



# Transportation Disadvantaged Service Plan

for DeSoto, Hardee, Highlands, and Okeechobee Counties  
(The Coordinated Public Transit-Human Services Transportation Plan)

**2015-2021**  
2019/2020 Update

**Prepared By**  
Heartland Regional  
Transportation Planning  
Organization and  
MV Transportation, Inc.

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Adopted: April 15, 2020

# How to get involved



**CALL US @ (863) 534-7130**  
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**VISIT OUR WEBSITE**  
[www.HeartlandRegionalTPO.org](http://www.HeartlandRegionalTPO.org)



**COME TO AN EVENT**  
The HRTPO participates in events throughout the region and hosts workshops for citizens to learn about projects where they work and live. Visit the HRTPO website at [heartlandregionaltpo.org](http://heartlandregionaltpo.org) to learn more.



**PARTICIPATE IN PERSON**  
Make a public comment at a HRTPO board or committee meeting. Find our calendar of events at [heartlandregionaltpo.org](http://heartlandregionaltpo.org)



**VOLUNTEER**  
To serve as a representative on a HRTPO committee contact [info@heartlandregionaltpo.org](mailto:info@heartlandregionaltpo.org) or call (863) 534-7130 for more information

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**About this Plan**

This Transportation Disadvantaged Service Plan (TDSP) has been prepared in accordance with the requirements of Chapter 427, Florida Statutes; Rule 41-2, Florida Administrative Code and the guidelines provided by the Commission for the Transportation Disadvantaged. In addition, the Federal Transit Administration (FTA) requires the development and adoption of a “Coordinated Public Transit-Human Services Transportation Plan” (CPTHSTP) for recipients of FTA Section 5310 (Elderly and Persons with Disabilities), and 5311(Rural Public Transportation), grant funding programs. The State of Florida has received concurrence from the Federal Transit Administration to allow the Transportation Disadvantaged Service Plan to fulfill this requirement. Consistent with the direction given by the State of Florida Department of Transportation, the Commission for the Transportation Disadvantaged, and the guidelines issued by the Federal Transit Administration, this TDSP has been prepared as a CPTHSTP. This plan was developed through a process that included representatives of public, private and nonprofit transportation and human services providers and participation by the public.

**HRTPO Full and Fair Participation**

Public participation is solicited without regard to race, color, national origin, sex, age, disability, religion or family status. Persons requiring accommodation under the Americans with Disabilities Act (ADA) or language translation, free of charge should contact Marybeth Soderstrom, HRTPO Title VI Liaison, 863-534-7130 (voice), or via Florida Relay Service 711, or by emailing msoderstrom@cfrpc.org at least three days prior to the event. The HRTPO strives to ensure full and fair participation by all potentially affected individuals, groups and communities in the transportation decision-making process.

## COORDINATING BOARD MEMBERSHIP CERTIFICATION

Name: Heartland Regional Transportation Planning Organization

Address: 555 E. Church Street, Bartow, Florida, 33830

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

1. The membership of the Local Coordinating Board, established pursuant to Rule 41-2.013(3), FAC, does in fact represent the appropriate parties as identified in the following lists; and
2. The membership represents, to the maximum extent feasible, a cross section of the local community.

Signature:  Date: 6/19/19

### DESOTO, HARDEE, HIGHLANDS, and OKEECHOBEE

POSITION	MEMBER	REPRESENTATION
<b>Chair</b>	Don Elwell, Commissioner	Highland County
<b>Vice Chair</b>	Noey Flores, Commissioner	Hardee County
<b>Elected Official</b>	Bryant Culpepper, Commissioner	Okeechobee County
<b>Elected Official</b>	Terry Hill, Commissioner	DeSoto County

REPRESENTATION	MEMBER	ALTERNATE
Agency for Healthcare Administration	Maribel Perez	Glenda Gonzalez
Children at Risk Representative	Wendy Amos	Erin Linhardt Tonya Akwetey
Citizen Advocate User Representative	Patty Bond	<i>Vacant</i>
Citizen Advocate Representative	Ingrasherese (Ingra) Gardner	Gerald Cruz Camacho
Community Action Agency	<i>Vacant</i>	<i>Vacant</i>
Community Transportation Coordinator	Kelly Kirk-Brooks	Tracy House Ed Griffin
Department of Children and Families	Sheilea Watkins	Iola Trotter Michael Day
Department of Elder Affairs	Joan Cecil	Zeke Barbosa Shelby Yevington
Department of Transportation	Charlene Ross	Michelle Peronto
Disabled Representative	Aric Robison	<i>Vacant</i>
Division of Vocational Rehabilitation or Division of Blind Services	Bruce Emmerton	Dolores Beynor Leigh Ann Bellamy
Elderly Representative	Jessie Alford	<i>Vacant</i>
Public Education Community	Robert Smith	<i>Vacant</i>
Regional CareerSource Board	Ann Martin	Lenora White
Local Medical Community	Elizabeth Lind	Audra Wheatley Penny Pringle
Agency for Persons with Disabilities	Donna Fain	<i>Vacant</i>
Veterans Service Office	Larry Kirsch	Sarah Carter
Private Operator	Robert Layne	Madelon Mansfield

## CERTIFICATION

The Local Coordinating Board hereby certifies that an annual evaluation of this Community Transportation Coordinator was conducted consistent with the policies of the Commission for the Transportation Disadvantaged and all recommendations of that evaluation have been incorporated in this Service Plan. We further certify that the rates contained herein have been thoroughly reviewed, evaluated and approved. This Transportation Disadvantaged Service Plan was reviewed in its entirety and approved by this Board at an official meeting held on: April 15, 2020.

4/15/20

Date



Don Elwell, Local Coordinating Board Chair

Approved by the Commission for the Transportation Disadvantaged

7/1/20

Date

Executive Director

### TRANSPORTATION DISADVANTAGED SERVICE PLAN LOCAL COORDINATING BOARD ROLL CALL VOTE

Representation	Member	Voted For	Voted Against	Absent From Voting
Chair	Don Elwell (Highlands)	X		
Vice Chair	Noey Flores (Hardee)	X		
Elected Official	Bryant Culpepper (Okeechobee)			
Elected Official	Terry Hill (DeSoto)	X		
FDOT	Charlene Ross	X		
Agency For Health Care Administration (Medicaid)	Signe Jacobson	X		
Children at Risk	Tonya Akwetey	X		
Citizen Advocate User	Pady Bond			
Citizen Advocate	Ingra Gardner	X		
Community Action Agency	<i>Vacant</i>			
Dept. Children & Families	Sheila Watkins			
Disabled Community	Aric Robinson			
Department of Elder Affairs	Joan Cecil	X		
Agency for Persons with Disabilities	Donna Fain/Mollie Brown-Ferrier	X		
Elderly in the Service Area	Jessie Alford			
Medical Community Representative	Elizabeth Lind /Mary K. Burns	X		
Public Education	Robert Smith			
Regional Workforce Board	Ann Martin /Lenora White	X		
Veterans Representative	Larry Kirsch			
Vocational Rehabilitation/DBS	Laurel White			
Private Operator	Madelon Mansfield	X		

# I. Development Plan

The Transportation Disadvantaged Service Plan (TDSP) is coordinated between the following partners:



This collaboration facilitates delivery of transportation services to persons in DeSoto, Hardee, Highlands, and Okeechobee Counties in Florida who are transportation disadvantaged, overseen by the Local Coordinating Board.

## A. Introduction of Service Area

### 1. Background of Transportation Disadvantaged Program

The Transportation Disadvantaged Program, established in 1989, is a coordinated system in all 67 Florida counties that provides vital transportation to medical appointments, employment, educational and other life-sustaining services for those who cannot obtain their own transportation due to a disability, age, or income and defined as:

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*“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”*

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The following sections identify each of the major components of Florida’s Transportation Disadvantaged Program.

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



The Florida Commission for the Transportation Disadvantaged is an independent commission housed administratively within the Florida Department of Transportation and reports to the Governor and the Legislature. The purpose of the Commission is to accomplish the coordination of transportation services to the transportation disadvantaged. The Florida Legislature created the Commission for the Transportation

Disadvantaged in 1989. The Commission sets policies and provides direction to its staff in the areas of quality assurance and program evaluation, technical assistance and training, review of policies and procedures, contract management and financial accountability. The Commission for the Transportation Disadvantaged administers the Transportation Disadvantaged Trust Fund and implements all provisions in Chapter 427.013 F.S.

## Planning Agency



Formed on April 29, 2015, the Heartland Regional Transportation

Planning Organization (HRTPO) coordinates transportation plans for the Heartland region including the six counties of DeSoto, Glades, Hardee, Hendry, Highlands and Okeechobee and the urbanized area of Highlands County including the cities of Sebring and Avon Park. The HRTPO provides the forum for local elected officials, their staff, and industry experts, and the public to work together to improve transportation in the Heartland Region.

As the Transportation Disadvantaged program was established prior to the formation of the HRTPO, the Central Florida Regional Planning Council served as the designated official planning agency for DeSoto County, and the three-county service area of Hardee, Highlands, and Okeechobee.

Effective July 1, 2018, the HRTPO was designated as the official planning agency for the Transportation Disadvantaged Program in the new multi-county service area of DeSoto, Hardee, Highlands, and Okeechobee. The HRTPO is also the planning agency for the service area of Glades and Hendry Counties.

### **Local Coordinating Board (LCB)**

The Planning Agency is responsible for appointing a local coordinating board. The purpose of the coordinating board is to identify local service needs and to provide advice and direction to the Community Transportation Coordinator (CTC) concerning the coordination of transportation services. Each Local Coordinating Board (LCB) is recognized as an advisory body to the Commission.

#### **The Local Coordinating Board is responsible for:**

Review and approve the Memorandum of Agreement and the Transportation Disadvantaged Service Plan drafted by the planning agency and CTC and approved by the LCB, prior to submittal to the Commission.

Evaluate services provided by the CTC under the approved Transportation Disadvantaged Service Plan (TDSP).

In cooperation with the CTC, review and provide recommendations to the Commission on funding applications affecting the transportation disadvantaged.

Review the coordination strategies of service provision to the transportation disadvantaged in the designated service area.

Evaluate multi-county or regional transportation opportunities.

Appoint a Grievance Committee to serve as a mediator.

Prepare an Actual Expenditure Report.

Review and approve the Transportation Disadvantaged Service Plan (TDSP) and its updates for consistency with approved guidelines, goals and objectives of the Local Coordinating Board.



**Community Transportation Coordinator (CTC)**

The Community Transportation Coordinator (CTC) is the agency or organization in each county responsible for ensuring that coordinated transportation services are provided to serve the transportation disadvantaged. The Community Transportation Coordinator is responsible for the short-range operational planning, administration, monitoring, coordination, arrangement and delivery of transportation disadvantaged services originating within their designated service area on a full-time basis.



Based on either negotiations or competitive proposal process, the official planning agency selects a Community Transportation Coordinator (CTC) for recommendation to the Florida Commission for the Transportation Disadvantaged which has final approval.

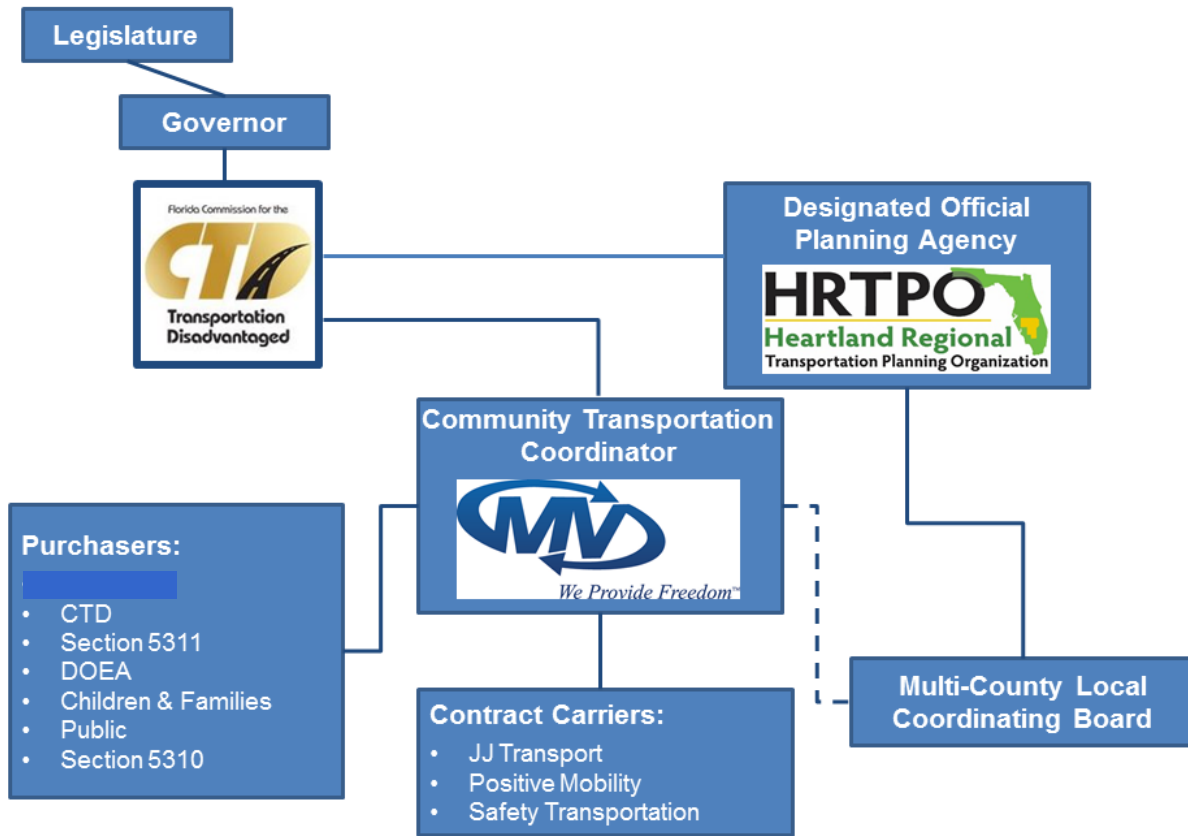
MV Transportation, Inc. is the designated CTC for DeSoto, Hardee, Highlands, and Okeechobee counties. The CTC operates as a full broker and therefore contracts with local contract carriers to provide transportation service.

<b>The Community Transportation Coordinator will:</b>
Develop, implement and monitor an approved Coordinated Transportation Disadvantaged Service Plan.
Execute uniform contracts for service.
Collect annual operating data for submittal to the TD Commission.
Review annually all transportation operator contracts.
Maximize the utilization of school bus and public transportation services in accordance with Chapter 427.0158.
In cooperation with a functioning Local Coordinating Board, review all applications for local government, federal and state transportation disadvantaged funds and develop and implement cost effective coordination strategies.
In cooperation with the Local Coordinating Board, develop and negotiate a Memorandum of Agreement for submittal to the Commission outlining the services planned.
Have full responsibilities for the delivery of transportation services for the transportation disadvantaged as outlined in Chapter 427.015(2), F.S.

## 2. Community Transportation Coordinator Designation Date/History

<b>1981-1992</b>	<i>The Central Florida Regional Planning Council (CFRPC) accepted the designation of Coordinated Community Transportation Provider for DeSoto, Highlands, Okeechobee, and Hardee Counties</i>	
<b>1993</b>	<i>A formal selection process was initiated which culminated in the selection of Senior Friendship Center, Inc., a non-profit agency, in March 1993. At that time, the DeSoto County Board of County Commissioners requested to become the official planning agency for transportation disadvantaged planning. This request was approved by the Commission for the Transportation Disadvantaged and responsibilities transferred beginning October 1, 1993.</i>	
	<b>DeSoto County</b>	<b>Hardee, Highlands, and Okeechobee Counties</b>
<b>1997</b>	<i>In January 1997, the DeSoto County Board of County Commissioners issued a Request for Proposal (RFP) for a Community Transportation Coordinator. The highest ranked entity, Transdev Transportation, Inc., which was recommended by the LCB and approved as the CTC by the CTD.</i>	<i>Transdev Transportation, Inc. was the only respondent to the Request for Letters of Interest issued by the CFRPC and was recommended by the LCB and approved as the CTC by the CTD.</i>
<b>2000</b>	<i>In the years of 2000 and 2003 a Request for Letters of Interest was issued. With no response except for the current CTC, Transdev Transportation, Inc. (doing business as Veolia Transportation Services) was recommended to continue as the coordinator and approved by the CTD.</i>	
<b>2003</b>	<i>Transdev Transportation, Inc. (doing business as Veolia Transportation Services) was the only respondent to each of those Request for Letters of Interest and was recommended to remain the CTC through June 30, 2008.</i>	
<b>2009</b>	<i>A Request for Letters of Interest were issued with no response except for the current CTC was recommended to continue as the coordinator and approved by the CTD.</i>	
<b>2013</b>	<i>DeSoto County conducted a competitive procurement process for a CTC in 2013. Through that process Transdev Transportation, Inc. (doing business as Veolia Transportation Services) was designated by the CTD as the CTC for DeSoto County starting July 1, 2013.</i>	<i>The CFRPC conducted a competitive procurement process for a CTC in 2009. Through that process Transdev Transportation, Inc. (doing business as Veolia Transportation Services) was designated by the CTD and entered into a five-year Memorandum of Agreement starting October 1, 2009.</i>
<b>2015</b>	<i>In the fall of 2015 Transdev Transportation, Inc. (doing business as Veolia Transportation Services) ceased services as the CTC. The CTD issued an emergency RFP for a CTC for DeSoto County and MV Transportation, Inc. was awarded an emergency MOA from the CTD to perform as the DeSoto County CTC for a one-year term beginning January 1, 2016 to December 31, 2016.</i>	<i>The CFRPC conducted a competitive procurement process for a CTC in 2015. Through that process MV Transportation was designated by the CTD and service start-up with the new CTC was November 1, 2015.</i>
<b>2016</b>	<i>A competitive RFP was issued on Sept. 30, 2016. MV Contract Transportation, Inc. was the only proposal received. The CTD appointed MV Contract Transportation, Inc. as the CTC for DeSoto County at the December 2016 business meeting.</i>	
<b>July 1, 2018</b>	<i>With the support of the Central Florida Regional Planning Council, the HRTPO, and the Board of County Commissioners for DeSoto, Hardee, Highlands, and Okeechobee, a multi-county service area was formed and the HRTPO was named the Designated Official Planning Agency. MV Transportation remained as the CTC for the entire service area under their current amended MOU until June 30, 2021.</i>	

### 3. Organization Chart



### 4. Consistency Review of other Plans

This Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the following documents.



<b>Local Government Comprehensive Plans</b>	✓ Consistent, to the maximum extent feasible
<b>Strategic Regional Policy Plan</b>	✓ Consistent, to the maximum extent feasible
<b>Highlands County Transit Development Plan</b>	✓ Consistent
<b>Commission for the Transportation Disadvantaged Five-Year Plan</b>	✓ Consistent
<b>HRTPO 2040 Long Range Transportation Plan</b>	✓ Consistent
<b>Transportation Improvement Programs</b>	✓ Consistent
<b>HRTPO Public Participation Plan</b>	✓ Consistent
<b>FDOT Heartland Rural Mobility Plan</b>	✓ Consistent

## 5. Public Participation

In August of 2005, Congress passed the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for users (SAFETEA-LU), reauthorizing the surface transportation act. SAFETEA-LU requires that the Coordinated Public Transit-Human Service Transportation Plan be developed through a local process that includes representatives from public and private transportation providers, human service agencies, interested parties, and the general public.

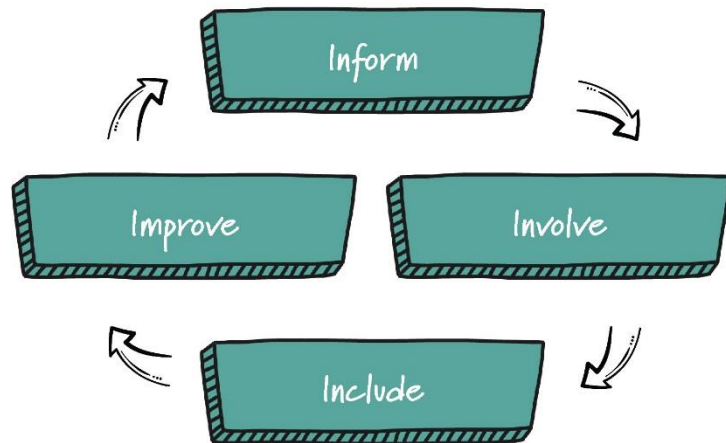


The responsibility of the HRTPO is to manage a continuing, cooperative, and comprehensive planning process that results in the development of transportation plans and programs. The HRTPO provides a forum for cooperative decision making by officials of the affected governmental entities with input from citizens and constituency groups. Public participation is a key component of transportation planning and one of the core functions of the HRTPO. Meaningful and effective public involvement brings a diverse set of views

into the discussion and improves decision making by generating ideas for how the transportation system may be improved.

The HRTPO Public Participation Plan (PPP) provides guidelines used by the HRTPO to inform and gather input from residents, communities, and interest groups throughout the six counties in order to expand the information available for planning with the goals of informing, involving, and including the public through a process that continually seeks improvement.

It is important that stakeholders be included in the development and implementation of the TDSP. A public hearing is held annually to allow residents the opportunity to discuss unmet transportation needs, or any other areas that relate to the local transportation services. This plan was developed through a process that included representatives of public, private and nonprofit transportation and human services providers and participation by the public.



In the State of Florida's Transportation Disadvantaged Program pursuant to Chapter 427, F.S. and Rule 41-2 FAC, a local coordinating board shall be formed and they shall identify local service needs and provide information, advice, and direction to the community coordinator on the coordination of services to be provided to the transportation disadvantaged population. In

addition to the requirement of meeting on a quarterly basis, the LCB reviews and approves the Transportation Disadvantaged Service Plan, evaluates the services provided in its jurisdiction, and assists the CTC with many issues related to the delivery of transportation disadvantaged services. Rule 41-2.012, FAC outlines the membership of the LCB. This service area follows the multi-county framework outlined in the Rule.

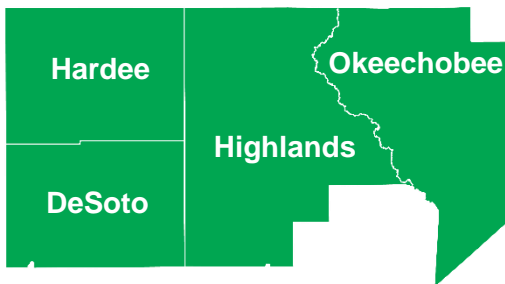


The Local Coordinating Board meetings are advertised in the Florida Administrative Weekly and local newspaper and are held in accessible locations that are open to the public. In addition to the membership, the mailing list for the LCB quarterly agendas include transportation partners, transportation disadvantaged customers and advocates, human service organizations, faith-based and community-based organizations, local school districts and others. The multi-county LCB seeks

input from the public at all its meetings and makes an effort to include many community partners and advocacy groups in the planning, evaluation, and service development processes throughout the year. In addition, an annual public hearing is held and advertised to the public as required under the CTD regulations.

Given that the State of Florida, under the Transportation Disadvantaged program has representation of those entire customer groups on each Local Coordinating Board throughout the State, the local coordinating board can serve as the mechanism for meeting the Coordinated Public Transit-Human Services Transportation Plan directive. To enhance the efforts of the Local Coordinating Board's involvement in the process, the HRTPO engages the involvement of other representatives from workforce boards, aging agencies, vocational rehabilitation entities, Economic Development Councils, Florida's Heartland Rural Economic Development Initiative, and representatives of other civic organizations.

