consider rescinding the appointment of any member of the LCB who fails to attend three consecutive meetings. The LCB may notify CTD if any State agency representative or their alternate staff fails to attend three consecutive meetings.

7. STAFF SUPPORT

The MPO shall provide the LCB with sufficient staff support and resources to enable the LCB to fulfill its responsibilities as set forth in Chapter 427.0157, F.S. This responsibility includes providing sufficient:

- (a) Staff to manage and oversee the operations of the LCB; and
- (b) Staff to assist in the scheduling of meetings, preparing ~~preparation~~ of meetings agenda packets and performing other necessary administrative duties.

Staff shall assist the Chair with the preparation, duplication, and distribution of all materials necessary for the LCB meetings.

8. MEETINGS

The LCB shall meet as often as necessary to fulfill ~~in order to meet~~ its responsibilities and shall meet at least quarterly as required by Section 427.0157, F.S. All meetings shall comply with the Government in Sunshine Law and shall provide opportunity for public comment on agenda items. ~~However, as required by Section 427.0157, F.S., the LCB shall meet at least quarterly. All meetings, including committee and subcommittee meetings, will function under the "Government in the Sunshine Law". All meetings will provide opportunity for public comments on agenda items.~~

One public meeting will be held each year for the purpose of receiving input on unmet needs or any other areas that relate to the disadvantaged local transportation services. The public meeting will be held at a place and time that is convenient and accessible to the general public. The public meeting may be incorporated with a regular business meeting of the LCB or a public meeting held jointly with CTD will satisfy this annual requirement.

A two-week notice shall be given for regular meetings. Agenda materials shall be made available and sent to the LCB no less than one week in advance of any regular meeting. Special meetings may be called by the Chair with a minimum of three (3) calendar days prior to any special or emergency meeting. Members may place items on the agenda by notification of staff.

Staff is responsible for maintaining an official set of Minutes for each LCB meeting. The Minutes shall include an attendance roster and reflect official actions taken by the LCB. Copies of all LCB Minutes shall be sent to CTD and the Chair of the MPO Board. ~~A quorum to conduct business shall be six (6) voting members.~~ A quorum to conduct business shall consist of a majority of the appointed voting members of the LCB, which shall be no fewer than six (6) voting members.

9. STANDING GRIEVANCE COMMITTEE

- (A) There is hereby created a Charlotte County Transportation Disadvantaged Grievance Committee pursuant to Chapter 427, F.S., and Rule 41-2 of the Florida Administrative Code (FAC) and as referenced in the Memorandum of Agreement (MOA) between the CTC and the CTD. The body formed will hereinafter be referred to as the Grievance Committee.
- (B) The objective of the Grievance Committee shall be to develop rules and procedures to ensure quality control and to provide participating users, funding agencies and transportation providers with an impartial body to hear complaints and settle disputes concerning services rendered.
- (C) Membership of the Grievance Committee shall be the same as the voting membership ~~of the voting members~~ of the LCB as explained in Section 3 item A of these Bylaws and shall be concurrent with membership of the LCB.
- (D) The Vice Chair of the LCB shall ~~will~~ serve as Chair of the Grievance Committee. In the event the Vice Chair is the representative of the local private sector, then the Grievance Committee shall elect by majority to vote on a different Chair. In this case, the LCB Vice Chair will not Chair the Grievance Committee.
- (E) A quorum shall be present for any official action. Meetings shall be held at such times as the Grievance Committee may determine or as requested by the LCB.
- (F) The grievance process will be specified in the Grievance Procedures. These procedures will address complaints that may emanate from continued tardiness in pick up time windows; drivers' behavior and deportment; passenger discomfort; irregularities in the system of delivery or decisions made to deny, reduce or terminate services will constitute grievances for users or funding agencies. This may also include complaints about charges or billing ~~constituent grievances~~ by a funding agency or transportation provider, and other complaints that may be heard at the discretion of the Grievance Committee.

10. DUTIES

According to Section 427.0157, F.S., the LCB shall have the following duties:

- A. Review and approve the coordinated Community Transportation Disadvantaged Service Plan (TDSP), following Memorandum of Agreement (MOA) execution, so that the document may be submitted to the CTD within 120 days after the MOA is signed. The TDSP also functions also as the Coordinated Public Transit-Human Services Transportation Plan.
- B. Evaluate services provided in meeting the approved plan.
 - 1. The LCB shall conduct an annual performance evaluation of CTC. ~~This evaluation shall be conducted~~ using evaluation criteria

developed by CTD. The evaluation of the CTC shall be both in general and relative to specific criteria as it pertains to obtainable goals listed in the TDSP and recommendations contained in CTD's quality assurance reviews.

2. Evaluation ~~The results of this evaluation~~ shall be forwarded to the MPO for its consideration as it develops its recommendation concerning the redesignation of the CTC. The results of this evaluation and the MPO's recommendation shall be forwarded to CTD.
- C. In cooperation with CTC in reviewing and providing recommendations to the CTD on funding applications affecting the transportation disadvantaged, the LCB shall:
1. Request federal, state, or local government agencies to provide for LCB review of all applications or purchase of service requests for client services which contain funds for transportation disadvantaged services. Such funds may include expenditure for operating, capital or administrative needs.
 2. Present to CTD any unresolved funding requests without delaying the application process.
- D. Assist the CTC in establishing priorities with regard to the recipients of non-sponsored TD services that are purchased with TD Trust Fund moneys.
- E. Review the coordination strategies of service provision to the transportation disadvantaged in the designated service area.
- F. Evaluate multi-county or regional opportunities.
- G. Work cooperatively with Regional Workforce Boards as established, chapter 445, F.S., to provide for the development of innovative transportation services for participants.

11. PARLIAMENTARY PROCEDURES

The Board shall ~~will~~ conduct business using parliamentary procedures according to the latest version of Robert's Rules of Order.

12. AMENDMENTS

These Bylaws may be amended by the affirmative vote of a majority of a quorum at any regular meeting. Whenever possible, proposed amendments shall be submitted to the membership one week prior to the meeting to which it is to be considered.

These Bylaws and all amendments to the Bylaws will become effective upon affirmative vote of a majority of a quorum.

These Bylaws for the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) were originally adopted on August 2, 1990, by the LCB and subsequently amended as follows:

November 16, 1993
June 28, 1996
January 14, 2000
July 17, 2003
September 10, 2009
November 7, 2011
November 15, 2012
November 14, 2013
September 11, 2014
September 10, 2015
September 8, 2016
September 7, 2017
September 6, 2018
September 5, 2019
September 10, 2020
September 9, 2021
September 8, 2022
September 7, 2023
September 5, 2024
September 4, 2025
September 3, 2026

PASSED AND DULY ADOPTED after motion, second and majority vote favoring same, this ~~September 4, 2025~~ September 3, 2026.

CHARLOTTE COUNTY-PUNTA GORDA
METROPOLITAN PLANNING
ORGANIZATION

BY: _____
Lakshmi N. Gurram, Director

CHARLOTTE COUNTY
TRANSPORTATION DISADVANTAGED
LOCAL COORDINATING BOARD

BY: _____
Kenneth Doherty, LCB Chair

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY:

By: _____
David Thomas, County Attorney

SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 6

**PUBLIC MEETING: APPROVAL FY 2026/2027-FY 2030/2031
TRANSPORTATION DISADVANTAGED SERVICE PLAN/COORDINATED
PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION PLAN
(TDSP/CPT-HSTP)**

Purpose: To hold a public meeting and approve the FY 2026/2027-FY 2030/2031 Transportation Disadvantaged Service Plan/Coordinated Public Transit-Human Services Transportation Plan TDSP/CPT-HSTP)

Presented by: Charlotte County and MPO staff

Discussion: On April 8, 2026, the Florida Commission for the Transportation Disadvantaged (CTD) designated the Charlotte County Board of County Commissioners (BCC), through its Transit Division, as the Community Transportation Coordinator (CTC) for Charlotte County for the five-year period beginning July 1, 2026

Charlotte County and MPO staff have developed a combined Transportation Disadvantaged Service Plan (TDSP) and Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP) for review by the Local Coordinating Board (LCB). This combined document fulfills State requirements for the TDSP submittal to CTD as well as Federal requirements for coordinated human service transportation planning, including those associated with the FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program.

A Public Meeting is required to solicit public input.

Recommendation: To hold a Public Meeting and approve the FY 2026/2027-FY 2030/2031 Transportation Disadvantaged Service Plan/Coordinated Public Transit-Human Services Transportation Plan (TDSP/CPT-HSTP). authorizing staff to make any minor revisions as recommended.

A ROLL CALL VOTE IS REQUIRED

Attachment: [Draft FY 2026/2027-FY 2030/2031 Transportation Disadvantaged Service Plan \(TDSP\) / Charlotte County Coordinated Public Transit – Human Services Transportation Plan \(CPT-HSTP\)](#)

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

FY 2026/2027 - FY 2030/2031

**Approved by the Charlotte County
Transportation Disadvantaged
Local Coordinating Board:**

September 3, 2026



Prepared by



**Charlotte County-Punta Gorda
Metropolitan Planning Organization
1050 Loveland Blvd, Box C
Port Charlotte, FL 33980
(941) 883-3535**

Charlotte Rides
Safe. Local. Free.

**Charlotte County Board of County Commissioners
Charlotte Rides
545 Theresa Blvd.
Port Charlotte, FL 33954
(941) 575-4000**

This document was prepared by the staff of the Charlotte County-Punta Gorda Metropolitan Planning Organization in cooperation with the Florida Department of Transportation and local government agencies. Funding for this document was provided by the U.S. Department of Transportation (Federal Highway Administration and Federal Transit Administration), the State of Florida Department of Transportation, the Florida Commission for the Transportation Disadvantaged, Charlotte County, and the City of Punta Gorda.

**Charlotte County Transportation Disadvantaged
Local Coordinating Board (LCB)
As of September 3, 2026**

<u>Board Member</u>	<u>Representing</u>
Commissioner Ken Doherty	LCB Chair
Suzanne Roberts	Local Medical Community Representative, LCB Vice Chair
Leigh Ann Bellamy	Florida Department of Education Division of Blind Services
Tabitha Larrauri	Florida Department of Children and Families
Emily Black	Florida Department of Transportation (FDOT)
Maricela Morado	Florida Department of Elder Affairs
Michael Stahler	Florida Agency for Health Care Administration
Carmen Henry	Regional Workforce Development
Angela Hemstreet	Economically Disadvantaged
Donna Fain	Agency for Persons with Disabilities
Tony Conte	Public Education Community
Matt McGee	Veterans Services
Pamela Jordan	Elderly Interests
Lynn Dorler	Representative of Children-at-Risk
Cheryl Sytsma	Disabled Interests
Joseph Sabatino	Citizen Advocate
Dottie Fulton	Citizen Advocate User
VACANT	Private Transportation Industry

Commissioner Ken Doherty, LCB Chair

**Transportation Disadvantaged Service Plan (TDSP/
Charlotte County Coordinated Public Transportation Plan (CPT-HSTP)**

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Local Coordinating Board Membership Certification
Charlotte County-Punta Gorda Metropolitan Planning Organization
Bob Pryor Building 1050 Loveland Blvd, Box C, Port Charlotte, Florida 33980-2503

The Metropolitan Planning Organization/Designated Official Planning Agency named above hereby certifies the following:

1. The membership of the Local Coordinating Board, established pursuant to Rule 41-2.012(3), F.A.C., does in fact represent the appropriate parties as identified in the list below; and
2. The membership represents, to the maximum extent feasible, a cross-section of the local community.

Signature: _____ **Date:** _____

Representation	Member	Alternate	Term
Chairperson – Elected Official	Commissioner Ken Doherty	—	Appointed by MPO
Elderly Interests	Pamela Jordan	—	12/18/2026
Disabled Interests	Cheryl Sytsma	—	3/21/2027
Citizen Advocate	Joseph Sabatino	—	10/21/2027
Citizen Advocate/User	Dottie Fulton	—	12/18/2026
Economically Disadvantaged Representative	Angela Hemstreet	Shery Stahnke	5/18/2029
Children-at-Risk	Lynn Dorler	—	Agency Appt.
Public Education-School Transportation	Tony Conte	John Furlong	Agency Appt.
Dept. of Transportation	Emily Black	Michelle Peronto	Agency Appt.
Dept. of Children & Families	Tabitha Larrauri	Helen Parrilla	Agency Appt.
Area Agency on Aging-Florida Department of Elder Affairs	Maricela Morado	Tracyann Brathwaite	Agency Appt.
Agency for Health Care Administration	Mike Stahler	Alana Watson	Agency Appt.
Regional Workforce Development Board	Carmen Henry	Kimberly Dextre	Agency Appt.
Veterans Services	Matthew McGee	Ezequiel Tirado	Agency Appt.
Transportation Industry	Vacant	—	
Local Medical Community	M. Suzanne Roberts (Vice Chair)	—	Agency Appt.
Division of Blind Services	Leigh Ann Bellamy	—	Agency Appt.
Agency for Persons with Disabilities	Donna Fain	Leah Watson	Agency Appt.

LCB Roll Call Voting Sheet

(Completed at September 3, 2026 LCB Meeting)

Representation	Member	Voted For	Voted Against	Absent From Voting
Chairperson – Elected Official	Commissioner Ken Doherty			
Elderly Interests	Pamela Jordan			
Disabled Interests	Cheryl Sytsma			
Citizen Advocate	Joseph Sabatino			
Citizen Advocate/User	Dottie Fulton			
Economically Disadvantaged Representative	Angela Hemstreet			X
Children-at-Risk	Lynn Dorler			
Public Education-School Transportation	Tony Conte			
Dept. of Transportation	Michelle Peronto			
Dept. of Children & Families	Tabitha Larrauri			
Area Agency on Aging-Florida Department of Elder Affairs	Maricela Morado			
Agency for Health Care Administration	Mike Stahler			
Regional Workforce Development Board	Carmen Henry			
Veterans Services	Matthew McGee			
Transportation Industry	Vacant			X
Local Medical Community	M. Suzanne Roberts (Vice Chair)			
Division of Blind Services	Leigh Ann Bellamy			
Agency for Persons with Disabilities	Donna Fain			

The Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB) hereby certifies that it reviewed and approved the FY 2026/2027 - FY 2030/2031 Charlotte County Transportation Disadvantaged Service Plan/Coordinated Public Transit – Human Services Transportation Plan (TDSP/CPT-HSTP) on September 3, 2026.

September 3, 2026
Date

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

Approved by the Florida Commission for the Transportation Disadvantaged (CTD)

Date

Karen Somerset, Interim Executive Director
Florida Commission for the Transportation Disadvantaged

I. DEVELOPMENT PLAN

A. Introduction to the Service Area

1. Background of the Transportation Disadvantaged Program

In 1986, Charlotte County created the “Transportation Section” to serve as the Community Transportation Coordinator (CTC) for the County under F.S. Chapter 427. Although comparable service had been provided since 1976, this allowed the County to receive Federal Transit Administration (FTA) funding through Section 5307 grant as well as State Transit Block Grant Funds. Charlotte County Board of County Commissioners, through Charlotte County Transit, now known as Charlotte Rides, has served as the sole source governmental operator of transit and transportation disadvantaged services within the County since.

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

Charlotte County Board of County Commissioners, through now Charlotte Rides, has served as the CTC for Charlotte County since 1986 under a sole governmental selection process. Charlotte County Transit has grown over the years and now includes 13 staff members.

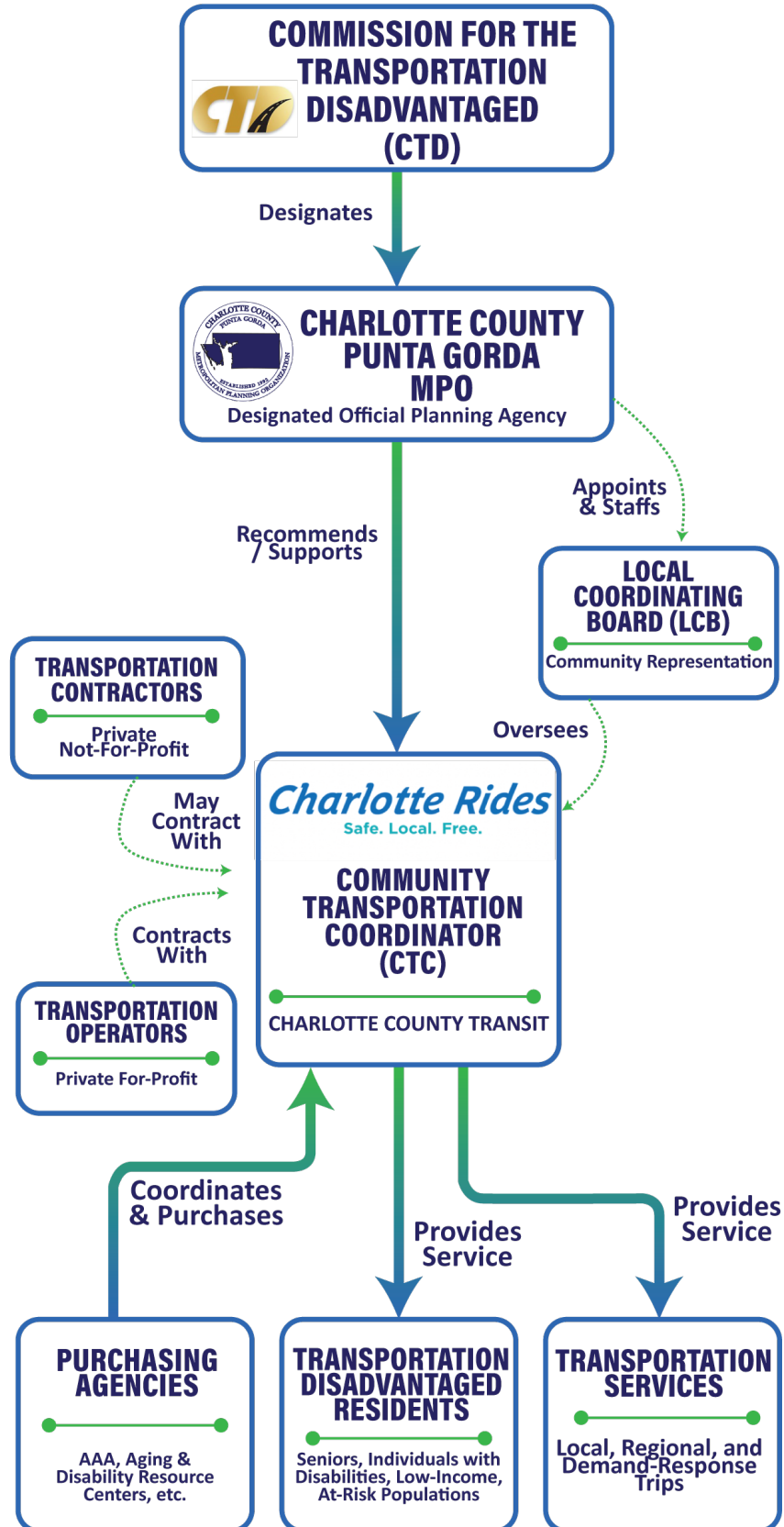
The Charlotte County Board of County Commissioners provides most of the local matching funds required for this operation and acts as the Board of Directors in capital acquisitions and operating matters. In February 2014, Transit and all County staff members supporting transit service were moved under the direction of the County’s Budget & Administrative Services Department. As of January 2026, Transit and All County Staff Services are now housed under Human Services.

3. Organization Chart

Transportation Disadvantaged (TD) services as well as public paratransit services within the County are operated by Charlotte County Transit. A current organizational chart displaying Transit staff housed within Charlotte County’s Human Services Department is in **Appendix B** of this document.

The chart below (Page 11) highlights organizations and individuals involved in the TD system, and how they interact to ensure TD populations in Charlotte County maintain transportation services.

TD Program Concept Chart



Transit Facility:



With funding from an FTA Section 5307 CARES grant, a centrally located transit facility completed in January 2022, was constructed off Veterans Blvd at 545 Theresa Blvd., Port Charlotte

The facility provides a central location for servicing passengers county-wide. This location reduces the response time to reach customers. The building contains open and private office spaces, a central dispatch control area, lockers for drivers, a fully equipped breakroom, a large conference room for training and meetings, and a lobby for customer service needs. It also has surface/non-enclosed parking for at least 50 transit vehicles, 40 personal vehicles for drivers and staff, and 2 administrative service vehicles.

4. Consistency Review of Other Plans

a. County & City Comprehensive Plans



Charlotte County's Charlotte 2050 Comprehensive Plan was adopted on July 20, 2010, with two evaluation and appraisal reviews in 2014 and 2021. The plan was last amended in 2022. The Comprehensive Plan supports coordinated and compatible development as well as listing TRA Goal 3: Public Transit System with the aim of considering future transit needs in the county through meeting the demand of the public with priority given to persons who are transit dependent.

The City of Punta Gorda's Comprehensive Plan 2045 was adopted February 7, 2024. This TDSP is consistent with the goals, objectives, and policies of the City of Punta Gorda's Comprehensive Plan as it relates to transit and transportation disadvantaged. The comprehensive plan highlights the importance of promoting orderly development, compatible land use patterns, safe and efficient transportation access, infrastructure coordination, and sustainable growth with the goal of developing transit-oriented development.



b. Southwest Florida Strategic Regional Policy Plan



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

c. Transit Development Plan

Benesch prepared the *Charlotte County 2025-2034 TDP* for Charlotte County Transit. Data analysis, stakeholder interviews, and public outreach (including two rounds of workshops and surveys of both current transit riders and citizens) were performed. Both a



needs component and a cost-efficient component were developed. The TDP was approved by the Charlotte County Commissioners on July 23, 2024. In December 2025, the 2026 TDP Annual Progress Report was completed, and was deemed to follow Chapter 14-73.001, F.A.C. by FDOT January 7, 2026. Data was obtained utilizing surveys of passengers and the general public, as well as the latest available census figures. Factors assessed include household density and income, transit propensity, work trips, age of passengers, availability of autos in households, trip purposes and travel alternatives. Public outreach was conducted at public transit workshops (held in South, Mid and West Charlotte County). For more information regarding TDP, please visit [Charlotte Rides](#).

d. Commission for the Transportation Disadvantaged Plans



Both the Commission for the Transportation Disadvantaged 5-year plan and 20-year plan set forth goals, objectives, and a plan of action.

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

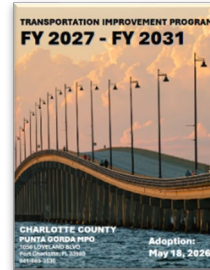
e. MPO Long Range Transportation Plan

The Charlotte County – Punta Gorda Metropolitan Planning Organization (MPO) 2050 Long



Range Transportation Plan (LRTP) is a 25-year forecast of future needs of the transportation system within the MPO's planning area. These may be the needs of roads, transit, bike and pedestrian infrastructure, or air/sea mobility in some instances, ensuring a multimodal system within the planning area. The LRTP prioritizes projects to address the growing needs of the community and uses extensive public outreach to do so.

f. Transportation Improvement Program



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

5. Charlotte Rides TDP



Building on the vision established in the **2019–2029 Transit Development Plan (TDP)**, Charlotte County Transit introduced **Charlotte Rides** as an identity that reflects the agency's commitment to providing accessible, customer-focused transportation throughout the community.

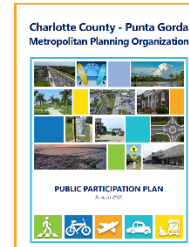
A major milestone was reached in **November 2024** with the launch of the **Charlotte Rides mobile app**, providing passengers with a convenient way to schedule on-demand trips. Riders can easily book transportation by selecting their trip purpose, travel date and time, pickup location, and destination. Since its launch, the app has facilitated approximately **5,700 completed trips** as of **June 2026**, demonstrating growing adoption of digital trip scheduling. Traditional telephone reservations continue to be offered, ensuring that services remain accessible to all passengers regardless of technological access.

To further enhance safety, accountability, and operational efficiency, Charlotte Rides equipped its fleet with advanced onboard camera systems. These systems improve contracted driver and passenger security while supporting service monitoring, incident investigations, staff training, and more accurate local, state, and federal reporting.

On September 1, **2026**, the agency officially adopted the **Charlotte Rides** name, completing a key initiative identified in the Transit Development Plan. Updated vehicle graphics, consistent public messaging, and a continued focus on exceptional customer service have strengthened public awareness and reinforced the agency's commitment to innovative, reliable, and accessible transportation.

Today, **Charlotte Rides provides safe, local, free transportation** that improves mobility, connects residents to employment, healthcare, education, shopping, and other essential destinations, and enhances the quality of life throughout Charlotte County.

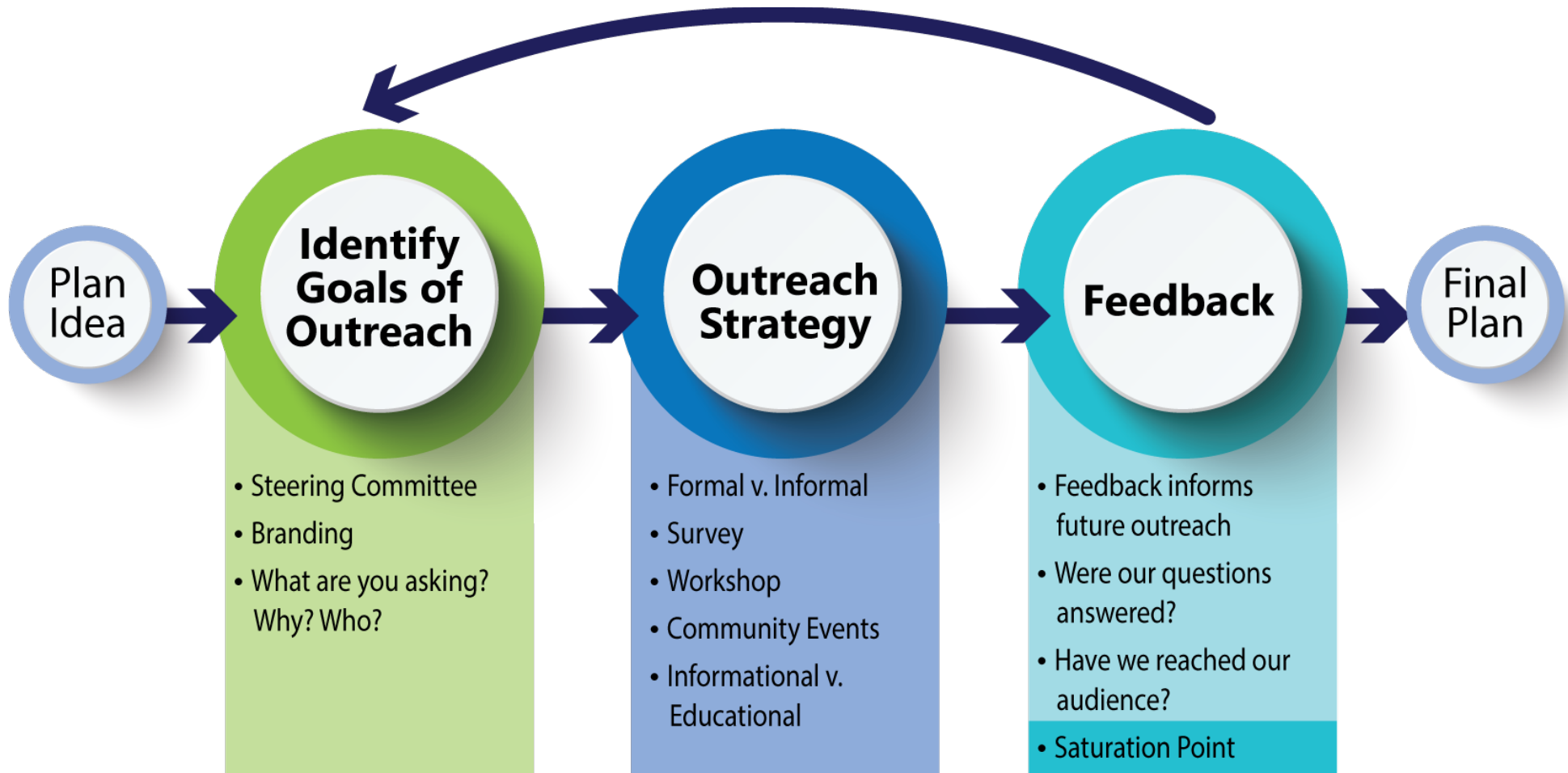
6. Public Participation (CPT-HSTP)



Federal transportation legislation requires a Coordinated Public Transit–Human Services Transportation Plan (CPT-HSTP) developed with public input for eligibility under the Enhanced Mobility of Seniors and Individuals with Disabilities Grant Program (FTA Section 5310). The Charlotte County–Punta Gorda MPO, serving as the Official Planning Agency for the Charlotte County Transportation Disadvantaged Local Coordinating Board (LCB), worked with Charlotte County Transit staff to prepare this document. Public participation has been a longstanding MPO priority, reflected in its Public Participation Plan (PPP), first adopted in 1994 and most recently updated on May 18, 2026. PPP strategies, including electronic and printed public comment opportunities, continue to guide development of transit planning documents.