## B. Service Area Profile and Demographics

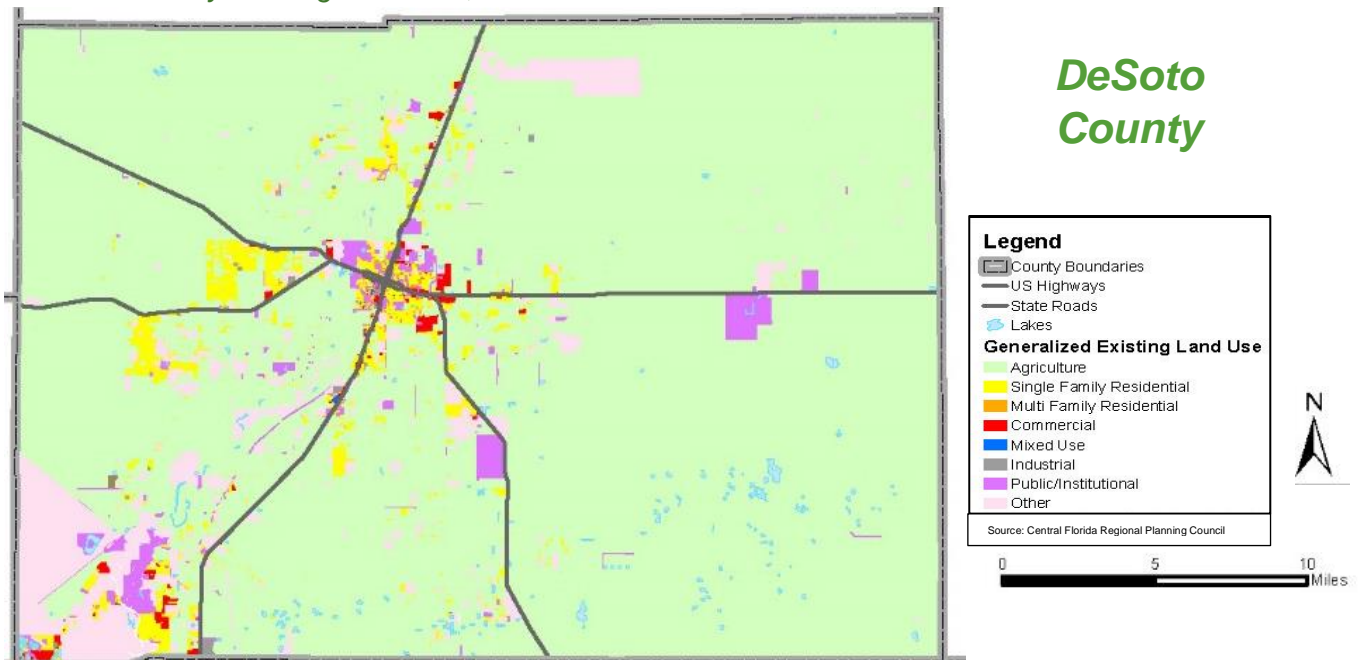


Located in the south-central part of Florida, the four-county service area of DeSoto, Hardee, Highlands and Okeechobee Counties has approximately 3,060 square miles of land area. The service area is largely rural except for the Sebring-Avon Park designated urbanized area.

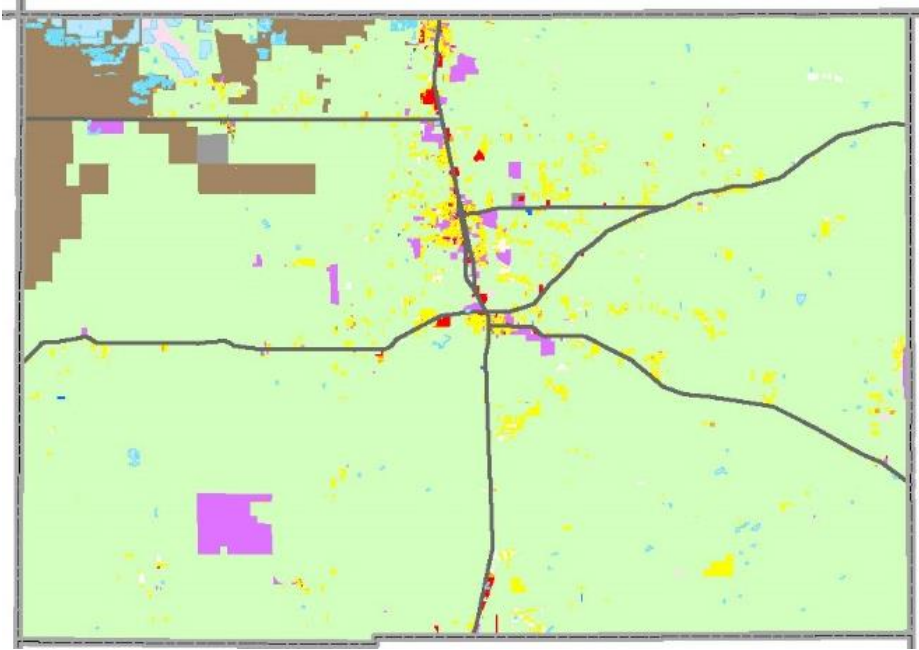
### 1. Land Use

The service area is entirely inland and is mostly rural. Approximately seventy percent (70%) of the residents live in the unincorporated areas which increases the distances that need to be traveled to access vital services. The HRTPO plays an active role in merging the needs of public transportation with regional development plans. This includes neighborhoods, shopping areas, medical facilities and community facilities.

*DeSoto County Existing Land Use, 2017*



Hardee County Existing Land Use, 2017



## Hardee County

**Legend**

- County Boundaries
- US Highways
- State Roads
- Lakes

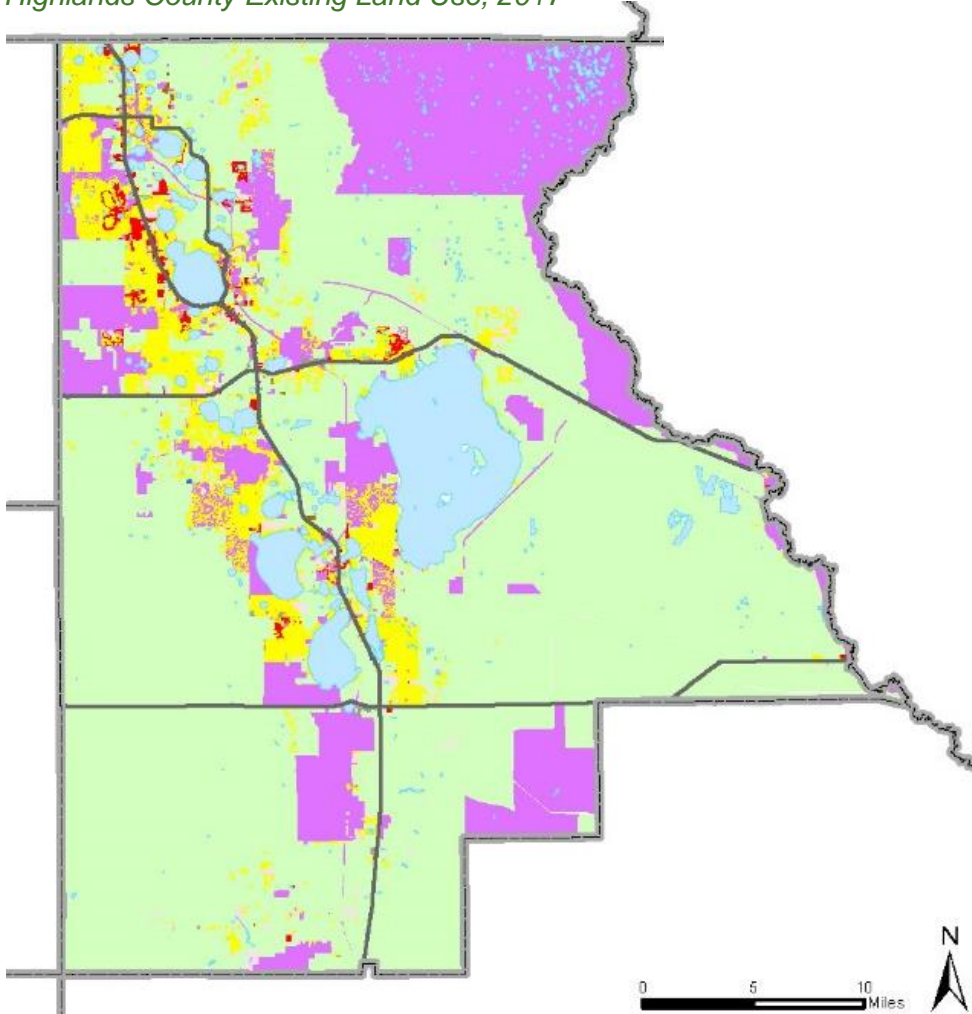
**Generalized Existing Land Use**

- Agriculture
- Single Family Residential
- Multi Family Residential
- Commercial
- Mixed Use
- Industrial
- Public/Institutional
- Other

Source: Central Florida Regional Planning Council



Highlands County Existing Land Use, 2017



## Highlands County

**Legend**

- County Boundaries
- US Highways
- State Roads
- Lakes

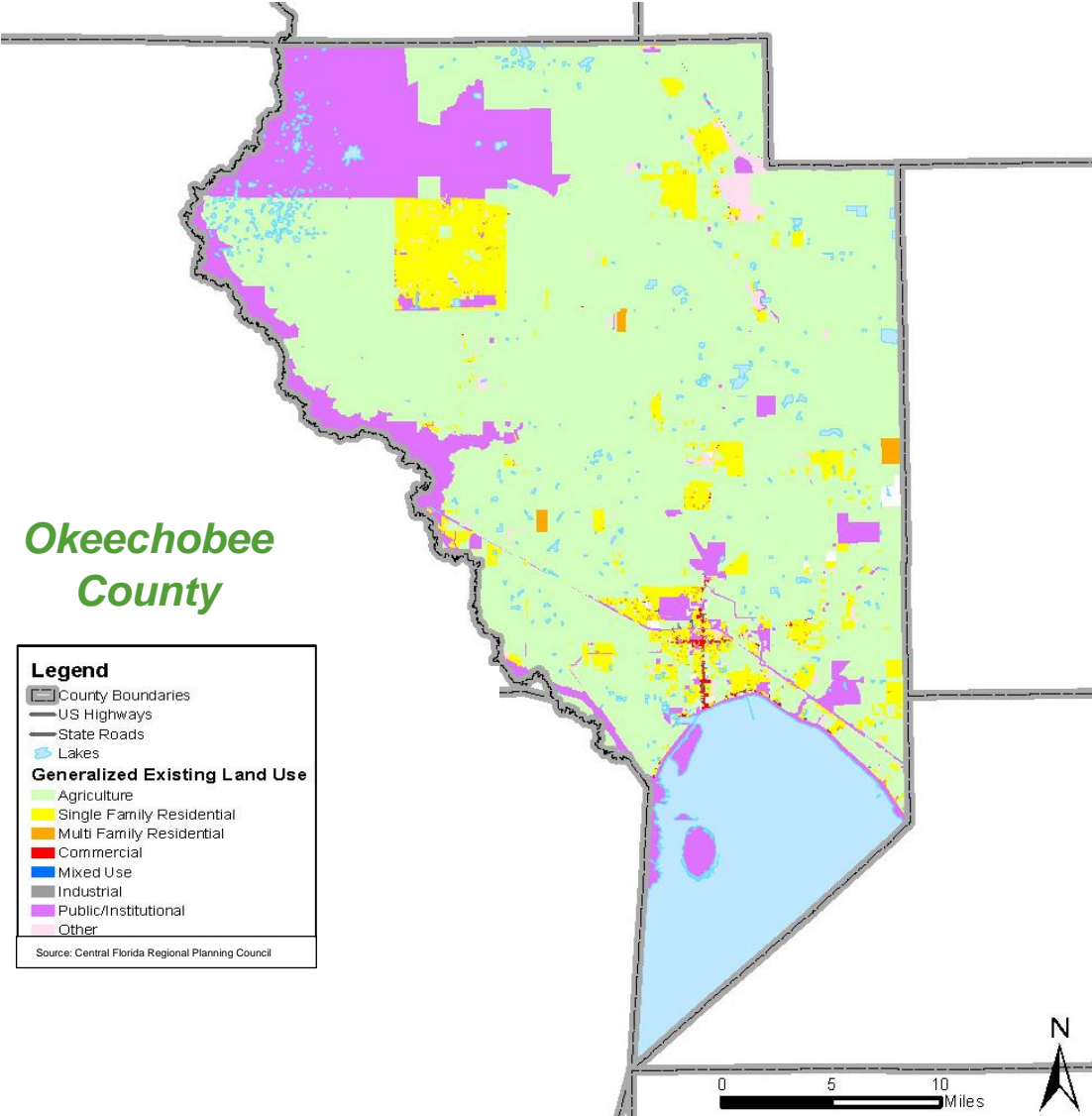
**Generalized Existing Land Use**

- Agriculture
- Single Family Residential
- Multi Family Residential
- Commercial
- Mixed Use
- Industrial
- Public/Institutional
- Other

Source: Central Florida Regional Planning Council



Okeechobee County Existing Land Use, 2017





## 2. Population/Composition

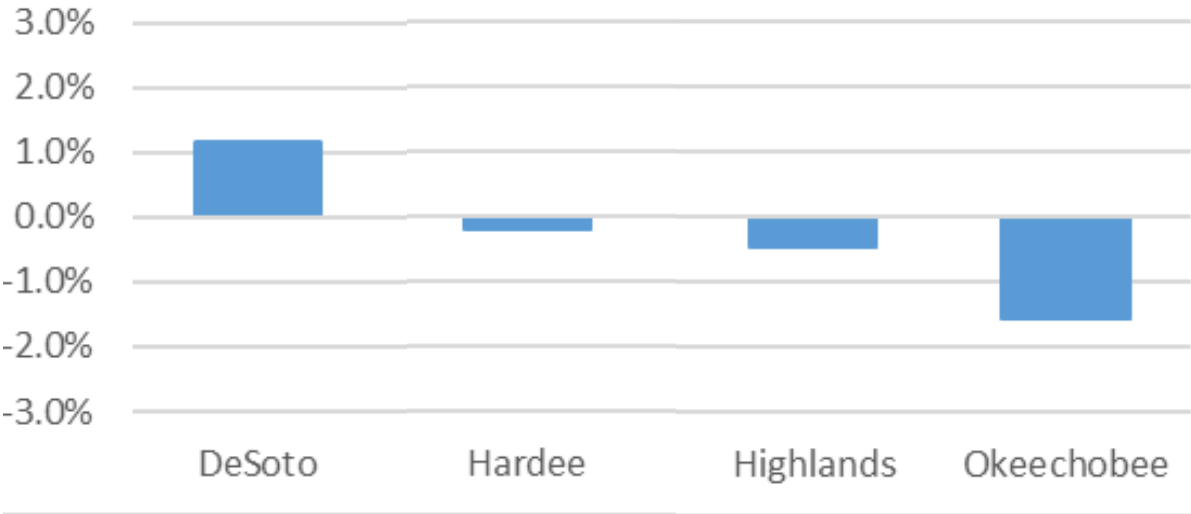


The population, economic and employment trends for each county and the region, which were derived from the FDOT Heartland Rural Mobility Plan Update, were examined and cross-referenced with data from the U.S. Census American Community Survey (ACS) 5-year 2015 data, the Longitudinal Employment Household Dynamics (LEHD) data, and data from the Bureau of Economic and Business Research (BEBR) at the University of Florida. The examination of the economic and population activity of the region reveals potential public transportation markets.

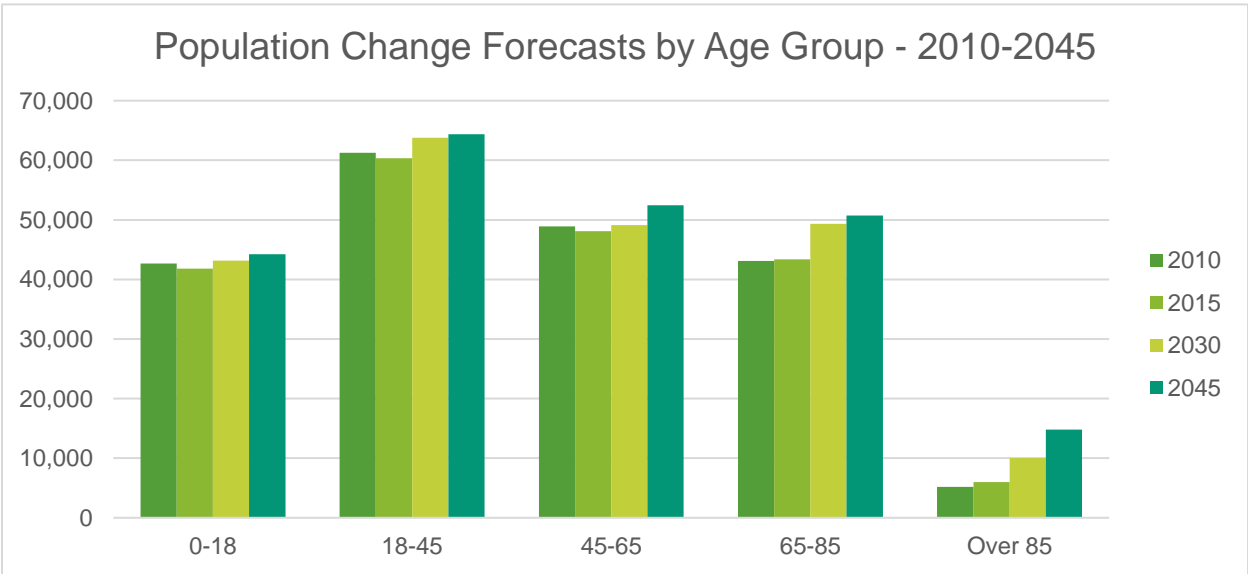
This section examines the demographic and employment characteristics for the multi-county service area of DeSoto, Hardee, Highlands, and Okeechobee. For a more detailed county-level examination, please view the FDOT Heartland Rural Mobility Plan Update, 2018

In the past five years, the overall population growth trend has slowed with several counties losing population since 2010 and only DeSoto County experiencing population growth since 2010. In spite of this recent trend, analysis by BEBR predicts population growth of 17% with nearly 33,370 more people from 2015, to near 232,960 in 2045.

County Population Change (2010 – 2015)



A closer examination of age characteristics clarifies demographic trends that affect transportation demand for the region. More specifically, because of the reduced access to personal vehicles, the youth and senior market have higher demand for public transportation services. Further, due to the significant influence, employment has on transportation demand; the working-age population segment represents another public transportation market. According to projections produced by BEBR, the Heartland region is getting older, with the percentage of the population older than 65 expected to represent 31% of the service area’s population by 2045. Conversely, the population under age 18 is becoming a smaller proportion of the Heartland’s population at 19%. These trends may affect the region’s economic well-being as well as the demand for transportation.



Accompanying the population trends are economic and employment conditions that similarly influence transportation needs. An examination of median income levels, poverty levels and employment conditions begin to define transportation markets and alternatives.

*Population Densities/Persons Per Square Mile by County*

Area	Land Area (Square Miles)	Persons Per Square Mile
<b>United States</b>	3,531,905.43	87.4
<b>Florida</b>	53,624.7	350.6
<b>DeSoto</b>	637.06	54.7
<b>Hardee County</b>	637.78	43.5
<b>Highlands County</b>	1,016.62	97.2
<b>Okeechobee County</b>	768.91	52.0

Source: Census QuickFacts, 2010

Given the very rural nature of the four-county service area, providing transportation under the Transportation Disadvantaged umbrella has been challenging. Even though there is an urbanized area in Highlands County including the cities of Sebring and Avon Park, there is a very high percentage of users that live in remote sections. For purposes of timely (one hour or less travel time on the vehicles) transport of customer for fixed appointment times, customers are scheduled based on available vehicles and vehicle seating capacities. With long-distance travel times, customers must sometimes plan to be away from their residences for a long period of the day. Therefore, they are encouraged to bring medications, food, reading materials, etc. to accommodate them for these long periods of time.

In addition to service provided within the four-county service area, many trips are scheduled to adjacent service areas. Trips to destinations outside the service area are restricted to certain times of the day and/or days of the week/month. Average trip miles in this service area are therefore higher than in more urbanized areas.

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*Income*

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Work activities, income levels and household characteristics influence travel behavior. Accordingly, examining these characteristics reveals additional public transportation markets in the service area. For example, public transportation may offer reliable transportation to low-wage workers and people living below poverty level to retain existing or access new employment.

The median income of the region is lower than the statewide median of \$47,507 to varying degrees throughout the service area. More significantly, between 2010 and 2015 the median income for all but Highlands County has decreased with Okeechobee and Hardee experiencing a reduction greater than 5%.

*Median Income Change by County (2010 – 2015)*

County Name	2010 Median Income	2015 Median Income	Percent Change
DeSoto County	\$35,979	\$35,165	-2.3%
Hardee County	\$37,466	\$35,457	-5.4%
Highlands County	\$34,946	\$35,093	0.4%
Okeechobee County	\$38,339	\$35,405	-7.7%

Areas with higher levels of poverty have more acute transportation needs. Overall, the Heartland region’s poverty rate is higher than the State of Florida rate of 15.5%. Between 2010 and 2015, DeSoto, Highlands and Okeechobee poverty rates increased. However, Highlands has the lowest poverty rate in the region.

*Percent Population Below Poverty (2010 – 2015)*

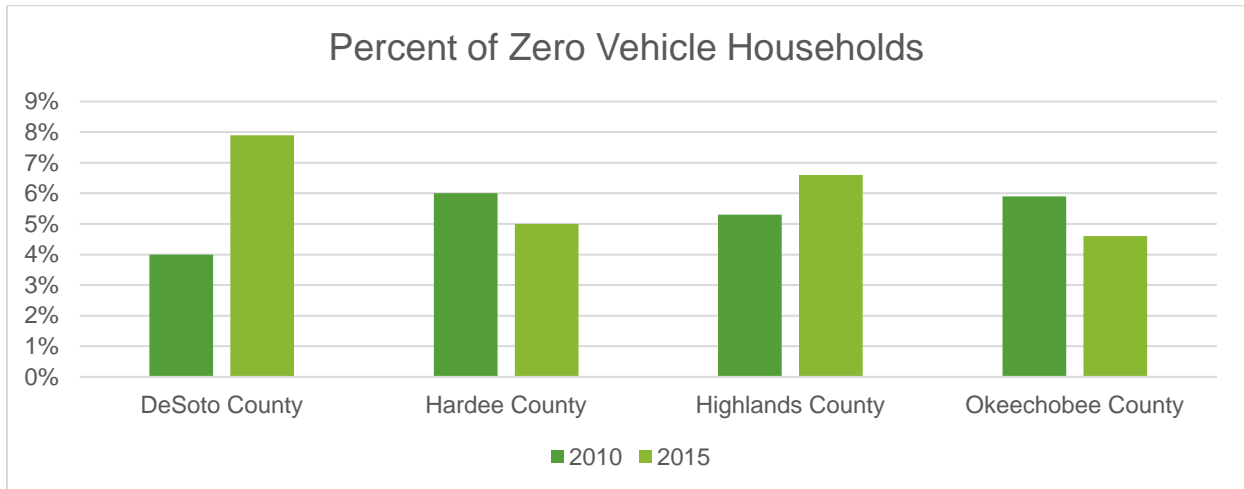


*Population Below Poverty Changes (2012 – 2015)*

County Name	2012 Percent Population Below Poverty	2015 Percent Population Below Poverty
DeSoto County	26.8%	30.6%
Hardee County	29.7%	27.4%
Highlands County	19.0%	19.4%
Okeechobee County	27.2%	27.7%

## Vehicle Availability

The availability of vehicles is crucial for accessing vital activities. Areas with higher numbers of households without vehicles available have higher demand for public transportation services. According to the 2015 Census, the percentage of homes with zero vehicles has gone up to 6% from 5.3% in 2010 in the service area.