The Charlotte County LCB, composed in accordance with Rule 41-2.012, F.A.C., includes representatives of transportation providers, funding agencies, transit-dependent populations, and an MPO-appointed elected official serving as Chair. Public input is solicited through LCB meetings, public notices, and MPO outreach efforts. Citizens were invited to comment on this draft TDSP/CPT-HSTP before LCB approval at its September 3, 2026, meeting. The document is updated annually and informed by ongoing planning activities, including the MPO's 2050 Long-Range Transportation Plan update, which incorporated public workshops, stakeholder meetings, surveys, interactive mapping tools, and outreach to transit-dependent populations during 2025.

Charlotte County – Punta Gorda MPO 3-Step Outreach Process



B. Service Area Profile and Demographics

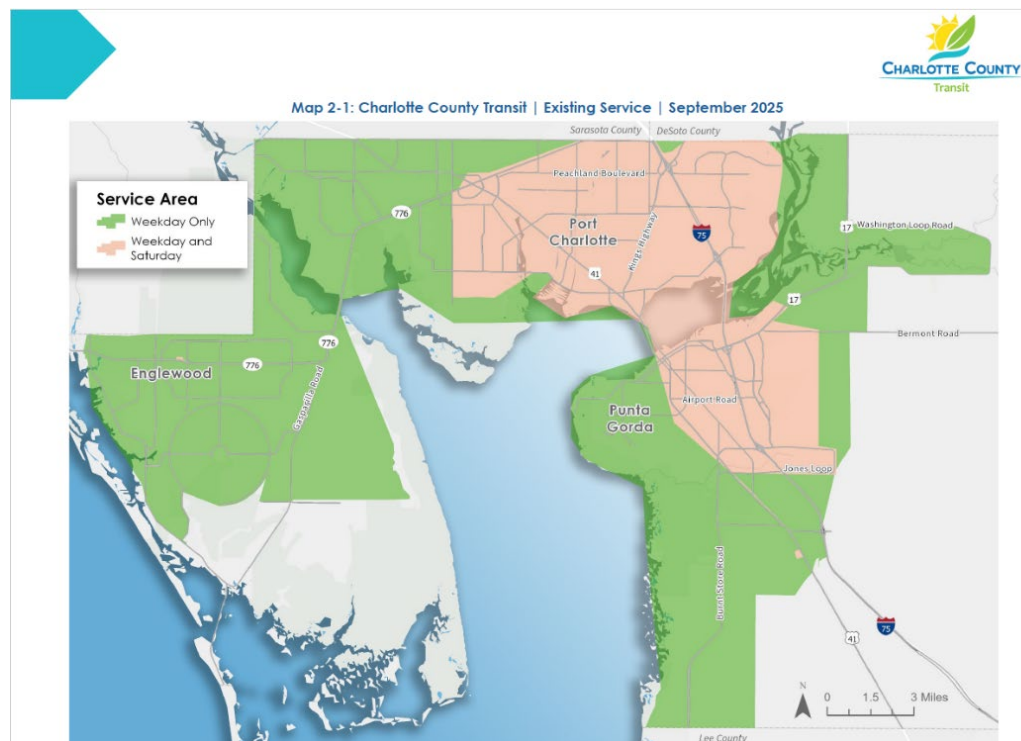
1. General Service Area Description

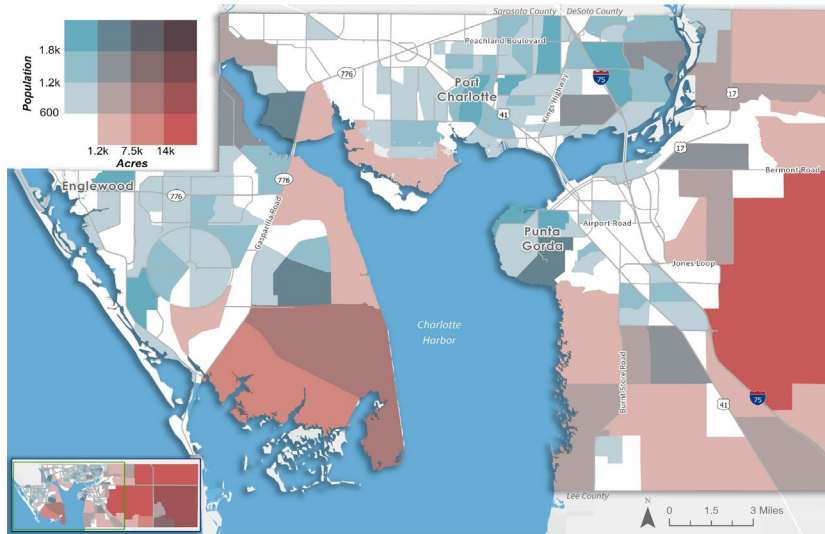
Charlotte County's transportation service area is displayed in Map 2-1 of the January 2026 Annual TDP Update below.

Charlotte County at a Glance

- **Location:** Southwest Florida
- **Borders:** Sarasota and DeSoto counties (north), Glades County (east), Lee County (south), and the Gulf of America (west)
- **2025 Population:** 217,212
- **Population Growth Since 2020:** 16.3%
- **Projected 2026 Population:** Approximately 223,000
- **Total Area:** 858 square miles
- **Land Area:** Approximately 680 square miles

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





Charlotte County includes the City of Punta Gorda—its only incorporated municipality—and several Census Designated Places (CDPs) including Port Charlotte, Rotonda, Englewood, and others.

The county's geography creates challenges for transportation service delivery. Communities in South County are located up to 15 miles from the county's primary population centers, while Englewood is approximately 21 miles from central Port Charlotte. These distances result in substantial deadhead mileage, increasing operating costs and reducing service efficiency.

Travel patterns further influence transportation demand, particularly in the Englewood area, where many residents' access healthcare, shopping, employment, and other services in neighboring Sarasota County. These cross-county travel needs highlight the importance of regional coordination and connectivity.

2. Demographics

a. Land Use of Service Area

Charlotte County continues to experience significant growth consistently in line with the **Charlotte 2050 Comprehensive Plan**. Major developments, including Babcock Ranch, West Port, and the recently approved Harborview project, are expanding residential, commercial, and mixed-use opportunities across the county. Ongoing infill and redevelopment along U.S. 41, S.R. 776, and within Community Redevelopment Areas further support the county's strategy of directing growth to designated urban corridors while meeting increasing housing demand. Together, these initiatives reflect the coordinated implementation of the Charlotte 2050 vision and reinforce the need for transportation services that support a growing and evolving community.

This version is slightly shorter, improves flow, avoids repetition of "growth," and ties the paragraph back to transportation planning, making it fit naturally within a Transit Development Plan.

b. Identify Population/Composition

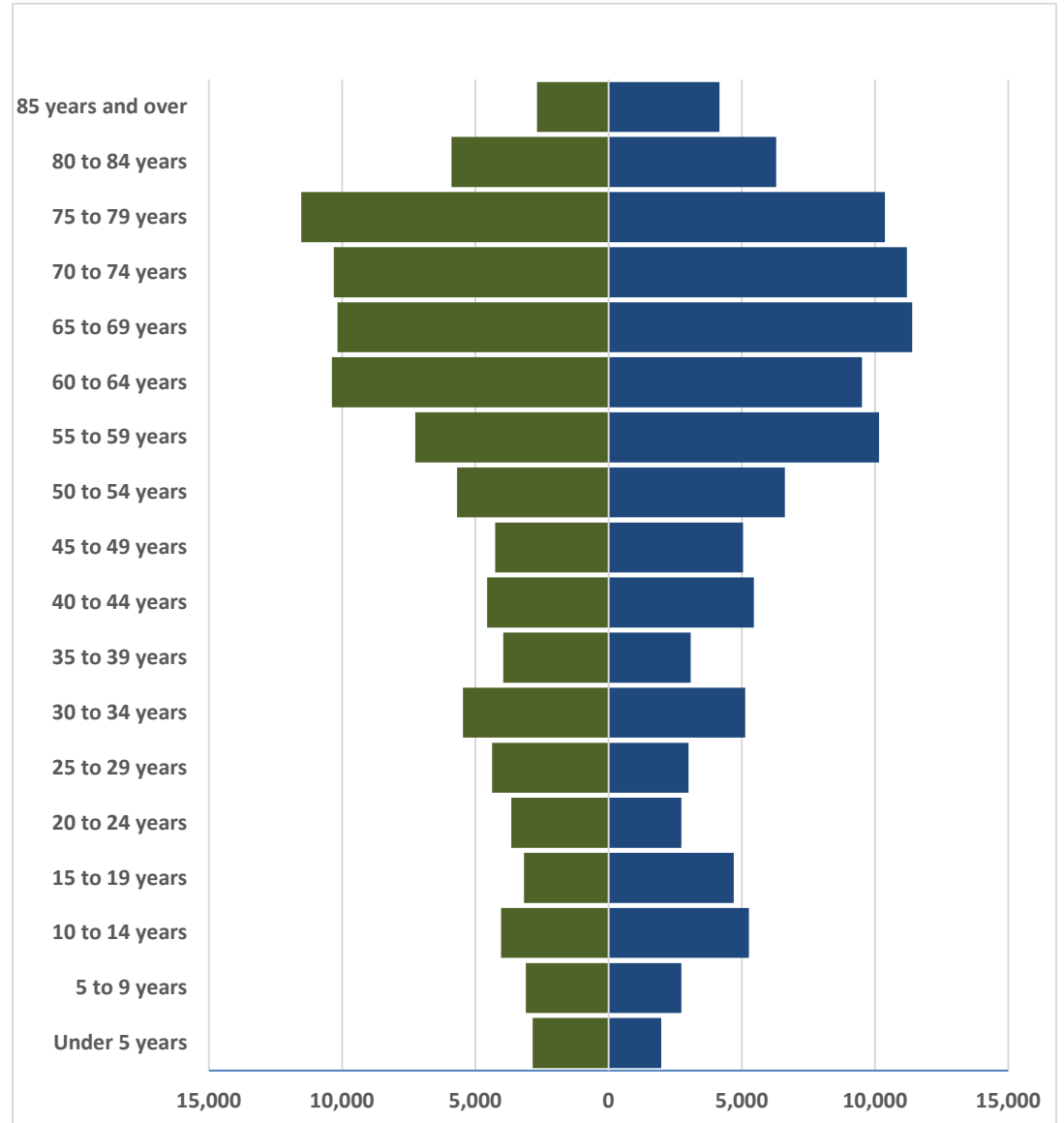
According to the 2024 American Community Survey 1-year estimates, Charlotte County has a median age of **59.6**, making it one of the oldest counties in the United States. Older adults have historically been Charlotte Rides' primary customer base, and demographic trends indicate that demand for transit services will continue to increase.

The University of Florida's Bureau of Economic and Business Research (BEBR) 2021 estimates show that **40.6%** of Charlotte County residents are age 65 or older, compared with **21.75%** statewide. This is particularly significant because many older adults outlive their ability to drive. Research indicates that drivers aged 70–74 have an average of 11 years of driving life expectancy remaining, and women generally require more years of transportation support than men because they tend to live longer (Foley, Heimovitz, Guralnik, & Brock, 2002). Both younger and older populations are important transit markets because they are less likely to have reliable access to a personal vehicle. Port Charlotte and East Englewood have relatively high concentrations of residents ages 0–17, while Englewood and Punta Gorda have larger proportions of residents age 65 and older.

c. Employment

Areas with high employment density, such as downtowns and activity centers with medical offices, schools, or shopping hubs, tend to generate strong transit demand—particularly where

Age-Sex Distribution of Population, Charlotte County, 2024



parking is scarce. Transit service also ensures workers have affordable and reliable access to employment, supporting economic resilience.

According to 2024 data, Charlotte County’s civilian labor force includes approximately 78,500 workers, with 74% employed in the private, for-profit sector, 12% in government, 8% self-employed, and 6% in private nonprofit organizations. Service-providing industries dominate, contributing 78% of county GDP, while goods-producing sectors account for about 14%, with government at 8.5%

Employment by Employment Class, Charlotte County, 2024

Class of Worker	Percentage
Private for-profit	74.1%
Government	11.6%
Self-employed	7.8%
Private nonprofit	6.0%

Key employment sectors remain consistent:

- Healthcare, education, and social assistance
- Retail trade
- Arts, recreation, and food services
- Professional, management, and administrative services

Employment by Employment Sector, Charlotte County, 2024

Employment Sector	Percentage
Health care, educational services, and social assistance	20.2%
Retail trade	14.0%
Arts, entertainment, recreation, accommodation, and food services	11.4%
Professional, scientific, management, administrative, and waste management services	12.2%

Together, these sectors continue to represent the majority of jobs in Charlotte County, reflecting stable trends in data.

Jobs are most densely concentrated along major corridors—particularly US-41 through Punta Gorda, and emerging concentrations in Babcock Ranch. Babcock Ranch, part of the Punta Gorda–North Port Metropolitan Statistical Area, has seen job growth surge: regional employment grew ~12% from 2017 to 2022, with continued concentration anticipated as the area expands. Projected employment growth is strongest where existing employment hubs are located or adjacent along key arterial routes and expanding mixed-use nodes supporting strategic transit investment.

According to data from the Florida Department of Economic Opportunity (www.floridajobs.org), these employment trends are consistent with countywide workforce patterns. In addition, a representative from CareerSource Southwest Florida serves on the Local Coordinating Board (LCB), ensuring that regional workforce development needs and priorities are reflected in local planning efforts.

As of 2024, the Charlotte County School District is the county's largest employer, with more than 2,200 employees, followed by Charlotte County Government with over 1,700 employees. Education, public administration, healthcare, and hospitality represent the county's largest employment sectors, reflecting its predominantly service-based economy.

To support workforce mobility, the Florida Department of Transportation (FDOT) sponsors the Commuter Services Program, which provides employers and employees with resources for alternative transportation options and commute planning.

Punta Gorda Airport (PGD) continues to serve as a major economic and employment center. According to a 2022 FDOT economic impact study, the airport supports approximately 11,319 jobs and generates an estimated **\$1.7 billion** in annual economic output. Continued investment in the airport area includes the recently approved Challenger Boulevard–Piper Road connector, which will improve access to the Enterprise Charlotte Airport Park and is projected to support approximately 360 new jobs over the next five years.

d. Major Trip Generators/Attractors

Charlotte County's primary trip generators include major hospitality, recreation, government, healthcare, education, and commercial centers, many of which have expanded since 2023. The 2023 opening of Sunseeker Resort established a new regional destination, with Phase II now adding a convention and event center. Fishermen's Village, Charlotte Sports Park, and the county's beaches and waterfront parks also continue to attract significant visitor activity.

Government services remain concentrated at the Murdock Administrative Complex, Punta Gorda civic facilities, and social service offices along Loveland Boulevard. Healthcare remains a major trip generator through HCA Florida Fawcett Hospital, Bayfront Health facilities, and the growing medical corridor along Harbor Boulevard and US-41. Educational institutions, including Florida SouthWestern State College, Charlotte Technical College, and aviation training programs at Punta Gorda Airport, generate steady travel demand.

Major retail destinations, including the Port Charlotte Town Center area, the Promenades district, and the US-41 commercial corridor, continue to serve as important activity centers, with redevelopment introducing more mixed-use development. Emerging employment centers such as the Parkside CRA, Charlotte Harbor CRA, and Murdock Village further reflect the county's continued investment in housing, transportation, parks, and economic development, creating new and evolving travel patterns throughout the county.

Table I-1 shows all major attractors in Charlotte County.

TABLE I-1: TRIP ATTRACTORS

TYPE	FACILITY	LOCATION
Attractions	Ann & Chuck Dever Memorial Regional Park at Oyster Creek	6791 San Casa Drive, ENG
Attractions	Bayshore Live Oak Park	23157 Bayshore Road, CH
Attractions	Carmalita Park	6905 Florida Street, PG
Attractions	Cedar Point Environmental Park	2300 Placida Road, ENG
Attractions	Charlotte County Council on Aging, Inc.	3456 DePew Avenue, PC
Attractions	Charlotte County Historical Center	514 East Grace Street, PG
Attractions	Charlotte Harbor Event & Conference Center	75 Taylor Street, PG
Attractions	Charlotte Performing Arts Center	1250 Cooper Street, PG
Attractions	Charlotte Sports Park & Tippecanoe Environmental Pk	2300 El Jobean, PC
Attractions	Charlotte Harbor Environmental Center	10941 S. Burnt Store Rd, PG
Attractions	Englewood Beach at Chadwick Park	2100 N. Beach Road, ENG
Attractions	Englewood Charlotte Public Library	3450 McCall Road, ENG
Attractions	Gaines Jr. Veterans Memorial Park	20499 Edgewater Dr, PC
Attractions	Gilchrist Park	750 W. Retta Esplanade, PG
Attractions	Harbor Heights Park	3350 N. San Marino Dr, PC
Attractions	Harold Avenue Recreation Center	23400 Harold Avenue, PC
Attractions	Larry Taylor Kiwanis Park	3100 Donora Street, PC
Attractions	Laishley Park	350 E. Marion Avenue, PG
Attractions	Mid-County Regional Library (closed for repairs)	2050 Forrest Nelson Blvd, PC
Attractions	North Charlotte Regional Park	1185 Centennial Blvd, PC
Attractions	Peace River Wildlife Center	3400 Ponce de Leon Pkwy, PG
Attractions	Port Charlotte Beach/Rec Center	4500 Harbor Boulevard, PC
Attractions	Punta Gorda Airport	28000 Airport Road, PG
Attractions	Punta Gorda Public Library	401 Shreve Street, PG
Attractions	Rebecca Neal Owen Congregate Meal Center	27420 Voyageur Drive, PC

Attractions	South County Regional Park/Rec Center	670 Cooper Street, PG
Attractions	Town Center 16 Regal Cinemas	1441 Tamiami Trail, PC
Attractions	Tringali Community Center	3460 N Access Rd, ENG
Attractions	Tringali Recreational Complex/Park	3460 N. Access Road, ENG
Government	CareerSource Southwest Florida	3745 Tamiami Trl, PC
Government	Charlotte County Administration Center	18400 Murdock Circle, PC
Government	Charlotte County Cooperative Extension Service	1120 Centennial Blvd, PC
Government	Charlotte County – Englewood Annex	6868 San Casa Blvd, ENG
Government	Charlotte County Family Services Center	21450 Gibraltar Drive, PC
Government	Charlotte County Human Services Office	21450 Gibraltar Drive, PC
Government	Charlotte County Justice Center	350 E. Marion Ave, PG
Government	Charlotte County Old Courthouse/Elections Supervisor	226 Taylor Street, PG
Government	Charlotte County Public Works	7000 Florida Street, PG
Government	Charlotte County Sheriff's Department	25500 Airport Road, PG
Government	Charlotte County Sheriff's Department	3110 Loveland Blvd, PC
Government	Charlotte County – South County Annex	410 Taylor Street, PG
Government	Charlotte County – Tax Collector's Office/PC	21229 Olean Blvd, Ste B, PC
Government	Charlotte County Utilities/Customer Service	18400 Murdock Circle, PC
Government	Charlotte County Veterans Services	21450 Gibraltar Drive, PC
Government	Charlotte County-Punta Gorda Metro Plan Org (MPO)	1050 Loveland Blvd, PC
Government	City of Punta Gorda Police Department	1410 South Tamiami Trail, PG
Government	City of Punta Gorda – City Hall (closed for repairs)	326 W. Marion Ave, PG
Government	US Social Security Administration	4054 Beaver Lane, PC
Health Care	Arbors at Port Charlotte	18480 Cochran Blvd, PC
Health Care	Best Care Senior Living at Punta Gorda, LLC	2295 Shreve Street, PG
Health Care	Brookdale Port Charlotte	18440 Cochran Blvd, PC
Health Care	Brookdale Punta Gorda Isles	250 Bal Harbor Blvd, PG

Health Care	Brookdale Rotonda	550 Rotonda Blvd W, ENG
Health Care	Brookdale South Port Square	23023 Westchester Blvd, PC
Health Care	Charlotte Behavioral Healthcare, Inc.	1700 Education Avenue, PG
Health Care	Chelsea Place Retirement Living	315 Addison Drive, PC
Health Care	Courtyard Retirement Center	26455 Rampart Blvd, PC
Health Care	Englewood Healthcare and Rehabilitation Center	1111 Drury Lane, ENG
Health Care	Florida Department of Health in Charlotte Co. - Main	1100 Loveland Blvd, PC
Health Care	Florida Department of Health in Charlotte Co. - WIC	6868 San Casa Drive, ENG
Health Care	Grand Villa of Englewood	925 S. River Road, ENG
Health Care	Harbor Home Care Services	23013 Westchester Blvd, PC
Health Care	Harbor View Acres Assisted Living	24450 Harbor View Rd, PC
Health Care	HCA Florida Fawcett Hospital	21298 Olean Blvd, PC
Health Care	Lexington Manor Assisted Living	20480 Veterans Blvd, PC
Health Care	Life Care Center of Punta Gorda	450 Shreve Street, PG
Health Care	Magnolia Acres Assisted Living Facility	729 Crestwood Road, ENG
Health Care	Mariner Health Care of Port Charlotte	25325 Rampart Blvd, PC
Health Care	Northside Psychiatric Services	1032 Tamiami Trail, # 1, PC
Health Care	Parkside Assisted Living and Memory Cottage	2595 Harbor Blvd, PC
Health Care	Port Charlotte Rehabilitation Center	25325 Rampart Blvd, PC
Health Care	Riverside Behavioral Center	733 E. Olympia Avenue, PG
Health Care	Truewood by Merrill, Port Charlotte	2500 Aaron Street, PC
Health Care	Sandhill Gardens Retirement	24949 Sandhill Blvd, PC
Health Care	Advent Health Port Charlotte - Hospital	2500 Harbor Blvd, PC
Health Care	Advent Health Punta Gorda – Hospital (CLOSED)	809 E. Marion Avenue, PG
Health Care	Signature HealthCARE of Port Charlotte	4033 Beaver Lane, PC
Health Care	Singing Pines Adult Care	4410 US 17, Duncan Road, PG
Health Care	Solaris	4000 Kings Highway, PC

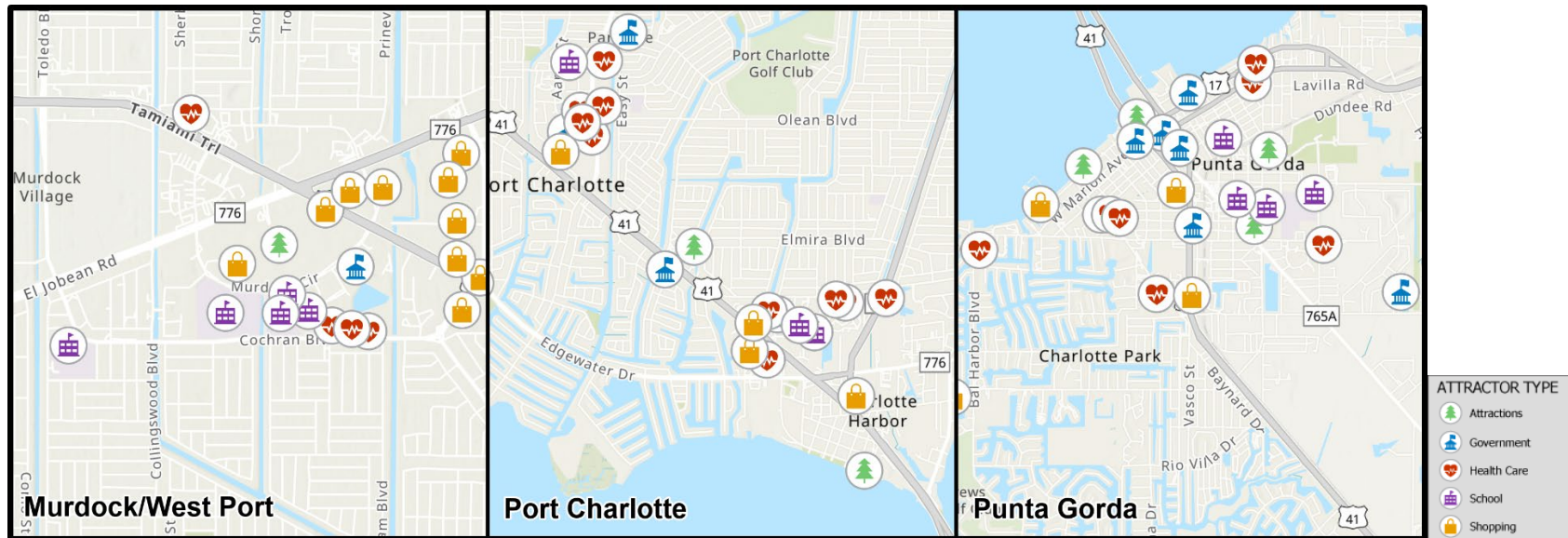
Health Care	Southern Heritage Home	509 Berry Street, PG
Health Care	Vick Street Manor Assisted Living	22332 Vick Street, PC
Health Care	Village Place Health and Rehabilitation Center	2370 Harbor Blvd, PC
Health Care	Village Place Retirement	18400 Cochran Blvd, PC
Health Care	Virginia B. Andes Volunteer Community Clinic	21297 Olean Blvd, Unit B, PC
School	Adult and Community Education	2280 Aaron Street, PC
School	AeroGuard Flight Training Center	8200 Skyline Way, PG
School	AMI Kids Crossroads	45991 Bermont Rd, PG
School	Baker Center	311 E. Charlotte Avenue, PG
School	Charlotte County School Board Administration	1445 Education Way, PG
School	Charlotte Harbor Center	22450 Hancock Ave, PC
School	Charlotte High School	1250 Cooper Street, PG
School	Charlotte Technical Center	18150 Murdock Cir, PC
School	Deep Creek Elementary School	26900 Harbor View Road, PC
School	East Elementary School	27050 N. Fairway Drive, PG
School	Florida SouthWestern State College	26300 Airport Road, PG
School	Kingsway Elementary School	23300 Quasar Blvd, PC
School	L.A. Ainger Middle School	245 Cougar Way, RT
School	Lemon Bay High School	2201 Placida Road, ENG
School	Liberty Elementary School	370 Atwater Street, PC
School	Meadow Park Elementary School	750 Essex Avenue, PC
School	Murdock Middle School	17325 Mariner Way, PC
School	Myakka River Elementary School	12650 Willmington Bl, ENG
School	Neil A. Armstrong Elementary School	22100 Breezeswept Ave, PC
School	Peace River Elementary School	22400 Hancock Ave, PC
School	Port Charlotte High School	18200 Cochran Blvd, PC
School	Port Charlotte Middle School	23000 Midway Blvd, PC

School	Punta Gorda Middle School	1001 Education Ave, PG
School	Sallie Jones Elementary School	1230 Narranja St, PG
School	Special Training and Rehabilitation, Inc	525 Bowman Terrace, PC
School	The Academy	18300 Cochran Blvd, PC
School	Vineland Elementary School	467 Boundary Blvd, RT
Charter School	Babcock Neighborhood School	43301 Cypress Pkwy, BR
Charter School	Babcock High School	43301 Cypress Pkwy, BR
Technical College	Charlotte Technical College	18150 Murdock Cir, PC
College	FSW State College – Charlotte Campus	26300 Airport Road, PG
Alternative Education	The Academy	18300 Cochran Blvd, PC
Shopping	Aldi's	1391 Tamiami Trail, PC
Shopping	Aldi's	1391 Tamiami Trail, PC
Shopping	Aldi's	26279 Jones Loop Road, PG
Shopping	Bal Harbor Plaza	1133 Bal Harbor, PG
Shopping	Bayshore Village	4265 Tamiami Trail, CH
Shopping	BJ's Wholesale Club	19150 Quesada Ave, PC
Shopping	Charlotte Square Shopping Center	2200 Tamiami Trail, PC
Shopping	Cleveland Marketplace	27680 Bermont Rd, PG
Shopping	Colonial Promenades	3941 Tamiami Trail, PG
Shopping	Cross Trail Shopping Center	615 Cross Street, PG
Shopping	Fisherman's Village	1200 W Retta Esplanade, PG
Shopping	Harbor Square Shopping Center	4200 Tamiami Trail, PC
Shopping	Home Depot	12621 McCall Rd, ENG
Shopping	Home Depot	19690 Cochran Blvd, PC
Shopping	Home Depot	3941 S Tamiami Trail, PG
Shopping	Kohls	19600 Cochran Blvd, PC
Shopping	Merchants Crossing of Englewood	1500 Placida Road, ENG

Shopping	Murdock Carousel Shopping Center	2000 Tamiami Trail, PC
Shopping	Paradise Shoppes of Port Charlotte	19301 Cochran Blvd, PC
Shopping	Peachland Promenades	24051 Peachland Blvd, PC
Shopping	Port Charlotte Marketplace	19400 Cochran Blvd, PC
Shopping	Port Charlotte Town Center Mall (<i>recently purchased following foreclosure</i>)	1441 Tamiami Trail, PC
Shopping	Promenades Mall	3280 Tamiami Trail, PC
Shopping	Punta Gorda Crossings	2310 Tamiami Trail, PG
Shopping	Rotonda Plaza	5855 Placida Rd, ENG
Shopping	School House Square	4300 Kings Highway, PC

PC=Port Charlotte, ENG=Englewood, PG=Punta Gorda, RT=Rotonda, CH=Charlotte Harbor, BR=Babcock Ranch

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



In 2013, a transit latent demand study jointly funded by the Charlotte County-Punta Gorda MPO and the Sarasota/Manatee MPO, explored demand for scheduled service between Parkside (including its medical district) and the City of North Port in southern Sarasota County. The data and its analysis recommended that there is sufficient latent demand to support a fixed route transit service in South Sarasota County and North Charlotte County. The results of this study were considered in the subsequent development of both Transit Development Plans for Charlotte County and Sarasota County. Charlotte County continues to monitor the feasibility of a fixed-route transit system within the service area.

e. Inventory of Available Transportation Services

Table I-2 is an inventory of available transportation services with two categories of providers: 1) coordinated transportation providers; and 2) non-coordinated transportation providers. Coordinated transportation providers are those providers who operate as part of the transportation program coordinated by the CTC under the Florida Coordinated Transportation System. Non-coordinated providers are those service providers and agencies who do not have a coordination agreement with the CTC. Charlotte County maintains coordination agreements with partner agencies that provide transportation services to their clients within the Transportation Disadvantaged system. On June 16, 2026, Charlotte County BCC entered

into a coordination agreement with Hope PACE, ensuring compliance with applicable safety, insurance, reporting, and service standards established by the CTD and CTC.