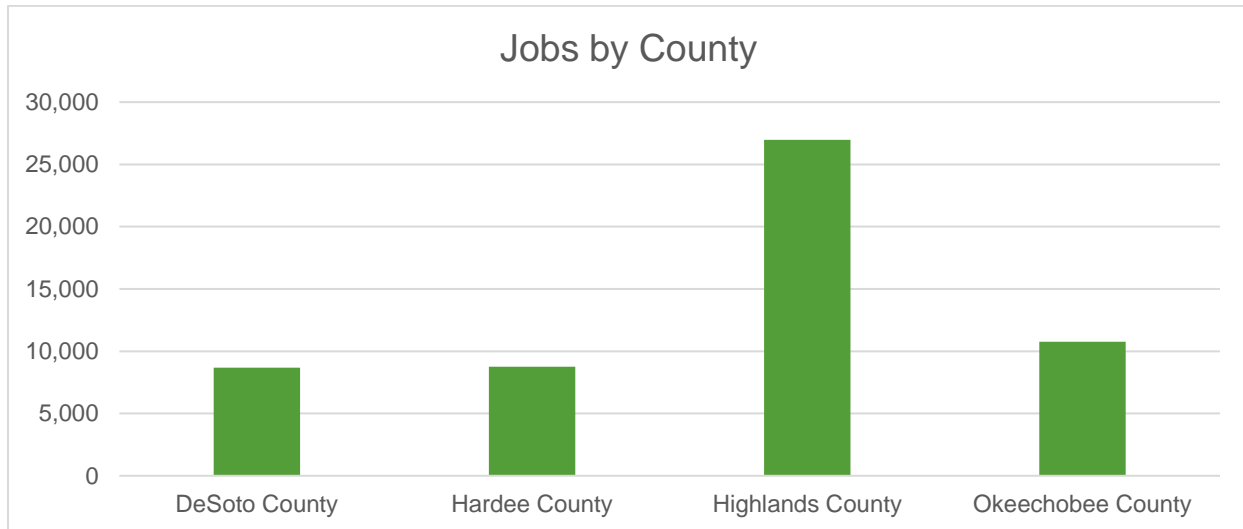


### 3. Employment

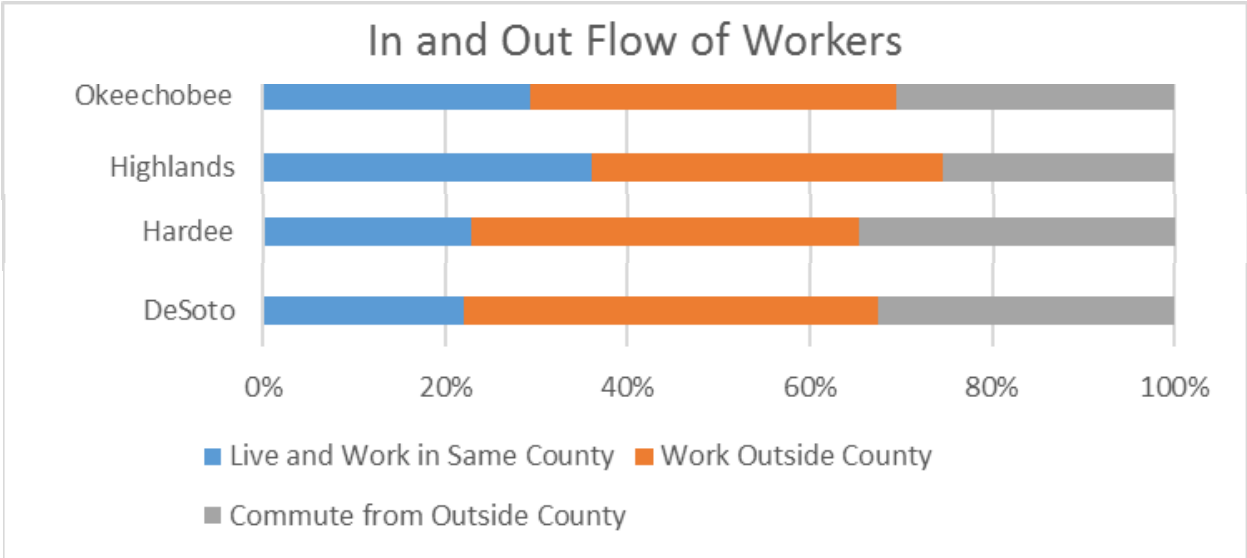
With the exception of DART a small circulator public bus service in DeSoto County operated by MV Transportation, the service area is without any fixed-route public transportation. MV Transportation, the Community Transportation Coordinator receives funding from the Florida Department of Transportation through the Central Florida Regional Planning Council to provide the DART service.

There are limitations to providing transportation to those who are employed if they don't own their own vehicle or are unable to carpool. The Transportation Disadvantaged Community Transportation Coordinator contracts with State agencies that pay for a limited number of

employment trips, and the Local Coordinating Board has prioritized the use of non-sponsored funds for employment as the third priority after medical and education. The higher cost of providing evening service severely impacts provision of service to customers for employment purposes. The system is open to the general public; however, service is still limited to availability of vehicles/drivers after hours. The fare structure is the same for general public users and TD users. However, most persons needing transportation for work purposes can't afford the cost of using the TD system as their primary means of transport.



Based on 2015 data, 58% of the workers employed in the Heartland region commute in and between Heartland counties. The remaining 42% of the workers in the Heartland region commute to counties outside the region. An examination of each county reveals the in and out commuting patterns of the region's workers. The figure below illustrates the distribution of commuters for each county.



A positive trend for educational attainment for the service area is the increase that each county experienced in terms of percentages of high school graduates. Discouraging education statistics occurred between 1980 and 1990, when each county experienced a decrease in persons possessing a Bachelor’s Degree or higher. However, by the 2010 census, these numbers were on the rise.

*Educational Attainment of Persons 25+ Years of Age, 2016 By County*

Area	High School Graduate or Higher, Percent of Persons Age 25+ Years	Bachelor’s Degree or Higher, Percent of persons age 25+ Years
<b>Florida</b>	87.2%	27.9%
<b>DeSoto County</b>	70.5%	10.0%
<b>Hardee County</b>	68.9%	9.6%
<b>Highlands County</b>	83.3%	16.5%
<b>Okeechobee County</b>	71.9%	10.7%

Source: Census QuickFacts, 2010

#### 4) Major Trip Generators



### DeSoto County

- DeSoto County Health Department
- DeSoto Hospital
- Local Health Care Facilities
- Shopping Centers for groceries and prescriptions



### Hardee County

- Hospital
- Local health care facilities
- Local government offices
- Higher educational facilities
- Shopping centers (no local Mall)
- Peace River waterway activities



### Highlands County

- South Florida State College
- Highlands Regional Medical Center
- Local health care facilities
- Local government offices
- Higher educational facilities
- Highlands County Health Department
- Senior services
- Sheltered workshop training and employment
- Local recreational facilities



### Okeechobee County

- Lake Okeechobee
- Indian River State College
- Raulerson Hospital
- Local health care facilities
- Local government offices
- Higher educational facilities
- County Health Department
- Rehabilitation training and employment
- Other local recreational facilities

Many trips from each county require travel outside the county for essential and nonessential services



## 5) Inventory of Available Transportation Services

### *Transportation Disadvantaged Services*

The Florida Commission for the Transportation Disadvantaged Program is a statewide initiative to provide transportation for children at risk, seniors, persons with disabilities, and people considered low-income. The program coordinates Federal, state, and local funding sources to provide transportation to these groups for medical appointments, employment, education, and other life sustaining activities.

### *DeSoto-Arcadia Regional Transit*

The DeSoto-Arcadia Regional Transit (DART) bus service is a flex route bus service operating in the town of Arcadia, Florida in DeSoto County. Flex route means the bus has a set route, but it will deviate up to three-quarters of a mile from the advertised path. This service, which was identified as an opportunity and possible pilot project in the 2009 Heartland Rural Mobility Plan is operated by MV Transportation. The service operates Monday through Friday from 8:30 a.m. to 4:30 p.m.

### *Commuter Assistance*

Commute Connector is a program of the Florida Department of Transportation that serves the Heartland Counties. Working with businesses and governments, this program helps facilitate carpooling, vanpooling, transit options, walking and bicycling programs, emergency ride home, and initiates the establishment of park and ride lots. The program promotes company, employee, and the community benefits of mobility services. Additional information about Commute Connectors can be obtained by downloading their App at [www.swflroads.com/commute-connector/index.html](http://www.swflroads.com/commute-connector/index.html)

### *Inter-County / Inter-Region Services*

Throughout the Heartland region, there are limited inter-county and inter-region transportation services. MV Transportation, Inc. contracts with several service providers in the area to provide service within and outside of DeSoto, Hardee, Highlands, and Okeechobee Counties, and Commute Connector facilitates inter-county and inter-region transportation. While not as heavily used as they are in their urban counterparts, traditional taxicab services exist in each county as well as transportation network companies (TNCs), however, TNC service is never guaranteed, as it is reliant on independent drivers driving their own personal vehicles. Both taxicabs and TNCs such as Lyft and Uber have the ability to take the passenger to a destination in any service area. The Dr. Ella Piper Center in Lee County provides two volunteer transportation programs focused on seniors in DeSoto County, which can take passengers from their home to surrounding counties.

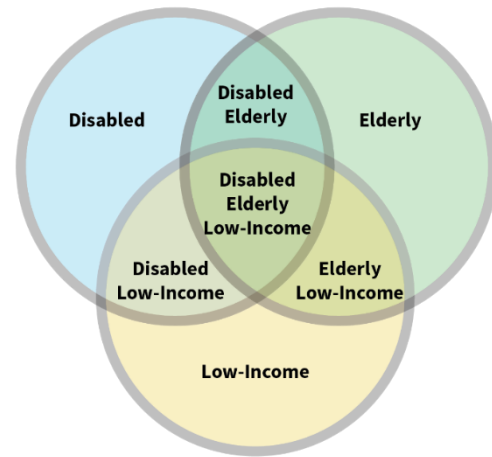
### *Health, Education, and Other Programs*

In each of the Heartland counties, the Florida Commission for the Transportation Disadvantaged through the CTCs, provides transportation to those who are Transportation Disadvantaged. In addition, the American Cancer Association provides volunteer-based transportation in each of the Heartland Counties for persons seeking treatment. MTM, JJ Transport, Positive Medical Transport, and Safety Transportation all provide non-emergency medical transportation in the Heartland region.

## C. Service Analysis

### 1. Forecast of Transportation Disadvantaged Population

To forecast the potential Transportation Disadvantaged population in the service area, the CTD developed a tool in 2015 that utilizes data from a variety of the most currently available sources to predict demand into the future. Data from the U.S. Census Bureau's American Community Survey (ACS) and the Survey of Income and Program Participation (SIPP), The Bureau of Economic and Business Research County Population Projections, and the National Household Travel Survey and fixed route bus coverage are examples of the data utilized. These sources are helpful in capturing economic trends, population growth, and the changing demographic composition of the population such as aging baby boomers and the associated increases in disabilities. The full forecast detail may be found in Appendix B.

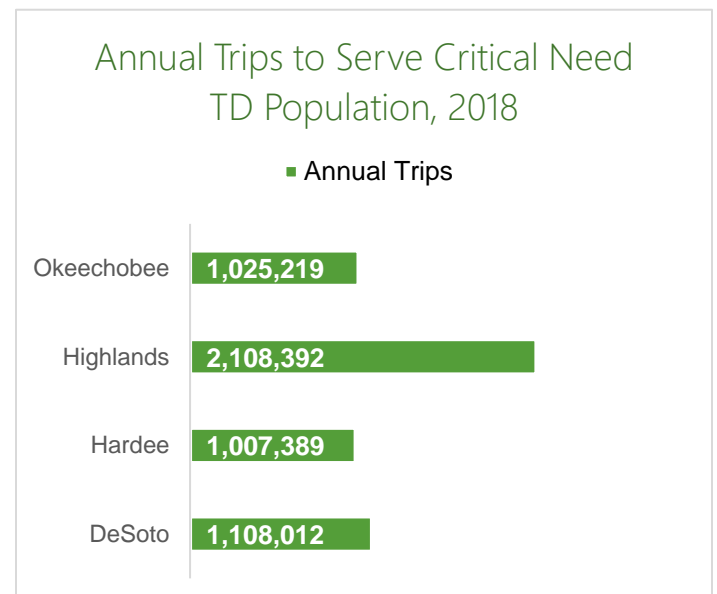
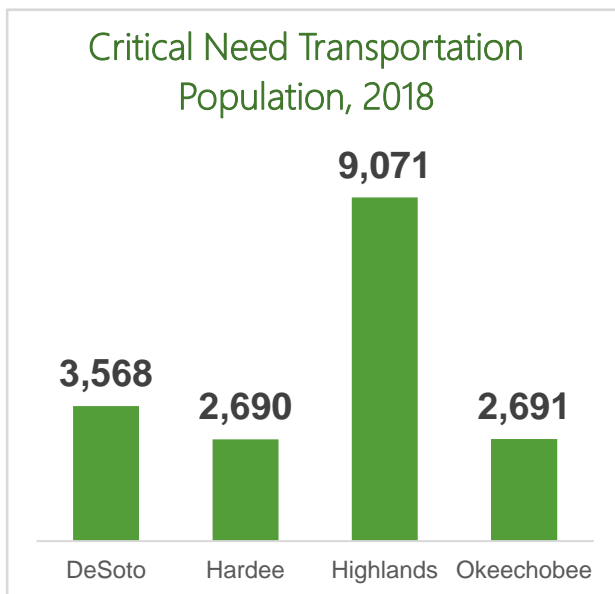


TD Composition

It is important to note the tool only quantifies *potential* TD demand in the geography analyzed and trends in potential utilization over time. Other factors such as the quality of available transportation services or other unique community characteristics may impact actual service utilization. Following is a summary of several of the key factors and data analysis steps used to arrive at the TD demand estimates for the service area.

#### Critical Need Trip Demand

By using population forecasts prepared by the Bureau of Economic and Business Research and applying the changes to the TD population and trip rate estimate previously described, the tables below display the future potential demand for critical need transportation in the service area through 2023.



## 2. Needs Assessment

Successful coordination of transportation services depends on an effective planning process that establishes priorities and goals. The multi-county (TDSP) has three parts to its planning process:

1. Inventory of existing transportation resources
2. Identification of service gaps/barriers
3. Priorities for implementation
4. The following service gaps have been identified through on-going meetings with social service agencies, public forums, and identified unmet trip needs.

Identified Unmet Service Needs		
Service/Financial Gaps	Proposed Plan	Timeline
Employment related trips	Continue partnerships with CareerSource Boards, Vocational Rehabilitation Programs, Community Colleges, and Private Sector, to identify community needs and coordinate services.	Continue monitoring funds that are applicable for employment related use.
General Public Trips	Continue to apply for FTA Section 5311 and 5310 operating funds.	On-going; Section 5311 funds are not available for use in the Urbanized area of Highlands County.
Elderly and Disabled	Continue to apply for FTA 5310 Operating Funds	Grant funds applied for annually.
Resources for Expanded Services	Coordinate with Mobility Management, DART, and Commuter Services	Ongoing
Extend Service Hours (evenings and weekends)	Work with system contract carriers to expand service hours to coincide with the needs of customer transported under these programs.	Service expansion includes service over weekends and evenings coordinated with service needs.
Funding Shortfalls	Investigate other funding opportunities. Revise procedures and policies where possible to cut costs. Investigate opportunities for private funding contributions. Encourage participation in the "Voluntary Dollar" program. Investigate voucher opportunities and other mobility options.	The CFRPC will continue to apply for capital and operational funding.
Coordination Contracts	The CTC and LCB will review all existing and new applications for Coordination Contracts.	CTC will continue to coordinate resources resulting in cost effective, efficient service provision.
Capital Procurement	Apply for capital grants for replacement and expansion of vehicle fleet when funds are available.	The CTC and the CFRPC will continue to apply for capital funding.

### 3. Barriers to Coordination

- **Geographic Location** – The rural service area creates a challenge as essential services are often located outside of the service area. The Commission for the Transportation Disadvantaged will only pay a per trip rate or a per mile rate and that type of trip rate does not work well for long distance trips. Out of service area trips are cost prohibitive.
- **Lack of Public Transportation** - With the exception of the DeSoto County public transportation circulator route (DeSoto Area Regional Transit) in the area of Arcadia, no other fixed route public transportation system exists in the service area, and private taxi service is generally too expensive for transportation disadvantaged citizens to access.
- **Demographics** - The demographic composition of the service area includes a high percentage of senior citizens and those that are at the poverty level or below.
- **Availability of Funding** - All known available grant funds are accessed, and, all local cash match requirements are met; typically, by each County Commission. Long term funding is not guaranteed. In addition, the lack of operational funds directly impacts the ability of the CTC to expand services.
- **Social Service Agencies Role** - Some social service agencies, and/or other entities receiving Federal, State, local funds for transportation remain outside of coordination. This has no apparent detrimental effect on these agencies continuing to receive funding. However, these agencies have an overall impact to the TD provision of service. TD dollars are perceived as dollars to supplant rather than expand transportation services. Many potential purchasers of transportation are unwilling to identify and/or revise budgeting procedures to include transportation dollars as a budget line item. This is largely due to conflicting directives among the varying agencies. When approached for services, the CTC requests how many dollars are available for purchasing transportation. The potential purchaser usually responds that they are requesting services through the TD program for the non-sponsored trip funds. This action is in conflict with the CTC's directive which is to secure sponsored trips and lessen the demand on limited TD dollars.
- **Administrative Tasks** - Clearly, a very positive aspect of the transportation disadvantaged program has been funds for providing long and short-range planning. However, funding levels limit planning effectiveness.
- **Rising Cost** - The goal of providing cost-effective, efficient transportation tends to be lost because of the rising costs in fuel and insurance over the years. Program eligibility processing, funding cuts and Drug/Alcohol Testing/Monitoring put a strain on personnel and funding resources.

### 4. Strengths in Coordinated Transportation Services in Service Area

- This area benefits from being a multi-county service area and resources are utilized in a cost-effective efficient manner.
- Local governments in the service area provide financial support for grants.
- The award of Federal Transit Capital grant funds for procurement of vehicles provides cost efficiencies.

## D. Goals, Objectives, Strategies and Implementation

The goals and objectives contained in this document adapt legislative and administrative requirements as they relate to the transportation disadvantaged (TD) population and provision of service in the service area.

The Florida Coordinated Transportation System is a concerted effort to coordinate, not consolidate, all government funded transportation, to better serve agencies and customer with safe, reliable and cost-effective transportation services. *The mission statement of the Commission for the transportation Disadvantaged (CTD) is to: "To insure the availability of efficient, cost-effective, and quality transportation services for transportation disadvantaged persons."*

To that end, the Multi-County Local Coordinating Board developed their mission statement as:

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*To identify transportation disadvantaged persons, their needs, and available resources, and provide a cost effective, accessible, coordinated transportation service in DeSoto, Hardee, Highlands, and Okeechobee Counties.*

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One of the initial tasks in the development of a five-year plan is to identify what the intent of the plan is and what is to be accomplished from the local perspective. With an approved mission statement in place, broad goals and corresponding objectives can be defined. These goals and objectives are based on requirements of Chapter 427, F.S., the CTD, and those established by the Multi-County local coordinating board. Goals and objectives are developed in conjunction with demographic data, demand forecasting and demonstration of current needs, evaluation results, public hearing input, and other service area data, in order to develop strategies for goal attainment.



## Goal 1: Identify and Analyze Demand for Service in the Service Area

Objective	Strategy	Measure	Responsibly Party
Review trips denied and/or not provided at requested time	Track trips denied/changed and report to LCB	Number and percent of trips denied/changed	CTC
Survey unmet needs of social service agencies	Survey social service agencies	Number of persons eligible	CTC, Planning Agency
Review demand of trip types	Track types of trips requested	Number and percent of trips requested	CTC
<b>Implementation:</b>	A report will be provided to the LCB at their 3 <sup>rd</sup> quarter meeting for analysis and to develop next steps.		

## Goal 2: Enhance Coordination to Provide Cost Efficient and Effective Service

Objective	Strategy	Measure	Responsibly Party
Educate front line staff on other existing transportation services in the service area	Develop a quick guide for referrals to other services	Number of customer referrals to other services	CTC
Educate community partners and other existing transportation services of TD services available	Awareness meetings, participation in community coordination groups	Number of awareness meetings	CTC, Planning Agency
<b>Implementation:</b>	This should be an ongoing effort. A report will be provided to the LCB at their 4 <sup>th</sup> quarter meeting for analysis and to develop next steps.		

## Goal 3: Reduce Barriers to Access TD Services

Objective	Strategy	Measure	Responsibly Party
Enhance the public's knowledge of the service	Form diverse committee to evaluate and recommend action items to help meet goal	Survey of new users	CTC, Planning Agency
Ensure user friendly application and registration process			
Coordinate with the Heartland Mobility Program	Identify action items from Heartland Rural Mobility Plan		Planning Agency
<b>Implementation:</b>	This should be an ongoing effort. A report will be provided to the LCB at their 2 <sup>nd</sup> quarter meeting for analysis and to develop next steps.		

## Goal 4: Prepare for Emergency Events

Objective	Strategy	Measure	Responsibly Party
Coordinate efforts with local emergency management officials	Attend regularly scheduled EOC meetings	Agreements/Letter of Understanding with each County	CTC, Planning Agency
Educate users/user agencies on emergency procedures.	Provide information to users and agencies as needed		CTC, Planning Agency

### Implementation:

This should be an ongoing effort. A report will be provided to the LCB at their 1<sup>st</sup> quarter meeting for analysis and to develop next steps.

## Goal 5: Ensure Quality Service and Program Accountability

Objective	Strategy	Measure	Responsibly Party
Comprehensive CTC report to LCB	Utilize spreadsheet provided by planning agency	Accurate and timely reports to planning agency	CTC
Meet or exceed all federal, state, and local performance measures	Annual review and follow up on review findings	Percent of standards met	CTC, Planning agency
Maintain quality customer relations	Survey users	Survey responses	CTC
Minimize customer discomfort	Maintain and provide safe and appropriate vehicles	Review of maintenance records and complaints	CTC, Planning agency
Minimize customer travel/wait time	Maintain appropriate vehicle inventory/proper scheduling.	Customer wait time	CTC
Require real-time communications	Require radio or tablets phone equipment	Percent of vehicles equipped with devices	CTC
Minimize customer complaints/grievances	LCB review of complaints/comments/grievances by types	Include on each quarterly report	CTC

### Implementation:

This should be an ongoing effort. A report will be provided to the LCB at each meeting for analysis and to develop next steps.

# II. Service Plan

## A. Operations Element

### 1. Types, Hours, and Days of Service

All service is door to door. Ambulatory and wheelchair service is offered countywide. Drivers are not permitted to assist persons in wheelchairs or stretchers up or down more than one step. Limited stretcher service is provided to customer of the TD program. Requests for transportation may be made by calling MV Transportation, Inc. There are five phone lines available to accept reservations, three administrative lines and a facsimile line. No fax or telephone request will be accepted after 5:00 p.m.

The CTC Office hours are Monday through Friday from 8:00 a.m.-5:00 p.m. except on approved holidays. Service hours are Monday through Friday from 6:00 a.m. until 7:00 p.m. Limited services are available on Saturday from 6:00 a.m. until 7:00 p.m.

Note: Service for dialysis clients may require more flexibility in scheduling. Dialysis services may begin as early as 4:00 a.m. and may run after 7:00 p.m. to serve the needs of the clients.

### 2. Accessing Services, including LCB Policies such as Eligibility, Prioritization, and Other Procedures

The Community Transportation Coordinator (CTC) maintains an advanced telephone system with toll-free access for all users of the service. The numbers for the CTC reservations system and administration are:

800/694-6566	DeSoto County Reservations/Customer Service
800/694-6566	DART Reservations/Customer Service
863/773-0015	Hardee County Reservations/Customer Service
863/452-0139	Avon Park Reservations/Customer Service
863/382-0139	Sebring Reservations/Customer Service
863/699-0995	Lake Placid Reservations/Customer Service
863/357-9900	Okeechobee County Reservations/Customer Service
800/260-0139	All Other Area Reservations/Customer Service
863/382-6004	CTC Administration Line
863/382-8469	Fax Line

*Customers can be assured timely service if:*

- **Return trips are scheduled in advance.** If the customer does not know the return time or is not ready at the scheduled return time, a vehicle will be dispatched upon notification; however, the wait for the dispatched vehicle can be up to two hours. When scheduling medical appointments, riders are asked to use their best estimate for the time for the return trip.
- **As a courtesy to others, customers should be ready at least one hour prior to the scheduled appointment time.** Longer trips will require earlier pickup times. Drivers will wait no more than five minutes for a customer.



- **Customers must cancel a requested trip no later than one hour before the scheduled pickup time.** Trips are canceled by calling the CTC.
- **Failure to cancel a trip will be assessed as a no-show.** The customer may then receive a written notice explaining that they have been assessed a no-show.
- **When scheduling trips, customers should be specific about the type of service required (i.e., wheelchair, ambulatory, escort.) and the destination (i.e., correct destination name, street address, suite number, and telephone number).**

Service is door-to-door. Drivers are required to assist customers from the door of the trip origin to the door of the trip. The driver should not be expected to assist customers to specific offices, departments, or floors within large medical facilities and cannot provide personal attendant care. destination confused customers or those unable to care for themselves should be accompanied by an attendant or escort.

### A. Eligibility

Program	Eligibility																						
<p><b>Transportation Disadvantaged Program</b></p>	<ol style="list-style-type: none"> <li>Individual does not have an available operational vehicle in the household; or the ability to operate a vehicle; or the ability to find transportation from other sources.</li> <li>Must live in DeSoto, Hardee, Highlands, or Okeechobee County</li> <li>No other means of transport and qualify based on one of the following: <ul style="list-style-type: none"> <li>✓ Is under the age of 18, or over the age of 60</li> <li>✓ Has an income at or less than 150% of the Federal Poverty Guidelines</li> </ul> <table border="1" data-bbox="696 984 1235 1312"> <thead> <tr> <th colspan="2">2020 Federal Poverty Guidelines</th> </tr> <tr> <th>Family Size</th> <th>150%</th> </tr> </thead> <tbody> <tr><td>1</td><td>\$19,140</td></tr> <tr><td>2</td><td>\$25,860</td></tr> <tr><td>3</td><td>\$32,580</td></tr> <tr><td>4</td><td>\$39,300</td></tr> <tr><td>5</td><td>\$46,020</td></tr> <tr><td>6</td><td>\$52,740</td></tr> <tr><td>7</td><td>\$59,460</td></tr> <tr><td>8</td><td>\$66,180</td></tr> <tr><td colspan="2">Add \$4,480 for each person over 8</td></tr> </tbody> </table> </li> <li> <ul style="list-style-type: none"> <li>✓ Has a documented disability</li> </ul> </li> <li>An application (Appendix C) must be updated every 2 years and the applicant must have one of the following documents on file. <ul style="list-style-type: none"> <li>✓ Photo Identification</li> <li>✓ Proof of Income</li> <li>✓ Disability Letter</li> </ul> </li> <li>Trips provided with this funding source are limited to life-sustaining trips and prioritized by the Local Coordinating Board.</li> </ol> <p>Non-sponsored trips are funded by a Trip/Equipment Grant from the Transportation Disadvantaged Commission. A local match of 10% will be required (generated through the fare box and local sources). With concurrence from the local coordinating board, these funds will continue to be allocated on a daily basis with an equal allocation for each day (Monday through Friday). No TD trips can be scheduled once the daily cap is reached. This service is offered only to those persons who are transportation disadvantaged as defined by Chapter 427, Florida Statutes and persons who met the eligibility criteria outlined in this service plan. Transportation Disadvantaged Trust Fund trips cannot be subsidized by a funding agency.</p>	2020 Federal Poverty Guidelines		Family Size	150%	1	\$19,140	2	\$25,860	3	\$32,580	4	\$39,300	5	\$46,020	6	\$52,740	7	\$59,460	8	\$66,180	Add \$4,480 for each person over 8	
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<b>Innovation and Service Development Grants</b>	<p>These grants are to provide on demand services for employment and dialysis trips. There are no fares for clients being served under either of these grants.</p> <ul style="list-style-type: none"> <li>• An employment grant is for after hours and on demand for individuals who get called in to work, or who get sick at work and need a ride home. This is for after normal hours and on weekends.</li> <li>• A dialysis grant is an on-demand service for a direct ride home for dialysis patients who are experiencing difficulties with their treatments, or whose treatment has gone beyond their normal pick-up time, or for clients requiring service after the normal operating hours. It is also for patients who may get called in for earlier treatments.</li> </ul>
<b>Door-to-Door Public Transportation funding (FTA 5311)</b>	<ol style="list-style-type: none"> <li>1. There are no restrictions for the types of trips provided with these funds. However, there is a monthly budgeted amount that can be spent and when the funds run out, service is capped.</li> <li>2. Passengers will be required to complete an application to access services, however their ability to access services is not contingent on any information provided in their application.</li> </ol>
<b>Door-to-Door Public Transportation funding (FTA 5310)</b>	<ol style="list-style-type: none"> <li>1. Section 5310 operating funds are used to enhance seniors and persons with disabilities with transportation needs. Therefore, trips are provided to seniors and persons with disabilities only. There is a monthly budgeted amount that can be spent and when the funds run out, service is capped.</li> <li>2. Passengers will be required to complete an application to access services, however their ability to access services is only contingent on age and disability status.</li> </ol>
<b>DART Bus</b>	<p>Anyone may ride the DeSoto-Arcadia Regional Transit Bus from 8:30 a.m. to 4:30 p.m. Monday – Friday. Visit <a href="http://www.DeSotoBus.com">www.DeSotoBus.com</a> for the bus route.</p>
<b>Medicaid Non-Emergency Medical Transportation</b>	<p>Medicaid will pay for non-emergency transportation services for a Medicaid eligible recipient who has no other means of transportation to a Medicaid covered service. Here are some examples of where Medicaid will transport using non-emergency transportation services: Doctor Appointments; Dental Appointments; Mental Health Appointments; To receive Dialysis Services; To receive services at a Prescribed Pediatric Extended Care (PPEC) Center.</p> <p>Reservations must be made through the rider’s health plan by calling the Medicaid Helpline at 1-877-254-1055 for more information on how to schedule Medicaid Non-Emergency Medical Transportation</p>
<b>Full-Cost Trip</b>	<p>If an individual or trip is not eligible for any of the above programs, a trip may be scheduled and the individual may pay the full cost of the services provided.</p>

**B. Prioritization for TD Trust Fund Trips**

TD trips and other funded trips are scheduled strictly on a first-come, first-served basis. The local coordinating board has established a priority for TD trust fund trips as noted below:

- In an effort to reduce ridership demands on the current Transportation Disadvantaged system, a prioritized ridership policy for trips funded through the TD Trust Fund “Non-Sponsored Trip/Equipment Grant”, has been developed.
- Although prioritizing non-sponsored trips based solely on trip purpose seems to be a rational solution to providing transportation to those who most need it and avoiding misuse of the system, it does allow for maximum system efficiency or coordination of trips. By scheduling most of the trip routes around medical and life sustaining trips and then filling in the empty seats with shopping or recreational trips whose origins and

destinations are along the same routes, maximum coordination and efficiency can be obtained. The goal of the program is to provide the most riders with the highest number of trips while utilizing the least amount of mileage. However, the importance of all types of trips in the TD system cannot be overlooked.

- The prioritization procedure, which emphasizes the necessity of carrying out the medical and nutritional trips on a timely basis without excluding work, recreational, or shopping trips, is followed on a daily basis. The Coordinator shall, to the maximum extent feasible, fulfill the medical and life sustaining trips without significant delay and place less significance on the shopping and recreational trips while maintaining maximum system efficiency. This discretionary policy allows the Coordinator more flexibility in coordinating trips while acknowledging the LCB's commitment to ensuring that the most essential trips are provided. The Coordinator shall place the highest priority on the following TD Trust Fund trips in the appropriate order:
  1. Medical
  2. Nutritional (Grocery Shopping, Meal sites, and SNAP Benefits)
  3. Employment
  4. Education/Day Care
  5. Life Sustaining/Others- Personal business, banking, Social Service Offices, visiting nursing homes, shopping excluding grocery shopping, after school, social and recreational reasons

### C. Reservation Service

There is a forty-eight (48) business hours (excluding weekends and holidays) advance notice requirement for all trips scheduled within the coordinated system, except under special circumstances, such as outlined in the Innovation and Service Development Grant.

Clients may schedule up to two (2) weeks in advance of their trip.

### D. Subscription Service

Subscription service is defined as a regular and recurring service in which schedules are prearranged to meet the travel needs of riders who sign up for the service in advance. The service is characterized by the fact that the same passengers are picked up at the same location and time and are transported to the same location and then returned to the point of origin in the same manner.

### E. Demand Response Service

The name(s) and address(es) of the customer(s) to be transported are placed with the CTC forty-eight (48) business hours before the day of travel.

### F. Non-Emergency Medical (Stretcher) Service

MV Transportation is currently not a provider of Non-Emergency Medical (Stretcher) Services.

**G. DeSoto, Hardee, Highlands, and Okeechobee County Customer Fare Policy**  
 The Local Coordinating Board approved the customer fare Policy in 2018.

County	In Service Area	Out of Service Area
<b>DeSoto</b>	\$1.50	\$3.00 up to \$5.50
<b>Hardee, Highlands, Okeechobee</b>	\$1.00	\$3.00

The policy covers all non-sponsored customers. Customers residing in the counties of Highlands, Hardee, and Okeechobee have a fare of \$1.00 for local one-way trips and a fare of \$3.00 for out of area trips. Customers residing in DeSoto County have a fare of \$1.50 for local trips and for one way out of service area trips depending on destination varies from \$3.00 up to \$5.50. Customer will be notified the cost of the fare at time of scheduling the trip.

On the trip from home to a destination, customers required to pay a fare will not be transported if they refuse to pay the appropriate fare. On the return trip, customers will be transported even if they refuse to pay. However, they will be required to pay any amount not paid prior to being transported in the future. Agency sponsored customer are not required to pay a fare.

**H. General Public Transportation**

The Community Transportation System is open to the general public through the receipt of Federal Transit Administration Section 5311 and Section 5310 Operating grant funds. The FTA requires that trips paid for with these funds be scheduled on a first-come, first-served basis. The general public may access the system by calling the CTC’s local access number or toll-free number. Once the funds for the month have been depleted, the general public may only access the system by personally paying the fully allocated cost per trip if there is vehicle seating/capacity for the trip request. Those persons who meet eligibility for trip requests under the Transportation Disadvantaged trip eligibility/trip prioritization policy will be processed through that funding source.

**I. Public Awareness of Non-Sponsored Funds**

Brochures describing the coordinated transportation system briefly discussing eligibility criteria and the scope of the services provided are distributed to social service agencies, public forums, health departments, hospital social service departments, etc. within the designated service area. The CTC meets with social service agency staff and advocacy groups on a frequent basis, to ensure that those individuals eligible for service have accessibility.

**J. Driver Training**

New driver certification and training procedures have been developed by MV Transportation, Inc. All drivers have been issued a Driver’s Training Manual. New drivers receive the manual upon their hiring. Drivers are required to sign an acknowledgment that they have received the manual and a copy of the receipt is included in their permanent training records. Drivers are required to read the manual and, as part of an initial training, are tested on key points.

Every new driver is required to complete an initial training course administered by the carrier. Before entering service, new drivers are required to complete the initial training, review the training manual, and pass a written test. In addition to a review of the Driver’s Training Manual,

the course includes an introduction to the CTC organizational structure, an outline of the relevant parts of Chapter 427., instruction about how to read a driver manifest, the basic rules and regulations and preliminary customer assistance training.

Drivers are also given customer assistance and defensive driver training provided by MV Transportation, Inc. or the contract carrier during their first 30 days of employment. Customer assistance training is vitally important as it instructs the driver in how to offer more appropriate services to disabled customers and can significantly reduce the number of incidents that occur on vehicles. In addition, it addresses the concerns of the disabled and their advocacy groups. MV Transportation, Inc. uses Customer Assistance Training developed by the University of Wisconsin's Office of Statewide Transportation Program in the provision of training.

Defensive driver training consists of the National Safety Council and University of Wisconsin defensive driver modules and includes specialized training for minibus operators. All drivers in the coordinated system must attend the annual training provided by the Community Transportation Coordinator and every two years thereafter. Drivers must also have a good driving record with no more than five points in the last two years. Drivers are required to receive the following training:

1. Defensive Driving
2. Customer Assistance/Sensitivity
3. Substance Abuse Training/testing
4. Pre-Post Trips
5. System safety
6. Wireless Communication

All customer assistance and defensive driving training is conducted or provided by the Coordinator or contract carriers with training credentials. Written tests for these courses have been developed. Failure to pass the written tests disqualifies a driver from operating a system vehicle until a passing grade is achieved.

For safety reasons, drivers may not take customers in wheelchairs or stretchers up or down more than one step. All customers must be secured with seat belts or wheelchair tie-downs as appropriate. Three and four wheeled scooters may be transported, but because they are difficult to secure, once on board, the customer is requested to transfer to a regular seat.

### M. Emergency, Accident, and Delay Procedures

The CTC, through contractual agreements with contract carriers and in the System Safety Program Plan (SSPP) establishes policies for the handling of emergencies, accidents, and delays.

Contract carriers are required to notify the CTC and appropriate emergency personnel immediately if an emergency, accident, or delay occurs. Appropriate emergency personnel can include police, fire, and/or ambulance. The carrier must solicit appropriate medical or emergency assistance, if an accident or other emergency occurs. The CTC must also be notified of schedule delays. The carrier must also submit a written accident or incident report and management analysis, within 24 hours. If the asset is owned by FDOT, FDOT must be notified within 24 hours.

Drug and alcohol testing is required in the event of bodily injury or property damage in compliance with U.S. DOT and Federal Transit Administration (FTA) guidelines.

To handle delays, each carrier is required to have one back-up vehicle for every six vehicles in service. If delays occur, the CTC may reassign trips to other service providers. If an extended delay results, the customer will be notified, and a satisfactory resolution will be reached.

The Memorandum of Agreement (MOA) between the Community Transportation Coordinator (MV Transportation, Inc.) and the Transportation Disadvantaged Commission requires the CTC to develop and implement a Safety System Program Plan (SSPP). The SSPP Certificate of Compliance, as required by Rule Chapter 14-90, Florida Administrative Code, Equipment and Operational Safety Standards Governing Public Sector Bus Transit Systems and is updated annually. In accordance with this rule, the plan assures compliance with the minimum standards established and includes safety considerations and guidelines for the following:

1. Carrier and MV Transportation, Inc. Management
2. Vehicles and Equipment
3. Operational functions
4. Driving requirements
5. Maintenance
6. Equipment for transporting wheelchairs
7. Training
8. Federal, State, and local regulations, ordinances or laws
9. Private contracted service provider

The Safety System Program Plan (SSPP) outlines driver training requirements and vehicle inspection requirements. Required safety equipment for all vehicles is:

- Seatbelts
- Wheelchair securement systems and restraining devices (l belt and shoulder harness)
- Dry chemical fire extinguishers (tagged and inspected annually)
- First aid kits
- Two-way radios or equivalent real-time communications devices

The SSPP limits the number of consecutive hours a driver can work, requires defensive driving and customer assistance/sensitivity training for all drivers. It further requires all subcontracted service providers be certified before providing service in the coordinated transportation system and requires vehicles to undergo annual safety inspections. The SSPP also includes driver and accident policies.

Extensive record keeping by the CTC and the individual subcontractor contract carriers is also required. Records kept include personnel data, operational reports, dispatching logs, driver trip sheets and reports of accidents, incidents, and service delays.

## N. Insurance Requirements

Contract carriers under contract to MV Transportation, Inc. are required to carry a minimum of \$500,000 in single limit auto liability insurance for dedicated vehicles. Contract carriers must also maintain \$1,000,000 in general liability coverage and workmen's compensation insurance at the statutory limits.

### 3. Transportation Operators and Coordination Contracts

MV Transportation, Inc., the CTC, enters into contracts with transportation operators approved by the multi-county LCB. MV Transportation, Inc. makes no guarantee as to the total number of vehicles, hours, or trips that a transportation operator will receive. These contracts may be negotiated on a yearly basis if the service provided has been adequate and the contract allows for annual rate changes. The CTC, however, is not bound to renew carrier contracts and may re-bid services at the end of any contract year. The rate paid to transportation operators/contract carriers is by trip and is covered in the carrier contract.

Each vehicle shall have the following lettering:

Outside of Vehicle  
**COMMUNITY TRANSPORTATION**  
**PHONE 1-800-694-6566**  
**Operated by [Carrier Name]**  
**Vehicle #: \_\_\_\_\_**

Inside of Vehicle:  
**Complaints or Comments? Call 1-800-694-6566**  
**Drivers Name**

“COMMUNITY TRANSPORTATION” in very visible block letters two (2) inches in height, on the rear and or both sides of the vehicle. “PHONE 1-800-694-6566” painted in two (2) inch high very visible block letters directly beneath the COMMUNITY TRANSPORTATION sign. “Operated by [carrier name]” in very visible block letters, no more than two (2) inches in height on the rear quarter of each of the two long sides of the vehicle. The signs may be magnetic but must be displayed when coming or going to a customer’s location as well as when a customer is on board. “Complaints or Comments? Call 1-800-694-6566” shall be displayed in one (1) inch high very visible block letters inside each vehicle above the windshield. The drivers name must be placed inside the vehicle and be visible from the customer locations. Each vehicle shall have a vehicle number unique to it, painted in two (2) inch high very visible block letters on the back of the vehicle.

#### List of Contracts/Contract Carriers for DeSoto, Hardee, Highlands, And Okeechobee

Community Transportation Coordinator				
<b>MV Transportation, Inc.</b> Contact: Kelly Kirk-Brooks	DeSoto, Hardee, Highlands, and Okeechobee	4650 U.S. Highway 27, S Sebring, FL 33870 Office 863/382-6004 Fax 863/382-8469		Office Hours Monday – Friday 8 AM – 5PM
Operators				
<b>JJ Medical Transport</b> Contact: Madelon Mansfield	DeSoto County	1866 Hillsborough Avenue, Arcadia, Fl 34266 Office: 863/993-0471		Monday – Saturday 6 AM – 7 PM (limited service on Saturday) Note: Service for dialysis clients may require more flexibility in scheduling.
<b>Positive Mobility</b> Contact: Robert Layne	Hardee, Highlands and Okeechobee Counties	201 Commercial Court Sebring, FL 33876 Office: 863/655-0030 Or 863/381-7765 Fax 863/655-0062	Public Paratransit Service: Ambulatory and Wheelchair	
<b>Safety Transportation</b> Contact: Crystal Oliveros	Hardee and Highlands Counties	4650 U.S. Highway 27, S, Sebring, FL 33870 Office: 863/547-0603 Fax 863/382-8469		

Coordination Contractors		
<b>Ridge Area ARC</b> Contact: Kathleen Border	Highlands County	Client Paratransit Service: Ambulatory and Wheelchair
<b>New Concepts by Visions, Inc.</b> Contact: Barbara Cook	Highlands County	
<b>Sunrise Community, Inc.</b> Contact: Gary Glasse	Hardee County	
<b>Palms of Sebring</b> Contact: Lisa Pantaline	Highlands County	

#### 4. Public Transit Utilization

Mass transit is not available in Hardee, Highlands, or Okeechobee Counties. DeSoto County has a small public transportation circulator service in the City of Arcadia area called the DeSoto Area Regional Transit (DART) transit system. The service operates Monday through Friday from 8:30 a.m. to 4:30 p.m.

#### 5. School Bus Utilization

School buses are not currently utilized in the coordinated system.

#### 6. Current Vehicle Inventory

A current vehicle inventory may be found in Appendix D. A Vehicle Implementation Plan may be found in Appendix E.

#### 7. System Safety Program Plan Certificate of Compliance

A copy of the latest System Safety Program Plan Certification may be found in Appendix F.

#### 8. Intercounty Services

Transportation is provided to sponsoring agency-approved destinations outside of the service area. All out of service area trips are to be for morning scheduled appointments only. Customers will be transported to the closest medical facility or medical specialist to their home. Out of service area trips are scheduled for specific days of the week. (Customers must contact the CTC for specific schedules.) Customers will be grouped with other customers who have appointments at the same or nearby facility, regardless of appointment times.

#### 9. Emergency Preparedness and Response

The CTC, through contractual agreements with contract carriers and in the System Safety Program Plan (SSPP), establishes policies for the handling of emergencies, accidents and delays. Contract carriers are required to notify the CTC and appropriate emergency personnel immediately if an emergency, accident or delay occurs. Appropriate emergency personnel can include police, fire or ambulance. Contract carriers must solicit appropriate medical or emergency assistance, if an accident or other emergency occurs. The CTC must also be notified of schedule delays. The carrier must also submit a written accident or incident report and management analysis within 24 hours. If bodily injury and/or property damage exceeds levels outlined in the U.S. DOT guidelines, the driver is required to undergo drug and alcohol testing as per Federal guidelines. If delays occur, the CTC may reassign trips.

The CTC has established guidelines in the event of other natural disasters. The CTC will enter into agreements with local governments, Emergency Operations Divisions and Health



Department's regarding the transport of citizens and special needs customers during and after events such as hurricanes when people are transported to shelters in each county.

The CTC shall participate in the meetings of the Emergency Operations Divisions of each of the Counties in the service area.

## 10. Education Efforts/Marketing

Brochures that describe the coordinated transportation system and discuss eligibility criteria and scope of the services provided have been distributed to social service agencies within the designated area. MV Transportation, Inc. meets with social service agencies staff and advocacy groups on a frequent basis, to ensure that those individuals eligible for services are able to access it. Please read General Public Transportation section of this service plan for the explanation of how to access service, page 28 section H.

Transportation is offered to the general public on a first-come, first-served basis.

## 11. Acceptable Alternatives

Three (3) coordination contracts have been executed with agencies who have provided fully-allocated cost comparisons between providing their own service and purchasing transportation through the coordinated system. Other agencies are currently using state and federal funds to provide or purchase transportation for their customer without having proven fully-allocated costs and without a coordination contract in place; thereby falling into non-compliance with Rule 41-2.015.

Coordination contracts have been executed with Ridge Area ARC (Highlands County, New Concepts by Visions (Highlands County), and Sunrise Community Services (Hardee County).

The multi county Local Coordinating Board developed a system standard for consideration in reviewing requests for coordination contracts and/or requests by sponsoring agencies to provide transportation services to their customer outside of the coordinated system. This process is outlined in the Quality Assurance section of the TDSP (Standard #40). A copy of this standard may also be obtained by contacting MV Transportation, Inc. Transportation at the numbers listed at the beginning of this service plan.