Table I-2: Inventory of Transportation Providers in Charlotte County

Provider	Phone Number	C = Coordinated / N = Non-Coordinated	Provider Type (PP / PNP / G)
Charlotte Rides	941-575-4000	CTC	G
Uber	Mobile App	N	PP
Lyft	Mobile App	N	PP
Comfort Travel Non-Emergency Medical Transport	941-249-7523	N	PP
Cabbie's Taxi Service LLC	941-391-5090	N	PP
Charlotte Shuttle & Transportation	941-255-9117	N	PP
Bluebird Taxi Company	941-343-8294	N	PP
ACC Medlink	800-550-1025	N	PP
AllyRides	941-242-7433	N	PP
A Better Solution of Venice	866-945-7973	N	PP
A1 Royal Airport Transportation	239-369-8300	N	PP
Hope PACE	239-482-4673	C	PNP
Boys & Girls Clubs of Charlotte County	941-575-9797	N	PNP
Premier Taxi Service	941-497-2010	N	PP
Charlotte County Homeless Coalition	941-627-4313	N	PNP

C=Coordinated N=Non-Coordinated PP=Private for Profit PNP=Private Non-Profit G=Government

Source: MPO and Transit Staff

C. Service Analysis

1. Forecasts of TD Population

Utilizing 2024 American Community Survey Data (the most current data available as of this report), the population estimates for the TD population are shown in the figures below. As defined by the Commission for the Transportation Disadvantaged, TD population consists of all individuals with a disability, people aged 65 and over, individuals of low income, and children at risk or at high risk. Figures reflecting Charlotte County's general TD population are shown in Table I-3:

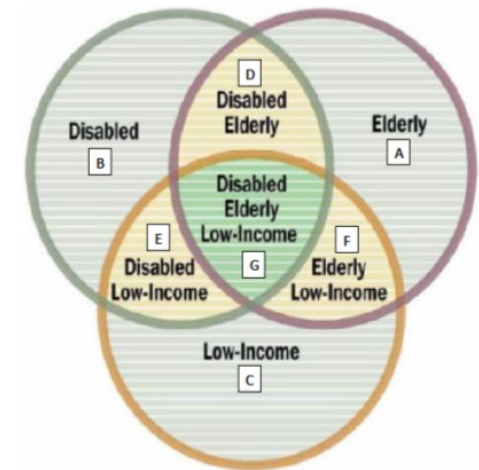
Table I-3 General TD Population

CALCULATION OF GENERAL TRANSPORTATION DISADVANTAGED POPULATION

Charlotte County					Census Data From: 2024			
County Pop. By Age	Total Pop by Age	% of Total Pop	Population Below Poverty Level by Age	% of Total Pop Below Poverty Level by Age	Total Population with a Disability by Age	% of Total Pop with a Disability by Age	Total Pop with Disability and Below Poverty Level by Age	% Total Pop with a Disability and Below Poverty Level by Age
< 5 Years of Age	4,725	2.3%	908	0.4%	0	0.0%	0	0.00%
5-17	19,623	9.4%	987	0.5%	630	0.3%	0	0.00%
18-34	26,537	12.8%	3,482	1.7%	2,864	1.4%	498	0.24%
35-64	73,898	35.6%	5,938	2.9%	9,797	4.7%	1,465	0.71%
Total Non Elderly	124,783	60.1%	11,315	5.4%	13,291	6.4%	1,963	0.94%
65-74	42,667	20.5%	2,944	1.4%	7,168	3.5%	292	0.14%
75+	40,306	19.4%	3,791	1.8%	14,746	7.1%	1,743	0.84%
Total Elderly	82,973	39.9%	6,735	3.2%	21,914	10.5%	2,035	0.98%
Total	207,756	100%	18,050	8.7%	35,205	16.9%	3,998	1.92%

Double Counts Calculations		
E - Estimate non-elderly/disabled/ low income	From Base Data (I11)	1,963
B - Estimate non-elderly/ disabled/not low income	Subtract I11 from G11	11,328
G - Estimate elderly/disabled/low income	From Base Data (I14)	2,035
D - Estimate elderly/ disabled/not low income	Subtract I14 from G14	19,879
F - Estimate elderly/non-disabled/low income	Subtract I14 from E14	4,700
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C14	56,359
C - Estimate low income/not elderly/not disabled	Subtract I11 from E11	9,352
Total - Non-Duplicated		105,616

General TD Population		% of Total
Non-Duplicated General TD Population Estimate	105,616	50.8%



This methodology also defines the “critical need transportation disadvantaged (TD)” population as individuals who, due to significant physical limitations or limited financial resources, are unable to provide their own transportation or independently purchase transportation services. As a result, they rely on others to access essential services such as health care, employment, education, shopping, social activities, and other necessary daily activities. Because Census data does not distinguish between severe and non-severe disabilities, the following estimates are based on available 2024 American Community Survey data. Figures reflecting Charlotte County’s critical need TD population are shown in Table I-4.:

Table I-4 Critical Need TD Population

Charlotte County

Census Data from:

2024

County Pop. By Age	Total Population with a Disability by Age	% with a Severe Disability by Age	Total Population with a Severe Disability by Age	% of Total Pop with Severe Disability by Age	% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
< 5 Years of Age	0	4.20%	-	-		
5-17	630	4.20%	26	0.13%		
18-34	2,864	6.30%	180	0.68%		
35-64	9,797	13.84%	1,356	1.83%		
Total Non Elderly	13,291		1,563	1.25%	28.60%	447
65-74	7,168	27.12%	1,944	4.56%		
75+	14,746	46.55%	6,864	17.03%		
Total Elderly	21,914		8,808	10.62%	11.70%	1,031
Total	35,205		10,371	4.99%		1,478

Critical Need - Severely Disabled TD Population			
	Not Low Income	Low Income	Totals
Non-Elderly	1,116	447	1,563
Elderly	7,778	1,031	8,808
TOTAL	8,893	1,478	10,371

TRIP RATES USED	
Low Income Non Disabled Trip Rate	
Total	2.400
Less	
Transit	0.389
School Bus	0.063
Special Transit	0.049
	1.899
Severely Disabled Trip Rate	
Special Transit	0.049

Assumes		Low Income & Not Disabled = C + F		CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION	
27.2%	xx % without auto access	14,052	Calculation of Daily Trips		
		3,822			
100.0%	xx % without transit access	3,822	Calculation of Daily Trips		
		3,822			
		Total Actual Critical TD Population	Daily Trip Rates Per Person	Total Daily Trips	
		Severely Disabled	10,371	0.049	508
		Low Income ND	3,822	1.899	7,258
		Totals	14,193		7,766

2. Needs Assessment

Charlotte County Transit serves as the County's **Community Transportation Coordinator (CTC)** for the Florida Commission for the Transportation Disadvantaged (CTD) while also providing fare-free, door-to-door public transportation for all residents. Supported through funding from the **Federal Transit Administration (FTA)**, the **Florida Department of Transportation (FDOT)**, and the CTD, the system delivers coordinated transportation services that meet the mobility needs of both Transportation Disadvantaged (TD) riders and the general public.

Annual Operating Reports (AORs) continue to identify unmet transportation needs, particularly for medical appointments and employment-related trips. These findings reinforce the importance of regularly evaluating service coverage, operating hours, vehicle capacity, service frequency, regional connectivity, and coordination with other transportation providers to ensure the system continues to meet the evolving needs of the community.

Since service began in 2001, Charlotte County Transit has expanded its service area to improve access throughout the county, including recent extensions to the Burnt Store Road corridor and the Washington Loop area. The system has also increased flexibility by offering same-day trips whenever vehicle availability permits, improving access to essential destinations for riders with urgent transportation needs.

Demand for accessible transportation continues to grow. While approximately 30 percent of riders qualified as Transportation Disadvantaged when the service was established, current estimates

indicate that approximately 50.8 percent of Charlotte County residents meet TD eligibility criteria. Combined with the county's aging population and continued residential growth, this trend highlights the increasing need for reliable, coordinated transportation services.



The **2025 Transit Development Plan (TDP)** evaluated the feasibility of fixed-route transit; however, Charlotte County's low-density development patterns, dispersed destinations, and significant older adult population continue to support a flexible, door-to-door service model as the most effective and efficient approach. Many riders experience mobility limitations or other barriers that make walking to fixed-route bus stops impractical, particularly during periods of extreme heat, heavy rainfall, or when carrying groceries, medical equipment, or other personal items.

Looking ahead, Charlotte County remains committed to enhancing mobility by maintaining and expanding transportation services as funding becomes available. Through continued investment and the pursuit of federal and state grant opportunities, the County will focus on improving access to healthcare, employment, education, nutrition programs, shopping, and other essential community destinations while ensuring transportation remains safe, accessible, and responsive to the needs of its residents.

3. Barriers to Coordination

Natural disasters remain one of the greatest challenges to transportation coordination in Charlotte County and throughout Southwest Florida. Hurricanes, flooding, and other severe weather events can disrupt roadways, damage infrastructure, interrupt communications, and limit agencies' ability to coordinate services and respond effectively. Charlotte County's geography further complicates transportation planning. The Peace River, Myakka River, and Charlotte Harbor create natural barriers between Mid County, South County, and West County, requiring many trips to travel through limited roadway connections. While these waterways contribute to the area's quality of life and tourism economy, they also increase vulnerability during evacuations, service disruptions, and post-disaster recovery. As a result, transit planning must balance daily mobility needs with emergency preparedness, resilience, and long-term hazard mitigation. Economic conditions also continue to influence the delivery of transit services. Uncertainty in state and local funding, fluctuating fuel prices, rising operating costs, and increasing expenses for driver wages, insurance, and vehicle maintenance all place pressure on service delivery. These challenges are compounded by a limited pool of contractors and an ongoing

shortage of both professional and volunteer drivers, an issue affecting transit providers nationwide.

Charlotte Rides' demand-response service remains the primary means of providing mobility for residents, particularly older adults, individuals with disabilities, and other transportation-disadvantaged populations. While this service model offers flexibility and has been successful for residents' transportation needs, it also presents coordination challenges because it lacks the consistent network and transfer opportunities associated with fixed-route transit. Recognizing the County's continued growth and evolving transportation needs, the Charlotte County Board of County Commissioners approved a feasibility study in May 2026 to evaluate the potential implementation of fixed-route transit. The study's findings will help guide future service planning and identify the transit options that best meet the community's short- and long-term mobility needs.

D. Goals, Objectives, And Strategies

All goals are implemented as of July 1, 2026 (the effective date of the MOA).

Goal	Objective	Strategy	Measure
1. Strengthen Coordination and Service	Improve cross-agency coordination to support expansion and deliver an integrated TD system and meet all MOA coordination responsibilities.	1. Maintain communication with governments, planning agencies, LCB, and human-service agencies.	Quarterly coordination logs and meeting minutes.
		2. Coordinate with regional CTCs for inter-county trip sharing.	Monthly inter-county trip statistics and documentation.
		3. Conduct regular outreach with healthcare, nutrition, and social service agencies to align services with client and community needs	Outreach logs showing agency engagement and coordination activity.
		4. Maintain MOUs/contracts with other transportation providers ensuring compliance with MOA standards.	Updated MOUs/contracts maintained on file and review annually.
		5. Ensure coordination practices meet MOA expectations for documentation, reporting, and service integration.	Annual TDSP updates demonstrating MOA aligned coordination efforts.
2. Provision for reliable, accessible, and expanded transportation needs	Expand and enhance mobility, service capacity, and accessibility to meet increasing transportation disadvantaged needs in Charlotte County	1. Identify growth areas annually and adjust service coverage accordingly, consistent with MOA requirements for planning and coordination.	New service zones/areas added as possible and need arises.
		2. Expand trip capacity using new resources, subcontractors, and grants.	Percent reduction in unmet/denied trip requests.
		3. Increase service levels in high demand residential, medical, and employment areas identified through needs assessments and LCB input.	AOR trip volume and service statistics (capacity, productivity, denials).

		4. Coordinate with County Planning and MPO on development driven service needs consistent with MOA expectations	Number of development-related service adjustments implemented annually
		5. Maintain an ADA accessible, climate controlled, safe, and reliable fleet	Fleet ADA compliance and vehicle condition ratings.
		6. Improve operational efficiency with enhanced scheduling, routing, and Realtime data tools to meet MOA reporting requirements	Customer satisfaction from passenger surveys.
3. Maximize efficient and compliant use of financial, operational, and capital resources	Maximize efficient use of resources.	1. Monitor costs and submit grant applications (e.g., 5310).	Cost reports; grant submissions.
		2. Pursue funding	Grants awarded.
		3. Use volunteer agencies to support cost-effective service.	Volunteer participation logs.
		4. Plan for accessible fleet replacement/expansion.	Capital plan updates.
		5. Ensure compliance with FDOT maintenance requirements.	Maintenance inspection logs.
		6. Report annual voluntary TD Trust Fund contributions.	January LCB report.
4. Marketing & Outreach	Promote TD transportation services within available resources to ensure riders and the community understand how to access and use services	1. Provide updated service information on the County website and distribute current brochures and materials to assist riders.	Track outreach activities, number of engagements, and website activity.
		2. Provide required rider information (brochures, reservation details, complaint and grievance procedures) on all vehicles and at partner agencies,	Track number of printed and distributed materials and document distribution frequency.

		with regular replenishment.	
		3. Participate in community outreach events and maintain up to date public information tools.	Track event participation, number of community engagements.
5. Safety	Maintain safe TD system.	1. Update Safety and Security Program Plan (SSPP) annually.	Annual SSPP update record.
		2. Promote safety culture for all personnel.	Training and incident logs.
		3. Conduct recurring safety/maintenance inspections.	Safety inspection logs.
		4. Maintain hazard-free, drug-free workplace.	Drug tests; compliance records.
		5. Ensure SSPP training/testing compliance.	Training logs.
		6. Verify subcontractor liability coverage.	Insurance certificates.
		7. Maintain ≤ 2 chargeable accidents per 100,000 miles.	Accident rate reports.
6. Quality of Service and performance monitoring	Ensure consistently high service quality through ongoing customer feedback and performance monitoring	1. Conduct rider surveys and present results to the LCB to monitor service quality improvements	Survey results.
		2. Conduct agency satisfaction surveys to assess coordination effectiveness.	Agency survey records.
		3. Maintain $\leq 1\%$ complaint rate.	Complaint tracking reports.
		4. Maintain ≤ 5 mechanical failures per 100,000 miles.	Road call logs.
		5. Provide quarterly complaint/grievance summaries.	LCB quarterly reports.
		6. Display TD Helpline info in all vehicles.	Vehicle signage audits and compliance records.
7. Standards & Policies	Ensure CTD and local standards compliance.	1. Conduct annual TDSP review.	Annual review logs.
		2. Review and update LCB By-Laws and Grievance Procedures.	Policy files.
		3. Adopt LCB-approved policies into TDSP.	Policy adoption records.

E. Implementation Schedule

The implementation schedule is directly tied to the goals, objectives, and strategies. Although some of the operations are ongoing, others are date specific, either (1) annually at the end of the fiscal year, (2) a certain deadline date each year, (3) at every one of the four regular LCB meetings, or (4) annually at a specific LCB meeting (*see Section D, each strategy*). Most costs associated with the accomplishment of these tasks are covered in staff, planning, operations and maintenance grant funding or match from each of the levels of government.

Strategies	Responsible Party	Frequency/ Dates
1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 3.2, 3.3, 3.4, 3.5 4.1, 4.2, 4.3, 5.2, 5.4, 5.5, 5.6, 5.7, 6.6, 7.3	CTC	Ongoing
3.1	CTC	Mid-December (annually)
3.6	Planning Agency	January LCB meeting (annually)
5.1	CTC	biennially
5.3	CTC	annually
6.1	Planning Agency (and contractors)	At time of major TDP review (by August 2019 and every subsequent 5 years) and as needed
6.2	Planning Agency/CTD QAPE staff	At time of CTC QAPE (and as needed)
6.5	CTC/Planning Agency	All regular LCB meetings (Jan, May, Sept, and Nov)
6.3, 6.4	CTC	At the end of each fiscal year
7.1	CTC/Planning Agency/LCB	Annually, prior to July 1
7.2	Planning Agency/LCB	Annually

As discussed, this document meets specific federal requirements for FTA Section 5310 funding and at times, other federal programs. Accordingly, it serves as Charlotte County's Transportation Disadvantaged Service Plan, as well as its Coordinated Public Transit – Human Services Transportation Plan. It is anticipated that it will be utilized until June 30, 2032, when a new MOA for Charlotte County CTC will take effect and a major TDSP document will be provided to the Commission for the Transportation Disadvantaged within 120 days of MOA execution. Annual updates will be provided.

II. SERVICE PLAN

A. Operations Element

1. Types, Hours, and Days of Service

Charlotte Rides provides non-discriminatory ambulatory and wheelchair-accessible transportation services through a combination of subscription and on-demand, curb-to-curb service. Subscription service supports recurring trips to employment sites, schools, congregate dining programs, mental health services, grocery stores, and other common destinations. On-demand service is available for medical appointments, employment programs, and other life-enhancing activities.

To ensure safe, reliable, and consistent service, the Community Transportation Coordinator (CTC) administers a comprehensive System Safety Plan. Contract requirements include compliance with Federal Transit Administration (FTA) drug and alcohol testing regulations, on-time performance standards, and service quality monitoring.

Operational policies address key areas including passenger assistance, children and escorts, contracted driver uniforms, complaints and grievances, on-time performance, no-shows, accident reporting, vehicle maintenance, trip prioritization, substance abuse, and bloodborne pathogen procedures. The Local Coordinating Board has also established performance standards for accidents, road calls, and customer complaints.

2. Accessing Services

A Missed Trip policy has been developed by Charlotte Rides as departmental policy. A copy of the Missed Trip policy appears in **Appendix C**. An advanced cancellation occurs when a client cancels a trip via the Charlotte Rides mobile app or calls to give advance notice of at least one (1) hour prior to the operation of a trip. Recent software improvements and the Charlotte Rides mobile app have made same day trips possible.

Transit office hours are from 8 am- 5 pm Monday through Friday; and the transportation hours are from 6:30AM to 6:00PM Monday through Friday; 9:00AM to 6:00PM on Saturday (limited-service area); and no Sunday service. Charlotte Rides is closed on all federal and county recognized holidays. All service calls come in on 941.575.4000.

Eligibility for TD Trust funds, at this writing, is determined by the established criteria. New clients may apply completing and submitting a completed TD application which is assessed by the Transit Division for program eligibility (**see Appendix L**). Eligibility requirements for the use of Transportation Disadvantaged funded trips were adopted by the LCB on May 11, 2017.

Generally stated the policy is that no other funding for the trip is available, and no friends or relatives are available to provide transportation. A complete policy is included in **Appendix D**. Certifications will be reviewed every three years.

A copy of the Charlotte County Prioritization Policy for Non-Sponsored Trips approved by the Local Coordinating Board appears in Appendix E. The prioritization policy was approved at the May 11, 2017, meeting of the Charlotte County Transportation Disadvantaged Local Coordinating Board and reads in part:

Utilization of Charlotte County Transit Division resources, including but not limited to, personnel, equipment, and funding sources used in the provision of rides for Transportation Disadvantaged individuals in Charlotte County shall be prioritized as follows:

- Priority 1 Individual Medical Trips
- Priority 2 Group Trips for Groceries and Congregate Meals
- Priority 3 Trips for Employment Purposes
- Priority 4 Trips for Adult Education
- Priority 5 Social and Non-Essential Shopping

Individuals prioritized in this fashion shall be afforded rides within the limits of Charlotte County Transit Division's ability to deliver service in an ambulatory or wheelchair mode without regard to age, sex, race, or ethnic origin.

CPR Medical Transportation LLC- effective October 1, 2025
6111A Clark Center Ave
Sarasota, FL 34238

HOPE PACE HOSPICE
3280 Tamiami Trail, Suites 45–47,
Port Charlotte, FL 33952
[\(239\) 985-6400](tel:2399856400)

Hope Hospice is a nonprofit hospice and palliative care provider that serves Charlotte County and the surrounding Southwest Florida region as part of Hope Healthcare. Although its main administrative offices are in Fort Myers, it provides hospice services to residents

throughout Charlotte County, including Port Charlotte, Punta Gorda, Englewood, and surrounding communities.

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

4. Public Transit Utilization

Charlotte County has developed a general public transit paratransit system, and service became available January 2, 2001. Charlotte Rides provides curb-to-curb, public transit service in most areas of Charlotte County. Much of the design of this service was based on the existing TD system, and ADA trips are not an issue, because such trips are handled in mainstream service delivery. Vehicles are accessible, making this feasible.

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

5. School Bus Utilization

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

6. Vehicle Inventory

The February 19, 2026, inventory for the TD program is located in **Appendix G** of this document.

7. System Safety Program Plan Certification

A copy of the 2025 certification is available on the following page.

CHARLOTTE COUNTY TRANSIT
ANNUAL SAFETY CERTIFICATION AND ADOPTION

February 12, 2026

In accordance with FTA 49 CFR Part 673 Final Rule, the bus system named above hereby adopts and certifies to the following:

- a. The adoption of the Charlotte County Transit Safety Management System (SMS) for calendar year 2026.
- b. Compliance with adopted standards of the Public Transportation Agency Safety Plan (PTASP), for calendar year 2026.
- c. Compliance with all applicable safety measures in accordance with Rule 14-90 F.A.C. as amended.

Maddox, Heidi Digitally signed by Maddox,
Heidi
Date: 2026.02.12 15:09:34
-05'00'

Heidi Maddox, Transit Operations Manager, Accountable Executive

Maddox, Heidi Digitally signed by Maddox,
Heidi
Date: 2026.02.12 15:09:47 -05'00'

Heidi Maddox, Transit Operations Manager, Accountable Executive &
Charlotte County Transit Division Designee per Resolution 2021-153

8. Intercounty Services

Charlotte County Board of County Commissioners has an Agreement with Sarasota County Area Transit Breeze to service the Englewood portion of Charlotte County. Agreement is available upon request.

9. Emergency Preparedness and Response

Charlotte Rides plays a major role in the Emergency Management Evacuation Plan for Charlotte County. In the event of a hurricane or other disaster, Operational staff sits in the Emergency Operations Center and manages the transportation for evacuations.

10. Educational Efforts/Marketing

Charlotte Rides uses a variety of outreach and communication methods to ensure residents are aware of the public transportation services available. Referrals come from community partners, healthcare providers, social service agencies, public meetings, word of mouth, the County website, and community events. Charlotte Rides also provides informational brochures and digital resources that explain available services, eligibility requirements, and how to schedule trips.

A dedicated **Community Outreach Team** plays an important role in connecting with residents throughout the county. The team focuses on public education, community engagement, and building partnerships with local organizations to increase awareness of Charlotte Rides' services. Staff regularly participate in health fairs, senior expos, neighborhood events, food distributions, and presentations to civic groups. Helping residents understand how public transit can improve access to employment, healthcare, shopping, education, and other essential destinations.

Additionally, printed materials are distributed through public and private agencies, while staff continue to collaborate with the Charlotte County-Punta Gorda Metropolitan Planning Organization (MPO) and other community partners during Transit Development Plan (TDP) and Long-Range Transportation Plan (LRTP) public engagement activities.

Technology has also improved access to public transit services in Charlotte County. The **Charlotte Rides** mobile app allows riders to schedule trips, cancel reservations, monitor their bus in real time, and receive trip notifications directly from their smartphone. Combined with traditional phone reservations and customer service support, these tools make Charlotte Rides' safe, local, and free service more accessible and convenient for residents throughout the service area of the county.

11. Acceptable Alternatives

The general public paratransit system is operational and functioning under an updated System Safety Program Plan, which serves both programs.

12. Service Standards

Service standards ensure that quality and uniform service will be provided for the TD population. Many of the standards have been jointly developed by the LCB, the Planning Agency and the CTC, approved by the Board and are consistent with those of the CTD. Other standards are local or internal policies of the CTC. These standards provide the basis for evaluation of the CTC by the LCB and the evaluation of the contracted operators by the CTC.

(1) Drug and Alcohol Testing. Pre-employment, randomization, post-accident and reasonable suspicion drug and alcohol testing shall apply to all safety sensitive job positions, including contracted positions.

(2) Monitoring Requirements. The LCB and the CTD, with the assistance of Planning staff, monitors various aspects of the CTC through an annual evaluation, reports on trends and tracking of complaints and grievances, as well as other service areas of the CTC as requested by the LCB. The CTC monitors the contracted operators through random spot checks and an annual evaluation.

(3) Driver Identification. Drivers are required to wear a picture identification with their name and Contractor's name on their uniforms at all times while in service. Drivers will identify and announce themselves and the organization in a professional manner to new customers.

(4) Seating. Vehicle seating shall not exceed the manufacturer's recommended seating capacity.

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

(6) Smoking Policies. Drivers and passengers shall be prohibited from smoking on the vehicle and within 25' feet of a vehicles. No Smoking signs are prominently placed in all vehicles.

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

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

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

(10) Escorts and Children. All children under the age of 13 are required to have one parent, guardian, or competent adult escort accompany them. Parents who are passengers may bring their dependent children under the age of 13 with them, as seats are available. Aides or medical escorts required for personal safety, health or well-being of passengers as well as friends and relatives shall be transported when included on the original trip request.

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

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

(13) Pick-up Windows. There is a 30-minute pick-up window for all trips within the service area.

(14) On-Time Performance. The CTC has adopted an internal policy for on-time performance. The CTC established a 95% on-time performance standard. The on-time policy is found in the Contract between Charlotte County BCC and C.P.R. Medical Transportation, LLC (“Contractor”).

(15) Advance Reservation Requirements. Same day trip reservation requests will be accommodated based upon availability.

(16) Complaints. Any consumer concern involving timeliness, vehicle condition, quality of service, personnel behavior, and other operational policies are considered a complaint to be addressed by appropriate staff. Minor verbal complaints can be handled by various staff immediately. More serious verbal, written, and governmental complaints are to be addressed within ten working days by the Transit Operations Manager. The service report form provided by the CTC is utilized by the Transit Division in the resolution of complaints. Grievance standards have been adopted by the LCB and are referenced in Section I, D, Strategy 6.3.

(17) Accidents. It is the responsibility of the Contractor to respond to and prepare Accident Reports and subsequent investigations. Accidents will be reported to the Risk Management Division and FDOT and FTA as applicable. Accident standards have been adopted by the LCB and are located in Section I, D, Strategy 5.8.

(18) Roadcalls. Roadcall standards have been adopted by the LCB and are located in Section I, D, Strategy 6.4.

- (19) Public Transit Ridership.** In January 2001, Charlotte County started public paratransit service.
- (20) Call-Hold Time.** All calls placed to Charlotte Rides be placed in a queue, and every effort is made to respond to the caller in a timely manner. Call hold time is monitored by the Cisco telephone system used by Charlotte County.
- (21) Transportation Prioritization Policy.** Resources of Charlotte Rides for TD trips within the service area are to be utilized according to the following priority ranking:
(1) Individual medical trips, (2) Group trips for groceries and congregate dining, (3) Trips for employment purposes, (4) Trips for adult education, and (5) Social and non-essential shopping.
- (22) Out-of-Service Area Trips.** As of June 5, 2021, SCAT announced after an 18-month evaluation of their Englewood operations, the closure of Route 16 and Route 26 and inclusion of those areas in what is now called “OnDemand by Sarasota County.”
- (23) Transit Clients with Medical Conditions.** The Charlotte County Transit Division accepts TD clients who are ambulatory or in wheelchairs in a non-discriminatory manner. Every effort will be made to provide safe and dignified service.
- (24) Vehicle Maintenance.** Vehicles are to be cleaned weekly and to be checked daily for safety, passenger comfort, performance and appearance. The use of any vehicle will be suspended if any safety component is deemed a failure during a pre-trip inspection or during service.
- (25) Missed Trip Policy.** A TD client can cancel a trip up to one hour before the scheduled trip without being considered a no-show. However, if a client does not cancel a trip at least one hour prior to the scheduled trip, or is not at the appointed place of pick-up, and these circumstances occur three times in six months, the client may lose the privilege of TD services. Those clients utilizing the service for life-sustaining medical purposes will not be suspended for no-shows.
- (27) Eating and Drinking.** Consuming food or drinking any beverage is not allowed on Charlotte Rides’ vehicles, unless it is an approved reasonable modification.
- (28) Two-way Communication.** All Charlotte Rides’ vehicles will be equipped with a two-way communication system in good working order.