## 12. Service Standards

The Multi County LCB utilizes the CTD evaluation workbook to evaluate the CTC. In addition, the following system standards have been developed based on service effectiveness, cost efficiency and effectiveness, vehicle utilization, service availability, reliability, safety and training.

### 1. Drug and alcohol policy

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 (FHWA) and the Federal Transit Administration (FTA). All safety sensitive job positions will comply with the pre-employment, randoms, post-accident, and reasonable suspicion testing requirements of the Federal Transit Administration.

### 2. Driver Identification

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 customer, 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 customer. 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.

### **3. Adequate Seating**

Adequate seating for paratransit services shall be provided to each rider and escort, child, or personal care attendant, and no more customers than the registered customer 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 customers than the registered customer seating or standing capacity shall be scheduled or transported in a vehicle at any time.

### **4. Customer Boarding/Loading Assistance/Transfer**

The paratransit driver shall provide the customer with boarding assistance, if necessary or requested, to the seating portion of the vehicle. Boarding assistance shall include holding hands or allowing the customer to hold an arm; 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 door-through-door paratransit service categories, the driver shall 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 customers 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 customer, guardian, and driver. Customers may transfer from their mobility device to regular vehicle seating but only with assistance as outlined above. Under no circumstances shall the driver lift the customer from their mobility device to regular seating (or vice versa).

### **5. Smoking, Eating and Drinking Policy**

Smoking is prohibited in any vehicle. Eating and drinking on board the vehicle is not allowed.

### **6. Rider Property**

Personal property includes personal items, packages, bags, or boxes. Passengers may bring personal property to meet their personal or nutritional needs at no additional charge.

The amount of personal property allowable is dependent upon storage capacity and availability onboard the vehicle. Items must be safely secured in the passenger's lap, personal space, or stowed under the passenger's seat. Personal property cannot be stowed in the wheelchair securement areas or any exit areas.

When scheduling trips for shopping or nutritional purposes, the reservationist shall notify the passenger that additional storage space may be available for personal property during off-peak travel hours. Travel during peak times will result in limited storage space onboard the vehicle. Drivers shall inform passengers of storage space availability for personal property when dropping the passenger off at shopping destinations.

Drivers may assist passengers with loading and unloading personal property when requested. Drivers may assist passengers with personal property to the door of their residence. For safety and security reasons, drivers are not permitted to enter the homes of the passengers.

## **7. Child Restraints**

All customers 5 years old and under are required to use a child restraint device. This device must be provided by the customer.

## **8. Toll-free Phone Number**

A local toll-free phone number for complaints or grievances shall be posted inside the vehicle. The local complaint process shall be outlined as a section in the local 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.

## **9. Escorts and Children**

Children 15 or younger must be accompanied by an escort. Customers unable to care for themselves must be attended to by an attendant. Escorts and attendants must be at least 18 years of age and provided by the customer. The escort must be able to provide the necessary assistance to the customer. The system does not pay for escort travel.

## **10. Vehicle Transfer Points**

Vehicle transfer points shall provide shelter, security, and safety of customers.

## **11. Customer/Trip Data**

Customer/trip data base must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system. For each customer transported within the coordinated system, the CTC collects the customer's name, address, telephone number, funding source(s) eligibility, and other special requirements in a database. The customer must provide the complete destination address, phone number, and times for the appointment and return trip.

## **12. Pick-up Windows**

In Service Area Trips - There is a 30-minute pick up window. The customer should expect the vehicle to pick them up 15 minutes before, to 15 minutes after their scheduled pick up time. There is a 30-minute arrival window. The customer should expect the vehicle to drop them off at their destination 15 minutes before to 15 minutes after their scheduled arrival time. The 15 minutes after scheduled arrival time is calculated to allow a customer to arrive in time for appointments.

Out of Service Area Trips - Out of service area trips are scheduled on specific days. (Please contact the Community Transportation Coordinator for specific schedules.) Customers will be transported for morning medical appointments only. Afternoon appointments will only be provided under special circumstances. Customers will be grouped where possible for out of service area trips regardless of appointment times.

### **13. On-time Performance**

The CTC will have an 85% on-time pick up performance standard for all completed trips. The CTC will have an 85% on-time arrival time performance standard for all completed trips.

### **14. Advance Reservation Requirements**

Customers are generally required to place reservations two (2) business Days (excluding weekends and holidays) in advance. Exceptions are sometimes made for “urgent” trips and hospitals.

### **15. No-Show Policy**

Community Transportation customers should notify the Coordinator as soon as possible when they need to cancel a trip. If the customer does not cancel at least 24 hours in advance of a scheduled trip, then the customer is classified as a no-show. Cancellations at the door will also be considered a no-show. No-shows occur when the rider is not ready, refuses their ride, or is not at home when the driver arrives. If three no-shows accumulate in a 60-day period, a 30-day suspension will result. If another occurrence happens the suspension will be extended to 45 days. After the third infraction of three no-shows, the suspension is for 60 days.

The following local toll-free phone numbers are accessible for scheduling and canceling trips.

DeSoto County	1-800-694-6566
DART	1-800-694-6566
Hardee County	863-773-0015
Avon Park	863-452-0139
Lake Placid	863-699-0995
Sebring	863-382-0139
Okeechobee	863-357-9900
Toll Free	1-800-260-0139

### **16. Public Transit Ridership**

DeSoto County has implemented the DeSoto Arcadia Regional Transit program – DART. Riders are encouraged to take the DART for local trips if the trips are located on the DART route.

### **17. Out of Service Area Trips**

Out of service area trips are provided to customers only when specific services are not available in the service area. Customers will be required to schedule medical or other appointments with facilities within the service area and that are nearest to the trip origin, regardless of funding source and only during the service hours established Monday through Friday. When alternative medical facilities are not available, customers shall schedule morning appointments. Out of service area trips are scheduled on specific days. (Contact the Community Transportation Coordinator for specific schedules.) Customers will be grouped with other customers who have appointments at the same or different facility, regardless of appointment times.

### **18. Vehicle Cleanliness**

The interior of all vehicles will be 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 customer. Vehicle exteriors shall be washed at least once per week in all seasons. Vehicle interiors shall be swept and cleaned each day and thoroughly cleaned (scrubbed) at least once per week.

### **19. Billing/Invoicing Requirements**

The CTC will make payments to the contract carriers based on the following schedule: Payments will be made for services rendered from the 1st through the 15th of the month and from the 16th to the end of the month. Payments will be made within seven (7) days of the carrier providing all of the required documentation and the CTC having received payments from the funding agencies. If the CTC, without reasonable cause, fails to make payments to the subcontractors and suppliers within seven (7) working days after the receipt by the CTC of full or partial payment from the CTD, the CTC shall pay to the subcontractors and suppliers a penalty in the amount of one-half of one percent of the amount due, per day, from the expiration of the period allowed herein for payment. (F.S. 2000/ Ch 287/Part 1/287.0585 Late payments by contractors to subcontractors and suppliers; penalty.)

### **20. Two-way Communications**

All vehicles must have two-way radios or cell phones in good working order and are audible to the driver at all times when operating the vehicle.

### **21. Wireless Communication Policy**

MV Transportation and its subcontractors have adopted a zero-tolerance policy in regard to drivers use of cell phones, and all other personal electronic devices including Bluetooth and all other hands free operation devices while behind the wheel, in conjunction with Florida's Rule 14.90 Wireless Communication, and wireless communication device prohibition under the Florida Statutes 316.305

This includes, but not limited to any work performing call-taking, scheduling, dispatch, GPS, customer service functions and/or any other administrative duties while behind the wheel of a vehicle.

### **22. First Aid**

Drivers are required to be trained in First Aid.

### **23. Cardiopulmonary Resuscitation (CPR)**

Drivers are required to be trained in Cardiopulmonary Resuscitation techniques.

### **24. Driver Criminal Background Screening**

All drivers in the coordinated system shall have a favorable Florida Department of Law Enforcement (FDLE) Level II background check prior to employment.

### **25. Accidents**

The standard for accidents will be 1.2, or less, accidents per 100,000 miles for the evaluation period (twelve months).

### **26. Road Calls**

The standard for road calls will be an average of 10,000 miles, or more, between each road call. (e.g., the system-wide total, not each individual vehicle.)

### **27. Call Hold Time**

The customer should not be put on hold for more than 3 minutes on average. As a standard, 95% of all incoming calls will be completed within 3 minutes. A daily report will be prepared one random day per week to evaluate this standard.

### **28. Non-sponsored Customer Fare**

All non-sponsored customers (TD Trust Fund, 5311 and 5310 funded trips) will be charged a fare per one-way trip. Social service funded (sponsored trips) customers are not charged a fare. Customers residing in the counties of Highlands, Hardee, and Okeechobee have a fare of \$1.00 for local one-way trips and a co-pay of \$3.00 for out of area trips. Customers residing in DeSoto County have a fare of \$1.50 for local trips and for one way out of service area trips depending on destination varies from \$3.00 up to \$5.50. Customer will be notified the cost of the fare at time of scheduling the trip.

### **29. Prioritization of Non-Sponsored Trips**

List of trip priorities adopted by the DeSoto, Hardee, Highlands, and Okeechobee Local Coordinating Board, July 15, 2020.

- Medical
- Nutritional (Grocery Shopping, Meal sites, and SNAP Benefits)
- Employment
- Education/Day Care
- Life Sustaining/Others- Personal business, banking, Social Service Offices, visiting nursing homes, shopping excluding grocery shopping) After school, social and recreational reasons.

By giving medical trips number one priority, it is also intended that return trips from medical appointments will be given priority scheduling to ensure that customers are experiencing the minimum waiting periods feasible. For example, scheduling shopping

trips during the time a customer needs to be picked-up from a doctor's appointment will be given less priority than the return trip from the medical appointment. An effort will be made to accommodate all eligible trip requests using the priority order. The priority order is not intended to eliminate any eligible trip purpose. The goal of the system is to provide transportation to all eligible participants within funding availability. This prioritization policy is based on cost-effectiveness, efficiency, trip purpose, and unmet needs.

### **30. Insurance**

Commission Standard - The Community Transportation Coordinator shall ensure compliance with the minimum liability insurance requirement of \$200,000 per person and \$300,000 per incident, which are comparable to 768.38(5), Florida Statutes, limits, for all transportation services purchased or provided for the transportation disadvantaged. Any liability insurance coverage in excess of \$1 million per incident must be approved by the Commission before it is included in a Memorandum of Agreement.

Local Policy - All contract carriers must have \$500,000 per accident combined single limit for bodily injury liability and property damage liability including liability to customers. In addition, all contract carriers must have \$1 million comprehensive general liability insurance.

### **31. Emergency Preparedness**

The CTC shall established protocol with local Emergency Management officials and establish a local emergency policy and procedure manual to ensure effective coordination and execution of emergency operations before, during, and after an emergency.

### **32. Eligibility**

It is the intent of the Commission to set forth eligibility requirements for customers of the Transportation Disadvantaged Program. At a minimum, each CTC shall use the following criteria to determine eligibility for Transportation Disadvantaged Trust fund (non-sponsored) monies:

- No other funding available. A customer would not be considered eligible for TDTF when another purchasing agency is responsible for such transportation.
- No other means of transportation is available. As specified by the CTC and the LCB.
- Fixed Route Public Transit. If the fixed route public transit is available the customer must demonstrate why it cannot be used.
- Physical or mental disability. A disability as outlined in the Americans with Disabilities Act of 1990.
- Age. For this program elderly is anyone 60 or older. As specified by the CTC and the LCB.
- Individual and Household income status is a specified percent of the poverty level. As specified by the CTC and the LCB.

- No self declarations are allowed except for people who are homeless or living in shelters. The CTC will use an enrollment process that substantiates the individual's ability to meet the criteria listed and any other CTC determined criteria.
- Ability to pay. The CTC and the LCB may establish an ability to pay policy for "non-sponsored" customers using a sliding scale based on the customer's income and/or assets status.

View the CTC Application in Appendix C, which is the CTC policy for determining eligibility.

### **33. Private Pay Access**

Trip requests from persons who do not meet the definition of transportation disadvantaged but wish to access the system will be scheduled only when vehicle route and seating availability will accommodate the request, and, at the expense of the requesting party. The fare structure shall be the same as provided in the Memorandum of Agreement/Service Plan and approved by the Commission for the Transportation Disadvantaged.

### **34. Vehicle Air Conditioning and Heating System**

All vehicles operating within the coordinated system must have working air conditioning and heating systems. In the event that a vehicle's air conditioning or heating system fails, the vehicle shall be removed from service immediately and not returned to service until corrective repairs have been made.

### **35. Service Effectiveness**

Service effectiveness standards should be jointly established by the CTC and LCB. These standards should give the LCB information on how effectively the CTC is operating and can include trips/vehicle mile, trips/vehicle hour, and trips/capita. The data for establishing these standards can be found in the CTC's Annual Operating Report.

The LCB monitors the CTC and contract carriers effectiveness by analyzing monthly reports which are modeled after Section II of the Annual Operating Report.

### **36. Service Animals**

A service animal is any animal individually trained to work or perform tasks for an individual with a disability. In order to ride:

- The animal must be on a leash or in a container, remain under the control of the owner and behave appropriately
- The animal must remain at the passenger's feet or on their lap. The animal may not sit on a vehicle seat.
- The animal must not be aggressive toward people or other animals
- The passenger is responsible for any damage caused by the animal (49 CFR 37.167(d))

### **37. Accommodating Mobility Aids and Life Support Systems**



Customers are permitted to travel with respirators and portable oxygen. Travel with this equipment will only be denied if it would violate rules concerning the transportation of hazardous materials (49 CFR Parts 100-199).

In general, the transport of common types of portable life support equipment is not prohibited. Cylinders of oxygen used by customers for health reasons, for example, are not subject to the Hazardous Materials Regulation.

All life support equipment brought onto a Community Transportation vehicle must be able to be operated and maintained by the customer or by the customer's escort and must be able to be secured in the vehicle. The Community Transportation driver will not have any contact or provide assistance with the life support equipment.

### **38. Complaints**

The standard for complaints will be 2.0 (or less) complaints per 1,000 one-way customer trips on an annual basis.

### **39. Process for Identifying Cost Effectiveness of Vehicles Purchased and Operated with Section 5310 and/or Section 5339 Federal Transit Administration funds.**

The award and inclusion of Federal Transit Administration Section 5310 and/or Section 5339 vehicles procured for the Community Transportation Coordinated System have contributed significantly to keeping costs contained. The fact that a contract carrier does not have to contribute capital funds for the purchase of all new vehicles helps to keep the cost per trip maintained both to the system and purchasing agencies. The increases in cost of service experienced thus far are only a fraction of what would be experienced if these vehicles had not been awarded. In addition, the vehicles have contributed to maintaining a certain level of service which might not have been provided if they were not awarded. The vehicles are a tremendous asset to the system.

When vehicles have reached their useful life as determined by regulations administered by the Department of Transportation, the Central Florida Regional Planning Council will request the titles to such vehicles, ask that a worth be determined for the vehicle(s) and proceed to follow the Council's Vehicle Disposal Policy. Any funds received from the disposal of vehicles will be used to off-set the cost for future vehicles or, with the consent of the Local Coordinating Boards, repair of current vehicle(s).

### **40. Distribution of Grant Vehicles to Contract Carriers**

The following criteria shall be applied when grant vehicles are distributed to contract carriers in the system.

- Contract carriers shall submit a complete vehicle inventory in October of each year. The vehicle inventory shall identify the replacement date for each vehicle.
- To the best of their ability, the Community Transportation Coordinator shall distribute system trips equally to each primary carrier.
- In calculating the number of vehicles requested each year through available grant programs, the Coordinator will take into consideration the average trip lengths and vehicle capacity of each contract carrier.

- In calculating how vehicles will be distributed to contract carriers, the Coordinator will take into consideration the number of wheelchair positions available per carrier's vehicle inventory.
- In calculating how vehicles will be distributed to contract carriers, the Coordinator will review each carrier in terms of how they have maintained previously awarded vehicles and how they have followed the terms of the vehicle lease agreements.
- The Coordinator will bring the final recommendation regarding the distribution of vehicles to the Local Coordinating Board (LCB) for review and approval.
- Any changes which would necessitate a different distribution than originally approved by the Local Coordinating Board shall be brought back before the LCB for approval.

#### **41. Process for Considering Coordination Contracts and/or Requests to Provide Transportation Services to Customers Outside of the Coordinated**

The LCB shall follow Rule 41-2.015, and Procedure for Member Department/Purchasing Agency Utilization of Alternative Providers, dated 2/2003 and use the procedure developed by the CTD and integrate it with the process outlined below:

Agencies requesting consideration of a coordination contract and/or request to provide service to TD funded customers outside of the Coordinated Community Transportation system shall provide the following information to the Community Transportation Coordinator. The LCB shall review all requests and make the final recommendation to the Coordinator.

1. Identify how customers are currently transported.
2. Identify the current cost per trip (one-way) and projected cost per trip (one-way) if awarded a coordination contract.
3. Identify the type of trip(s) needed for customers, current and planned. (i.e., medical, educational, recreational, etc.). Provide the percentage of each type of trip.
4. Identify current and planned funding that supports the transportation component of the customer's support. (Federal, State, Local, Private contributions.)
5. Identify the current number of trips provided. (Daily, weekly, annually.)
6. Identify the number of hours the requested vehicle will operate per day/week.
7. If a coordination contract is entered into with the Coordinator, the requesting agency must adopt the system safety program plan and follow the mandates for driver training and drug and alcohol testing and training. Please explain your agency's substance abuse policy and/or procedure and driver training procedure and how, if at all, it will change under a coordination contract.
8. Identify approximate number of customers who will be served (unduplicated count).
9. Provide a list of other vehicles specifically assigned for transport of customers. (include make, model, year, seating capacity, whether it is wheelchair accessible.)
10. Explain why it isn't feasible to purchase/coordinate transportation services for your customer through the Coordinated Community Transportation System.

### 13. Grievance Procedures

The Local Coordinating Board has adopted a Grievance Procedure for resolving complaints. A copy of the Grievance Procedure and sample forms may be found in Appendix G.

### 14. Community Transportation Coordinator Monitoring Procedures of Operators and Coordination Contractors

The CTC is currently contracting with three (3) transportation contract carriers to provide service in the system. Contract carriers are monitored by the CTC, and planning staff and LCB members on occasion, on an annual basis. The CTC monitors operator performance in the areas of:

- Emergency, Accident, and Delay procedures
- Rule Chapter 14-90 Florida Administrative Code
- Carrier and CTC Management
- Vehicles and equipment
- Operational functions
- Driving requirements
- Maintenance
- Equipment for transporting wheelchairs
- Training: defensive driving, customer assistance/sensitivity, first aid, CPR, federal, state, and local regulations, ordinances or laws
- Required Safety Equipment: seat belts, wheelchair locks and restraining devices (lap type body belts), dry chemical fire extinguisher (tagged and inspected annually), first aid kits.
- Substance Abuse (Drug and Alcohol Testing)

The Florida Department of Transportation performs a Safety Compliance Review of the CTC annually. Copies of the review are presented to the LCB's for review.

### 15. Coordination Contract Evaluation Criteria

The CTC will annually monitor the Coordination Contract providers on the data included in Service Standard 40.

## B) Cost/Revenue Allocation and Rate Structure Justification

The CTD has established the Rate Calculation Model, a standard process for the development of rates for transportation services that are arranged or provided by the CTC. The following Rate Calculation Model was adopted by the LCB at their meeting on July 17, 2019 by a unanimous roll call vote. The complete Rate Calculation Worksheets may be found in Appendix H.

### Service Rates Summary

**Community Transportation Coordinator:** MV Contract Transportation, Inc.

**Effective Date:** July 1, 2019

Type of Service to be Provided	Unit (Passenger Mile or Trip)	Cost Per Unit
Ambulatory	Trip	\$40.55
Wheelchair	Trip	\$69.51
Stretcher	Trip	\$144.82

# III. Quality Assurance

The Multi County LCB utilizes the CTD evaluation workbook to evaluate the CTC. In addition, the following system standards have been developed based on service effectiveness, cost efficiency and effectiveness, vehicle utilization, service availability, reliability, safety and training.

## A) CTC Evaluation Process

The DeSoto, Hardee, Highlands, and Okeechobee Multi County Local Coordinating Boards evaluate the Community Transportation Coordinator in and of itself, as well as the entire system. Using the Commission for the Transportation Disadvantaged guidelines, the LCB's evaluate in the areas of

- 1) Cost;
- 2) Availability;
- 3) Competition; and,
- 4) Standards

## B) Planning Agency Evaluation Process

The Planning Agency is formally reviewed by the Commission for the Transportation Disadvantaged.

As part of the Planning Agency Performance Review, LCB members and the CTC will be asked their opinion of their planning agency's support in fulfilling their duties. Additionally, records will be reviewed on-site as it relates to the responsibilities of the planning agency staff.

# Appendix A

## Glossary of Terms and Abbreviations

The following glossary is intended to coordinate terminology within the Florida Coordinated Transportation System. It is imperative that when certain words or phrases are used, the definition must be universally acknowledged.

**Accidents:** when used in reference to the AOR, the total number of reportable accidents that occurred whereby the result was either property damage of \$1,000 or more, or personal injury that required evacuation to a medical facility, or a combination of both.

**(AER) Actual Expenditure Report:** an annual report completed by each state member agency and each official planning agency, to inform the Commission in writing, before September 15 of each year, of the specific amount of funds the agency expended for transportation disadvantaged services.

**Advance Reservation Service:** shared or individual paratransit service that is readily delivered with at least prior day notification, seven days a week, 24 hours a day.

**Agency:** an official, officer, commission, authority, council, committee, department, division, bureau, board, section, or any other unit or entity of the state or of a city, town, municipality, county, or other local governing body or a private non-profit transportation service providing entity.

**(ADA) Americans with Disabilities Act:** a federal law, P. L. 101-336, signed by the President of the United States on July 26, 1990 providing protection for persons with disabilities.

**(AOR) Annual Operating Report:** an annual report prepared by the community transportation coordinator detailing its designated service area operating statistics for the most recent operating year.

**(APR) Annual Performance Report:** an annual report issued by the Commission for the Transportation Disadvantaged that combines all the data submitted in the Annual Operating Reports and the CTD Annual Report.

**(ASE) Automotive Service Excellence:** a series of tests that certify the skills of automotive technicians in a variety of maintenance areas.

**Availability:** a measure of the capability of a transportation system to be used by potential riders, such as the hours the system is in operation, the route spacing, the seating availability, and the pick-up and delivery time parameters.

**Bus:** any motor vehicle designed for carrying more than 10 customers and used for the transportation of persons for compensation.

**Bus Lane:** a street or highway lane intended primarily for buses, either all day or during

specified periods, but used by other traffic under certain circumstances.

**Bus Stop:** a waiting, boarding, and disembarking area, usually designated by distinctive signs and by curbs or pavement markings.

**(CUTR) Center for Urban Transportation Research:** a research group located at the University of South Florida's College of Engineering.

**(CMBE) Certified Minority Business Enterprise:** any small business concern which is organized to engage in commercial transactions, which is domiciled in Florida, and which is at least 51 percent owned by minority persons and whose management and daily operations are controlled by such persons. These businesses should be certified by the Florida Department of Management Services.

**Chapter 427, Florida Statutes:** the Florida statute establishing the Commission for the Transportation Disadvantaged and prescribing its duties and responsibilities.

**Commendation:** any documented compliment of any aspect of the coordinated system, including personnel, vehicle, service, etc.

**(CDL) Commercial Driver's License:** a license required if a driver operates a commercial motor vehicle, including a vehicle that carries 16 or more customers (including the driver), or a vehicle weighing more than 26,000 pounds.

**Commission:** the Commission for the Transportation Disadvantaged as authorized in Section 427.013, Florida Statutes.

**(CTD) Commission for the Transportation Disadvantaged:** an independent agency created in 1989 to accomplish the coordination of transportation services provided to the transportation disadvantaged. Replaced the Coordinating Council on the Transportation Disadvantaged. **(CTC)**

**Community Transportation Coordinator:** (formerly referred to as "coordinated community transportation provider") a transportation entity competitively procured or recommended by the appropriate official planning agency and local Coordinating Board and approved by the Commission, to ensure that safe, quality coordinated transportation services are provided or arranged in a cost-effective manner to serve the transportation disadvantaged in a designated service area.

**Competitive Procurement:** obtaining a transportation operator or other services through a competitive process based upon Commission-approved procurement guidelines.

**Complaint:** any documented customer concern involving timeliness, vehicle condition, quality of service, personnel behavior, and other operational policies.

**Complete (or Full) Brokerage:** type of CTC network in which the CTC does not provide any on street transportation services itself, but contracts with transportation operators or coordination contractors for the delivery of all transportation services.

**Coordinated Transportation System:** includes the CTC, the transportation operators and coordination contractors under contract with the CTC, the official planning agency, and local Coordinating Board involved in the provision of service delivery to the transportation disadvantaged within the designated service area.

**Coordinated Trips:** customer trips provided by or arranged through a CTC.

**Coordinating Board:** an entity in each designated service area composed of representatives who provide assistance to the community transportation coordinator relative to the coordination of transportation disadvantaged services.

**Coordination:** the arrangement for the provision of transportation services to the transportation disadvantaged in a manner that is cost effective, safe, efficient, and reduces fragmentation and duplication of services. Coordination is not the same as total consolidation of transportation disadvantaged services in any given service area.

**Coordination Contract:** a written contract between the community transportation coordinator and any agency who receives transportation disadvantaged funds and performs some, if not all of, its own services, as well as services to others, when such service has been analyzed by the CTC and proven to be a safer, more effective and more efficient service from a total system perspective. The Commission's standard contract reflects the specific terms and conditions that will apply to those agencies who perform their own transportation, as well as joint utilization and cost provisions for transportation services to and from the coordinator.

**Deadhead:** the miles or hours that a vehicle travels when out of revenue service. From dispatch point to first pick-up, and from last drop-off to home base, or movements from home base to maintenance garage or fuel depot, and return.

**Demand Response:** a paratransit service that is readily delivered with less than prior day notification, seven days a week, 24 hours a day. This service can be either an individual or shared ride.

**Designated Service Area:** a geographical area subject to approval by the Commission, which defines the community where coordinated transportation services will be provided to the transportation disadvantaged.

**Disabled Customer:** anyone with a physical or mental impairment that substantially limits at least one of the major life activities (i.e., caring for one's self, walking, seeing, hearing, speaking, learning).

**Dispatcher:** the person responsible for having every scheduled run leave the yard or garage on time and maintain a schedule, matching the work force with the work load on a minute-by-minute basis. In demand-response transportation, the person who assigns the customers to vehicles and notifies the appropriate drivers.

**Driver Hour:** the period of one hour that person works whose main responsibility is to drive



vehicles.

**Economies of Scale:** cost savings resulting from combined resources (e.g., joint purchasing agreements that result in a lower cost per gallon or quantity discount for fuel).

**Effectiveness Measure:** a performance measure that indicates the level of consumption per unit of output. Customer trips per vehicle mile are an example of an effectiveness measure.

**Efficiency Measure:** a performance measure that evaluates the level of resources expended to achieve a given level of output. An example of an efficiency measure is operating cost per vehicle per vehicle mile.

**Emergency:** any occurrence, or threat thereof, whether accidental, natural or caused by man, in war or in peace, which results or may result in substantial denial of services to a designated service area for the transportation disadvantaged.

**Emergency Fund:** transportation disadvantaged trust fund monies set aside to address emergency situations and which can be utilized by direct contract, without competitive bidding, between the Commission and an entity to handle transportation services during a time of emergency.

**Employees:** the total numbers of persons employed in an organization.

**Fixed Route:** (also known as Fixed Route/Fixed Schedule) service in which the vehicle(s) repeatedly follows a consistent time schedule and stopping points over the same route, whereby such schedule, route or service is not at the customer's request (e.g. conventional city bus, fixed guide way).

**(FAC) Florida Administrative Code:** a set of administrative codes regulating the State of Florida.

**(FCTS) Florida Coordinated Transportation System:** a transportation system responsible for coordination and service provisions for the transportation disadvantaged as outlined in Chapter 427, Florida Statutes.

**(FDOT) Florida Department of Transportation:** a governmental entity. The CTD is housed under the Florida Department of Transportation for administrative purposes.

**(FS) Florida Statutes:** the laws governing the State of Florida.

**(FTE) Full Time Equivalent:** a measure used to determine the number of employees based on a 40-hour work week. One FTE equals 40 work hours per week.

**(FAC) Fully Allocated Costs:** the total cost, including the value of donations, contributions, grants or subsidies, of providing coordinated transportation, including those services which are purchased through transportation operators or provided through coordination contracts.

**General Trips:** customer trips by individuals to destinations of their choice, not associated with any agency program.

**Goal:** broad conditions that define what the organization hopes to achieve.

**Grievance Process:** a formal plan that provides a channel for the adjustment of grievances through discussions at progressively higher levels of authority, culminating in mediation, if necessary.

**In Service:** the time a vehicle begins the route to provide transportation service to the time the route is completed.

**In-Take Clerk/Reservationist:** an individual whose primary responsibility is to accept requests for trips, enter dates on requests, determine eligibility and provide customer service.

**Latent Demand:** demand that is not active (i.e., the potential demand of persons who are not presently in the market for a good or service).

**Limited Access:** the inability of a vehicle, facility or equipment to permit entry or exit to all persons. Lack of accessibility of vehicle, facility or other equipment.

**Load Factor:** the ratio of use to capacity of equipment or a facility during a specified time period.

**Local Government:** an elected and/or appointed public body existing to coordinate governs, Plan, fund, and administer public services within a designated, limited geographic area of the state.

**Local Government Comprehensive Plan:** a plan that meets the requirements of Sections 163.3177 and 163.3178, Florida Statutes.

**(LCB) Local Coordinator Board:** an entity in each designated service area composed of representatives appointed by the official planning agency. Its purpose is to provide assistance to the community transportation coordinator concerning the coordination of transportation disadvantaged services.

**(MIS) Management Information System:** the mechanism that collects and reports key operating and financial information for managers on a continuing and regular basis.

**(MOA) Memorandum of Agreement:** the state contract included in the transportation disadvantaged service plan for transportation disadvantaged services purchased by federal, state or local government transportation disadvantaged funds. This agreement is between the Commission and the community transportation coordinator and recognizes the community transportation coordinator as being responsible for the arrangement of the provision of transportation disadvantaged services for a designated service area.

**(MPO) Metropolitan Planning Organization:** the area-wide organization responsible for

conducting the continuous, cooperative and comprehensive transportation planning and programming in accordance with the provisions of 23 U.S.C. s. 134, as provided in 23 U.S.C. s. 104(f)(3). Also serves as the official planning agency referred to in Chapter 427, F.S.

**Network type:** describes how a community transportation coordinator provides service, whether as a complete brokerage, partial brokerage, or sole provider.

**Non-coordinated Trip:** a trip provided by an agency, entity, or operator who is in whole or in part subsidized by local, state, or federal funds, and who does not have coordination/operator contract with the community transportation coordinator.

**Nonsponsored Trip:** transportation disadvantaged services that are sponsored in whole by the Transportation Disadvantaged Trust Fund.

**Objective:** specific, measurable conditions that the organization establishes to achieve its goals.

**Off Peak:** a period of day or night during which travel activity is generally low and a minimum of transit service is operated.

**(OPA) Official Planning Agency:** the official body or agency designated by the Commission to fulfill the functions of transportation disadvantaged planning. The Metropolitan Planning Organization shall serve as the planning agency in areas covered by such organizations.

**Operating Cost:** the sum of all expenditures that can be associated with the operation and maintenance of the system during the particular period under consideration.

**Operating Cost per Driver Hour:** operating costs divided by the number of driver hours, a measure of the cost efficiency of delivered service.

**Operating Cost per Customer Trip:** operating costs divided by the total number of customer trips, a measure of the efficiency of transporting riders. One of the key indicators of comparative performance of transit properties since it reflects both the efficiency with which service is delivered and the market demand for the service.

**Operating Cost per Vehicle Mile:** operating costs divided by the number of vehicle miles, a measure of the cost efficiency of delivered service.

**Operating Environment:** describes whether the community transportation coordinator provides service in an urban or rural service area.

**Operating Expenses:** sum of all expenses associated with the operation and maintenance of a transportation system.

**Operating Revenues:** all revenues and subsidies utilized by the operator in the provision of transportation services.

**Operating Statistics:** data on various characteristics of operations, including customer trips, vehicle miles, operating costs, revenues, vehicles, employees, accidents, and road calls.

**Operator Contract:** a written contract between the community transportation coordinator and the transportation operator to perform transportation services.

**Organization Type:** describes the structure of a community transportation coordinator, whether it is a private-for-profit, private non-profit, government, quasi-government, or transit agency.

**Paratransit:** elements of public transit that provide service between specific origins and destinations selected by the individual user with such service being provided at a time that is agreed upon between the user and the provider of the service. Paratransit services are provided by sedans, vans, buses, and other vehicles.

**Partial Brokerage:** type of CTC network in which the CTC provides some of the on-street transportation services and contracts with one or more other transportation operators, including coordination contractors, to provide the other portion of the on-street transportation disadvantaged services, including coordination contractors.

**Customer Miles:** a measure of service utilization which represents the cumulative sum of the distances ridden by each customer. This is a duplicated mileage count. For example: If 10 people ride together for 10 miles, there would be 100 customer miles.

**Customer Trip:** a unit of service provided each time a customer enters the vehicle, is transported, and then exits the vehicle. Each different destination would constitute a customer trip. This unit of service is also known as a one-way customer trip.

**Customer Trips per Driver Hour:** a performance measure used to evaluate service effectiveness by calculating the total number of customer trips divided by the number of driver hours.

**Customer Trips per Vehicle Mile:** a performance measure used to evaluate service effectiveness by calculating the total number of customer trips divided by the number of vehicle miles.

**Performance Measure:** statistical representation of how well an activity, task, or function is being performed. Usually computed from operating statistics by relating a measure of service output or utilization to a measure of service input or cost.

**Potential TD Population:** (formerly referred to as TD Category I) includes persons with disabilities, senior citizens, low income persons, and high risk or at-risk children. These persons are eligible to receive certain governmental and social service agency subsidies for program related trips.

**Program Trip:** a customer trip supplied or sponsored by a human service agency for the purpose of transporting customer to and from a program of that agency (e.g., sheltered

workshops, congregate dining, and job training).

**Public Transit:** means the transporting of people by conveyances or systems of conveyances traveling on land or water, local or regional in nature, and available for use by the public. Public transit systems may be governmental or privately owned. Public transit specifically includes those forms of transportation commonly known as paratransit.

**Purchased Transportation:** transportation services provided for an entity by a public or private transportation provider based on a written contract.

**(RFB) Request for Bids:** a competitive procurement process.

**(RFP) Request for Proposals:** a competitive procurement process.

**(RFQ) Request for Qualifications:** a competitive procurement process.

**Reserve Fund:** transportation disadvantaged trust fund monies set aside each budget year to insure adequate cash is available for incoming reimbursement requests when estimated revenues do not materialize.

**Revenue Hours:** total vehicle hours used in providing customer transportation, excluding deadhead time.

**Revenue Miles:** the total number of paratransit service miles driven while TD customers are actually riding on the vehicles. This figure should be calculated from first customer pick-up until the last customer drop-off, excluding any breaks in actual customer transport. For example: if 10 customers rode 10 miles together, there would be 10 revenue miles.

**Ridesharing:** the sharing of a vehicle by customer of two or more agencies, thus allowing for greater cost efficiency and improved vehicle utilization.

**Roadcall:** any in-service interruptions caused by failure of some functionally necessary element of the vehicle, whether the rider is transferred or not. Roadcalls exclude accidents.

**Rule 41-2, F.A.C.:** the rule adopted by the Commission for the Transportation Disadvantaged to implement provisions established in Chapter 427, F.S.

**Scheduler:** a person who prepares an operating schedule for vehicles on the basis of customer demand, level of service, and other operating elements such as travel times or equipment availability.

**Shuttle:** a transit service that operates on a short route, or in a small geographical area, often as an extension to the service of a longer route.

**Sole Source:** (also referred to as Sole Provider) network type in which the CTC provides all of the transportation disadvantaged services.

**Sponsored Trip:** a customer trip that is subsidized in part or in whole by a local, state, or federal government funding source (not including monies provided by the TD Trust Fund).

**Standard:** something established by authority, custom, or general consent as a model for example.

**Stretcher Service:** a form of non-emergency paratransit service whereby the rider is transported on a stretcher, litter, gurney, or other device that does not meet the dimensions of a wheelchair as defined in the Americans with Disabilities Act.

**Subscription Service:** a regular and recurring service in which schedules are prearranged, to meet the travel needs of riders who sign up for the service in advance. The service is characterized by the fact that the same customers are picked up at the same location and time and are transported to the same location, and then returned to the point of origin in the same manner.

**(SSPP) System Safety Program Plan:** a documented organized approach and guide to accomplishing a system safety program set forth in Florida Rule 14-90.

**Total Fleet:** this includes all revenue vehicles held at the end of the fiscal year, including those in storage, emergency contingency, awaiting sale, etc.

**(TQM) Total Quality Management:** a management philosophy utilizing measurable goals and objectives to achieve quality management practices.

**Transportation Alternative:** those specific transportation services that are approved by rule to be acceptable transportation alternatives, and defined in s. 427.018, F.S.

**(TD) Transportation Disadvantaged:** those persons, including children as defined in s. 411.202 F.S., who because of physical or mental disability, income status, or inability to drive due to age or disability are unable to transport themselves or to purchase transportation and have no other form of transportation available. These persons are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, or medically necessary or life-sustaining activities.

**Transportation Disadvantaged Funds:** any local government, state or available federal funds that are for the transportation of the transportation disadvantaged. Such funds may include, but are not limited to, funds for planning, Medicaid transportation, transportation provided pursuant to the ADA, administration of transportation disadvantaged services, operation, procurement and maintenance of vehicles or equipment, and capital investments. Transportation disadvantaged funds do not include funds expended by school districts for the transportation of children to public schools or to receive service as a part of their educational program.

**Transportation Disadvantaged Population:** (formerly referred to as TD Category II) persons including children, who, because of disability, income status, or inability to drive due to age or disability are unable to transport themselves.

**(TDSP) Transportation Disadvantaged Service Plan:** a five-year implementation plan, with annual updates developed by the CTC and the planning agency which contains the provisions of service delivery in the coordinated transportation system. The plan shall be reviewed and recommended by the local Coordinating Board.

**Transportation Disadvantaged Trust Fund:** a fund administered by the Commission for the Transportation Disadvantaged in which all fees collected for the transportation disadvantaged program shall be deposited. The funds deposited will be appropriated by the legislature to the Commission to carry out the Commission's responsibilities. Funds that are deposited may be used to subsidize a portion of a transportation disadvantaged person's transportation costs which are not sponsored by an agency.

**Transportation Operator:** a public, private for profit, or private non-profit entity engaged by the community transportation coordinator to provide service to the transportation disadvantaged pursuant to an approved coordinated transportation system transportation disadvantaged service plan.

**Transportation Operator Contract:** the Commission's standard coordination/operator contract between the community transportation coordinator and the transportation operator that outlines the terms and conditions for any services to be performed.

**Trend Analysis:** a common technique used to analyze the performance of an organization over a period of time.

**Trip Priorities:** various methods for restricting or rationing trips.

**Trip Sheet:** a record kept of specific information required by ordinance, rule or operating procedure for a period of time worked by the driver of a public customer vehicle in demand response service. Also known as a drive log.

**(UPHC) Unduplicated Customer Head Count:** the actual number of people that were provided paratransit transportation services, not including personal care attendants, non-paying escorts, or persons provided fixed schedule/fixed route service.

**Unmet Demand:** the number of trips desired but not provided because of insufficient service supply.

**Urbanized Area:** a city (or twin cities) that has a population of 50,000 or more (central city) and surrounding incorporated and unincorporated areas that meet certain criteria of population Size of density.

**(USDHHS) U.S. Department of Health and Human Services:** a federal agency regulating health and human services.

**(USDOT) U.S. Department of Transportation:** a federal agency regulating the transportation field.

**Van Pool:** a prearranged ride-sharing service in which a number of people travel together on a regular basis in a van. Van pools are commonly a company-sponsored van that has a regular volunteer driver.

**Vehicle Inventory:** an inventory of vehicles used by the CTC, transportation operators, and coordination contractors for the provision of transportation disadvantaged services.

**Vehicle Miles:** the total distance traveled by revenue vehicles, including both revenue miles and deadhead miles.

**Vehicle Miles per Vehicle:** a performance measure used to evaluate resource utilization and rate of vehicle depreciation, calculated by dividing the number of vehicle miles by the total number of vehicles.

**Vehicles:** number of vehicles owned by the transit agency that are available for use in providing services.

**Volunteers:** individuals who do selected tasks for the community transportation coordinator or its contracted operator, for little or no compensation.

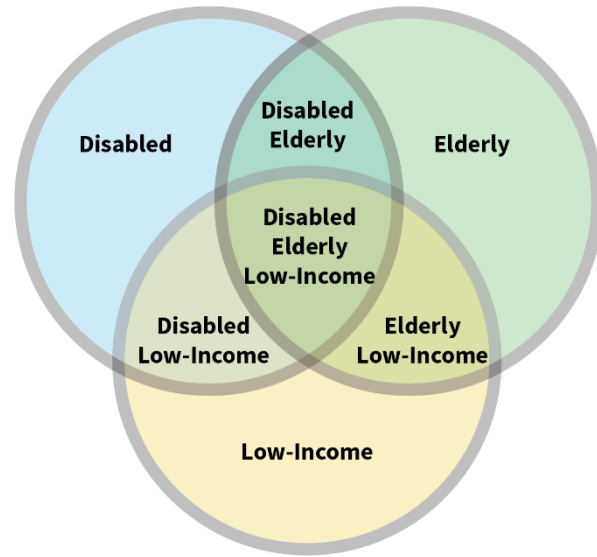
**Will-Calls:** these are trips that are requested on a demand response basis, usually for a return trip. The transportation provider generally knows to expect a request for a will-call trip, but cannot schedule the trip in advance because the provider does not know the exact time a customer will call to request his/her trip.



# Appendix B

## Forecast of Transportation Disadvantaged Population

Utilizing 2011-2013 U.S Census American Community Survey information (the most current data available) the population estimates for the TD population in the service area are shown tables below. As defined by the CTD, the Category I TD population consists of all disabled, elderly, low income, and children who are high risk or at risk.



*To ensure individuals who fall into two or more categories (e.g. low income and disabled) are not counted twice, the overlapping population must be eliminated.*

TD Composition

### TD Population Estimates

DeSoto County					Census Data from 2013			
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	2,086	6.4%	756	2.3%	11	0.2%	0	0.00%
5-17	5,159	15.8%	2,625	8.1%	245	0.8%	96	0.29%
18-34	6,914	21.2%	2,426	7.4%	442	1.4%	126	0.39%
35-64	12,087	37.1%	4,049	12.4%	1,988	6.1%	948	2.91%
<b>Total Non Elderly</b>	<b>26,246</b>	<b>80.5%</b>	<b>9,856</b>	<b>30.2%</b>	<b>2,686</b>	<b>8.2%</b>	<b>1,170</b>	<b>3.59%</b>
65-74	3,747	11.5%	617	1.9%	1,167	3.6%	178	0.55%
75+	2,604	8.0%	386	1.2%	1,176	3.6%	174	0.53%
<b>Total Elderly</b>	<b>6,351</b>	<b>19.5%</b>	<b>1,003</b>	<b>3.1%</b>	<b>2,343</b>	<b>7.2%</b>	<b>352</b>	<b>1.08%</b>
<b>Total</b>	<b>32,597</b>	<b>100%</b>	<b>10,859</b>	<b>33.3%</b>	<b>5,029</b>	<b>15.4%</b>	<b>1,522</b>	<b>4.67%</b>

Hardee County					Census Data from 2013			
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	2,140	8.4%	918	3.6%	29	1.0%	0	0.00%
5-17	5,223	20.5%	2,824	11.1%	129	0.5%	42	0.16%
18-34	5,795	22.7%	1,674	6.6%	53	0.2%	0	0.00%
35-64	8,443	33.1%	2,230	8.7%	1,157	4.5%	504	1.98%
<b>Total Non Elderly</b>	<b>21,601</b>	<b>84.7%</b>	<b>7,646</b>	<b>30.0%</b>	<b>1,368</b>	<b>5.4%</b>	<b>546</b>	<b>2.14%</b>
65-74	2,028	7.9%	410	1.6%	442	1.7%	80	0.31%
75+	1,881	7.4%	601	2.4%	997	3.9%	111	0.44%
<b>Total Elderly</b>	<b>3,909</b>	<b>15.3%</b>	<b>1,011</b>	<b>4.0%</b>	<b>1,439</b>	<b>5.6%</b>	<b>191</b>	<b>0.75%</b>
<b>Total</b>	<b>25,510</b>	<b>100%</b>	<b>8,657</b>	<b>33.9%</b>	<b>2,807</b>	<b>11.0%</b>	<b>737</b>	<b>2.89%</b>

**Highlands County**

Census Data from **2013**

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	4,749	4.9%	1,344	1.4%	21	0.1%	21	0.28%
5-17	12,718	13.2%	3,639	3.8%	763	0.8%	346	0.36%
18-34	14,694	15.2%	3,925	4.1%	896	0.9%	243	0.25%
35-64	32,762	33.9%	5,839	6.0%	5,396	5.6%	1,479	1.53%
<b>Total Non Elderly</b>	<b>64,923</b>	<b>67.2%</b>	<b>14,747</b>	<b>15.3%</b>	<b>7,076</b>	<b>7.3%</b>	<b>2,089</b>	<b>2.16%</b>
65-74	16,168	16.7%	1,567	1.6%	3,182	3.3%	1,479	1.53%
75+	15,578	16.1%	1,796	1.9%	6,568	6.8%	3,910	4.04%
<b>Total Elderly</b>	<b>31,746</b>	<b>32.8%</b>	<b>3,363</b>	<b>3.5%</b>	<b>9,750</b>	<b>10.1%</b>	<b>5,389</b>	<b>5.57%</b>
<b>Total</b>	<b>96,669</b>	<b>100%</b>	<b>18,110</b>	<b>18.7%</b>	<b>16,826</b>	<b>17.4%</b>	<b>7,478</b>	<b>7.74%</b>

**Okeechobee County**

Census Data from **2013**

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	2,638	7.3%	1,129	3.1%	0	0.0%	0	0.00%
5-17	6,112	16.9%	2,636	7.3%	430	1.2%	236	0.65%
18-34	7,345	20.3%	2,636	7.3%	440	1.2%	185	0.51%
35-64	13,626	37.7%	3,134	8.7%	2,547	7.0%	818	2.26%
<b>Total Non Elderly</b>	<b>29,721</b>	<b>82.2%</b>	<b>9,535</b>	<b>26.4%</b>	<b>3,417</b>	<b>9.5%</b>	<b>1,239</b>	<b>3.43%</b>
65-74	3,638	10.1%	576	1.6%	1,490	4.1%	251	0.69%
75+	2,776	7.7%	426	1.2%	1,264	3.5%	201	0.56%
<b>Total Elderly</b>	<b>6,414</b>	<b>17.8%</b>	<b>1,002</b>	<b>2.8%</b>	<b>2,754</b>	<b>7.6%</b>	<b>452</b>	<b>1.25%</b>
<b>Total</b>	<b>36,135</b>	<b>100%</b>	<b>10,537</b>	<b>29.2%</b>	<b>6,171</b>	<b>17.1%</b>	<b>1,691</b>	<b>4.68%</b>

### Critical Needs Population

Ideally, comparisons of disability estimates should be made using the same survey information, geographic parameters and disability definitions. Because the severity of an individual's disability is not clearly captured in the ACS data, particularly as it relates to the need for specialized transportation, the 2010 U.S Census Bureau's SIPP is used for the next step in the demand estimates. The rates for those who report a severe disability, or those who have a "critical need" for transportation based on their disability status, are applied to the disability rates reported in the ACS as shown below.