- (29) Air Conditioning/Heating.** All Charlotte Rides' vehicles will be equipped with air conditioning and heating. Any vehicle not meeting this requirement will be scheduled for repair.
- (30) First Aid and CPR.** Charlotte Rides' requires that all contracted drivers maintain current CPR/First Aid certifications.
- (31) Driver Criminal Background Screening.** Charlotte Rides and contract operators are in compliance with the FTA, FDOT, and the various funding agencies, as reflected in the System Safety Plan.
- (32) Security Cameras.** All Charlotte Rides' vehicles are equipped with cameras.

13. Local Complaint and Grievance Procedure/Process

The Charlotte County Transportation Disadvantaged Local Coordinating Board annually approves policies and procedures for a complaint to grievance process. The process establishes a formal procedure if a complainant requests a grievance procedure. Initially, 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. All Grievance procedures are outlined and included in the **Grievance package**.

B. Cost/Revenue Allocations and Rate Structure Justification

Service Rates Summary

Charlotte Rides receives operating and capital funding from a combination of local, state, and federal sources, including the Charlotte County Board of County Commissioners, the Florida Department of Transportation (FDOT), the Florida Commission for the Transportation Disadvantaged (CTD), and the Federal Transit Administration (FTA).

CTD Trip and Equipment Grant funding is used to support eligible non-sponsored transportation services in accordance with program requirements. Transportation services are provided in a fair and equitable manner, with available capacity allocated on a first-come, first-served basis. Funding sources are administered in compliance with applicable grant requirements and are not assigned directly to individual riders, client groups, or purchasing agencies. Charlotte Rides operates as a **fare-free** service for both the general public and eligible TD riders.

Individuals requesting TD services are screened to determine eligibility through a non-discriminatory assessment process.

FDOT and FTA Section 5311 funding supports public transportation services in the county's rural areas and may be used for either TD or general public demand-response trips based on local transportation needs. Local funding provided by the Charlotte County Board of County Commissioners supports transit operations and helps sustain the County's fare-free service. FTA Section 5310 funding is used to improve transportation services for older adults and individuals with disabilities.

Charlotte Rides actively pursues Federal and State grant funding opportunities to support the continued operation, improvement and expansion of public transportation services throughout the service area in Charlotte County. Charlotte Rides applies for a variety of funding opportunities administered through the FTA, FDOT and the CTD. These funding sources include formula and discretionary programs that support transit operations, mobility services, capital investments and service enhancements.

Grant funding opportunities pursued by Charlotte Rides include the FTA Section 5307 Urbanized Area Formula Program, Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program and Section 5311 Rural Area Formula Program. Charlotte Rides also applies for applicable FDOT and State programs, including State Block Grant, Service Development Program, Innovative Service Development Program and TD funding opportunities. These grant funding programs support continued operation, mobility improvements, enhanced service delivery, vehicle and equipment maintenance and replacement and the expansion of services to meet the evolving transportation needs of Charlotte County residents.

FARE INCREASE ELEMENT

In 2016, Resolution 2016-071 established passenger fares of \$2.00 per trip and \$1.00 for passengers eligible under the Transportation Disadvantaged Program. During the COVID-19 pandemic, passenger fares were suspended under emergency authority. In December of 2025 the Charlotte County Board of County Commissioners adopted a resolution to formally establish **fare-free** service.

III. QUALITY ASSURANCE

COMMUNITY TRANSPORTATION COORDINATOR EVALUATION PROCESS

The Quality Assurance Element contains the policies to be utilized by the LCB to monitor and evaluate the coordinated services provided by the CTC. These are based upon the CTD and locally established service standards, the local grievance procedure/process and the evaluation processes.

Evaluation Processes

This section provides information concerning the evaluation processes utilized at the local level to ensure quality of service.

- **CTC Evaluation Process**

Introduction

An annual performance evaluation of the CTC is required by Chapter 427 F.S. and 41-2, F.A.C. The annual evaluation is conducted by the LCB with the assistance of the Official Planning Agency (OPA). The results of the annual evaluation and recommendations are forwarded to the Commission for the CTD for final disposition.

Purpose

The purpose of conducting the annual performance evaluation is to ensure that the most cost-effective, efficient, and available transportation service is being provided and planned for the TD population. The performance evaluation is both general and specific relative to CTD and local service standards.

Process

The LCB reviews the annual evaluation of the CTC. The areas of cost, competition and coordination are evaluated.

The annual evaluation is conducted utilizing the Commission for the Transportation Disadvantaged *QAPE/LCB CTC Evaluation Workbook*. This evaluation workbook provides a formal process for evaluation of the performance of the CTC and its operators. It contains several worksheets for utilization by the LCB in conducting the evaluation.

The CTC evaluation is normally conducted annually to cover the previous year's performance. Information required to conduct the evaluation is obtained from the most recent data available (i.e., Annual Operating Report, AOR). However, a CTC Evaluation is not conducted during the final year of the MOA, when the LCB and MPO Board are involved with consideration of the recommendation of a CTC for the next five-year period.

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

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

Included in the CTC Review are a bus or van ride and surveys of riders, contract operators and purchasing agencies. The information and findings are in a format that allows the LCB members to review performance and make appropriate decisions. The LCB analyzes the findings of the evaluation at a regularly scheduled LCB meeting. The CTC Evaluation is forwarded to the CTD for final disposition. The most recent CTC Evaluation conducted February 24-26, 2025 can be found in Appendix J.

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

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

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

vehicle maintenance records, daily vehicle inspection files, vehicle emergency and safety equipment inspection, and compliance with Drug Free Workplace Act.

An additional system for monitoring passenger satisfaction with the CTC, including contracted drivers, is a passenger satisfaction survey and analysis. These surveys are administered on a random basis and is ongoing.

- **Coordination Contract Evaluation Criteria**

All coordination contracts and evaluations of those contracts are performed by the CTC utilizing County and Commission standards for the evaluation. LCB members have the opportunity to discuss this information on a quarterly basis as part of CTC's quarterly report, a permanent part of each LCB meeting agenda.

- **Additional Reviews**

On April 29, 2019, CTD contractor Thomas Howell Ferguson, PA performed compliance consulting services as summarized in FCTD's 2017-18 compliance monitoring tool for the period of July 1, 2017 through June 30, 2018.

The Charlotte County Transit Division underwent FTA's FY 2019 Triennial Review on August 15-16, 2019. It was conducted by Milligan & Company, LLC. Additionally, an FDOT/FTA Section 5311 and 5307 Triennial Review was held on July 23-24, 2019. An FTA Drug and Alcohol (D&A) Review was held on May 5-7, 2021.

- **Planning Agency Evaluation Process**

The Charlotte County-Punta Gorda Metropolitan Planning Organization, as the Official Planning Agency, has been evaluated most recently by the CTD's contractor, Thomas Howell Ferguson. Additionally, the arrival of the Planning Grant Invoice's Excel spreadsheet is a deliverables-based tool that CTD Project Manager's use to ensure that the MPO staff provides all required Planning Staff and LCB documentation prior to invoice processing.

- **CTC Evaluation Materials**

A copy of the latest annual CTC Evaluation is found in Appendix J.

APPENDICES

APPENDIX A – Charlotte County Transit Brochure (also available in Spanish)

Charlotte Rides

— App Setup —

- Download the **Charlotte Rides** app in the Google Play Store (Android) or the App Store (iPhone).
- Call **941.575.4000**, option 1, to receive your login information.
- Allow the app to **access your location**.
- Select **"Book a trip"** to plan your next trip.
- Select **pickup** and **drop-off** locations.
- Choose a **date** and **time** for your trip.
- Schedule by requested pickup time or by requested drop-off time. Click next.
- Traveling with a **mobility aid**? Select your aid in the menu.



For assistance with the mobile app, call **941.575.4000**

Transportation Disadvantaged — Program —



For information on the
Transportation Disadvantaged
Program, call

941.575.4000

or visit

CharlotteCountyFL.gov/transit



In accordance with Title VI of the Civil Rights Act of 1964, Charlotte Rides provides services and operates its programs without regard to race, color, or national origin.

Traducción al español disponible a pedido.

This brochure is distributed by
Charlotte County Government.



941.575.4000

CharlotteCountyFL.gov/transit

Charlotte Rides

Charlotte County's **FREE** Shared-Ride, Curb-to-Curb Transportation Service

Reservations

Trips are first-come, first-served.
To request a trip, download the
Charlotte Rides app
or call **941.575.4000**, option 1.

Phone reservations are taken **Monday through Friday**, from **7:00 a.m. to 5:30 p.m.**

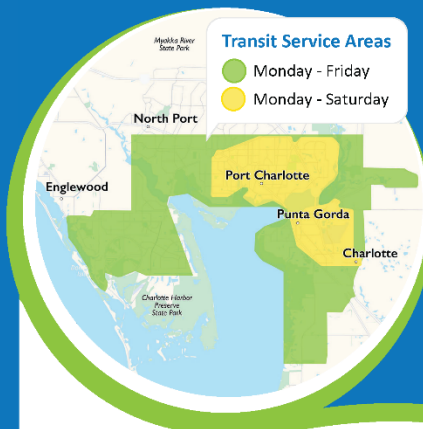
Please be ready to answer the following:

- First and last name
- Date of travel
- Number of passengers and names
- Requested destination arrival time
- Destination name and address
- Pickup location

Passengers will receive a 30-minute pickup window based upon the requested destination arrival time.

Reservations must be canceled at least one hour before the scheduled pickup window or they will be recorded as a "Missed Trip."

Please see the Passenger Rules and Regulations and Missed Trip Policy at CharlotteCountyFL.gov/transit.



Hours of Service

Monday - Friday 6:30 a.m. to 6:00 p.m.

Saturday 9:00 a.m. to 6:00 p.m.

Saturday service is restricted to a limited area.

Transportation is not provided on Sundays or holidays recognized by Charlotte County.

The service area consists of most of Charlotte County and includes the Charlotte County portion of Englewood, Port Charlotte, and Punta Gorda.



GET THE APP

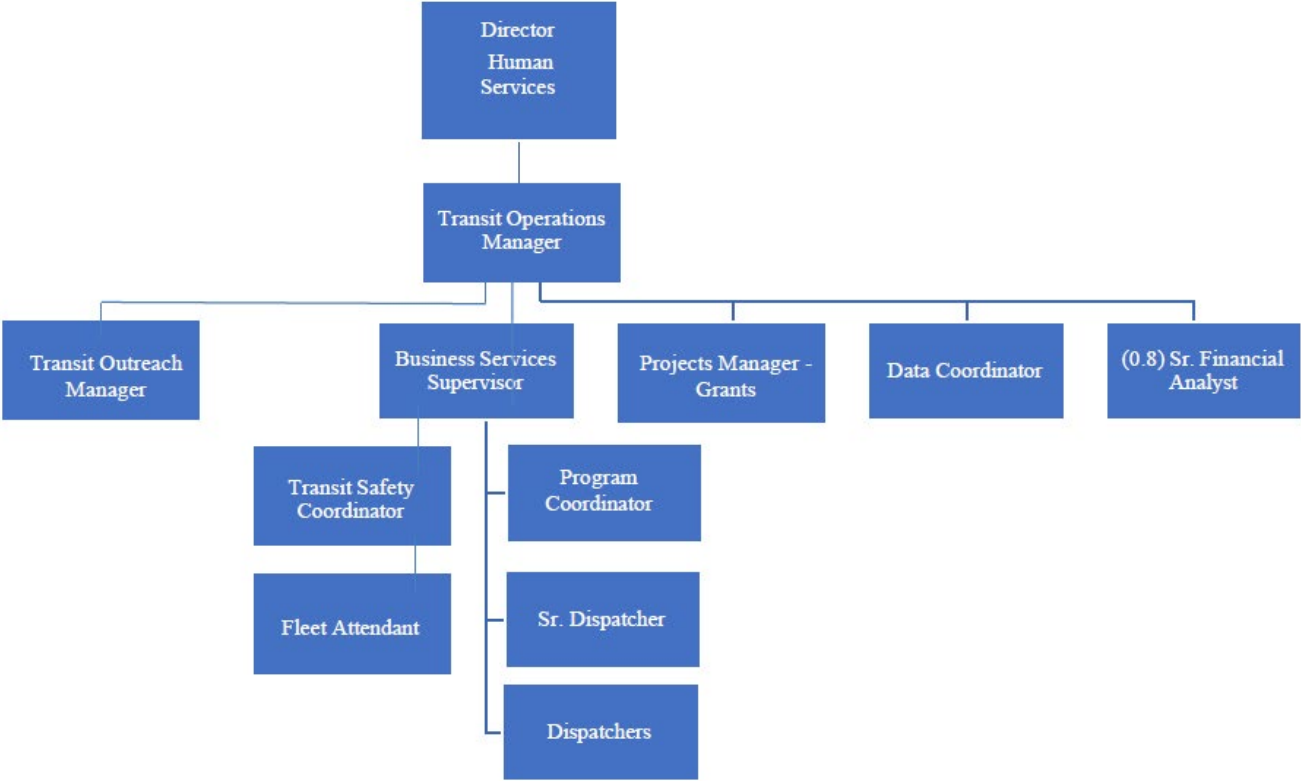


Charlotte Rides vehicles are fully accessible, with lifts that make it easy to board in a wheelchair, on a scooter, or with a walker.

APPENDIX B – Charlotte Rides Organization Chart



Effective 9/1/2026



APPENDIX C – Charlotte Rides Missed Trip Policy



[Spanish](#)



[French-Creole](#)

Effective
2/1/2025



Effective
2/1/2025

Charlotte County Transit Missed Trip Policy

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

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

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

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

Terms and Definitions:

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

determine the passenger's needs, the driver will not cancel any other trips booked for the passenger that day; this is the passenger's responsibility.

- **Missed Trips:** any no-show, late cancellation, or cancel at door trips.
- **Missed Trips Beyond a Passenger's Control:** This is when a trip is missed for reasons beyond the passenger's control. These include events such as a sudden illness, a family or personal emergency, an appointment delay, or another unforeseen reason where it is not possible to call Charlotte County Transit to cancel the trip in time or to take the trip when the driver arrives as scheduled, passengers should still make every effort to cancel scheduled trips in a timely manner. It is the passenger's responsibility to provide Charlotte County Transit the reason for not canceling a trip as soon as possible. Missed trips beyond a passenger's control will not be considered missed trips. If a missed trip is due to a passenger receiving life-sustaining treatment, such as kidney dialysis, Charlotte County Transit will not consider the trip a missed trip.

1. Cancelling Scheduled Trip:

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

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

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

Suspension of ALL services: While on suspension, ALL services offered by Charlotte County Transit are suspended from use, including but not limited to:

- Reservation line – Calling the reservation line for any reason is prohibited while on suspension.
- Reservations - No trips shall be booked during suspension, even trips to occur after suspension period.

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Effective
2/1/2025

- Charlotte Rides Mobile app – Mobile app access will be suspended, and no trips shall be booked.

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

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

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

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

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

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

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

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

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

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Effective
2/1/2025

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

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

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Appendix D – Charlotte County Eligibility Guidelines For Transportation Disadvantaged



CHARLOTTE COUNTY TRANSIT

Charlotte County Transit Division
25490 Airport Road
Punta Gorda, FL 33950
(941) 575-4000

CHARLOTTE COUNTY ELIGIBILITY GUIDELINES FOR TRANSPORTATION DISADVANTAGED

“Transportation Disadvantaged” service is available in all Florida counties to “those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk as defined in s. 411.202” per F.S. 427. One may be eligible for Transportation Disadvantaged (TD) services under the following criteria:

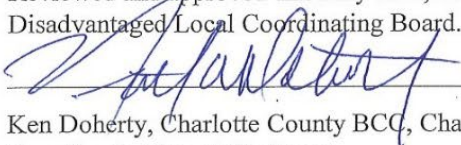
1. No other funding is available to pay for the requested trip.
2. One or more of the following criteria are met:
 - Physical or mental disability, as outlined in the Americans with Disabilities Act of 1990 (ADA); or
 - Age (60 or older); or
 - Individual and household income status must be 125% of the Federal Poverty level or less.
3. The individual is unable to transport themselves or to purchase transportation.

Charlotte County Transit has adopted these criteria to determine eligibility for non-sponsored TD clients and uses a formal process that substantiates an applicant’s ability to meet the TD eligibility criteria. The Charlotte County Transit Division will review the written application and may conduct an interview, when appropriate, to verify the applicant’s eligibility.

It is imperative that the reader recognize that Federal Poverty guidelines change each year, that agency funding is often subject to change on short notice, some referring agencies change their guidelines for eligibility, and that the Local Coordinating Board (LCB) may change prioritization.

The trip destination priorities are as agreed to by the LCB. As of this writing those prioritizations are individual medical trips, group trips for groceries and congregate dining, trips for employment purposes, trips for adult education, social and non-essential shopping.

Reviewed and approved this May 11th, 2017 by the Charlotte County Transportation Disadvantaged Local Coordinating Board.



Ken Doherty, Charlotte County BCC, Charlotte County Transportation Disadvantaged Local Coordinating Board Chairman

Appendix E – Charlotte County Transportation Disadvantaged Prioritization Policy

Charlotte County Transit Division
25490 Airport Road
Punta Gorda, FL 33950
(941) 575-4000

CHARLOTTE COUNTY TRANSPORTATION DISADVANTAGED PRIORITIZATION POLICY

Utilization of Charlotte County Transit Division resources, including, but not limited to personnel, equipment and funding sources used in the provision of rides for Transportation Disadvantaged individuals in Charlotte County shall be prioritized as follows:

- Priority 1 - Individual Medical Trips
- Priority 2 - Group Trips for Groceries and Congregate Dining
- Priority 3 - Trips for Employment Purposes
- Priority 4 - Trips for Adult Education
- Priority 5 - Social and Non-Essential Shopping

Individuals prioritized in this fashion shall be afforded rides within the limits of the Charlotte County Transit Division's ability to deliver services in an ambulatory or wheelchair mode within the geographic limits of Charlotte County, without regard to age, sex, race, ethnic origin, religion, or disability (whether physical or mental).

Reviewed and approved this May 11th, 2017 by the Charlotte County Transportation Disadvantaged Local Coordinating Board.

A handwritten signature in blue ink, appearing to read 'Ken Doherty', is written over a horizontal line.

Ken Doherty, Charlotte County BCC, Charlotte County Transportation Disadvantaged Local Coordinating Board Chairman

APPENDIX F – Memorandum of Agreement

Contract # TD2601
Effective: 7/1/2026 to 6/30/2031

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.

Rev. 04/02/12

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.

Rev. 04/02/12

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.

ev. 04/02/12

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.

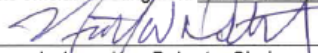
F. Notice and Contact:

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:

Charlotte County Board of County Commissioners

Agency Name
Hector Flores

Typed Name of Authorized Individual

Signature: 

Title: County Administrator

Attest:

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


By: _____ Deputy Clerk
A.A.G. 2025-141

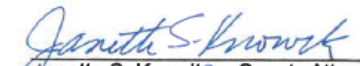
STATE OF FLORIDA, COMMISSION FOR
THE TRANSPORTATION DISADVANTAGED:


Typed Name of Authorized Individual

Signature: 

Title: Executive Director

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY:


Janette S. Knowlton, County Attorney
LR25-0399

APPENDIX G – Vehicle Inventory

Vehicle Inventory 8/15/2026

Agency Vehicle #	Year	Make	Model	Funding Source	Name of Title Holder
35632	2016	Taurus	Ford-Sedan	5307	Charlotte County BOCC
36242	2018	Ford	Transit Connect	5310	FDOT
36243	2018	Ford	Transit Connect	5310	FDOT
36328	2018	Ford	Transit Connect	5307	Charlotte County BOCC
36332	2018	Ford	Transit Connect	5307	Charlotte County BOCC
36347	2018	Ford	Transit Connect	5307	Charlotte County BOCC
36348	2018	Ford	Transit Connect	5307	Charlotte County BOCC
36506	2018	Ford	Transit Connect	5310	FDOT
37342	2019	Ford	Transit Connect	5339	Charlotte County BOCC
37343	2019	Ford	Transit Connect	5339	Charlotte County BOCC
37345	2019	Ford	Transit Connect	5339	Charlotte County BOCC
37438	2020	Ford	Odyssey	5339	FDOT
37440	2019	Ford	Transit Connect	5339	Charlotte County BOCC
37442	2019	Ford	Transit Connect	5339	Charlotte County BOCC
37450	2019	Ford	Transit Connect	5339	Charlotte County BOCC
37475	2020	Ford	Turtle Top	5339	FDOT
37481	2020	Ford	Turtle Top	5310	FDOT
37985	2021	Ford	Turtle Top	5310	FDOT
37986	2020	Ford E-450	Turtle Top	5339	Charlotte County BOCC
37987	2020	Ford	Transit Connect	5307	Charlotte County BOCC
37998	2021	Ford E-450	Turtle Top	5310	FDOT
37999	2020	Ford E-451	Turtle Top	5339	Charlotte County BOCC
38002	2020	Ford	Transit Connect	5307	Charlotte County BOCC
38003	2020	Ford	Transit Connect	5307	Charlotte County BOCC
38004	2020	Ford	Transit Connect	5307	Charlotte County BOCC
38005	2020	Ford	Transit Connect	5307	Charlotte County BOCC
38023	2021	Ford E-450	Turtle Top	5307	Charlotte County BOCC
38741	2025	Ford E-450	Cutaway	5339	Charlotte County BOCC
38742	2025	Ford E-450	Cutaway	5339	Charlotte County BOCC
38893	2025	Ford 350	Transit Connect	5339	Charlotte County BOCC
38894	2025	Ford 350	Transit Connect	5339	Charlotte County BOCC
39088	2026	Ford 350	Transit Minibus	5339	Charlotte County BOCC
39130	2026	Ford 350	Transit Minibus	5339	Charlotte County BOCC

APPENDIX H – Rate Model Calculations (Adopted May 1, 2025)

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

TD Rate Model 5 Year Comparison

	FY23	FY24	FY25	FY26	FY27
Ambulatory	\$ 20.44	\$ 30.37	\$ 29.20	\$ 33.61	\$ 32.97
Wheel Chair	\$ 35.03	\$ 52.06	\$ 50.06	\$ 57.62	\$ 56.52
Group per passenger	\$ 10.69	\$ 14.64	\$ 14.08	\$ 14.11	\$ -
Total Expenditures per rate calc	\$ 1,212,116.00	\$ 1,083,312.00	\$ 1,195,479.00	\$ 1,381,954.00	\$ 1,290,509.00
Budgeted Operating Rate Subsidy Revenue	\$ 182,800.00	\$ 182,800.00	\$ 284,999.00	\$ 384,490.00	\$ 448,460.00
Projected Passenger Miles	375,734	200,000	200,920	200,000	250,000
Projected Passenger Trips	45,846	30,000	30,000	30,000	22,000
Avg Passenger Trip Length miles	8.2	6.7	6.7	6.7	11.4
Group Load Rate persons	3.01	4.00	4.00	7.97	0.00
Rate per passenger trip if not subsidized	\$ 26.44	\$ 36.53	\$ 39.85	\$ 46.07	\$ 58.66

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

SECTION V: Rate Calculations for Multiple Services:

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

* Miles and Trips you input must sum to the total for all Services entered on the "Program-wide Rates" Worksheet, MINUS miles and trips for contracted services IF the rates were calculated in the Section II above

* Be sure to leave the service BLANK if you answered NO in Section I or YES to question #2 in Section II

RATES FOR FY: 2026 - 2027				
Ambul	Wheel Chair	Stretcher	Group	
		Leave Blank	Leave Blank	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	250,000	= 203,905 + 46,095 +		0
Rate per Passenger Mile =	\$2.98	\$5.10	\$0.00	\$0.00
		per passenger	per group	
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	22,000	= 17,042 + 4,958 +		
Rate per Passenger Trip =	\$32.97	\$56.52	\$0.00	\$0.00
		per passenger	per group	
Combination Trip and Mile Rate				
Ambul	Wheel Chair	Stretcher	Group	
		Leave Blank	Leave Blank	
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =				\$0.00
Rate per Passenger Mile for Balance =	\$2.98	\$5.10	\$0.00	\$0.00
		per passenger	per group	

Rates If No Revenue Funds Were Identified As Subsidy Funds				
Ambul	Wheel Chair	Stretcher	Group	
Rate per Passenger Mile =	\$4.56	\$7.82	\$0.00	\$0.00
		per passenger	per group	
Rate per Passenger Trip =	\$50.53	\$86.62	\$0.00	\$0.00
		per passenger	per group	
Program These Rates Into Your Medicaid Encounter Data				

Comprehensive Budget Worksheet

Version 1.4

CTC: Charlotte County Transit
County: Charlotte County

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

	Prior Year's ACTUALS from Oct 1st of 2024 to Sept 30th of 2025	Current Year's APPROVED Budget, as amended from Oct 1st of 2025 to Sept 30th of 2026	Upcoming Year's PROPOSED Budget from Oct 1st of 2026 to Sept 30th of 2027	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

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

Local Non-Govt

Farebox						Fare Free Services Other - CRN Trips
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other	\$ 7,076			-100.0%		
Bus Pass Program Revenue						

Local Government

District School Board						County cash Includes match for 5310,5311, TD and unfunded expenses.
Compl. ADA Services						Decrease due to grant revenue budget increasing, thereby reducing the amount of unfunded expenses.
County Cash	\$ 830,218	\$ 561,125	\$ 510,127	-32.4%	-9.1%	In FY 25, our unfunded expenses significantly increased due to the increase in expenses for labor, fringe, and contracted services.
County In-Kind, Contributed Services						
City Cash						
City In-Kind, Contributed Services						
Other Cash						Budgeted Base Rate Tab includes proportionate share of unfunded expenses and local match required.
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						

CTD

Non-Spons. Trip Program	\$ 401,256	\$ 555,005	\$ 555,005	38.3%	0.0%	Estimated revenue based on anticipated ridership not actual allocation.
Non-Spons. Capital Equipment						Anticipated FY26 Budget was prepared in FY24. FY26 budget will be revised - not available at the time of this report.
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						

USDOT & FDOT

49 USC 5307						Other DOT - 5310 100% Operating Expenditures
49 USC 5310						
49 USC 5311 (Operating)	\$ 88,196	\$ 70,300	\$ 69,800	-20.3%	-0.7%	
49 USC 5311(Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)	\$ 87,658	\$ 62,546	\$ 155,577	-28.6%	148.7%	
Bus Pass Program Revenue						

AHCA

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

DCF

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

DOH

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

DOE (state)

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

AWI

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

DOEA

Older Americans Act	\$ 23,199	\$ -	\$ -	-100.0%		Other DOEA - Senior Friendship
Community Care for Elderly						
Other DOEA (specify in explanation)						
Bus Pass Program Revenue						

DCA

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

CTC: Charlotte County Transit
County: Charlotte County

1	2	3	4	5	6	7
	Prior Year's ACTUALS from Oct 1st of 2024 to Sept 30th of 2025	Current Year's APPROVED Budget, as amended from Oct 1st of 2025 to Sept 30th of 2026	Upcoming Year's PROPOSED Budget from Oct 1st of  2026 to Sept 30th of 2027	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000

Office of Disability Determination						
Developmental Services						
Other APD (specify in explanation)						
Bus Pass Program Revenue						

(specify in explanation)						
Bus Pass Program Revenue						

xxx						
xxx						
xxx						
Bus Pass Program Revenue						

Interest Earnings						
XXXX						
XXXX						
Bus Pass Program Revenue						

Actual or Planned Use of Cash Reserve				
---------------------------------------	--	--	--	--

64

Budgeted Rate Base Worksheet

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

	Upcoming Year's BUDGETED Revenues
	from
	Oct 1st of
	2026
	to
	Sept 30th of
	2027
1	2

What amount of the <u>Budgeted Revenue</u> in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue EXCLUDED from the Rate Base	What amount of the <u>Subsidy Revenue</u> in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?
3	4	5

APD

Office of Disability Determination	\$ -
Developmental Services	\$ -
Other APD	\$ -
Bus Pass Program Revenue	\$ -

DJJ

DJJ	\$ -
Bus Pass Program Revenue	\$ -

Other Fed or State

xxx	\$ -
xxx	\$ -
xxx	\$ -
Bus Pass Program Revenue	\$ -

Other Revenues

Interest Earnings	\$ -
xxxx	\$ -
xxxx	\$ -
Bus Pass Program Revenue	\$ -

Balancing Revenue to Prevent Deficit

Actual or Planned Use of Cash Reserve	\$ -
---------------------------------------	------

Total Revenues = \$ 1,290,509

\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

\$ -	\$ -	
\$ -	\$ -	

\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	
\$ -	\$ -	

\$ -	\$ -	
------	------	--

\$ 842,049 \$ 448,460 \$ -

EXPENDITURES (CTC/Operators ONLY)

Operating Expenditures

Labor	\$ 237,453
Fringe Benefits	\$ 95,775
Services	\$ 5,000
Materials and Supplies	\$ -
Utilities	\$ 20,336
Casualty and Liability	\$ 6,778
Taxes	\$ -
Purchased Transportation:	
Purchased Bus Pass Expenses	\$ -
School Bus Utilization Expenses	\$ -
Contracted Transportation Services	\$ 795,375
Other	\$ -
Miscellaneous	\$ 500
Operating Debt Service - Principal & Interest	\$ -
Leases and Rentals	\$ 5,000
Contrib. to Capital Equip. Replacement Fund	\$ -
In-Kind, Contributed Services	\$ -
Allocated Indirect	\$ 124,292

Capital Expenditures

Equip. Purchases with Grant Funds	\$ -
Equip. Purchases with Local Revenue	\$ -
Equip. Purchases with Rate Generated Rev.	\$ -
Capital Debt Service - Principal & Interest	\$ -
	\$ -

Total Expenditures = \$ 1,290,509

minus EXCLUDED Subsidy Revenue = \$ 448,460

Budgeted Total Expenditures INCLUDED in
Rate Base = \$ 842,049

Rate Base Adjustment¹ =

**Adjusted Expenditures Included in Rate
Base = \$ 842,049**

\$ 448,460

Amount of Budgeted
Operating Rate
Subsidy Revenue

\$

¹ Rate Base Adjustment Cell

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

¹ The Difference between Expenses and Revenues for Fiscal Year.