#### DeSoto County

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
< 5 Years of Age	11	4.20%	0	0
5-17	245	4.20%	10	0.20%
18-34	442	6.30%	28	0.40%
35-64	1,988	13.84%	275	2.28%
<b>Total Non Elderly</b>	<b>2,686</b>		<b>314</b>	<b>1.20%</b>
65-74	1,167	27.12%	316	8.45%
75+	1,176	46.55%	547	21.02%
<b>Total Elderly</b>	<b>2,343</b>		<b>864</b>	<b>13.60%</b>
<b>Total</b>	<b>5,029</b>		<b>1,178</b>	<b>3.61%</b>

Census Data from: 2013

% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
<b>28.60%</b>	<b>90</b>
<b>11.70%</b>	<b>101</b>
	<b>191</b>

#### Hardee County

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
< 5 Years of Age	29	4.20%	1	0
5-17	129	4.20%	5	0.10%
18-34	53	6.30%	3	0.06%
35-64	1,157	13.84%	160	1.90%
<b>Total Non Elderly</b>	<b>1,368</b>		<b>170</b>	<b>0.79%</b>
65-74	442	27.12%	120	5.91%
75+	997	46.55%	464	24.67%
<b>Total Elderly</b>	<b>1,439</b>		<b>584</b>	<b>14.94%</b>
<b>Total</b>	<b>2,807</b>		<b>754</b>	<b>2.96%</b>

Census Data from: 2013

% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
<b>28.60%</b>	<b>49</b>
<b>11.70%</b>	<b>68</b>
	<b>117</b>

#### Highlands County

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
< 5 Years of Age	21	4.20%	1	0
5-17	763	4.20%	32	0.25%
18-34	896	6.30%	56	0.38%
35-64	5,396	13.84%	747	2.28%
<b>Total Non Elderly</b>	<b>7,076</b>		<b>836</b>	<b>1.29%</b>
65-74	3,182	27.12%	863	5.34%
75+	6,568	46.55%	3,057	19.63%
<b>Total Elderly</b>	<b>9,750</b>		<b>3,920</b>	<b>12.35%</b>
<b>Total</b>	<b>16,826</b>		<b>4,757</b>	<b>4.92%</b>

Census Data from: 2013

% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
<b>28.60%</b>	<b>239</b>
<b>11.70%</b>	<b>459</b>
	<b>698</b>

**Okeechobee County**

Census Data from: **2013**

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
< 5 Years of Age	0	4.20%	-	-
5-17	430	4.20%	18	0.30%
18-34	440	6.30%	28	0.38%
35-64	2,547	13.84%	353	2.59%
<b>Total Non Elderly</b>	<b>3,417</b>		<b>398</b>	<b>1.34%</b>
65-74	1,490	27.12%	404	11.11%
75+	1,264	46.55%	588	21.20%
<b>Total Elderly</b>	<b>2,754</b>		<b>992</b>	<b>15.47%</b>
<b>Total</b>	<b>6,171</b>		<b>1,391</b>	<b>3.85%</b>

% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
<b>28.60%</b>	<b>114</b>
<b>11.70%</b>	<b>116</b>
	<b>230</b>

**Critical Need Trip Rates**

Data from the Federal Highway Administration sponsored National Households Survey (NHTS) is used for the next step of the demand methodology. The NHTS collects in-depth information at the individual and household levels about travel patterns including, but not limited to, trip purpose, mode, vehicle availability and travel time. After applying the NHTS trip rates to the TD population in the service area, there is an estimated potential demand of 20,006 trips per day for the critical need population as shown in the tables below.

**DeSoto County**

Critical Need - Severely Disabled TD Population			
	Not Low Income	Low Income	Totals
Non-Elderly	224	90	314
Elderly	763	101	864
<b>TOTAL</b>	<b>987</b>	<b>191</b>	<b>1,178</b>

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

<b>Low Income &amp; Not Disabled = C + F</b>		<b>CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION</b>	
<b>Assumes</b>	9,337		
27.2% xx % without auto access	2,540		
80.0% xx % without transit access	2,032		
		<b>Calculation of Daily Trips</b>	
		Daily Trip Rates	Total
		Per Person	Daily Trips
<b>Total Actual Critical TD Population</b>			
Severely Disabled	1,178	0.049	58
Low Income ND	2,032	1.899	3,858
<b>Totals</b>	<b>3,209</b>		<b>3,916</b>

**Hardee County**

Critical Need - Severely Disabled TD Population			
	Not Low Income	Low Income	Totals
Non-Elderly	121	49	170
Elderly	516	68	584
<b>TOTAL</b>	<b>637</b>	<b>117</b>	<b>754</b>

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

<b>Low Income &amp; Not Disabled = C + F</b>		<b>CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION</b>	
<b>Assumes</b>	7,097		
27.2% xx % without auto access	1,930		
100.0% xx % without transit access	1,930		
		<b>Calculation of Daily Trips</b>	
		Daily Trip Rates	Total
		Per Person	Daily Trips
<b>Total Actual Critical TD Population</b>			
Severely Disabled	754	0.049	37
Low Income ND	1,930	1.899	3,666
<b>Totals</b>	<b>2,684</b>		<b>3,703</b>

## Highlands County

Critical Need - Severely Disabled TD Population			
	Not Low Income	Low Income	Totals
Non-Elderly	597	239	836
Elderly	3,462	459	3,920
<b>TOTAL</b>	<b>4,059</b>	<b>698</b>	<b>4,757</b>

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

Low Income & Not Disabled = C + F		CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION	
<b>Assumes</b>	14,552		
27.2%	xx % without auto access		
	3,958		
100.0%	xx % without transit access		
	3,958		
		Calculation of Daily Trips	
		Daily Trip Rates	Total
		Per Person	Daily Trips
<b>Total Actual Critical TD Population</b>			
Severely Disabled	4,757	0.049	233
Low Income ND	###	1.899	7,517
<b>Totals</b>	<b>8,715</b>		<b>7,750</b>

## Okeechobee County

Critical Need - Severely Disabled TD Population			
	Not Low Income	Low Income	Totals
Non-Elderly	284	114	398
Elderly	876	116	992
<b>TOTAL</b>	<b>1,161</b>	<b>230</b>	<b>1,391</b>

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

Low Income & Not Disabled = C + F		CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION	
<b>Assumes</b>	8,846		
27.2%	xx % without auto access		
	2,406		
100.0%	xx % without transit access		
	2,406		
		Calculation of Daily Trips	
		Daily Trip Rates	Total
		Per Person	Daily Trips
<b>Total Actual Critical TD Population</b>			
Severely Disabled	1,391	0.049	68
Low Income ND	2,406	1.899	4,569
<b>Totals</b>	<b>3,797</b>		<b>4,637</b>

### Critical Need Trip Demand

By using population forecasts prepared by the Bureau of Economic and Business Research and applying the changes to the TD population and trip rate estimate previously described, the tables below display the future potential demand for critical need transportation in the service area through 2023.

### DeSoto

Critical Need TD Population Forecast	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total Critical TD Population</b>								
Disabled	1,255	1,282	1,309	1,337	1,366	1,395	1,425	1,456
Low Income Not Disabled No Auto/Transit	2,165	2,211	2,259	2,307	2,357	2,407	2,458	2,511
<b>Total Critical Need TD Population</b>	<b>3,420</b>	<b>3,493</b>	<b>3,568</b>	<b>3,644</b>	<b>3,722</b>	<b>3,802</b>	<b>3,884</b>	<b>3,967</b>
<b>Daily Trips - Critical Need TD Population</b>								
Severely Disabled	61	63	64	66	67	68	70	71
Low Income - Not Disabled - No Access	4,111	4,199	4,289	4,381	4,475	4,571	4,669	4,769
<b>Total Daily Trips Critical Need TD Population</b>	<b>4,118</b>	<b>4,187</b>	<b>4,262</b>	<b>4,337</b>	<b>4,414</b>	<b>4,492</b>	<b>4,571</b>	<b>4,643</b>
<b>Annual Trips</b>	<b>1,070,648</b>	<b>1,088,742</b>	<b>1,108,012</b>	<b>1,127,624</b>	<b>1,147,583</b>	<b>1,167,895</b>	<b>1,188,567</b>	<b>1,207,228</b>

## Hardee

Critical Need TD Population Forecast	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total Critical TD Population</b>								
<i>Disabled</i>	755	755	756	756	756	756	757	757
<i>Low Income Not Disabled No Auto/Transit</i>	1,933	1,933	1,934	1,935	1,936	1,937	1,937	1,938
<b>Total Critical Need TD Population</b>	<b>2,688</b>	<b>2,689</b>	<b>2,690</b>	<b>2,691</b>	<b>2,692</b>	<b>2,693</b>	<b>2,694</b>	<b>2,695</b>
<b>Daily Trips - Critical Need TD Population</b>								
<i>Severely Disabled</i>	37	37	37	37	37	37	37	37
<i>Low Income - Not Disabled - No Access</i>	3,670	3,672	3,673	3,675	3,676	3,677	3,679	3,680
<b>Total Daily Trips Critical Need TD Population</b>	<b>3,894</b>	<b>3,959</b>	<b>4,030</b>	<b>4,101</b>	<b>4,173</b>	<b>4,247</b>	<b>4,323</b>	<b>4,390</b>
<b>Annual Trips</b>	<b>973,417</b>	<b>989,868</b>	<b>1,007,389</b>	<b>1,025,219</b>	<b>1,043,366</b>	<b>1,061,833</b>	<b>1,080,628</b>	<b>1,097,594</b>

## Highlands

Critical Need TD Population Forecast	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total Critical TD Population</b>											
<i>Disabled</i>	4,757	4,795	4,833	4,872	4,911	4,951	4,991	5,031	5,071	5,112	5,153
<i>Low Income Not Disabled No Auto/Transit</i>	3,958	3,990	4,022	4,054	4,087	4,120	4,153	4,186	4,220	4,254	4,288
<b>Total Critical Need TD Population</b>	<b>8,715</b>	<b>8,785</b>	<b>8,855</b>	<b>8,927</b>	<b>8,998</b>	<b>9,071</b>	<b>9,144</b>	<b>9,217</b>	<b>9,292</b>	<b>9,366</b>	<b>9,442</b>
<b>Daily Trips - Critical Need TD Population</b>											
<i>Severely Disabled</i>	233	235	237	239	241	243	245	247	248	250	253
<i>Low Income - Not Disabled - No Access</i>	7,517	7,577	7,638	7,699	7,761	7,824	7,887	7,950	8,014	8,079	8,143
<b>Total Daily Trips Critical Need TD Population</b>	<b>7,750</b>	<b>7,881</b>	<b>8,014</b>	<b>8,149</b>	<b>8,287</b>	<b>8,434</b>	<b>8,583</b>	<b>8,735</b>	<b>8,889</b>	<b>9,047</b>	<b>9,189</b>
<b>Annual Trips</b>	<b>1,937,397</b>	<b>1,970,139</b>	<b>2,003,434</b>	<b>2,037,292</b>	<b>2,071,722</b>	<b>2,108,392</b>	<b>2,145,710</b>	<b>2,183,689</b>	<b>2,222,341</b>	<b>2,261,676</b>	<b>2,297,184</b>

## Okeechobee

Critical Need TD Population Forecast	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total Critical TD Population</b>								
<i>Disabled</i>	755	755	756	756	756	756	757	757
<i>Low Income Not Disabled No Auto/Transit</i>	1,933	1,933	1,934	1,935	1,936	1,937	1,937	1,938
<b>Total Critical Need TD Population</b>	<b>2,688</b>	<b>2,689</b>	<b>2,690</b>	<b>2,691</b>	<b>2,692</b>	<b>2,693</b>	<b>2,694</b>	<b>2,695</b>
<b>Daily Trips - Critical Need TD Population</b>								
<i>Severely Disabled</i>	37	37	37	37	37	37	37	37
<i>Low Income - Not Disabled - No Access</i>	3,670	3,672	3,673	3,675	3,676	3,677	3,679	3,680
<b>Total Daily Trips Critical Need TD Population</b>	<b>3,894</b>	<b>3,959</b>	<b>4,030</b>	<b>4,101</b>	<b>4,173</b>	<b>4,247</b>	<b>4,323</b>	<b>4,390</b>
<b>Annual Trips</b>	<b>973,417</b>	<b>989,868</b>	<b>1,007,389</b>	<b>1,025,219</b>	<b>1,043,366</b>	<b>1,061,833</b>	<b>1,080,628</b>	<b>1,097,594</b>

# Appendix C

## Transportation Disadvantaged Eligibility Application



### MV Transportation

The information contained in this application will be used by MV Transportation to determine your eligibility for transit services.

I am applying for Non Sponsored \_\_\_\_ I have a disability that prevents me from transporting myself. \_\_\_\_ I am a senior citizen. \_\_\_\_ I live within the service area of Hardee, Highlands and Okeechobee, DeSoto counties. \_\_\_\_ I qualify as poverty level income or below. \_\_\_\_ I have no other means of transportation.

It should be noted that eligibility is determined by disability and also by the systems budget constraints in each county.

DATE: \_\_\_\_\_ Social Security # \_\_\_\_\_ Medicaid# \_\_\_\_\_ Full/Partial  
Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_  
Home Address: \_\_\_\_\_ Apt #: \_\_\_\_\_  
City: \_\_\_\_\_ County \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Cell #: \_\_\_\_\_ TDD: \_\_\_\_\_  
Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Age: \_\_\_\_\_ Male/Female  
Emergency Contact: \_\_\_\_\_ Phone #: \_\_\_\_\_  
Directions to Home: \_\_\_\_\_

1. Do you receive Food Stamps? \_\_\_\_\_
2. Do you have Medicaid? \_\_\_\_\_
3. How many family members in your home? \_\_\_\_\_
4. What is YOUR annual income? \_\_\_\_\_ Total Household income: \_\_\_\_\_
5. Do you live in an ALF, Nursing Home, Retirement Home or a boarding home? Yes \_\_\_\_\_ No \_\_\_\_\_
6. Do you have relatives or friends living in the area (city or county) Yes/No  
Would they transport you if asked? Yes/No  
Do you know someone that would transport you if you paid for gas? Yes/No
7. Do you or anyone in your home, a friend, relative or neighbor own a vehicle. Yes/No Can this vehicle be used to transport you to appointments Yes/No If No please explain. \_\_\_\_\_
8. Is your condition Temporary Yes or No If yes what is the duration of the disability \_\_\_\_\_ Weeks/Months  
Are there any other effects of your disability of which we need to be aware \_\_\_\_\_
9. Do you use any mobility aids Check all that apply. Manual Wheelchair \_\_\_\_\_ Power Wheelchair \_\_\_\_\_  
Power Scooter \_\_\_\_\_ Cane \_\_\_\_\_ Crutches \_\_\_\_\_ Walker \_\_\_\_\_ Service Animal \_\_\_\_\_
10. Please answer the following questions:
  - A. Can you travel without assistance a distance of: 200 feet \_\_\_\_\_ ¼ mile \_\_\_\_\_ ½ Mile \_\_\_\_\_
  - B. Can you climb a 12" step? Yes/No Without assistance? Yes/No
  - C. Can you wait outside without support for twenty (20) minutes? Yes/No
  - D. Can you give an address and telephone number upon request? Yes/No
  - E. Can you recognize a destination or landmark? Yes/No
  - F. Can you ask for and follow directions? Yes/No
  - G. Can you handle unexpected situations or changes in your routine? Yes/No
  - H. Can you safely and effectively travel through a crowded or complex facilities? Yes/No
  - I. Are you totally blind? Yes/No legally blind? Yes/No
  - J. Are you totally deaf? Yes/No severally hearing impaired? Yes/No



**MV Transportation**

Explanations for what assistance you require. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I hereby certify that the information given above is true and correct.

Signed: \_\_\_\_\_

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

Preparer's Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Preparer's Name \_\_\_\_\_ Phone \_\_\_\_\_

Process Date \_\_\_\_\_ By \_\_\_\_\_

**Mail or Fax back to: Fax 863-382-8469**

Any questions or concerns call:

Avon Park 863-452-0139

Sebring 863-382-0139

Lake Placid 863-6990995

Hardee 863-773-0015

Okeechobee 863-357-9900

DeSoto 800-694-6566

**MV Transportation**

4650 US 27 South

Sebring, FL., 33870





## MV Transportation

La informacion contenida en esta solicitud solo seera utilizada por MV Transportation para determinar su elegibilidad para transportacion.

Estoy solicitando el siguiente programa(a):

\_\_\_\_\_ No patrocinado: Cliente tiene una discapacidad que les impide transporter asi mismo. Cliente es una persona mayor. Cliente vive dentro de los cuatro condados, Desoto, Highlands, Hardee, Okeechobee.

Cabe señalar que la elegibilidad de paratransito esta determinada no solo por la discapacidad, sino tambien por las restricciones

Presupuestarias en cada condado.

Fecha: \_\_\_\_\_ Medicaid # \_\_\_\_\_ Seguro Social # \_\_\_\_\_ \ \ \_\_\_\_\_

Apellido: \_\_\_\_\_ Nombre: \_\_\_\_\_ Initial del Segundo nombre: \_\_\_\_\_

Direccion de domicilio: \_\_\_\_\_ Apt #: \_\_\_\_\_

Ciudad: \_\_\_\_\_ Estado: \_\_\_\_\_Codigo Postal: \_\_\_\_\_

Telefono de su casa#: \_\_\_\_\_ Telefono de trabajo#: \_\_\_\_\_ TDD: \_\_\_\_\_

Fecha de Nacimiento: \_\_\_\_/\_\_\_\_/\_\_\_\_ Edad: \_\_\_\_\_ Masculino:\_\_\_\_ Femenina:\_\_\_\_

Contacto de Emergencia(Nombre): \_\_\_\_\_ Telefono #: \_\_\_\_\_

Direccion a Domicilio: \_\_\_\_\_

1. Recibe cupones de alimentos? \_\_\_\_Si \_\_\_\_No
2. Tiene Medicaid? \_\_\_\_Si \_\_\_\_No
3. Cuantos miembros de su familia viven en su casa ? \_\_\_\_\_
4. Cual es su ingreso anual? \_\_\_\_\_ **Cual es el ingreso Total del hogar?** \_\_\_\_\_
5. Vive en una casa de retiro ACLF, clinica de reposo, o de embargo en casa? \_\_\_\_Si \_\_\_\_No
  - A. Esta instalacion tiene un vehiculo? \_\_\_\_\_
  - B. Ha sido alguna vez transportado por este servicio? \_\_\_\_\_
6. Tiene usted parientes o amigos que viven en la mismo ciudad(condado) en el que vive?
  - A. Esta persona lo transportaria si usted le pregunta? \_\_\_\_\_
  - B. Conoces a alguien a quien le transportaria si usted paga por el gas? \_\_\_\_\_
7. Usted o alguien de su familia, un amigo, pariente o vecino dueño de un vehiculo operable? \_\_\_\_Si \_\_\_\_No
8. Es su condicion temporal? \_\_\_\_\_ En caso afirmativo, cual es la duracion prevista de la discapacidad? \_\_\_\_\_ Semanas/Meses Existen otros efectos de su discapacidad de los cuales tenemos que ser conscientes. \_\_\_\_\_
9. Estas embarazada? \_\_\_\_Si \_\_\_\_No Fecha de parto: \_\_\_\_\_
  
10. Usted usa alguna de las siguientes ayudas de movilidad? Marque todas las que correspondan  
Silla de rueda manual \_\_\_\_\_ Silla de rueda electrica \_\_\_\_\_ Scooter electric \_\_\_\_\_ Baston \_\_\_\_\_  
Muletas \_\_\_\_\_ Andador \_\_\_\_\_ Animal de servicio \_\_\_\_\_



## MV Transportation

11. Por favor conteste las siguientes preguntas:

- A. Puede viajar sin ayuda de la distancia de: 200 pies \_\_\_\_\_ ¼ milla \_\_\_\_\_ ½ milla \_\_\_\_\_
- B. Puede subir un Escalon de 12 pulgadas? Si/No Sin Ayuda? Si/No
- C. Puede esperar afuera sin apoyo por diez 20 minutos? Si/No
- D. Puede dar direcciones y numero de telefonos al pedido? Si/No
- E. Puede reconocer un destino o lugar de interes? Si/No
- F. Puede pedir, entender y seguir instrucciones? Si/No
- G. Puede manejar situaciones inesperadas o cambios en su rutina? Si/No
- H. Puede con seguridad y eficacia de los viajes atraves de unas instalaciones abarrotadas o complejos? Yes/No
- I. Estas completamente ciego? Yes/No Legaimente ciego? Yes/No
- J. Estas totalmente sordo? Yes/No Graves problemas de audicion? Yes/No

Explicacion de que tipo de asistencia necesita. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Por la presente certifico que la informacion proporcionada es verdadera y correcta.