Worksheet for Program-wide Rates

CTC: Charlotte County T Version 1.4
County: Charlotte County

1. Complete Total Projected Passenger Miles and ONE-WAY Passenger Trips (GREEN cells) below

Do **NOT** include trips or miles related to Coordination Contractors!

Do **NOT** include School Board trips or miles UNLESS.....

INCLUDE all ONE-WAY passenger trips and passenger miles related to services you purchased from your transportation operators!

Do **NOT** include trips or miles for services provided to the general public/private pay UNLESS..

Do **NOT** include escort activity as passenger trips or passenger miles unless charged the full rate for service!

Do **NOT** include fixed route bus program trips or passenger miles!

PROGRAM-WIDE RATES

Total Projected Passenger Miles = 250,000

Rate Per Passenger Mile = \$ 3.37

Total Projected Passenger Trips = 22,000

Rate Per Passenger Trip = \$ 38.27

Fiscal Year

2026 - 2027

Avg. Passenger Trip Length = 11.4 Miles

Rates If No Revenue Funds Were Identified As Subsidy Funds

Rate Per Passenger Mile = \$ 5.16

Rate Per Passenger Trip = \$ 58.66

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

Worksheet for Multiple Service Rates

CTC: Charlotte County Version 1.4
County: Charlotte County

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

SECTION I: Services Provided

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

Ambulatory	Wheelchair	Stretcher	Group
☒ Yes	☒ Yes	☐ Yes	☐ Yes
☐ No	☐ No	☒ No	☒ No
Go to Section II for Ambulatory Service	Go to Section II for Wheelchair Service	STOP! Do NOT Complete Sections I - V for Stretcher Service	STOP! Do NOT Complete Sections I - V for Group Service

SECTION II: Contracted Services

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

Ambulatory	Wheelchair	Stretcher	Group
☐ Yes	☐ Yes	☐ Yes	☐ Yes
☒ No	☒ No	☒ No	☒ No
Skip #2, 3 & 4 and Go to Section III for Ambulatory Service	Skip #2, 3 & 4 and Go to Section III for Wheelchair Service	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Ambulatory	Wheelchair	Stretcher	Group
☐ Yes	☐ Yes	☐ Yes	☐ Yes
☒ No	☒ No	☒ No	☒ No
		Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Effective Rate for Contracted Services:
per Passenger Mile =
per Passenger Trip =

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

- If you answered #3 & want a Combined Rate per Trip PLUS a per Mile add-on for 1 or more services, INPUT the Desired per Trip Rate (but must be less than per trip rate in #3 above) Rate per Passenger Mile for Balance =

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

Appendix I - Charlotte County-Punta Gorda MPO Evaluation/Comment Form



Charlotte County-Punta Gorda MPO Evaluation/Comment Form

Title of Event/Workshop/Meeting: _____

Place: _____

Date: _____

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

☐ Yes ☐ No

If not, what additional information do you need?

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

☐ Yes ☐ No

If not, please suggest location and time options _____

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

☐ Newspaper ☐ From another person

☐ Invitation/Mail ☐ Other _____

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

www.ccpgmpo.gov

APPENDIX J – CTC Evaluation

CTC Review

Charlotte County Board of County Commissioners
Transit Division

Counties served: Charlotte

Date(s) of Review: February 24-26, 2025

PA Staff Assigned to Review: Wendy Scott and Sierra Ray Scott

I. Records and Areas of Review

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

II. Findings and Recommendations

A. General Information

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

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: None

CTC Review

Charlotte County Board of County Commissioners
Transit Division

B. Chapter 427, F.S.

The CTC complies with Chapter 427, F.S., by fulfilling the requirements specified in 427.0155, F.S. This includes assuming full responsibility for the delivery of transportation services for the transportation disadvantaged. Another task achieved is executing contracts for driver and bus washer services, disaster stretcher services and non-profit operators serving as volunteer organizational partners. The current contract for driver and bus washer services took effect on May 6, 2024 with A&Associates. The CTC also collects annual operating data and reviews all applications for local, state (including transportation disadvantaged) and federal (including Sections 5310 and 5311) grant funding. Additionally, the CTC develops cost-effective and efficient coordination strategies.

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: None

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

The CTC fully complies with Rule, 41-2, F.A.C. These requirements further refine those stated in Chapter 427, F.S. A key requirement is possession of an awareness of all transportation disadvantaged resources available or planned in the Charlotte County service area. Equipped with this knowledge, the CTC plans, coordinates and implements the most cost-effective system possible under existing conditions including funding constraints. The CTC performs this task very well, enhancing travel opportunities for TD passengers by currently offering free fares for general paratransit service (life enhancing trips beyond life sustaining TD trips). Since the COVID-19 pandemic, the BCC has provided free fares for all riders, whether the trips were TD or Section 5307 grant funded. Following a November 4, 2016 Compliance Monitoring (CM) review, Charlotte County Transit staff developed an excellent Transportation Disadvantaged application (effective July 1, 2017) in order to document rider eligibility and improve record retention. It has been used as a model for other CTCs. This application was further refined in December 2024 to make it flow more efficiently without changing requested information. Additionally, Transit is working toward a more secure method of receiving and maintaining applications. Another result from the previous CM review recommendations has been inclusion of required language in operator contracts.

Area of Observation: None

Recommendation: None

Timeline for Compliance: None

D. Americans with Disabilities Act

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

Area of Noncompliance: None

CTC Review

Charlotte County Board of County Commissioners
Transit Division

Recommendation: None
Timeline for Compliance: None

E. Bus/Van Ride

On February 24, 2025, two MPO staff members participated in a TD trip in the Mid-County and South County areas. The trip was conducted with seven passengers and driver (Troy Peterson) using a Charlotte County Transit vehicle to transport riders to and from various locations, including residences, a dialysis center, the Charlotte County Behavioral Center, the Charlotte Technical College (twice), and a doctor's office. A full discussion of the trip is attached.

Areas of Noncompliance: None
Recommendation: None
Timeline for Compliance: N/A

F. Surveys (see attachment)

Area of Noncompliance: N/A
Recommendation: Keep up all the improvements. They are appreciated by the passengers, especially the new mobile phone app capabilities.
Timeline for Compliance: None

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

Previous Area of Noncompliance: The last QAPE/CM Review was conducted by Thomas Howell Ferguson, P.A. (THF) and CTD staff on April 29, 2019 for the July 1, 2017 – June 30, 2018 fiscal year. The next Quality Assurance Review will be conducted virtually by THF by June 30, 2025 and will focus on grant compliance.

Status: Completed.
Timeline for Compliance: None

CTC Review

Charlotte County Board of County Commissioners
Transit Division

H. Additional Observations

As CTC, the Charlotte County BCC has performed the delivery of TD services in Charlotte County for more than three decades, handling the transportation needs of the County's most transit dependent populations. A portion of this work is achieved with volunteer programs, where the County provides the vehicles, fuel, maintenance and driver training, while the participating organizations furnish volunteer drivers. Currently, the organizational trips accomplished in this manner are for the Center for Abuse and Rape Emergencies, Inc. (C.A.R.E.)* and St. Vincent DePaul CARES (formerly the Homeless Coalition). The Veterans' Council is no longer a coordinated partner. Transit staff is working on an analysis to determine the cost effectiveness of the partner program. Also, typically the CTC obtains several grants to assist local passengers. These include funding from Federal Transit Administration (FTA) Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) and FTA Section 5311 (Rural Area Formula) grants.

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

**Transit was notified on March 25, 2025 that C.A.R.E is pausing program participation.*

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

The Trip and Equipment Grant for Charlotte County currently runs from July 1, 2024 through June 30, 2025.

Area of Noncompliance: None
Recommendation: None

III. Conclusion

The Charlotte County Transit Division is doing an excellent job of fulfilling its Transportation Disadvantaged program mission. This is especially true as it emerges from the COVID-19 pandemic, only to deal with Category IV Hurricane Ian's direct hit to the community in 2022 which was followed by the twin flooding events in 2024 from Hurricanes Helene and Milton. The role that Transit played in coping with all these events has received high praise throughout the community.

CTC Review

Charlotte County Board of County Commissioners
Transit Division

Here is an example:

Posted in Kudos Corner

Arthur, Richard

Yesterday at 10:22 AM @1
Seen by 141

I want to give a big shout out to Heidi Maddox and the Transit team for their swift response in assisting South County residents who were affected by Helene which flooded their vehicles. These residents walked to the South County POD site, and thanks to the Transit team's quick action, we were able to provide much-needed support. Your help made a big difference, and we were even able to assist a few more walk-ups throughout the afternoon using Transit's services. Thank you again, Heidi and team!

Charlotte County Transit staff members continue to make tremendous strides regarding outreach and marketing. The recent official launch of the Charlotte Rides mobile app which permits riders to schedule, confirm and modify trips has proven very successful. An interesting result has been providing the ability for family and friends to assist passengers with scheduling trips (often managed by adult family members helping elderly relatives from afar). The completion of the County's 10-Year Transit Development Plan (TDP) has afforded the opportunity to Charlotte County Transit to publicize the current transit service and to consider service upgrades. This document was submitted to FDOT by September 2024. It included a fare study and a marketing plan, as well as an assessment of alternative fuel vehicles. TDP results also are proving beneficial in developing the Transit element of the MPO's 2050 Long Range Transportation Plan (LRTP) which is due for completion in October 2025.

LCB Chairman:


Commissioner Ken Doherty

County: Charlotte

Date: May 1, 2025

CTC Review

Charlotte County Board of County Commissioners
Transit Division

ATTACHMENT

1. BUS/VAN RIDE

On February 24, 2025, two MPO staff members accompanied the driver (Troy Peterson) and seven passengers on various scheduled Monday morning trips throughout areas of Mid and South County. MPO Staff boarded the bus at the Transit Facility at 545 Theresa Blvd prior to passenger pickup. Mr. Peterson was wearing a bright yellow safety vest with the name of the contractor on the back. He was very attentive in providing boarding and exiting assistance to passengers based upon their levels of need and desires. Four passengers were ambulatory and utilized the bus steps. An additional passenger used the lift in conjunction with a walker. Another used a wheelchair with the lift and had an escort accompany her. Both the Transit Division's compliment and concern line and TD Ombudsman Helpline signage were posted, along with additional informational signage (regarding the new Transit mobile app and a QR code for taking a Transit survey, etc). The vehicle's air conditioning, heat and two-way communication devices were all in working order. The entire bus was tidy, including the seats which were clean and in good condition.

Noteworthy driver performance: Troy Peterson performed his job very professionally, especially in assisting the two passengers who needed the lift as well as one that required wheelchair securement. Given the regularly scheduled residential, dialysis, medical office, behavioral center, and vocational college destinations, he was familiar with the riders and had a good understanding of their needs. The atmosphere was very cordial both among passengers and with their driver. It was evident that friendships had been formed. Mr. Peterson also deserves high praise for his attention to adhering to his schedule to the best of his ability. This was while also ensuring that his wheelchair passenger who deals with extreme discomfort due to neurological issues (especially while being transported) obtained as painless a ride as possible (despite obstacles that included numerous speed bumps at the passenger's apartment complex).

2. RIDER SURVEYS

A County-wide survey of TD passengers who rode on February 24, 2025 was conducted on February 24-25, 2025 via telephone from the Transit Facility. Passenger average use of the Transportation Disadvantaged services was 3-5 times per week (50%) and daily (50%). These figures reflect frequent usage (tied to dialysis, work and educational/training/day care trips). Trip purposes were for

CTC Review

Charlotte County Board of County Commissioners
Transit Division

medical (75% of riders), employment (25%), educational/training/adult day care (25%), and life-enhancing (25%). Average satisfaction with the service on a scale of 1 to 10 (10 being most satisfied) was 9.25, an increase of .25 points from the last CTC Evaluation. *It should be noted that the sample size was small, and many messages were left on recorders with no callbacks.*

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

"It's my life. I'm in a wheelchair. It's my only way to get around. The hurricane rescue was wonderful! Tina is an excellent driver. *(The passenger uses the mobile app extensively for booking work and medical trips. Commented that it would be helpful to be able to book recurring work and occasional medical trips more than two weeks ahead. Previously, work commute standing appointments could be booked up to one year in advance.)*

"This transportation makes life easier for me. I need it for dialysis. Better dispatching flexibility would be beneficial and more efficient for riders leaving dialysis."

From parent (caregiver): "The service is convenient and allows my daughter to have more freedom. The program that she attends daily is far away and would be a multihour ordeal for me. The service is needed."

"It means a lot to me. God bless all who provide me this service. I need it more than anything else. The taxi expense is too much! The drivers are excellent. They are very helpful with assisting me with my bags that I take into dialysis. They take great care of me."

3. CONTRACT OPERATOR SURVEYS

The CTC's current contract operator (providing bus driver and bus washing services) was hired effective October 1, 2022. The new contractor is A&Associates. The most recent contract renewal was May 6, 2024.

- **Do the riders contact your facility directly to cancel a trip?**
The contractor stated "no," because the County handles these arrangements. Her firm only provides contract drivers and bus washers.
- **Do the riders/beneficiaries call your facility directly to issue a complaint?** The contractor stated "no," because the County handles these arrangements. Her firm only provides contract drivers and bus washers.

CTC Review

Charlotte County Board of County Commissioners
Transit Division

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

4. PURCHASING AGENCY SURVEYS

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

CTC Review

Charlotte County Board of County Commissioners
Transit Division

5. ANNUAL QA SELF CERTIFICATION

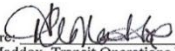


Charlotte County Transit Bus System Annual Safety and Security Certification

Date: February 13, 2025

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

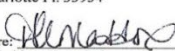
1. The adoption of a System Safety Program Plan (SSPP) and a Security Program Plan pursuant to FLORIDA DEPARTMENT OF TRANSPORTATION safety standards set forth in rule 14-90, Florida Administrative Code.
2. Compliance with the adopted standards of the SSPP and Security Program Plan.
3. Performance of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

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

Date: 2/13/25

NAME AND ADDRESS OF ENTITIES WHICH HAVE PERFORMED SAFETY INSPECTIONS:

Charlotte County Fleet
18000 Paulson Dr,
Port Charlotte FL 33954

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

Date: 2/13/25

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

941.833.6234
CharlotteCountyFL.gov

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

Appendix K – Compliance Review Form

NONPROFIT AGENCY CONTRACT COMPLIANCE REVIEW BY THE CHARLOTTE COUNTY TRANSIT DIVISION

Date: _____

Reviewing Transit _____

Agent / Title: _____

Agency Name: _____

Agency Physical
Address: _____

Agency Mailing
Address: _____



Phone Number: _____

Fax Number: _____

E-mail Address: _____

Counties Served: _____

Services Provided: _____

Purpose of Visit:

Annual Monitoring Review

Other: _____

Date/s of Visit: _____

Name / Title of
Provider Contacts: _____

Pre-review Issues/Concerns/Noteworthy Activities:

Lead Agency Monitor/s:

Signature: _____	Print: _____
Signature: _____	Print: _____
Signature: _____	Print: _____

Date of Report: _____

Records and Areas of Review

The following records and/or items were examined during the review:

Documentation of all qualifications shall be provided upon request to County including but not limited to the results of all drug test performed by the Nonprofit agency.

		Yes	No	Part	N/A
A	Identity of eligible nonprofit agency passengers				
	1 Method of determining eligibility				
	2 Eligible passenger list (provided to County upon request)				
	3 Passengers are residents of Charlotte County				

Findings/Recommendations/Requirements for Compliance:					
		Yes	No	Part	N/A
B	Vendor has provided a driver on each day trip for which our agency passengers are scheduled				
Findings/Recommendations/Requirements for Compliance:					

NONPROFIT AGENCY CONTRACT COMPLIANCE REVIEW (2.13 EDITION)

PG 2

		Yes	No	Part	N/A	
C	Those drivers have the following qualifications:					
	1	Valid Florida Driver's License				
	2	Have no moving violations as defined in the Charlotte County Transit Division Safety Plan ("System Safety Plan") for prior three year period				
	3	Be drug-free workplace compliant with substance abuse programs as might be enacted by the Board of County Commissioners of Charlotte County				
	4	Have a satisfactory Florida DOT physical within the preceding two years				
Findings/Recommendations/Requirements for Compliance:						
		Yes	No	Part	N/A	
D	Drivers shall follow the System Safety Plan, which may be ammended as rules and regulations change.					
Findings/Recommendations/Requirements for Compliance:						
		Yes	No	Part	N/A	

E	Nonprofit agencies shall have an accident policy in place upon the contract. The policy shall be delivered to the County upon request and shall at a minimum provide for the removal or discipline of a driver involved in an accident				
Findings/Recommendations/Requirements for Compliance:					

NONPROFIT AGENCY CONTRACT COMPLIANCE REVIEW (2.13 EDITION)

PG 3

		Yes	No	Part	N/A
F	Drivers shall not engage in the following conduct:				
	1 Smoking in County vehicles				
	2 Texting, calling, or otherwise communicating with a cell phone or other such device while operating County vehicles (less County 2-way radios)				
	3 Use of obscene or vulgar language				
Findings/Recommendations/Requirements for Compliance:					
		Yes	No	Part	N/A
G	Maintain all vehicles to standards of cleanliness required of all County Transit Division Vehicles; they shall be washed every two weeks, and the interior maintained by the drivers daily				

Findings/Recommendations/Requirements for Compliance:					
		Yes	No	Part	N/A
H	Operate all vehicles in strict compliance with the System Safety Plan adopted by the County Transit Division, as the same may be amended. This includes, but is not limited to, the immediate reporting of accidents, incidents, service failures, and service related incidents as defined in the System Safety Plan within one hour to Transit Operations				
Findings/Recommendations/Requirements for Compliance:					

NONPROFIT AGENCY CONTRACT COMPLIANCE REVIEW (2.13 EDITION)

PG 4

NON-PROFIT AGENCY CONTRACT COMPLIANCE REVIEW (2-15 EDITION)		189			
		Yes	No	Part	N/A
I	Perform daily safety and maintenance checks on all vehicles using Daily Vehicle Check list used for County Transit Division vehicles, and immediately report any problems found with a vehicle to the County Transit Division before operating that vehicle.				
Findings/Recommendations/Requirements for Compliance:					
		Yes	No	Part	N/A

J	Immediately advise the County Transit Supervisor or his (her) designee of any safety related conditions in the mechanical assessment of any vehicle				
Findings/Recommendations/Requirements for Compliance:					
		Yes	No	Part	N/A
K	Return the vehicle to the Transit parking facility at 25490 Airport Rd., Punta Gorda, FL 33950 or the Family Services Center at 21450 Gibraltar Dr. in Port Charlotte 33952.				
Findings/Recommendations/Requirements for Compliance:					
		Yes	No	Part	N/A
L	Provide uniform, dignified, comfortable and timely service in conformance with Chapter 427, Florida Statutes, as amended				
Findings/Recommendations/Requirements for Compliance:					

Deficiencies:

Compliance Requirements:

Compliance Timetable:

Summary of Review:

Signature of Reviewer/s

Signature of Agency Rep/s

Date Signed: _____

Date Signed: _____

Appendix L – Charlotte County Transit Transportation Disadvantaged Application - Also available in Spanish and French Creole (también disponible en español - disponib tou nan kreyòl franse)



**Charlotte Rides
Transportation Disadvantaged Application**

Updated 9/1/2026

Charlotte Rides includes transportation mandated by the Florida Commission for the Transportation Disadvantaged (TD). “Transportation disadvantaged” means “those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-enhancing activities, or children who are handicapped or high-risk or at-risk” as defined in s. 411.202 per F.S. 427.

Please review the qualifications and guidelines for the TD program outlined below. Should you have any questions or require assistance call 941.833.6233. If Charlotte Rides does not determine eligibility within 21 days of receiving a completed TD application, the applicant will be considered eligible. If your TD eligibility is denied and you wish to appeal, you can reach out to 941.833.6233. It is important to note that a denial of a TD application does NOT prevent clients from utilizing the Charlotte Rides bus service.

Transportation Disadvantaged Grant Qualifications and Guidelines:

- Origin and destination locations must be within the service area of Charlotte County
- Applicant must verify that they have one or more of the following:
 - Age 60 or older; or
 - A recognized disability (temporary or permanent) verified by an accepted medical professional; or
 - Applicant must verify that their gross annual household income does not exceed 125% of the Department of Health and Human Services poverty guidelines (Table I, page 6)
- Call 941.575.4000 Option 1 to schedule a reservation Monday through Friday 7:00 AM to 5:30 PM

Customer Copy
Eligibility Criteria (Select One)

- ☐ If applying for Transportation Disadvantaged (TD) based on age (60 or older) and unable to transport yourself or to purchase transportation:
- Complete Parts 1 and 2.
 - Attach a copy of valid government issued identification with date of birth.

OR

- ☐ If applying for TD due to medical reasons and unable to transport yourself or to purchase transportation:
- Complete Parts 1, 2, and 3.
 - Read and sign Applicant's Authorization in Part 6, providing the applicant's authorized signature to release medical information.
 - A currently Licensed Professional completes the rest of Part 3. See page 5 for a list of applicable professionals.

OR

- ☐ If applying for TD due to a total gross annual household income at or below 125% of the Federal Poverty Level and unable to transport yourself or to purchase transportation:
- Complete Parts 1, 2, and 4.
 - Attach proof of income. Please send copies as proof of income will not be returned. Acceptable forms of proof of income include current copies of: (Note: You only need to provide one)
 - First page of your tax return
 - Unemployment Compensation Income Verification
 - DCF Benefit Letter
 - Social Security Income Verification or Proof of Income Letter (includes SSI and SSDI)
 - Two most recent pay stubs
 - Retirement/Pension Statement (includes VA)
 - If no one in your household has income, you must attach proof of Food Stamp eligibility or a signed letter on agency letterhead verifying that you have no income

- **Incomplete forms will be returned to the applicant; failure to completely fill out this application will delay your eligibility determination.**
- **The evaluation process normally takes up to maximum of ten (10) business days from the receipt of the completed forms.**
- **If you have any questions, please call 941.833.6233.**
- **Please return completed form and required documents via mail to: TD Program Coordinator Charlotte Rides Division, 545 Theresa Blvd., Port Charlotte, FL 33954 or email to www.CharlotteCountyFL.gov/transit.**
- **If additional support is needed, the Transportation Disadvantaged Ombudsman helpline is available at 1.800.983.2435.**

Charlotte Rides

Safe. Local. Free.

Part 1: General Information

Please Print Clearly or Type

Complete every three (3) Years

Name:		Date:
Street Address:		
Apartment/ Building #:		
City:	State:	Zip Code:
Telephone # (Daytime):	Telephone # (Evening):	
Date of Birth:	Email:	
Are you enrolled in the Medicaid program? ☐ Yes ☐ No		

Primary Language: ☐ English ☐ Spanish ☐ Other: _____

1. Do you have a valid driver's license? ☐ Yes ☐ No

2. Do you have access to a vehicle? ☐ Yes ☐ No

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

3. Do you travel with a Personal Care Attendant (PCA) who assists you?

☐ Yes, always ☐ Yes, sometimes ☐ No

If someone assisted you in completing this form and you would like them to also be informed of decisions regarding your eligibility, please provide the following.

Name: _____ Relationship: _____ Phone: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Emergency Contact

Name: _____ Phone: _____

Relationship to Applicant: _____

Applicant's Signature

CHARLOTTE RIDES OFFICE USE ONLY

Date Received: _____ Approval Date: _____ Expires On: _____ ☐ New Registration ☐ Renew

Reviewed By: _____ Approved for TD Services: ☐ Age ☐ Disability ☐ Income

☐ Denied Date Denied: _____ Reason for Denial: _____

Updated 12/06/2024

(Applicant's Signature)

(Date)

Part 2: Questions About Applicant's Mobility

Charlotte Rides

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☐ I do not use mobility aids or equipment listed below and can climb three 12-inch steps without assistance (Skip to section 3)

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

☐ Cane ☐ Walker ☐ Manual Wheelchair ☐ Power Wheelchair ☐ Power Scooter ☐ Portable Oxygen CO2 ☐ Other:

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

- Is your wheelchair/scooter more than 48" long? ☐ Yes ☐ No
- Is your wheelchair/scooter more than 30" wide? ☐ Yes ☐ No
- Is your weight plus the weight of your wheelchair/scooter more than 800 pounds? ☐ Yes ☐ No

***NOTE: Charlotte Rides may not be able to accommodate you if your wheelchair, scooter, or cart is longer than 48 inches or wider than 30 inches or if your total weight with your wheelchair is more than 800 pounds.

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

☐ Yes ☐ No ☐ Sometimes ☐ I don't know because I have never tried

If you answered no or sometimes, please explain: _____

3. Once inside a bus, can you transfer to a seat by yourself?

☐ Yes ☐ No ☐ Sometimes

If you answered no or sometimes, please explain: _____

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

☐ Physical Disability ☐ Visual Impairment/Blindness ☐ Developmental Disability ☐ Mental Health Condition

☐ Other _____ ☐ None

Please describe your disability in more detail:

5. Is the disability temporary or permanent?

☐ Temporary Disability - I expect it to last for another _____ months. ☐ Permanent Disability ☐ I don't know

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

☐ Yes Type of animal: _____ ☐ No

PART 3: Medical Professional Verification

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

Applicant's Authorization

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

Applicant's Signature: _____ **Date:** _____

Dear Medical Professional,

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

Please review the information provided by the applicant in Parts 1-5 of this application and answer the following questions in Part 6. (For Licensed Professional Only) Thank you in advance.

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

2. The applicant's disability is

☐ Permanent

☐ Temporary Expected duration? Years _____ Months _____

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

☐ Yes ☐ No

Medical Professional

Print or Type Name and Title: _____

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

Business Address: _____ Phone No.: _____

City: _____ State: _____ Zip Code: _____

Professional's Signature: _____ Date: _____

Part 4: Household Income

Including all parents, caregivers, relatives, or others involved in your living functions, how many people reside at the address provided in Part I? _____

How many vehicles are in your household? _____

Including all wages, disability payments, Social Security payments, pensions, dividends, investments, etc., what is your total gross annual household income? Attach proof of income for you and all members of your household to this completed application. Please provide copies as proof, they will not be returned.

- Acceptable forms of proof of income include current copies of the first page of your most recent tax return, Unemployment Compensation Income Verification, DCF Benefit Letter, Social Security Income Verification or Proof of Income Letter (includes SSI and SSDI), minimum of (2) most recent pay stubs, Retirement/Pension Statement (includes VA) and Food Stamp eligibility.

Tax Return _____ W2 _____ SSI _____ SSDI _____

Pension _____ Interest/Dividends _____ Work Comp _____ Relatives _____
Other _____

Is your total gross annual household income at or below the 125% of the Federal Health and Human Services Guidelines for low household income? (See Table I, below) ☐ YES ☐ NO

Table I: 125% of the Department of Health and Human Services Poverty Guidelines 2026. The following totals represent 125% of the Federal Health and Human Services Guidelines for low household income and are updated annually. To qualify for the TD transportation program, household income may not exceed these guidelines:

Household/ Family Size	125%
1	\$15,960
2	\$21,640
3	\$27,320
4	\$33,000
5	\$38,680
6	\$44,360
7	\$50,040
8	\$55,720

For families/households with more than 8 persons add \$5,680 for each additional person.

Part 5: Applicant's Certification

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

(Applicant's Signature)

(Date)

SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 7

TRANSPORTATION DISADVANTAGED TRUST FUND (TDTF)
TRIP AND EQUIPMENT GRANT

Purpose: To provide LCB members with information on the TDTF Trip and Equipment Grant for FY 2026/2027

Presented by: Transit Staff

Discussion: Each year, a portion of the State Transportation Disadvantaged Trust Fund (TDTF) is allocated to every Community Transportation Coordinator (CTC) to support trips and equipment for non-sponsored Transportation Disadvantaged (TD) services.

For FY 2026/2027 (commencing July 1, 2026), the final funding amounts for the Trip and Equipment Grant and Voluntary Dollar contributions were not available at the time the agenda packet was prepared. A draft version of the grant was presented to the LCB on May 7, 2026. The totals presented today reflect the finalized amounts for these grants.

Trip & Equipment Grant allocation	\$ 557,889
Local Match	\$ 61,987
Total Funding	\$ 619,876
Voluntary Dollar	\$ 106
Local Match	\$ 11
Total	\$ 117
Grand Total	\$ 619,993

Recommendation: None (information only)

Attachment: None

SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 8
ANNUAL OPERATING REPORT

Purpose: To review and approve the Annual Operating Report

Presented by: Charlotte County Staff

Discussion: 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) 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.

Recommendation: Motion to approve the Draft FY 2025/2026 Annual Operating Report, with authorization for staff to make minor technical adjustments as needed based on guidance from CTD staff.

Attachment: [FY 2025/2026 DRAFT Annual Operating Report](#)



CTC Organization

County: Charlotte

Fiscal Year: 7/1/2025 - 6/30/2026

CTC Status: Submitted

CTD Status: Under Review

Date Initiated: 7/27/2026

CTC Organization Name: Charlotte County BOCC Transit Division

Address: 545 Theresa Blvd

City: Port Charlotte

State: FL

Zip Code: 33954

Organization Type: County

Network Type: Partial Brokerage

Operating Environment: Urban

Transportation Operators: No

Number of Transportation Operators: 0

Coordination Contractors: Yes

Number of Coordination Contractors: 1

Provide Out of County Trips: Yes

Local Coordinating Board (LCB) Chairperson: Kenneth W. Doherty

CTC Contact: Heidi Maddox

CTC Contact Title: Transit Operations Manager

CTC Contact Email: heidi.maddox@charlottecountyfl.gov

Phone: (941) 833-6234

CTC Certification

I, Heidi Maddox, as the authorized Community Transportation Coordinator (CTC) Representative, hereby certify, under the penalties of perjury as stated in Chapter 837.06, F.S., that the information contained in this report is true, accurate, and in accordance with the accompanying instructions.

CTC Representative (signature): _____

LCB Certification

I, Kenneth W. Doherty, as the Local Coordinating Board Chairperson, hereby, certify in accordance with Rule 41-2.007(6), F.A.C. that the Local Coordinating Board has reviewed this report and the Planning Agency has received a copy.

LCB Chairperson (signature): _____



Organization – Coordination Contractor

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County BOCC Transit Division

Fiscal Year: 7/1/2025 - 6/30/2026

Upload Date: 8/5/2026

Coordination Contractor Name: Hope Pace
Address: 3280 Tamiami Trl #45
City: Port Charlotte
State: FL
Zip Code: 33952
Organization Type: Private Non Profit
Operating Environment: Urban
Provide Out of County Trips: No
Who Do You Serve: Senior Citizens
Contact Person: Carlos Menjivar
Contact Title: Transportation Manager
Contact Email: menjivac@chaptershealth.org
Phone: (239) 446-8867

Coordination Contractor Certification

By submission of this form, I, Carlos Menjivar, as the authorized representative of Hope Pace, hereby certify, under the penalties of perjury as stated in Chapter 837.06, F.S., that the information contained in this report is true, accurate, and in accordance with the accompanying instructions.

CTC Representative (signature): _____



CTC Trips

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Service Type - One Way						
Fixed Route/Fixed Schedule						
Daily Pass Trips	0	N/A	0	0	N/A	0
Weekly Pass Trips	0	N/A	0	0	N/A	0
Monthly Pass Trips	0	N/A	0	0	N/A	0
Deviated Fixed Route Service	0	N/A	0	0	N/A	0
Complementary ADA Service	0	N/A	0	0	N/A	0
Paratransit						
Ambulatory	10,782	7,038	17,820	16,835	2,988	19,823
Non-Ambulatory	3,532	3,017	6,549	5,458	1,281	6,739
Stretcher	0	0	0	0	0	0
Transportation Network Companies	0	N/A	0	0	N/A	0
Taxi	0	N/A	0	0	N/A	0
School Board (School Bus)	0	N/A	0	0	N/A	0
Volunteers	0	N/A	0	0	N/A	0
Total - Service Type	14,314	10,055	24,369	22,293	4,269	26,562
Contracted Transportation Operator						
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC)	0	N/A	0	0	N/A	0
Total - Contracted Transportation Operator Trips	0	0	0	0	0	0
Revenue Source - One Way						
Agency for Health Care Administration (AHCA)	0	10,055	10,055	0	4,269	4,269
Agency for Persons with Disabilities (APD)	0	0	0	0	0	0
Comm for the Transportation Disadvantaged (CTD)	9,535	N/A	9,535	15,077	N/A	15,077
Dept of Economic Opportunity (DEO)	0	0	0	0	0	0
Dept of Children and Families (DCF)	0	0	0	0	0	0
Dept of Education (DOE)	0	0	0	0	0	0
Dept of Elder Affairs (DOEA)	1,395	0	1,395	2,309	0	2,309
Dept of Health (DOH)	0	0	0	0	0	0
Dept of Juvenile Justice (DJJ)	0	0	0	0	0	0
Dept of Transportation (DOT)	3,384	0	3,384	4,503	0	4,503
Local Government	0	0	0	404	0	404
Local Non-Government	0	0	0	0	0	0
Other Federal & State Programs	0	0	0	0	0	0
Total - Revenue Source	14,314	10,055	24,369	22,293	4,269	26,562



CTC Trips (cont'd)

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Passenger Type - One Way						
Older Adults	5,711	10,055	15,766	9,207	4,269	13,476
Children At Risk	1,675	0	1,675	2,697	0	2,697
Persons With Disabilities	2,419	0	2,419	4,682	0	4,682
Low Income	1,245	0	1,245	1,761	0	1,761
Other	3,264	0	3,264	3,946	0	3,946
Total - Passenger Type	14,314	10,055	24,369	22,293	4,269	26,562
Trip Purpose - One Way						
Medical	3,471	637	4,108	6,417	768	7,185
Employment	4,494	0	4,494	3,209	0	3,209
Education/Training/Daycare	1,652	9,418	11,070	4,505	3,501	8,006
Nutritional	1,525	0	1,525	3,586	0	3,586
Life-Sustaining/Other	3,172	0	3,172	4,576	0	4,576
Total - Trip Purpose	14,314	10,055	24,369	22,293	4,269	26,562
Unduplicated Passenger Head Count (UDPHC)						
UDPHC	2,546	80	2,626	2,871	75	2,946
Total - UDPHC	2,546	80	2,626	2,871	75	2,946
Unmet & No Shows						
Unmet Trip Requests	712	N/A	712	1,973	N/A	1,973
No Shows	0	N/A	0	1,478	N/A	1,478
Customer Feedback						
Complaints	118	N/A	118	71	N/A	71
Commendations	50	N/A	50	31	N/A	31



Coordination Contractor Trips

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

Upload Date: 8/5/2026

Coordination Contractor: Hope Pace

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Service Type - One Way		
Fixed Route/Fixed Schedule		
Daily Pass Trips	N/A	N/A
Weekly Pass Trips	N/A	N/A
Monthly Pass Trips	N/A	N/A
Deviated Fixed Route Service	N/A	N/A
Complementary ADA Service	N/A	N/A
Paratransit		
Ambulatory	7,038	0
Non-Ambulatory	3,017	0
Stretcher	0	0
Transportation Network Companies	N/A	N/A
Taxi	N/A	N/A
School Board (School Bus)	N/A	N/A
Volunteers	N/A	N/A
Total - Service Type	10,055	0
Contracted Transportation Operator		
How many of the total trips were provided by Contracted Transportation Operators? (If the CTC provides transportation services, do not include the CTC	N/A	N/A
Total - Contracted Transportation Operator Trips	0	0
Revenue Source - One Way		
Agency for Health Care Administration (AHCA)	10,055	0
Agency for Persons with Disabilities (APD)	0	0
Comm for the Transportation Disadvantaged (CTD)	N/A	N/A
Dept of Economic Opportunity (DEO)	0	0
Dept of Children and Families (DCF)	0	0
Dept of Education (DOE)	0	0
Dept of Elder Affairs (DOEA)	0	0
Dept of Health (DOH)	0	0
Dept of Juvenile Justice (DJJ)	0	0
Dept of Transportation (DOT)	0	0
Local Government	0	0
Local Non-Government	0	0
Other Federal & State Programs	0	0
Total - Revenue Source	10,055	0



Coordination Contractor Trips (cont'd)

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

Upload Date: 8/5/2026

Coordination Contractor: Hope Pace

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Passenger Type - One Way		
Older Adults	10,055	0
Children At Risk	0	0
Persons With Disabilities	0	0
Low Income	0	0
Other	0	0
Total - Passenger Type	10,055	0
Trip Purpose - One Way		
Medical	637	0
Employment	0	0
Education/Training/Daycare	9,418	0
Nutritional	0	0
Life-Sustaining/Other	0	0
Total - Trip Purpose	10,055	0
Unduplicated Passenger Head Count (UDPHC)		
UDPHC	80	0
Total - UDPHC	80	0
Unmet & No Shows		
Unmet Trip Requests	N/A	N/A
No Shows	N/A	N/A
Customer Feedback		
Complaints	N/A	N/A
Commendations	N/A	N/A



CTC Vehicles & Drivers

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Vehicle Miles						
Deviated Fixed Route Miles	0	N/A	0	0	N/A	0
Complementary ADA Service Miles	0	N/A	0	0	N/A	0
Paratransit Miles	670,487	57,600	728,087	649,478	39,419	688,897
Transportation Network Companies (TNC) Miles	0	N/A	0	0	N/A	0
Taxi Miles	0	N/A	0	0	N/A	0
School Board (School Bus) Miles	0	N/A	0	0	N/A	0
Volunteers Miles	0	N/A	0	0	N/A	0
Total - Vehicle Miles	670,487	57,600	728,087	649,478	39,419	688,897
Roadcalls & Accidents						
Roadcalls	33	3	36	26	8	34
Chargeable Accidents	13	1	14	13	1	14
Vehicle Inventory						
Total Number of Vehicles	32	3	35	32	3	35
Number of Wheelchair Accessible Vehicles	29	3	32	27	3	30
Drivers						
Number of Full Time & Part Time Drivers	30	3	33	18	3	21
Number of Volunteer Drivers	0	0	0	3	0	3



Coordination Contractor Vehicles & Drivers

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

Upload Date: 8/5/2026

Coordination Contractor: Hope Pace

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Vehicle Miles		
Deviated Fixed Route Miles	N/A	N/A
Complementary ADA Service Miles	N/A	N/A
Paratransit Miles	57,600	0
Transportation Network Companies (TNC) Miles	N/A	N/A
Taxi Miles	N/A	N/A
School Board (School Bus) Miles	N/A	N/A
Volunteers Miles	N/A	N/A
Total - Vehicle Miles	57,600	0
Roadcalls & Accidents		
Roadcalls	3	0
Chargeable Accidents	1	0
Vehicle Inventory		
Total Number of Vehicles	3	0
Number of Wheelchair Accessible Vehicles	3	0
Drivers		
Number of Full Time & Part Time Drivers	3	0
Number of Volunteer Drivers	0	0



CTC Revenue Sources

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Revenue Sources						
Agency for Health Care Administration (AHCA)	\$ 0	\$ 246,547	\$ 246,547	\$ 0	\$ 279,528	\$ 279,528
Agency for Persons with Disabilities (APD)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Economic Opportunity (DEO)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Children and Families (DCF)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Education (DOE)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Elder Affairs (DOEA)	\$ 19,052	\$ 0	\$ 19,052	\$ 27,517	\$ 0	\$ 27,517
Dept of Health (DOH)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Dept of Juvenile Justice (DJJ)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Commission for the Transportation Disadvantaged (CTD)						
Non-Sponsored Trip Program	\$ 508,836	N/A	\$ 508,836	\$ 382,335	N/A	\$ 382,335
Non-Sponsored Capital Equipment	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Rural Capital Equipment	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
TD Other	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Department of Transportation (DOT)						
49 USC 5307	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
49 USC 5310	\$ 125,259	\$ 0	\$ 125,259	\$ 89,968	\$ 0	\$ 89,968
49 USC 5311	\$ 76,971	\$ 0	\$ 76,971	\$ 89,968	\$ 0	\$ 89,968
49 USC 5311 (f)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Block Grant	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Service Development	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Commuter Assistance Program	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other DOT	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Local Government						
School Board (School Bus)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
County Cash	\$ 935,223	\$ 0	\$ 935,223	\$ 1,135,362	\$ 0	\$ 1,135,362
County In-Kind	\$ 56,555	\$ 0	\$ 56,555	\$ 67,497	\$ 0	\$ 67,497
City Cash	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
City In-Kind	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Cash	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other In-Kind	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Local Non-Government						
Farebox	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Donations/Contributions	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
In-Kind Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Non-Government	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Federal & State Programs						
Other Federal Programs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other State Programs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Total - Revenue Sources	\$ 1,721,896	\$ 246,547	\$ 1,968,443	\$ 1,792,647	\$ 279,528	\$ 2,072,175



Coordination Contractor Revenue Sources

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

Upload Date: 8/5/2026

Coordination Contractor: Hope Pace

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Revenue Sources		
Agency for Health Care Administration (AHCA)	\$ 246,547	\$ 0
Agency for Persons with Disabilities (APD)	\$ 0	\$ 0
Dept of Economic Opportunity (DEO)	\$ 0	\$ 0
Dept of Children and Families (DCF)	\$ 0	\$ 0
Dept of Education (DOE)	\$ 0	\$ 0
Dept of Elder Affairs (DOEA)	\$ 0	\$ 0
Dept of Health (DOH)	\$ 0	\$ 0
Dept of Juvenile Justice (DJJ)	\$ 0	\$ 0
Commission for the Transportation Disadvantaged (CTD)		
Non-Sponsored Trip Program	N/A	N/A
Non-Sponsored Capital Equipment	N/A	N/A
Rural Capital Equipment	N/A	N/A
TD Other	N/A	N/A
Department of Transportation (DOT)		
49 USC 5307	\$ 0	\$ 0
49 USC 5310	\$ 0	\$ 0
49 USC 5311	\$ 0	\$ 0
49 USC 5311 (f)	\$ 0	\$ 0
Block Grant	\$ 0	\$ 0
Service Development	\$ 0	\$ 0
Commuter Assistance Program	\$ 0	\$ 0
Other DOT	\$ 0	\$ 0
Local Government		
School Board (School Bus)	N/A	N/A
County Cash	\$ 0	\$ 0
County In-Kind	\$ 0	\$ 0
City Cash	\$ 0	\$ 0
City In-Kind	\$ 0	\$ 0
Other Cash	\$ 0	\$ 0
Other In-Kind	\$ 0	\$ 0
Local Non-Government		
Farebox	\$ 0	\$ 0
Donations/Contributions	\$ 0	\$ 0
In-Kind Services	\$ 0	\$ 0
Other Non-Government	\$ 0	\$ 0
Other Federal & State Programs		
Other Federal Programs	\$ 0	\$ 0
Other State Programs	\$ 0	\$ 0
Total - Revenue Sources	\$ 246,547	\$ 0



CTC Expense Sources

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

CTD Status: Under Review

	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Expense Sources						
Labor	\$ 267,178	\$ 131,993	\$ 399,171	\$ 400,867	\$ 136,380	\$ 537,247
Fringe Benefits	\$ 117,105	\$ 37,750	\$ 154,855	\$ 168,097	\$ 49,421	\$ 217,518
Services	\$ 1,092,101	\$ 52,112	\$ 1,144,213	\$ 920,599	\$ 67,863	\$ 988,462
Materials & Supplies Consumed	\$ 86,933	\$ 24,692	\$ 111,625	\$ 92,956	\$ 25,864	\$ 118,820
Utilities	\$ 34,914	\$ 0	\$ 34,914	\$ 63,339	\$ 0	\$ 63,339
Casualty & Liability	\$ 4,589	\$ 0	\$ 4,589	\$ 8,051	\$ 0	\$ 8,051
Taxes	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Miscellaneous	\$ 24,593	\$ 0	\$ 24,593	\$ 1,215	\$ 0	\$ 1,215
Interest	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Leases & Rentals	\$ 4,616	\$ 0	\$ 4,616	\$ 5,930	\$ 0	\$ 5,930
Capital Purchases	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Contributed Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 89,867	\$ 0	\$ 89,867	\$ 131,593	\$ 0	\$ 131,593
Purchased Transportation Services						
Bus Pass	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
School Board (School Bus)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Transportation Network Companies (TNC)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Taxi	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Contracted Operator	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Total - Expense Sources	\$ 1,721,896	\$ 246,547	\$ 1,968,443	\$ 1,792,647	\$ 279,528	\$ 2,072,175



Coordination Contractor Expense Sources

County: Charlotte

CTC Status: Submitted

CTC Organization: Charlotte County
BOCC Transit
Division

Fiscal Year: 07/01/2025 - 06/30/2026

Upload Date: 8/5/2026

Coordination Contractor: Hope Pace

	Selected Reporting Period	Previous Reporting Period
	Coordination Contractors	Coordination Contractors
Expense Sources		
Labor	\$ 131,993	\$ 0
Fringe Benefits	\$ 37,750	\$ 0
Services	\$ 52,112	\$ 0
Materials & Supplies Consumed	\$ 24,692	\$ 0
Utilities	\$ 0	\$ 0
Casualty & Liability	\$ 0	\$ 0
Taxes	\$ 0	\$ 0
Miscellaneous	\$ 0	\$ 0
Interest	\$ 0	\$ 0
Leases & Rentals	\$ 0	\$ 0
Capital Purchases	\$ 0	\$ 0
Contributed Services	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 0	\$ 0
Purchased Transportation Services		
Bus Pass	N/A	N/A
School Board (School Bus)	N/A	N/A
Transportation Network Companies (TNC)	N/A	N/A
Taxi	N/A	N/A
Contracted Operator	N/A	N/A
Total - Expense Sources	\$ 246,547	\$ 0

County: Charlotte
 CTC: Charlotte County BOCC Transit Division
 Contact: Heidi Maddox
 545 Theresa Blvd
 Port Charlotte, FL 33954
 941-833-6234

Email: heidi.maddox@charlottecountyfl.gov

Demographics	Number
Total County Population	0
Unduplicated Head Count	2,626



Trips By Type of Service	2024	2025	2026
Fixed Route (FR)	0	0	0
Deviated FR	0	0	0
Complementary ADA	0	0	0
Paratransit	38,150	26,562	24,369
TNC	0	0	0
Taxi	0	0	0
School Board (School Bus)	0	0	0
Volunteers	0	0	0
TOTAL TRIPS	38,150	26,562	24,369

Passenger Trips By Trip Purpose			
Medical	8,180	7,185	4,108
Employment	7,284	3,209	4,494
Ed/Train/DayCare	14,675	8,006	11,070
Nutritional	1,365	3,586	1,525
Life-Sustaining/Other	6,646	4,576	3,172
TOTAL TRIPS	38,150	26,562	24,369

Passenger Trips By Revenue Source			
CTD	19,649	15,077	9,535
AHCA	6,820	4,269	10,055
APD	0	0	0
DOEA	1,422	2,309	1,395
DOE	0	0	0
Other	10,259	4,907	3,384
TOTAL TRIPS	38,150	26,562	24,369

Trips by Provider Type			
CTC	24,510	22,293	14,314
Transportation Operator	0	0	0
Coordination Contractor	13,640	4,269	10,055
TOTAL TRIPS	38,150	26,562	24,369

Vehicle Data	2024	2025	2026
Vehicle Miles	491,108	688,897	728,087
Roadcalls	16	34	36
Accidents	4	14	14
Vehicles	39	35	35
Drivers	35	24	33

Financial and General Data			
Expenses	\$1,677,404	\$2,072,175	\$1,968,443
Revenues	\$1,677,404	\$2,072,175	\$1,968,443
Commendations	11	31	50
Complaints	75	71	118
Passenger No-Shows	2,573	1,478	0
Unmet Trip Requests	1,216	1,973	712

Performance Measures			
Accidents per 100,000 Miles	0.81	2.03	1.92
Miles between Roadcalls	30,694	20,262	20,225
Avg. Trips per Passenger	18.50	9.02	9.28
Cost per Trip	\$43.97	\$78.01	\$80.78
Cost per Paratransit Trip	\$43.97	\$78.01	\$80.78
Cost per Total Mile	\$3.42	\$3.01	\$2.70
Cost per Paratransit Mile	\$3.42	\$3.01	\$2.70

SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 9
QUARTERLY REPORT

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

Presented by: Charlotte County Staff

Discussion: The quarterly report for April-June 2026 will be presented to describe recent activities of the Community Transportation Coordinator. This is an informational item.

Recommendation: None

Attachment: [Quarterly Report April-June 2026](#)



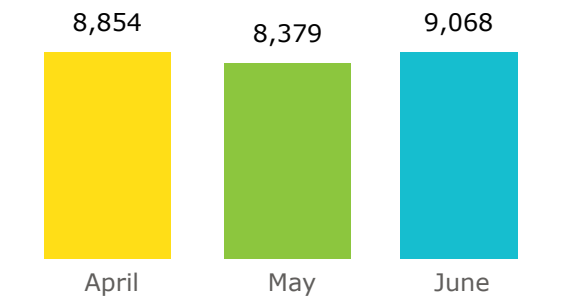
Charlotte Rides

Safe. Local. Free.

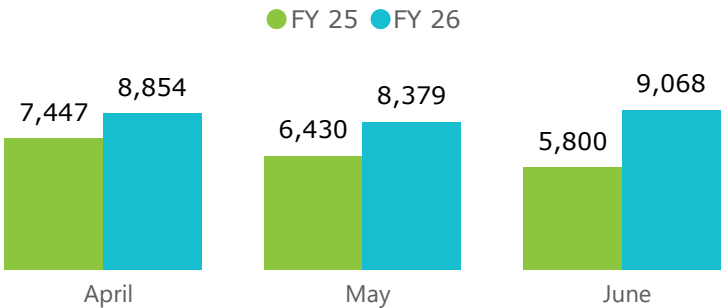
FY 26 LCB Q3 Report

September 3, 2026

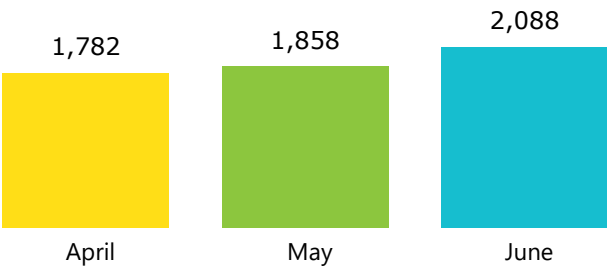
Completed Trips



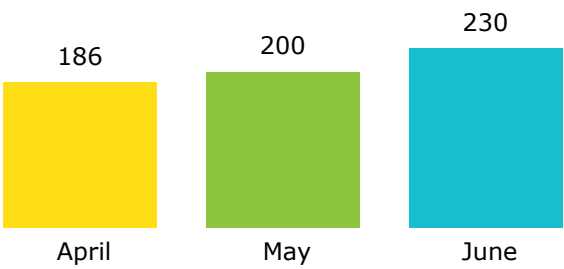
Q3 FY 25/FY 26 Completed Trip Comparison



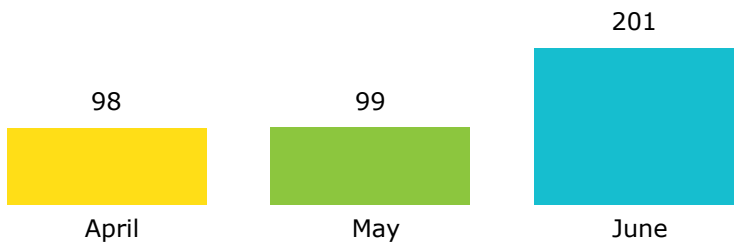
Trips Booked Through the App



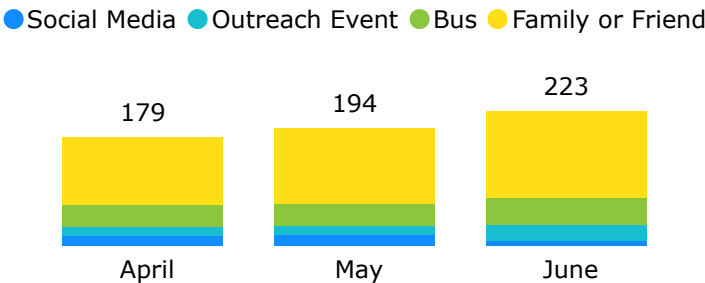
New Riders



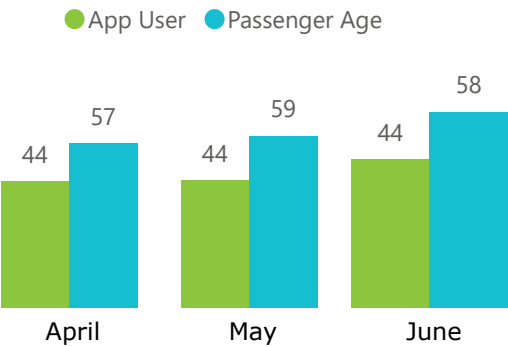
New App Subscribers



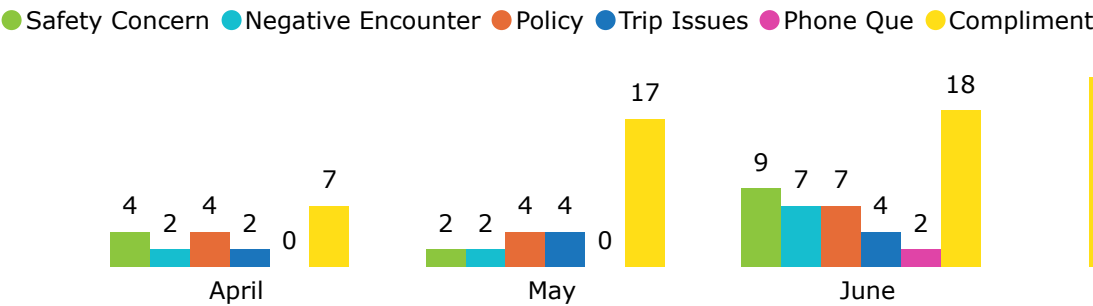
New Passenger Referrals



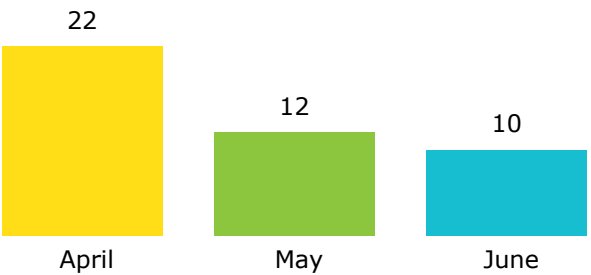
Average Age



Compliments and Concerns

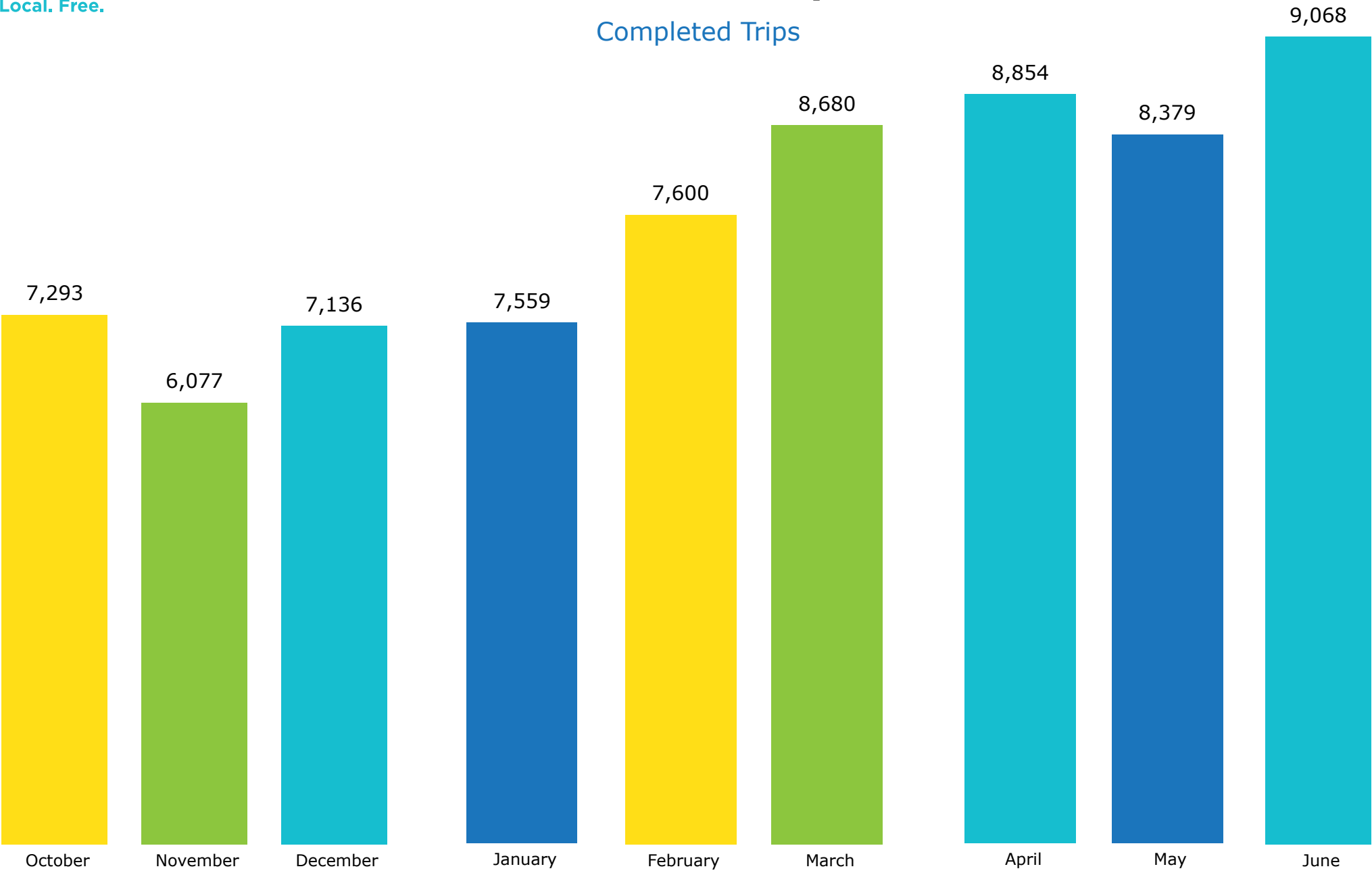


Unmet Trips



FY 26 LCB Report

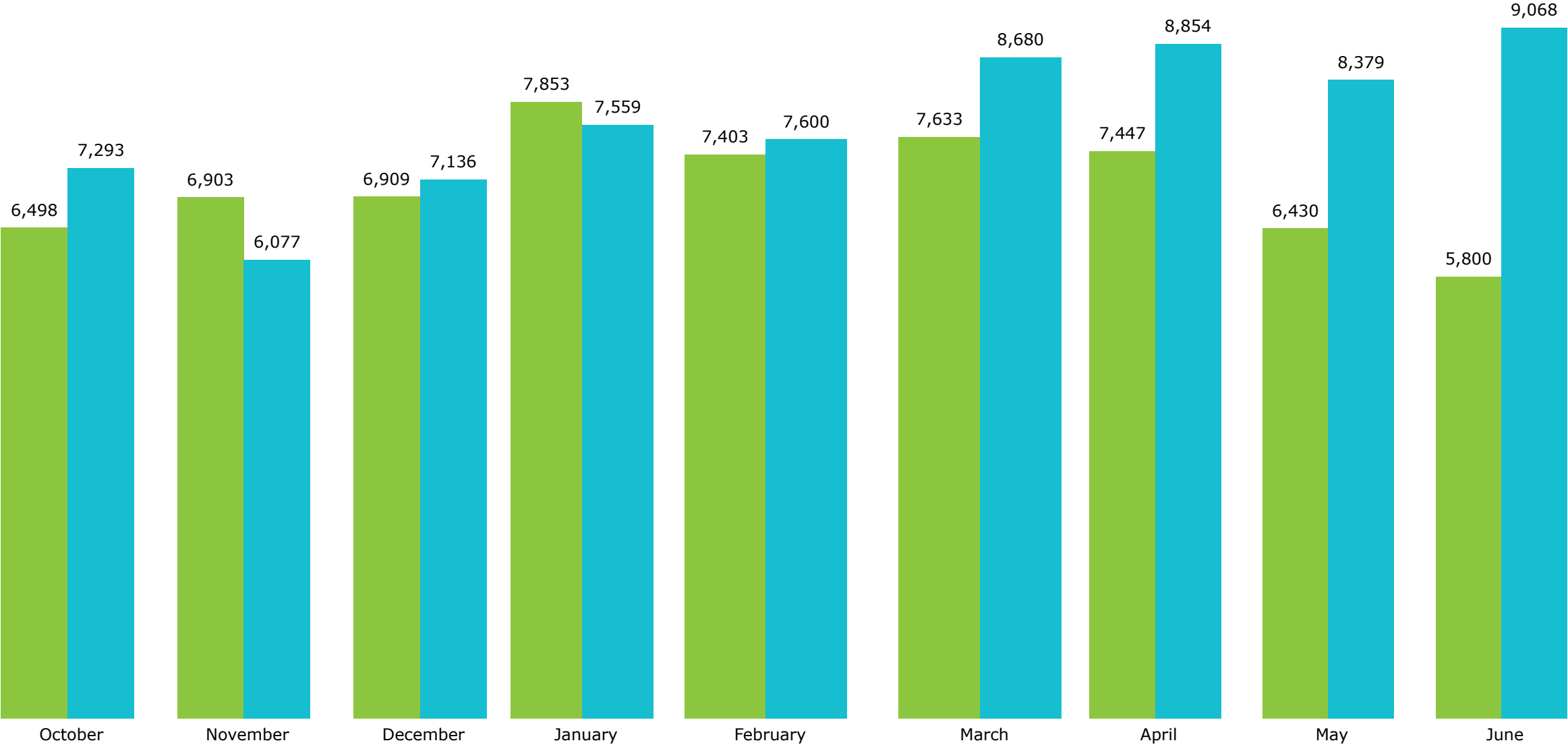
Completed Trips



FY 26 LCB Report

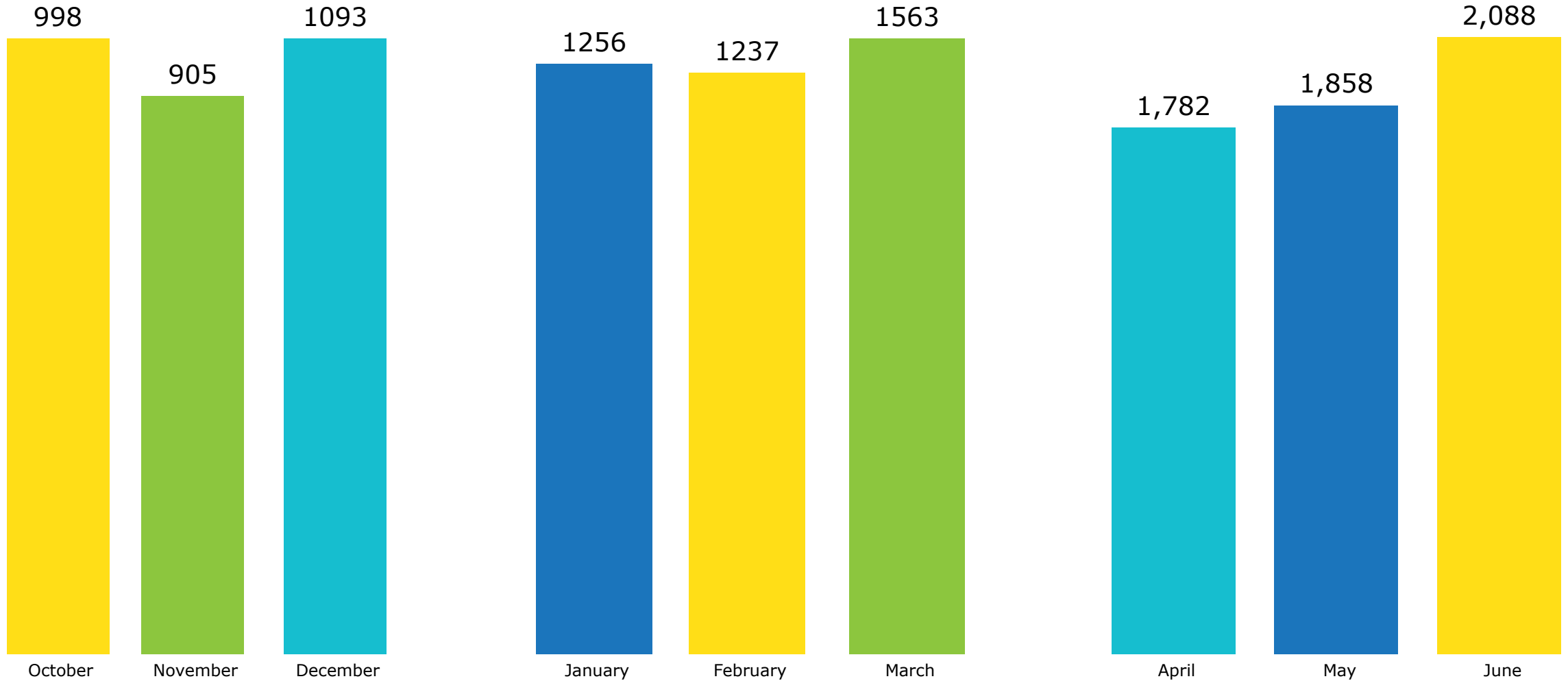
FY 25 FY 26 Month by Month Comparison

FY 25 FY 26



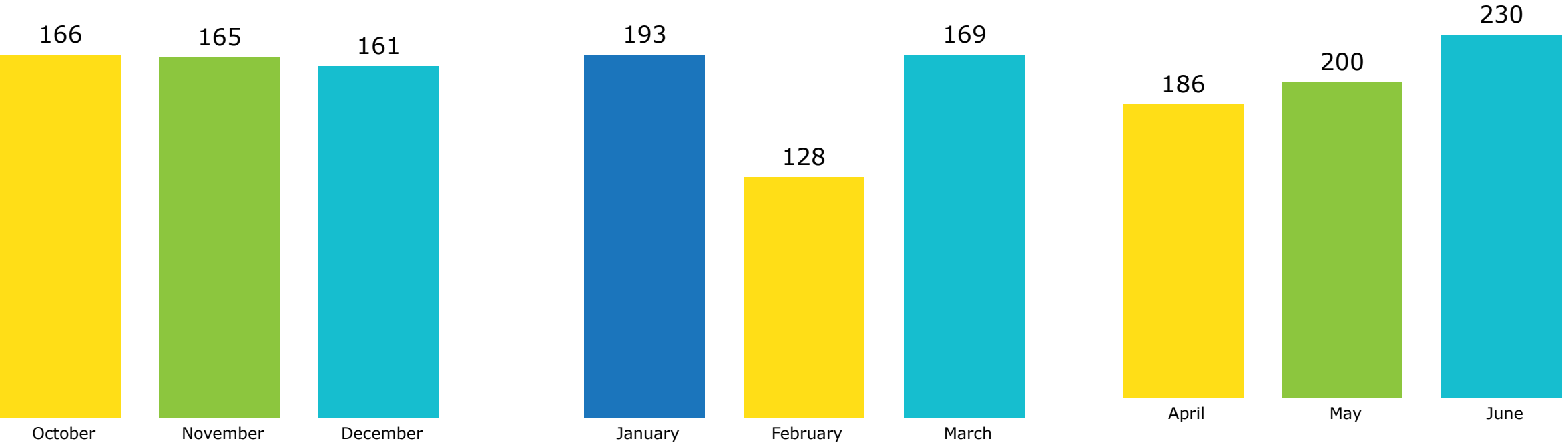
FY 26 LCB Report

Trips books Through the Charlotte Rides App

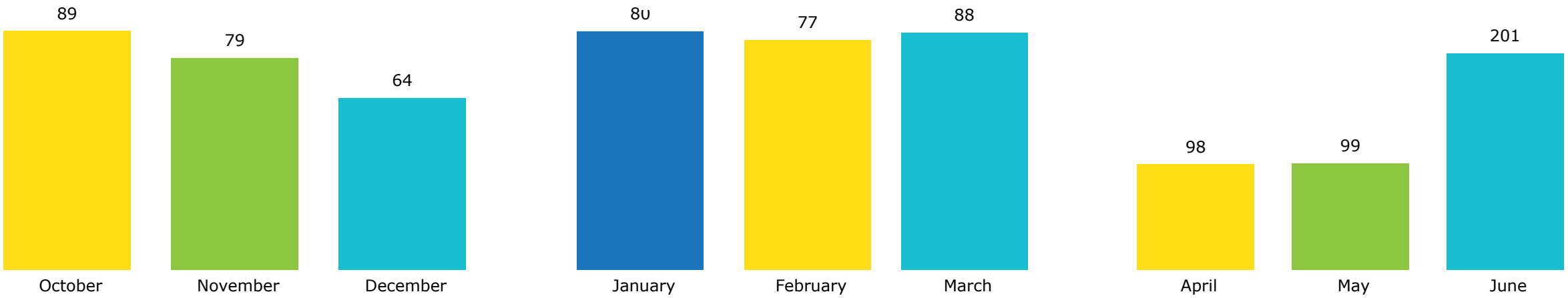


FY 26 LCB Report

New Passengers



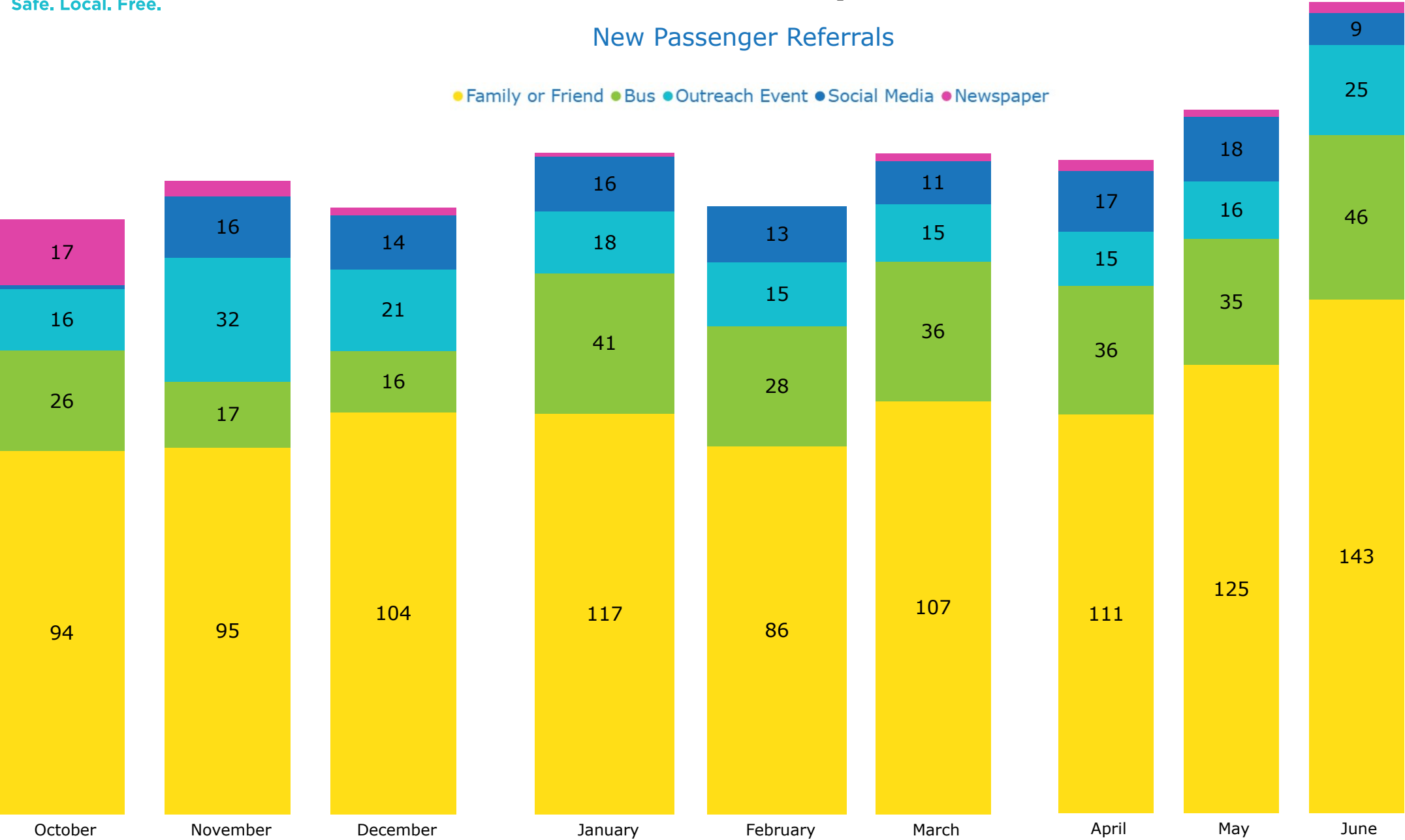
New App Subscribers



FY 26 LCB Report

New Passenger Referrals

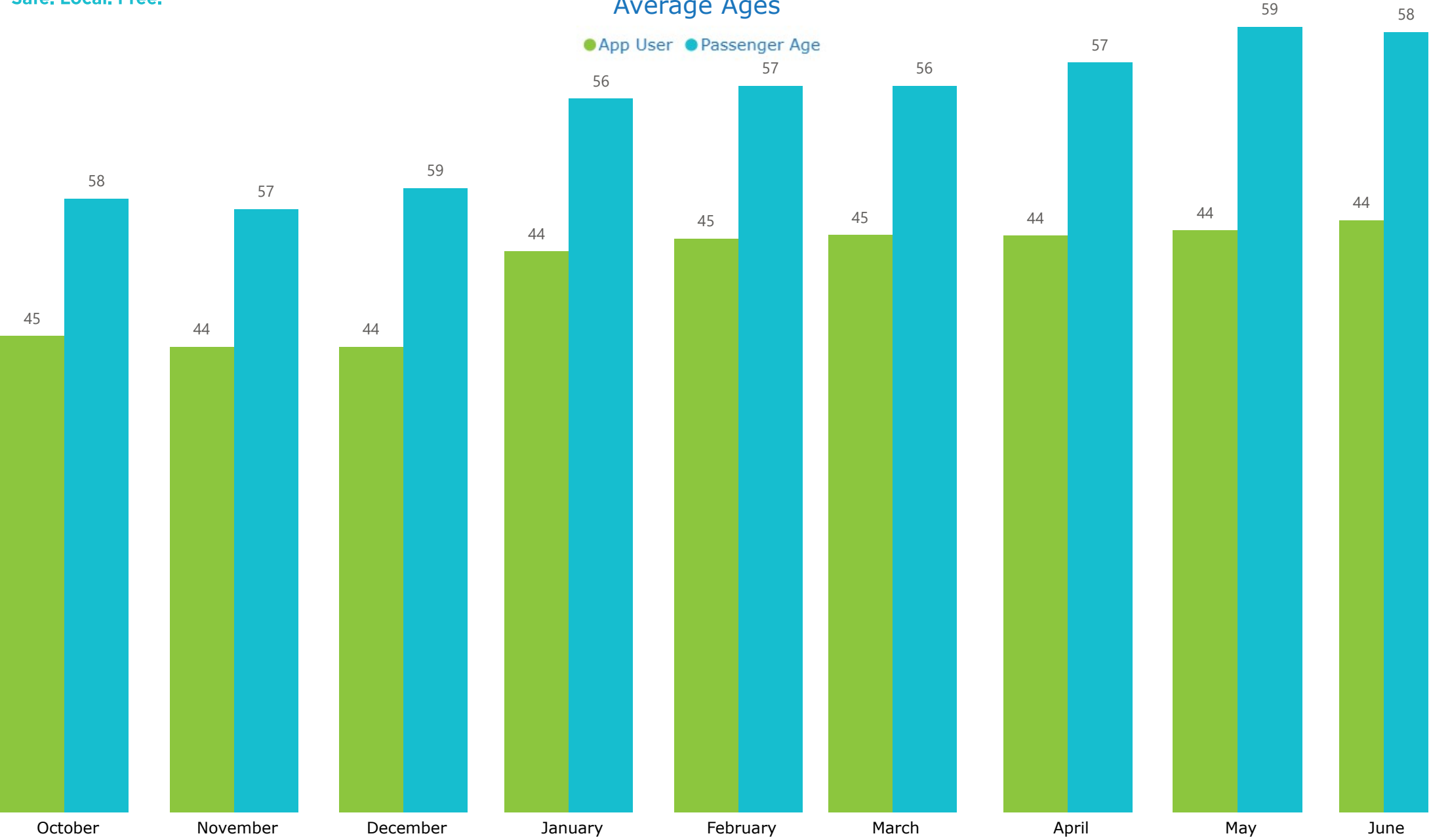
Family or Friend Bus Outreach Event Social Media Newspaper



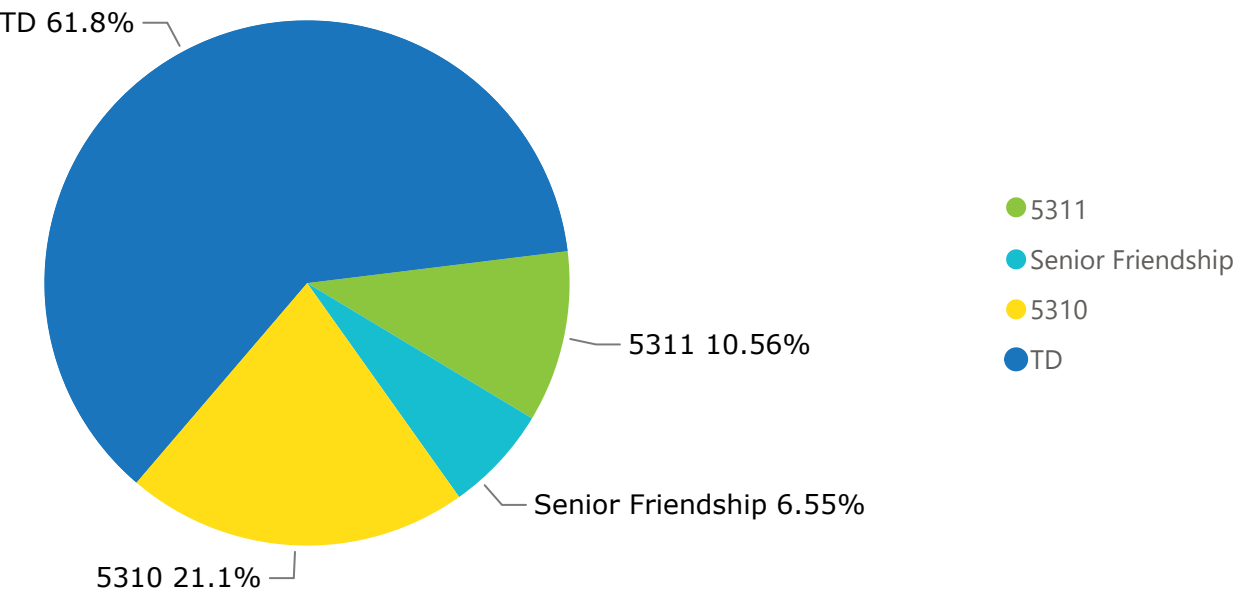
FY 26 LCB Report

Average Ages

● App User ● Passenger Age



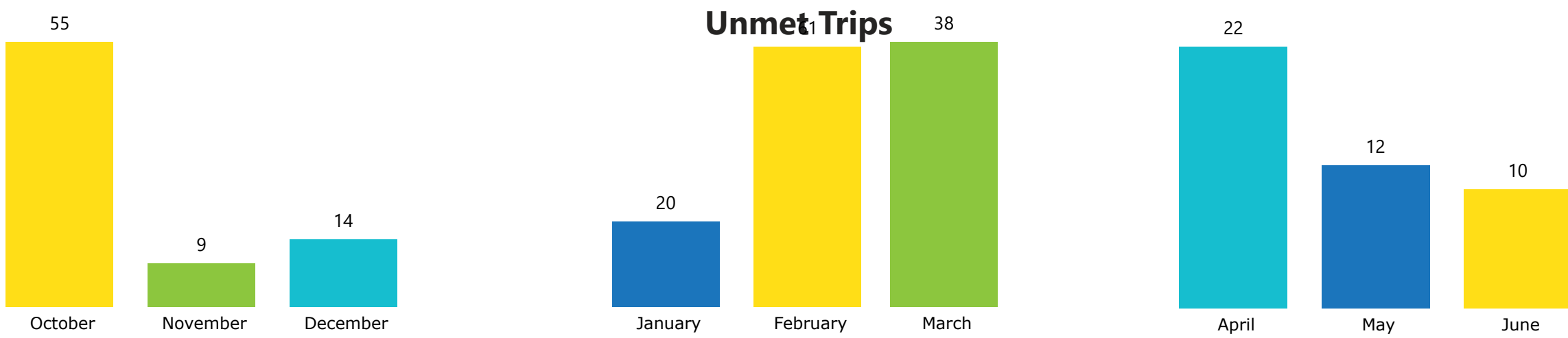
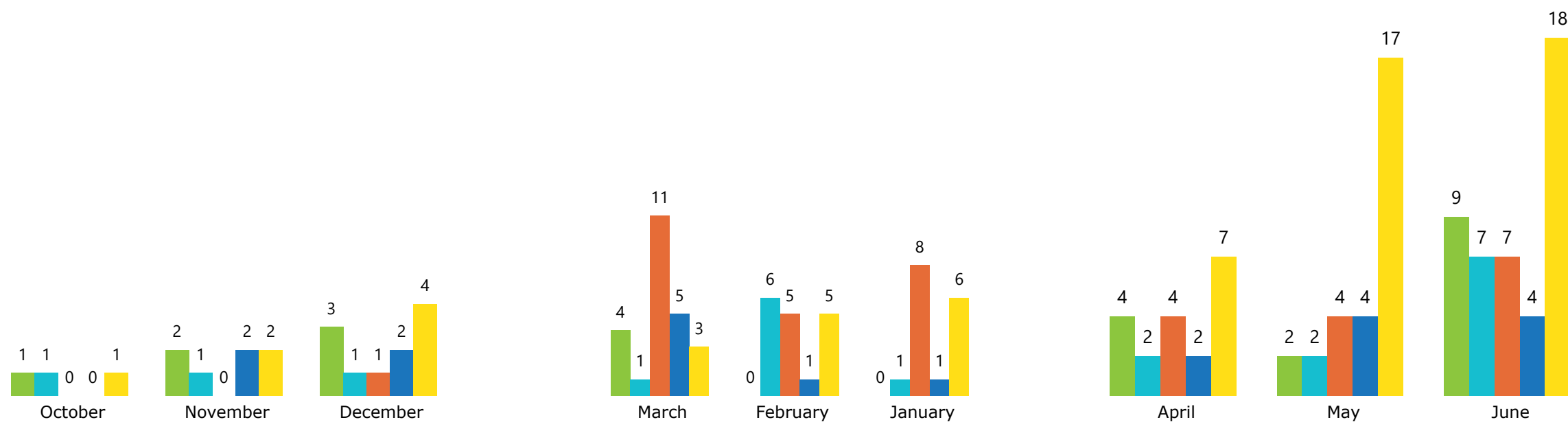
FY 26 LCB Report
Fiscal Report



Month	Senior Friendship	Rural 5311	5310	TD
April	4,788.02	0.00	0.00	38,460.29
May	3,586.50	0.00	0.00	34,795.75
June	3,830.92	19,683.27	39,325.44	41,934.73

FY 26 LCB Report
Compliments and Concerns

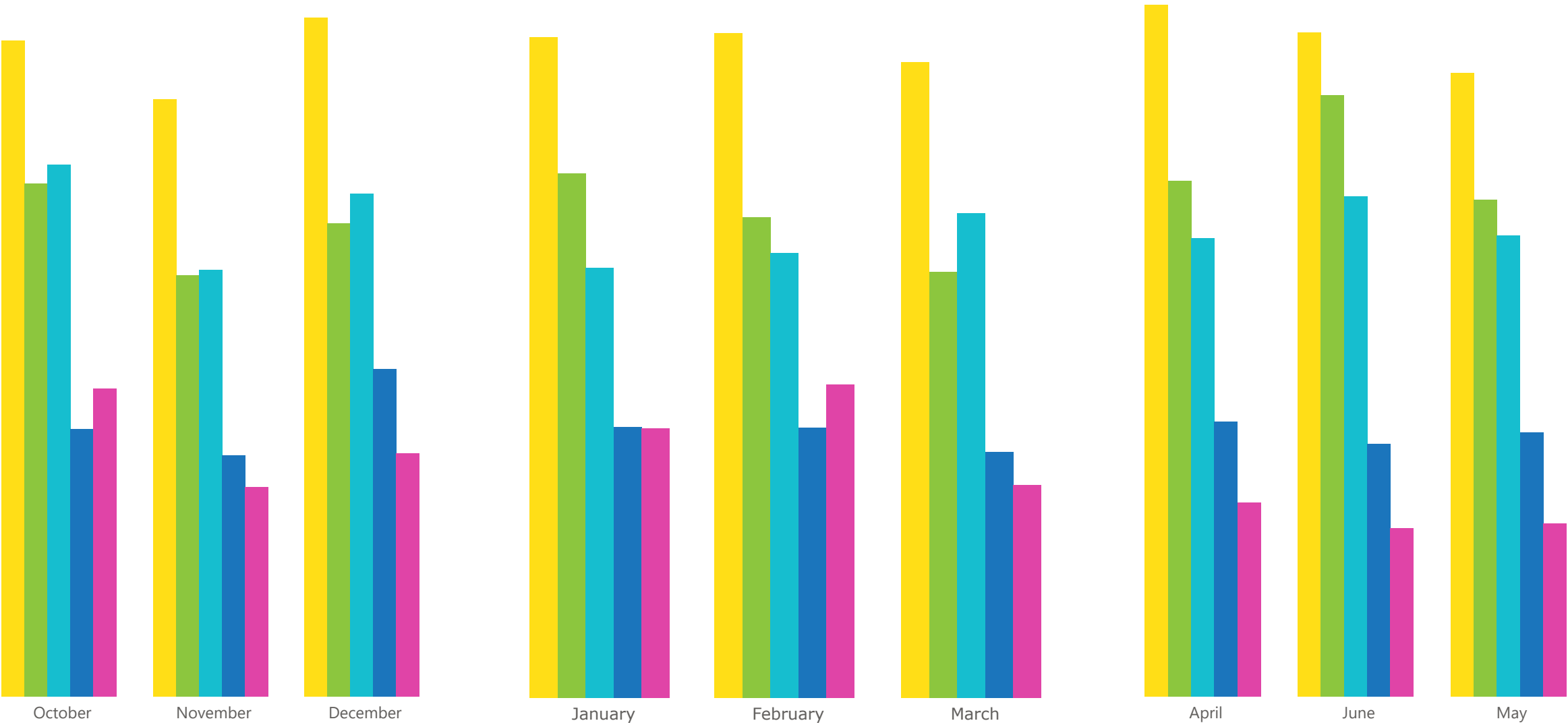
Safety Concern Negative Encounter Policy Trip Issues Compliment



FY 26 LCB Report

Trips by Purpose

● Employment ● Medical ● Life Enhancing ● Nutrition ● Education



Charlotte Rides

Safe. Local. Free.

New Look, New Name



Heidi Maddox
Presented at 2
Transit
Conferences



CCSO Back to
School Bash



Hurricane Food Distribution
Collection Box Decoration
Winners
for the Stuff the Bus theme



Transit Rolls in with a New Library to Library service

Charlotte County Transit is offering a **free** library circulator system from the now-closed Port Charlotte Library to Mid-County Library on **Monday, Wednesday, and Saturday.**

Riders will be picked up at Port Charlotte Library and brought to Mid-County Library as per the schedule below. First pick-up is 10 a.m., last drop-off is 6:15 p.m.



Tiffany Hummel
completed the
Florida Transit
Leadership
Program



35
Community
Outreach
Events!



Honoring and
Supporting
our Veterans



SEPTEMBER 3, 2026

LCB MEETING

AGENDA ITEM # 10
LCB MEMBER PRESENTATIONS

Purpose: To provide an overview of LCB member agencies role in Transit

Presented by: LCB Members

Discussion: Charlotte County's Local Coordinating Board (LCB) advises the Community Transportation Coordinator (CTC) and oversee services for the transportation disadvantaged. Members represent state agencies, local organizations, and citizen advocates, each with defined roles and responsibilities to ensure coordination, accountability, and equitable access to transit.

Today's presentation highlights each member's role in supporting transit services in Charlotte County.

Recommendation: None

Attachments:

1. [Maricela Morado – Area Agency on Aging for Southwest Florida](#)
2. Tabitha Larrauri (Nicole Negron) – Florida Department of Children and Families
3. [Suzanne Roberts – Local Medical Community](#)



Area
Agency
on Aging

FOR SOUTHWEST FLORIDA

Area Agency on Aging for Southwest Florida

Planning and Service Area (PSA) 8

Know Us Before You Need Us!

Maricela Morado, President & CEO

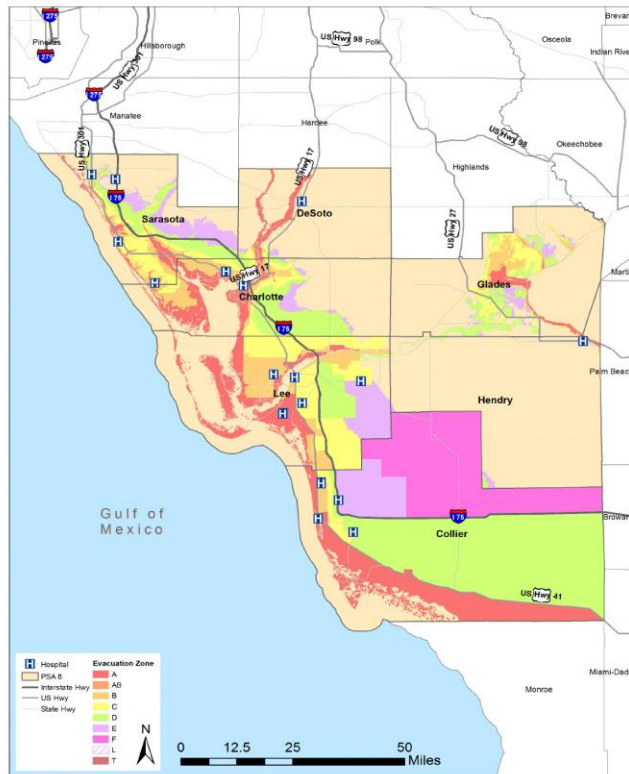


AAASWFL

- **Our Mission:** AAASWFL empowers older adults and adults with disabilities to create their own path to positive aging.

Planning and Service Area (PSA) 8 Disaster Preparedness

Evacuation Zones





Who we Are?

- AAASWFL is a private, not for profit organization that provides services and resources for older adults, caregivers and individuals with disabilities.
- AAASWFL is funded by federal and state dollars, private grants and donations. Works under the authority of the Florida Department of Elder Affairs.
- AAASWFL is part of the Aging Network in Florida.
- AAASWFL serves as the Area Agency on Aging & the Aging and Disability Resource Center for Charlotte, Collier, DeSoto, Glades, Hendry, Lee and Sarasota counties
- There are 11 Area Agencies on Aging in Florida and over 600 in the United States.





Area
Agency
on Aging

Who Do We Serve?

- Seniors age 60+
- Persons with Disabilities age 18-59
- Veterans
- Caregivers
- Professionals
- Anyone seeking Information & Community Resources



Know Us Before You Need Us!



What Is the “Aging Network”?

How funding and services flow from the federal government down to the people they serve



FEDERAL **ACL – Administration for Community Living**
Sets policy and funds the network through the Older Americans Act.



STATE **DOEA – Department of Elder Affairs**
Distributes federal funding and oversight to Florida's 11 planning service areas.



REGIONAL **AAA / ADRC (AAASWFL)**
Plans, funds, and coordinates services across Charlotte, Collier, DeSoto, Glades, Hendry, Lee, and Sarasota counties.



LOCAL **Lead Agencies & Providers**
Deliver direct services such as meals, transportation, and in-home care.



COMMUNITY **Consumers Needing Assistance**

613

Area Agencies on Aging nationwide

*AAASWFL is the designated AAA/ADRC for
Planning Service Area 8*

*Source: Administration for Community Living (ACL); Florida
Department of Elder Affairs (DOEA)*



FUN FACT

Florida's 11 AAA/ADRCs together cover all 67 counties in the state, every Floridian has a local point of entry to aging and disability services.

Source: Florida Department of Elder Affairs

All AAAs offer five core services under the OAA:



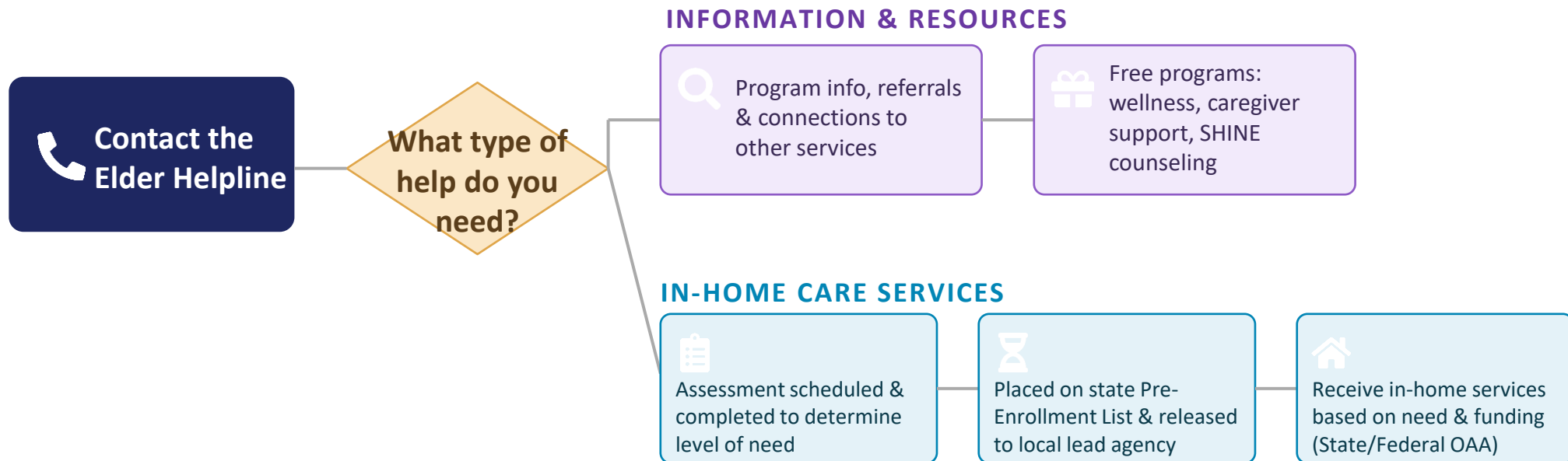
Entry Point?

Know Us Before You Need Us!



How the AAASWFL Elder Helpline Works

One call connects you to information, resources, and services — know us before you need us.



Elder Helpline

866-41-ELDER • 866-413-5337

Know Us Before You Need Us!



Questions We Can Help Answer

Our staff will listen to you, refer you to the appropriate services, and explain how to access them.



How do I get the help that I need?



Am I eligible for government-funded services?



What community resources are available?



How much will it cost?



Who can help me through this maze?



How do I plan for the future?

We help with: Information & Referral • Needs Assessment • Resource Connections • Assessment Referrals • SHINE Medicare Counseling



Elder Helpline: 866-41-ELDER • 866-413-5337

Know Us Before You Need Us!

What is the assessment process?

- Over the phone assessment (701s)
- Takes about 45 minutes to 1 hour
- Ranked 1 – 5 based on level of need
- Pre-Enrollment List for Services
- Released as funding is available





Long Term Care Services Team

"We help connect people with long-term care services, so they can live with dignity and independence."

WHAT OUR TEAM DOES



LTC Screening

Screens consumers for long-term care services.



LTC Counseling

Answers questions and provides guidance on long-term care options.



Pre-Enrollment List Placement & Release

Manages pre-enrollment list placement and release.



Medicaid Eligibility Assistance

Helps consumers apply for Medicaid eligibility.

Know Us Before You Need Us!



Eligibility & Speed of Access

How quickly consumers gain access depends on the program and their priority level.

	Non-Medicaid Programs	Medicaid LTC Programs
Who Qualifies	Age 60+; preference to those with the greatest economic and/or social need. Exceptions may apply depending on the program.	18+ and eligible for Medicaid by reason of disability, OR 65+ AND in need of a nursing-home level of care.
Income Limit	Varies by program	\$2,829/individual • \$5,658/couple
Asset Limit	Varies by program	\$2,000/individual • \$3,000/couple (Home & Community-Based Waivers)
How Quickly You're Served	Highest-priority clients are served first.	Highest-priority clients are served first, with monthly pre-enrollment list releases.

Source: Florida Medicaid Long-Term Care program eligibility guidelines. Income and asset limits are updated periodically.

Know Us Before You Need Us!

Lead Agencies

- Each AAA contracts with Lead Agencies
- Federal & State Funding
- 49 Lead Agencies serving Florida's 67 counties
 - Nonprofit organizations
 - County Government agencies





Services Lead Agencies Help Access



In-Home Support

Homemaker • Personal Care • Home Health Aide • Housekeeping • Respite • Caregiver Training & Support



Nutrition

Home-Delivered Meals • Congregate Meals • Nutrition Education



Health & Clinical

Skilled & Intermittent Nursing • Medication Administration & Management • Medical Equipment & Supplies



Community & Facility-Based

Adult Day Care • Transportation • Home Repair



Case Management & Advocacy

Case Management • Assistive Care Services • Legal Assistance • Shopping Assistance

Funded Programs: ADI† • CCE† • HCE† • OAA† • MLTC • Outreach

† Delivered through AAASWFL-funded Lead Providers

Know Us Before You Need Us!

Health & Wellness



Know Us Before You Need Us!





Navigating Medicare



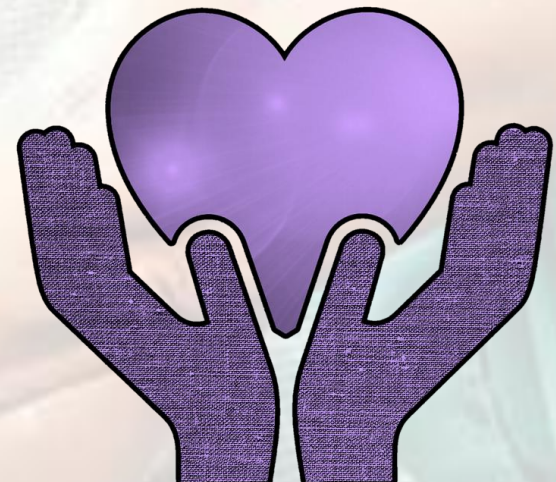
Preventing Medicare Fraud

Know Us Before You Need Us!



Area
Agency
on Aging

Volunteers



Know Us Before You Need Us!

Elder Abuse Awareness & Prevention



Elder 
Affairs
FLORIDA

Know Us Before You Need Us!

Veteran-Directed Home and Community-Based Services (VD-HCBS)





Scenario #1

I am 85 years old. Last week I received a call from FP&L telling me that I owed \$200 on my light bill and it had to be paid by 3:00 or they would turn off my lights. I told them I was not able to drive to their office. They said that I could give them my credit card number to make it easy for me. I am on oxygen and must have electricity, so I gave him my credit card number. I spoke to my son this morning and he said I was scammed. What should I do?



Scenario #2

My husband and I are in our 80s and are very low income. After we pay our utility bills, there is very little left over for food and we are not eating properly.



Area
Agency
on Aging

Questions?





Contact Information

ea@aaaswfl.org
239.652.6900

Helpline: 866.413.5337

www.aaaswfl.org



Know Us Before You Need Us!



Mobile Medical Clinic

***Partnerships in Motion:
Increasing Access to Care Across Charlotte County***

M. Suzanne Roberts, M.Ed.
Chief Executive Officer
Local Coordinating Board Meeting
September 3, 2026

INTRODUCTION

2008



2012



2024



Our Mission: To provide no-cost volunteer medical, pharmacy, and wellness services to the underserved in Charlotte County.

WE ARE MORE THAN A MISSION....



A commitment to a set of simple human values:

All people deserve access to quality medical care despite financial circumstances.

And...

Volunteerism is a fundamental expression of a civil, caring community.

VOLUNTEER IMPACT 2025

Total Volunteers

200 Active Base / 85 Utilized

Volunteer Hours: 12,501

Medical Volunteers

Value - \$454,599

Non-Medical Volunteers

Value - \$303,149

Total Value: \$757,758



CLINIC IMPACT 2025

In Clinic Visits – Avg. 300 monthly

In Clinic patient visits – Avg. 3600 annual

Specialty Services - 2738

**Increased service scope in response to
growing community need:**

- **Primary Care**
- **Semi-urgent**
- **Surgical / Specialty**
- **Pharmacy**



VBA PARTNERSHIPS FOR IMPROVED CLINICAL OUTCOMES



- Some of the many VBA partners that provide in-kind services: labs, imaging, funding, and treatment for our patients
- Partnering for patients to be a part of research to assist in education and the reduction of life-limiting disease processes
- In clinic programs: ER Diversion, Hepatitis C Program, Hypertension Program, Diabetic Program, Wellness Program, Tobacco Cessation Program, Opioid Management & Referral
- Cancer funding for education, prevention, detection, equipment, and treatment



VBA PHARMACY

Open to patients Monday, Tuesday, Wednesday, and Friday 9am to 2pm

Inventory 4/2025 = \$625,000

- 15% Purchased items
- 85% Donated items

From:

DISPENSARY OF
HOPE


Direct Relief

 **americares**



- Samples, individuals

Pharmacy dispenses Rx's and OTC items to VBA patients

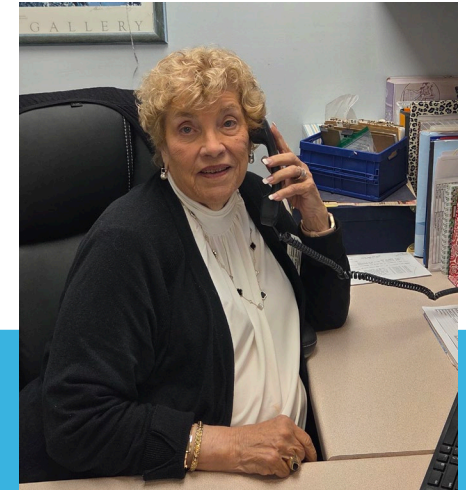
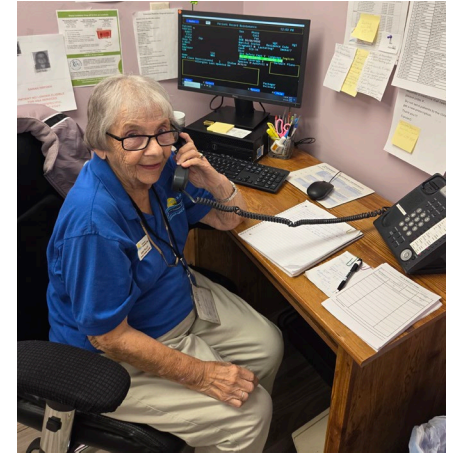
We do not stock or fill
Controlled Substances



PHARMACY IMPACT 2025



- **5,330** patient encounters
- **3,013** patients served
- **18,273** RXs filled



VBA PHARMACY IMPACT 2025

Patient Assistance Program

Meds and supplies delivered 452 / ARP \$1,864,985

- Medications
- Hepatitis C Treatment
- Vaccinations
- Between 100-140 active patients monthly
- 19 Manufacturers:

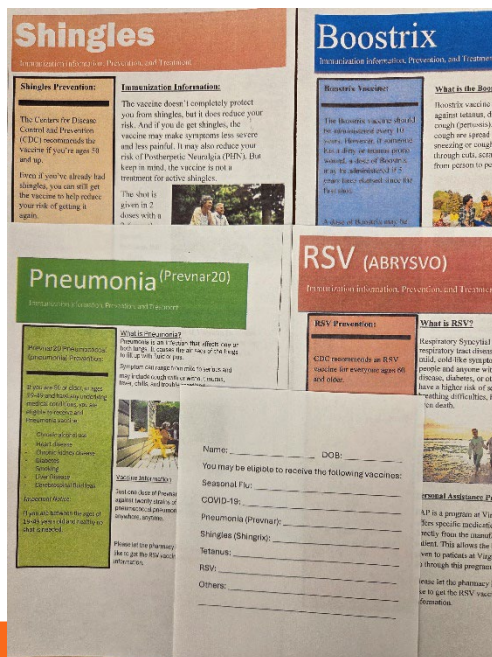


AbbVie, Amgen, Astellas Pharma, Astra-Zenica Pharmaceuticals, Biohaven Pharmaceuticals, Boehringer Ingelheim Pharmaceuticals, Bristol Myers Squibb, Covis Pharmaceuticals, Eli Lilly, Gilead Sciences, GlaxoSmithKline, Merck & Co, Novartis Pharmaceuticals, Novo Nordisk Pharmaceuticals, Pfizer, Rx Partnership, Sanofi and Regeneron Pharmaceuticals, Sanofi-Aventis, Takeda, Viartis, Xelsource.

VBA PHARMACY IMPACT 2025

Immunization services 152 shots administered including:

- Seasonal Flu
- COVID-19
- Pneumonia
- RSV
- Shingles
- Tetanus
- Diphtheria
- Pertussis



VBA PHARMACY IMPACT

*Independent Retail Pharmacy

VBA Pharmacy 2026

Annual \$ Volume \$3,459,814

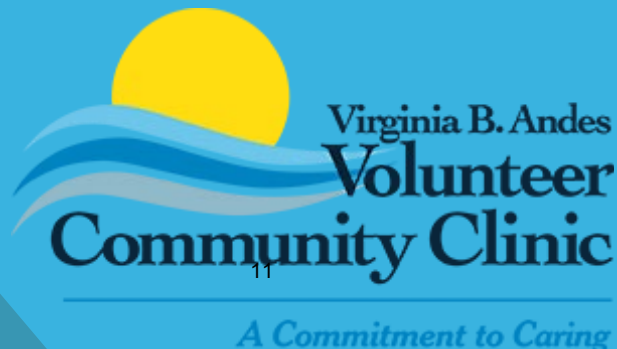
\$3,000.000 Includes In-kind

Operating Cost \$900,000

\$232.563



*Taken from 2020 National Association of Community Pharmacist Digest



MOBILE MEDICAL CLINIC SERVICES



GRAND OPENING!

MARCH 28, 2024

**Providing Access to Healthcare to the Uninsured
in Charlotte County**



WHY PARTNERSHIPS MATTER

- **Extend reach into vulnerable communities**

Partners like DOH and behavioral health agencies help bring care to the uninsured, homeless, and hard-to-reach residents.

- **Leverage shared expertise and resources**

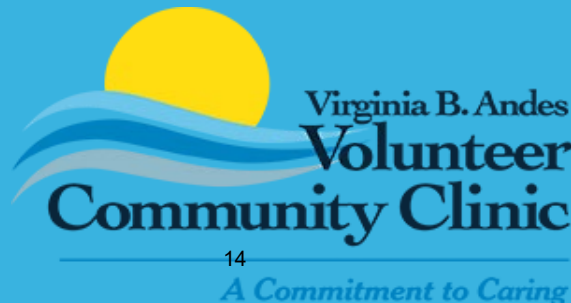
Collaboration combines medical, behavioral health, and pharmacy services to expand care capacity.

- **Enhance continuity and quality of care**

Coordinating referrals helps patients move smoothly between services without gaps in treatment.

- **Strengthen trust and engagement**

Trusted local partners reduce barriers and encourage more people to seek care earlier.



EXPANDING ACCESS THROUGH COMMUNITY PARTNERSHIPS

A Sample of our Community Partnerships



TEAM VBA



OPERATIONS & TEAM

Monday-Friday 8 AM–5 PM

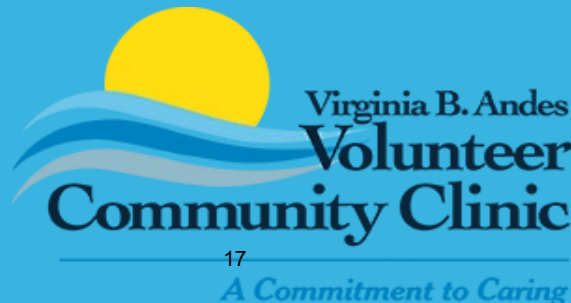
Serving Port Charlotte, Punta Gorda & Englewood

26 Community Partner sites across Charlotte County, FL

- **Charlotte County Department of Health's critical partnership provides on-site Public Health Services every Thursday and Friday.**
- **Charlotte Behavioral Healthcare supports mental health and substance abuse services.**
- **Opioid CORE Grant Partnership and Peer Support Program.**
- **Tobacco Free Florida, in partnership with Gulfcoast AHEC, offers free tobacco cessation classes.**

TEAM M-W and T-F

- **1 Full-time Mobile Medical Clinic Coordinator (Scheduler, Maintenance & Disaster Relief)**
- **2 Part-Time APRNs & 2 Part-Time RNs**
- **2 Part-Time CDL Drivers & 1 PRN CDL Driver for coverage & Disaster Relief**



PARTNERSHIPS IN ACTION

Bringing care directly to patients.

Flexible, responsive model. Disaster Relief.

Reducing barriers to healthcare access.

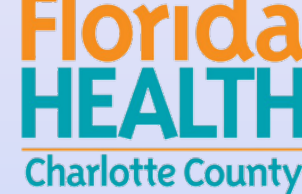
Improving ER Diversion rates.

Cost Effective Access to Care.



February 2026

Mobile Medical Clinic Calendar



Monday	Tuesday	Wednesday	Thursday	Friday
2 Charlotte Behavioral Health Care 10 AM - 4 PM	3 Charlotte CARE Center 10 AM - 3 PM	4 Englewood Helping Hand 9 AM - 12PM	5 Family Services Center 8:30 AM - 11 AM Charlotte CARE Center 12 PM - 3 PM	6 7 Palms Apartments 10 AM -4PM
9 Hampton Point Apartments 10 AM - 3 PM	10 Charlotte Behavioral Health Care 10 AM - 4 PM	11 St. Mary Baptist Church 9 AM - 12 PM	12 Wintergarden Presbyterian Church 10 AM - 4 PM	13 St. Vincent DePaul St. Charles Borromeo 8:30 AM - 11 AM Charlotte CARE Center 12PM -3PM
16 CLOSED Presidents Day	17 Charlotte CARE Center 10AM -3 PM	18 St. Francis of Assisi 9AM-11:30 PM	19 Jacaranda Place Apartments 10 AM - 3 PM	20 St. Vincent DePaul Sacred Heart 8:30 AM - 11 AM Charlotte Behavioral Health Care 12PM - 3 PM
23 Charlotte CARE Center 10 AM - 3 PM	24 Charlotte Behavioral Health Care 10AM - 1:30 PM	25 St. Mary Baptist Church 9 AM - 12 PM	26 Englewood Helping Hand 9 AM - 12PM	27 St. Vincent DePaul St. Charles Borromeo 8:30 AM - 11 AM Charlotte CARE Center 12 PM - 3 PM

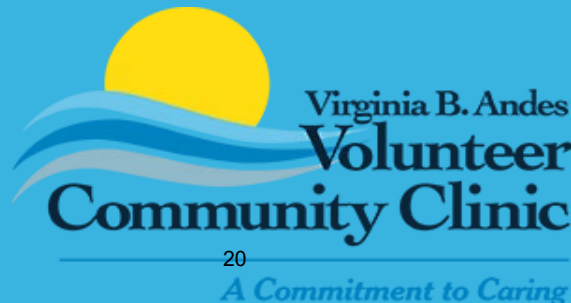
Florida Department of Health in Charlotte County services (Thursdays and Fridays) include Health Screenings, Immunizations, dental education, and other department referrals.

Virginia B. Andes Volunteer Community Clinic Primary Care services(Monday - Friday) include onsite exams, limited pharmacy, diabetes management, hypertension management, chronic disease management, wellness education, and semi-urgent care.

Mobile Clinic Phone Number: (941)339-2896

CORE PARTNERSHIP CATEGORIES

- **Healthcare Providers** – Hospitals and clinics supporting referrals, specialty services, diagnostics, and continuity of patient care.
- **Public Health Agencies** – Health departments providing vaccinations, screenings, disease prevention, and community health education.
- **Behavioral Health Organizations** – Mental health and substance use providers offering counseling, crisis intervention, and integrated care coordination.
- **Emergency Management Disaster Relief** – Local agencies coordinating disaster preparedness, response efforts, and continuity of care during emergencies.
- **Community Organizations** – Nonprofits, shelters, and faith-based groups addressing social needs like food, housing, transportation, and outreach.
- **Funding Partners** – Foundations, healthcare systems, and donors providing financial resources to sustain and expand programs



ON THE MOVE



GROWTH WITH PARTNERSHIPS

- **Purpose:** Addressed healthcare disparities by bringing high-quality, free medical services directly to Charlotte County underserved communities.
- **Collaborations:** Strengthened community partnerships, including the Charlotte County Department of Health and Charlotte Behavioral Healthcare, to provide comprehensive care.
- **Service Expansion:** Expanded operational hours from three days per week to five days per week through additional funding. Increased sites from 8 to 26 and growing.
- **Community Impact:** Provided barrier-free healthcare access, improving health outcomes and reducing emergency room visits.
- **Recognition:** The Board of Charlotte County Commissioners received naming rights for the \$750K Grant New Mobile Medical Clinic in appreciation of their generous support.

IMPACT OF PARTNERSHIPS 2025

In 2025, we have reached Charlotte County's most vulnerable residents.

Services:

- **Primary Care Exams.**
 - **Chronic Disease Management. (e.g., Diabetes, Hypertension)**
 - **Wound Care**
 - **Telehealth**
 - **Semi-Urgent care and health screenings.**
 - **Limited Onsite Pharmacy Services. Immunizations & Vaccines**
 - **Community Events & Health Care Clinics**
-
- **1522 patient visits**
 - **2,586 prescriptions**
 - **12,845 outreach encounters**
-
- **ER Diversion Savings: Each avoided ER visit (\$2,500–\$6,000) translates into millions in community savings during a single visit.**
 - **Medication Protection: Safeguards refrigerated insulin, vaccines, and other critical meds, preventing life-threatening complications for patients with diabetes, hypertension, and chronic conditions.**

FROM CHALLENGE TO CHANGE

- **High demand for services exceeded capacity, which caused a need for additional staffing.**

Action Taken:

Increased services to 5 days per week & hired part-time APRN and RN.

- **Transportation barriers for some patients.**

Action Taken:

Charlotte County Transit Service Community Partnership.

Secured transportation funding in the budget for taxi services.

EXPANSION PROGRESS THROUGH PARTNERSHIPS

- 1. Increased patient outreach activities.**
- 2. Expanded service location sites.**
- 3. Enhanced preventative healthcare programs.**
- 4. Strengthened disaster preparedness & emergency response role.**

STRATEGIC DIRECTION 2026-2027

- 1. Secure Sustainable Funding.**
- 2. Expand Geographic Reach.**
- 3. Stronger Disaster Resilience.**
- 4. Volunteer Cross Training.**
- 5. Pilot Dental Project.**



GRATEFUL FOR SHARED VALUES