Firma de aplicante: \_\_\_\_\_ Fecha: \_\_\_\_\_

Firma del preparador \_\_\_\_\_ Fecha \_\_\_\_\_

Imprima nombre de preparador: \_\_\_\_\_ Telefono #: \_\_\_\_\_

Process Date \_\_\_\_\_ By \_\_\_\_\_

**Envie la aplicacion por Fax o por Correo al: Fax 863-382-8469**

### Numeros de Telefonos:

Avon Park 863-452-0139

Sebring 863-382-0139

Lake Placid 863-699-0995

Hardee 863-773-0015

Okeechobee 863-357-9900

DeSoto 863-694-6566

### **MV Transportation**

4650 US 27 South

Sebring, FL., 33870

# Appendix D

## Vehicle Inventory

### Current Vehicle Inventory

#	Model Yr.	Service Mode	Vehicle Make	Vehicle Identification Number	W/C	Current Mileage	Funding Source
1	2012	Demand Response	Caravan	2C4RDGBG5CR322612	3+1	193,796	5310
2	2013	Demand Response	Cut-a-way	1GB6G5BG2D1185444	12+2	71,993	5310
3	2014	Demand Response	Caravan	2C7WDGBG5ER380020	3+1	198,584	5310
4	2015	Demand Response	Caravan	2CWDGBG3FR642845	3+1	173,425	5310
5	2015	Demand Response	Caravan	2C7WDGBG3FR642859	3+1	181,447	5310
6	2015	Demand Response	Caravan	2CWDGBG8FR533894	3+1	181,061	5310
7	2015	Demand Response	Caravan	2CWDGBGXFR533895	3+1	178,891	5310
8	2016	Demand Response	Caravan	2C7WDGBG6GR358434	3+1	125,491	5310
9	2016	Demand Response	Caravan	2C7WDGBG8GR358435	3+1	129,190	5310
10	2016	Demand Response	Caravan	2C4RDGBG5CR322612	3+1	105,169	5310
11	2017	Demand Response	Caravan	2C7WDGBG8HR784093	3+1	94,811	5339
12	2017	Demand Response	Caravan	2C7WDGBG8HR784076	3+1	66,961	5339
13	2018	Demand Response	Caravan	2C7WDGBG5JR243783	3+1	46,615	5310
14	2018	Demand Response	Caravan	2C7WDGBG5JR243766	3+1	49,347	5310
15	2018	Demand Response	Caravan	2C7WDGBG5JR176420	3+1	48,461	5339
16	2018	Demand Response	Caravan	2C7WDGBG7JR176426	3+1	70,660	5339
17	2018	Demand Response	Caravan	2C7WDGBG7JR176412	3+1	59,341	5339
18	2018	Demand Response	Caravan	2C7WDGBG6JR243775	3+1	57,431	5339
19	2018	Demand Response	Caravan	2C7WDGBG3JR363081	3+1	10,184	5339
20	2018	Demand Response	Caravan	2C7WDGBG3J363038	3+1	15,196	5339
21	2018	Demand Response	Caravan	2C7WDGBG5JR362966	3+1	13,634	5339
22	2018	Demand Response	Caravan	2C7WDGBG6JR362734	3+1	12,398	5339
23	2018	Demand Response	Caravan	2C7WDGBG4JR363039	3+1	12,177	5339
24	2011	Demand Response	Transit Cutaway	1FDEEFL9BDB36676	6+2	150,219	Private
25	2011	Demand Response	Transit Cutaway	1FDEE3FLXCDA39262	6+2	188,123	Private

26	2012	Demand Response	Transit	NMOAS8F7XE1144588	4+0	149,623	Private
27	2014	Demand Response	Transit	NMOAE8F73E1145041	4+0	124,643	Private
28	2012	Demand Response	Transit Cutaway	1FDEE3FL8CDA50891	6+2	232,850	Private
29	2012	Demand Response	Transit Cutaway	1FDEE3FL8CDA41558	6+2	211,183	Private
30	2014	Demand Response	Transit Cutaway	1FDEE3FL9GDC40768	6+2	129,466	Private
31	2016	Demand Response	2016	1FDEE3FLOGDC40769	6+2	140,341	Private
32	2016	Demand Response	2016	2C4RDGBG1GR320254	3+1	107,479	Private
33	2016	Demand Response	2016	2C4RDGBGOGR345687	3+1	91,604	Private
34	2016	Demand Response	2016	2C4RDGBG5GR3773887	3+1	92,734	Private
35	2016	Demand Response	2016	2C4RDGBG9GR377716	3+1	81,798	Private
36	2016	Demand Response	2016	2C4RDGBG6GR385644	3+1	73,489	Private
37	2016	Demand Response	2016	2C7WDGBG6HR743042	3+1	77,644	Private
38	2017	Demand Response	2017	2C7WDGBG5HR84116	3+1	68,247	Private
39	2017	Demand Response	2017	2C7WDGBGXHR808717	3+1	54,873	Private
40	2017	Demand Response	2017	1FTYE1CM5JKA26642	5+1	63,366	Private
41	2018	Demand Response	Transit	1FTYE1CM5JKA26643	5+1	70,618	Private
42	2018	Demand Response	Transit	1FTYE1CM5JKA26649	5+1	59,833	Private
43	2018	Demand Response	Transit	1FTYE1CM9JKA37997	2+2	108,698	DCBOCC
44	2000	Demand Response	Grand Marquise	2MEFM74WXY682533	3+0	54,058	Private
45	2000	Demand Response	Crown	2FAFP73WX2X113379	4+0	50,130	Private
46	2002	Demand Response	Grand Marquise	2MEFM75W74X665276	4+0	247,957	Private
47	2004	Demand Response	Grand Marquise	2MEHM75W35X626937	4+0	285,653	Private
48	2005	Demand Response	Grand Marquise	2MEFM75W674254	4+0	196,588	Private
49	2005	Demand Response	Grand Marquise	2MEFM74V37X625838	4+0	282,045	Private
50	2007	Demand Response	Caravan	2D8HN44H58679911	3+2	210,111	Private
51	2008	Demand Response	Caravan	2D4RN4DEXAR296600	2+1	235,178	Private
52	2010	Demand Response	Caravan	2D4RN4DE1AR455035	2+1	203,843	Private
53	2011	Demand Response	Caravan	2C4RDGBGXCR166891	2+1	149,143	5310
54	2012	Demand Response	Caravan	2C4RDGBG7CR322613	2+1	132,811	5310
55	2012	Demand Response	Caravan	2C4RDGBG1CR409035	6+0	240,539	Private

<b>56</b>	2012	Demand Response	Grand Marquise	2C4RDGCG8DR626162	4+0	89,786	Private
<b>57</b>	2013	Demand Response	Caravan	2C7WDGBG7ER380021	2+1	147,454	5310
<b>58</b>	2014	Demand Response	Caravan	2C4RDGBG0ER284015	5+0	128,777	Private
<b>59</b>	2014	Demand Response	Caravan	2C4RDGBG4ER129841	5+0	132,515	Private
<b>60</b>	2010	Demand Response	E-350 Cutaway	1FDEE3FL1ADA42371	10+2	219,200	Private

# Appendix E

## Vehicle Implementation Plan

### 3-Year Transportation Disadvantaged Improvement Program

Implementation Date	Estimated Cost	Description of Purchase	Anticipated Funding Source	New or Replacement	Date priority established
<b>2020</b>	\$233,435	5 mini vans	FTA 5339	Replace	2017
<b>2021</b>	\$233,435	5 mini vans	FTA 5339	Replace	2017
<b>2022</b>	245,107	5 minivans	FTA 5339	Replace	2020

Source: CFRPC 2020

# Appendix F

## System Safety Program Plan Certificate of Compliance



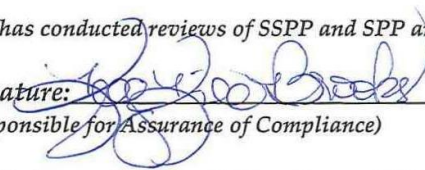
### Bus Transit System Annual Safety and Security Certification

*Certifying Compliance with Rule 14-90, FAC to the  
Florida Department of Transportation (FDOT)*

January 28, 2020.  
MV Contract Transportation, Inc.  
4650 US 27 S  
Sebring, FL 33870

*The Bus Transit System (Agency) named above hereby certifies the following:*

- 1. The Agency has adopted a System Safety Program Plan (SSPP) and a Security Program Plan (SPP) pursuant to the standards set forth in Rule Chapter 14-90, Florida Administrative Code.*
- 2. The Agency is in compliance with its adopted SSPP and SPP.*
- 3. The Agency has performed annual safety inspections on all operational vehicles in accordance with Rule Chapter 14-90, Florida Administrative Code.*
- 4. The Agency has conducted reviews of SSPP and SPP and the plans are up to date.*

*Blue Ink Signature:*  *Date:* 01/28/20  
*(Individual Responsible for Assurance of Compliance)*

*Name:* Kelly Kirk Brooks *Title:* General Manager

*Name and address of entity(ies) which has (have) performed bus safety inspections and security assessments:*

*Name:* MV Contract Transportation, Inc. CTC for DeSoto, Hardee, Highlands and Okeechobee Counties

*Address:* 4650 US 27 S, Sebring, FL 33870

*Name of Qualified Mechanic who Performed Annual Inspections:* Positive Medical/Junior Watley/ Safety Transportation/Big Johns Garage / JJ Transport (DeSoto) Scott's Service Center, Inc.

*\* Note: Please do not edit or otherwise change this form.*

# Appendix G

## Adopted Grievance Procedure



DeSoto • Glades • Hardee • Hendry • Highlands • Okeechobee  
heartlandregionaltpo.org

### Rules and Procedures for Formal Complaints/Grievances for the Transportation Disadvantaged Multi-County Local Coordinating Board *serving DeSoto, Hardee, Highlands, and Okeechobee Counties*

#### **Section 1. Creation**

1.1 There is hereby created a formal complaint/grievance procedure for DeSoto, Hardee, Highlands, and Okeechobee transportation disadvantaged program as specified by the Commission for the Transportation Disadvantaged pursuant to Chapter 427, Florida Statute and Rule 41-2.012, Florida Administrative Code, hereinafter referred to as the Grievance Process. The following rules and procedures shall constitute the grievance process to be utilized in the Transportation Disadvantaged Multi-County Coordinated system for DeSoto, Hardee, Highlands, and Okeechobee Counties.

#### **Section 2. Definitions**

2.1 As used in these rules and procedures the following words and terms shall have the meanings assigned therein. Additional program definitions can be found in Chapter 427, Florida Statutes and Rule 41-2, Florida Administrative Code.

**(a) Community Transportation Coordinator (CTC):** means a transportation entity recommended by a Metropolitan Planning Organization, or by the appropriate designated official planning agency as provided for in Section 427.015(1), Florida Statutes, in an area outside the purview of a Metropolitan Planning Organization and approved by the Commission, to ensure that coordinated transportation services are provided to serve the transportation disadvantaged population in a designated service area. The current CTC for DeSoto, Hardee, Highlands, and Okeechobee Counties is MV Transportation.

**(b) Designated Official Planning Agency (DOPA):** means the official body or agency designated by the Commission for the Transportation Disadvantaged to fulfill the functions of transportation disadvantaged planning also uniformly referred to as the Planning Agency. The Heartland Regional Transportation Planning Organization (HRTPO) is the Planning Agency for DeSoto, DeSoto, Hardee, Highlands, and Okeechobee Counties.

**(c) Disadvantaged (TD) (User):** means "Those persons who because of physical or mental disability, income status, or age or who for other reasons are unable to transport themselves or to purchase transportation and are, therefore, dependent on others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk as defined in Section 411.202, Florida Statutes.

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



(e)Transportation Operator: means one or more public, private for profit or private nonprofit entities engaged by the community transportation coordinator to provide service to transportation disadvantaged persons pursuant to a Transportation Disadvantaged Service Plan (TDSP).

(f) Service Complaint: means incidents that may occur on a daily basis and are reported to the driver or dispatcher or to other individuals involved with the daily operations and are resolved within the course of a reasonable time period suitable to the complainant. Local service complaints are driven by the inability of the CTC or transportation operators to meet local service standards established by the CTC and LCB. All service complaints should be recorded and reported by the CTC to the LCB. If the CTC is also an operator, their statistics on service complaints should be included.

(g) Formal Grievance: A written complaint to document any concerns or an unresolved service complaint regarding the operation or administration of TD services by the transportation operator, CTC, DOPA, or LCB.

(h) Administrative Hearing Process: Chapter 120, Florida Statute.

(i) Ombudsman Program: A toll-free telephone number established and administered by the Commission for the Transportation Disadvantaged to enable persons to access information and/or file complaints/grievances regarding transportation services provided under the coordinated effort of the Community Transportation Coordinator. The current TD Helpline phone number is (800) 983-2435.

### **Section 3: Objectives**

3.1 The objective of the grievance process shall be to process, investigate and make recommendations, in a timely manner on formal written complaints/grievances that are not resolved between individual agencies/entities and the complainant. It is not the objective of the grievance process to have "adjudicate" or "determinative" powers.

3.2 The Community Transportation Coordinator and its service operators and other subcontractors, must post the contact person's name and telephone number in each vehicle regarding the reporting of complaints.

3.3 All documents pertaining to the grievance process will be made available, upon request, in a format accessible to persons with disabilities.

3.4 A written copy of the grievance procedure shall be available to anyone upon request.

3.5 A part from this grievance process, aggrieved parties with proper standing may also have recourse through the Chapter 120, Florida Statutes Administrative Hearing Process, or the judicial court system.

### **Section 4. Membership**

4.1 The Grievance Committee shall be composed of a minimum of five (5) members of the Local Coordinating Board in the service area. Members shall be appointed by the Chair. The Grievance Committee membership shall include one (1) representative of users/clients. The Chair of the Local Coordinating Board reserves the right to make reappointments should any conflict of interest arise.

4.2 The Staff Services Director of the Official Planning Agency, or his/her designee, shall be an advisory member of the Grievance Committee.

### **Section 5. Terms of Members**

5.1 The members of the Grievance Committee shall be appointed for a two (2) year term.

5.2 A member of the Grievance Committee may be removed for cause by the Local Coordinating Board Chair who appointed him/her. Vacancies in the membership of the Grievance Committee shall be filled in the same manner as the original appointments. An appointment to fill a vacancy shall only be for the remainder of the unexpired term being filled.

5.3 The Grievance Committee shall elect a Chair and a Vice Chair at the first scheduled meeting of each year. The Chair and Vice Chair shall serve for a one (1) year term but may serve consecutive terms.

5.4 A quorum of three (3) voting members shall be present for official action by the Grievance committee. Meetings shall be held at such times as the grievance committee may determine and/or as necessitated by formally filed grievances.

### **Section 6: Grievance Process**

6.1 Grievance procedures will be those as specified by the Local Coordinating Board, developed from guidelines of the Commission for the Transportation Disadvantaged, and approved by the Local Coordinating Board as set forth below. The grievance procedures are for the purpose of fact-finding and not exercising adjudicative powers. Therefore, it should be understood that these procedures are for the purpose of "hearing", "advising", and "making recommendations" on issues affecting the service delivery and administration of the transportation disadvantaged program in the service area.

6.2 Apart from the grievance procedures outlined below, aggrieved parties with proper standing, may also have recourse through the Chapter 120, Florida Statutes Administrative Hearing Process, the judicial court system, or the Commission for the Transportation Disadvantaged.

6.3 Service Complaints. All service complaints should be recorded and reported by the Community Transportation Coordinator to the Local Coordinating Board. If the CTC is also an operator, their statistics on service complaints shall be included. Service complaints may include but are not limited to:

- Late trips (late pick-up and/or late drop-off)
- No-show by transportation operator
- No-show by client
- Client behavior
- Driver behavior
- Passenger discomfort
- Service denial (refused service to a client without an explanation as to why)
- Other, as deemed appropriate by the Local Coordinating Boards in the service area.

6.4 Formal Grievance. The complainant, in their formal complaint, should demonstrate or establish their concerns as clearly as possible. The formal grievance process shall be open to addressing concerns by any person or agency including but not limited to: purchasing agencies, users, potential users, private for-profit operators, private non-profit operators, the CTC, the Designated Official Planning Agency, elected officials, drivers. Formal grievances may include but are not limited to:

- Recurring or unresolved service complaints.
- Violations of specific laws governing the provision of TD services (i.e., Chapter 427, F.S., Rule 41-2 FAC and accompanying documents, Sunshine Law, ADA).
- Denial of Service
- Suspension of service
- Unresolved safety issues
- Contract disputes
- Coordination disputes
- Bidding disputes
- Agency compliance
- Conflicts of interest
- Supplanting of funds
- Billing and/or accounting procedures
- Other, as deemed appropriate by the Local Coordinating Boards of the service area.

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

- Name, address and phone number of the complainant.
- A statement of the grounds for the grievance, made in a clear and concise manner, supplemented by supporting documentation. This shall include a complete description of efforts taken by the complainant to resolve the complaint.
- An explanation of the complaint and the relief desired.

If the complainant does not supply the above information to substantiate the grievance, no further action will be taken.

The following nine steps constitute the process for formal grievance process:

6.6 Step One: The complainant shall first contact the CTC and the entity with which they have the complaint. The complainant may also contact the Commission for the Transportation Disadvantaged Ombudsman representative at 1-800-983-2435. (See Section 7 for the Commission Grievance Process). The CTC will attempt to mediate and resolve the grievance. The CTC contact information is:

MV Transportation  
 1103 U.S. Highway 27, South  
 Sebring, FL 33870  
 Contact: Kelly Kirk-Brooks, General Manager  
 Phone: 863-382-6004

Upon notice that a complainant wants to file a grievance, the CTC shall send the complainant a copy of the Grievance Procedures and Grievance Form. The Grievance Form is attached as Exhibit A.

Upon receipt of the completed Grievance Form, the CTC shall establish a file for the grievance and include a Grievance Log Tracking Form, attached as Exhibit B.

The CTC will review the Grievance Form, supporting documentation and then schedule a meeting with the complainant within (7) business days excluding holidays in an attempt to resolve the grievance. The meeting may be in person or via teleconference.

After the meeting, the CTC will prepare a written report, outlining the issues and their response. The written report shall be attached to the grievance and mailed to the complainant (Certified and Return Receipt Requested) within (7) business days after the meeting, excluding holidays. A copy

of the report shall also be provided to the Staff Services Director of the Designated Official Planning Agency.

6.7 Step Two: If mediation with the CTC is not successful, the CTC or complainant may file an official complaint with the Staff Services Director of the Designated Official Planning Agency (Heartland Regional Transportation Planning Organization) as outlined in Section 6.5 and 6.8. The Designated Official Planning Agency Contact is:

Heartland Regional Transportation Planning Organization  
555 E. Church Street, or P.O. Box 2089  
Bartow, FL 33830  
Contact: Patricia M. Steed, Staff Services Director  
Phone: 1-800-297-8041 or 1-863-534-7130

6.8 Step Three: The Designated Official Planning Agency will make every effort to resolve the grievance by arranging a meeting between the involved parties in an attempt to assist them in reaching an amicable resolution. The meeting shall take place within seven (7) business days of receipt of all evidence regarding the grievance. The Designated Official Planning Agency shall prepare a report regarding the meeting outcome. The report shall be sent to the complainant, the CTC and the Chair of the Grievance Committee within seven (7) business days of the date of the meeting.

6.9 Step Four: If the Designated Official Planning Agency is unsuccessful at resolving the grievance through the process outlined in Step Three above, the complainant may request, in writing, that their grievance be heard by the Grievance Committee. This request shall be made within seven (7) business days of receipt of the report prepared as a result of the mediation meeting arranged under Step Three above and sent to the Staff Services Director of the Designated Official Planning Agency.

6.10 Step Five: Upon receipt of the written request for the grievance to be heard by the Grievance Committee, the Staff Services Director of the Official Planning Agency shall have fifteen (15) business days to contact Grievance Committee members and set a grievance hearing date and location.

6.11 The complainant and all parties involved shall be notified of the hearing date and location at least seven (7) business days prior to the hearing date by certified mail, return receipt requested.

6.12 Step Six: Upon conclusion of the hearing, the Grievance Committee must submit a written report of the hearing proceedings to the chair of the local coordinating board, to the person filing the grievance and the CTC within ten (10) business days. The report must outline the grievance and the Grievance Committee's findings/recommendations.

6.13 If the grievance is resolved through the hearing process, steps four through six, the grievance process will end. The final report will be forwarded to the members of the Local Coordinating Board and the complainant.

6.14 Step Seven: If the grievance has not been resolved as outlined in steps four through six above, the complainant may request, in writing, that their grievance be heard by the Local Coordinating Board. This request must be made in writing and sent to the Staff Services Director of the Designated Official Planning Agency (Heartland Regional Transportation Planning Organization), within five (5) business days of receipt of the Grievance Committee Hearing report. The complainant may make their request for a hearing before the Local Coordinating Board immediately following the Grievance Committee hearing, however, until the final report is prepared from that meeting, the time frames established for notification of meetings herein apply.

6.15 Step Eight: The Staff Services Director shall have fifteen (15) business days to set a meeting date. Local Coordinating Board members shall have at least ten (10) business days' notice of such meeting. The meeting shall be advertised appropriately in the news media and other mandated publications.

6.16 The Grievance Committee's report must be received by the Staff Services Director of the Designated Official Planning Agency within seven (7) business days of the date of the hearing. The report, along with all other support documentation, shall be forwarded to the Local Coordinating Board members at least five (5) business days prior to the Local Coordinating Board meeting.

6.17 Step Nine: The result/recommendations of the Local Coordinating Board hearing shall be outlined in a final report to be completed within seven (7) business days of the hearing. The report shall then be forwarded to the complainant, members of the Grievance Committee, members of the Local Coordinating Board, the CTC and all other persons/agencies directly involved in the grievance process.

6.18 If the grievance has not been resolved as outlined in these grievance procedures, the complainant may exercise their adjudicative rights, use the Administrative Hearing Process outlined in Chapter 120, Florida Statutes, or request that their grievance be heard by the Commission for the Transportation Disadvantaged through the Ombudsman program established herein and the Commission's Grievance Process outlined in Section 7.

#### **Section 7: Commission for the Transportation Disadvantaged Grievance Process**

7.1 If the Local Coordinating Board does not resolve the grievance, the complainant will be informed of his/her right to file a formal grievance with the Commission for the Transportation Disadvantaged. The complainant may begin this process by contacting the Commission through the established Helpline at 1-800-983-2435 or by mail to: Florida Commission for the Transportation Disadvantaged, 605 Suwannee Street MS-49, Tallahassee, FL 32399-0450 or by email at [CTDOmbudsman@dot.state.fl.us](mailto:CTDOmbudsman@dot.state.fl.us). Upon request of the complainant, the Commission will provide the complainant with an accessible copy of the Commission's Grievance Procedures.

7.2 If the Commission is unable to resolve the grievance, the complainant will be referred to the Office of Administrative Appeals or other legal venues appropriate to the specific nature of the grievance.

All of the steps outlined in Section 6 and Section 7(1)(2) must be attempted in the listed order before a grievance will move to the next step. The complainant should be sure to try and have as many details as possible, when filing a complaint, such as date, times, names, vehicle numbers, etc.

There is an Ombudsman Program, provided by the Commission for the Transportation Disadvantaged, which is available to anyone who requests assistance in resolving complaints/grievances. The Ombudsman Program may be reached through the toll-free Helpline at 1-800-983-2435 or by email at [CTDOmbudsman@dot.state.fl.us](mailto:CTDOmbudsman@dot.state.fl.us). By requesting assistance of the Ombudsman Program in resolving complaints, the complaint will still follow, in order, all of the established steps listed in Sections 6 and 7 above. The Ombudsman will document each complaint and upon the request of the complainant, file the complaint with the local CTC on the complainant's behalf, to begin the local complaint process. If the complainant has already filed the grievance locally and remains unsatisfied, the Ombudsman will assist the complainant with the next step in the complaint or grievance process.

The complainant has the right to file a formal grievance with the Office of Administrative Appeals or other venues appropriate to the specific nature of the complaint.

## List of Names and Addresses of Persons/Entitles Referenced in Grievance Procedures

### Community Transportation Coordinator (CTC)

MV Transportation  
4650 U.S. Highway 27, South  
Sebring, FL 33870  
Contact: Kelly Kirk-Brooks, General Manager  
Phone: 1-863-382-6004

### Designated Official Planning Agency

Heartland Regional Transportation Planning Organization  
555 E. Church Street, or P.O. Box 2089  
Bartow, FL 33830  
Contact: Patricia M. Steed, Staff Services Director  
Phone: 1-800-297-8041 or 1-863-534-7130

### Grievance Committee Chair

Heartland Regional Transportation Planning Organization  
555 E. Church Street or P.O. Box 2089  
Bartow, FL 33830  
Phone: 1-800-297-8041 or 1-863-534-7130

### Multi-County Local Coordinating Board Chair:

Heartland Regional Transportation Planning Organization  
555 E. Church Street or P.O. Box 2089  
Bartow, FL 33830  
Phone: 1-800-297-8041 or 1-863-534-7130

Adopted by the Local Coordinating Board on the 18<sup>th</sup> day of July 2018.

  
\_\_\_\_\_

Don Elwell, Chair  
Transportation Disadvantaged Multi-County Local Coordinating Board

**Exhibit A**

**Grievance Process Form for  
Transportation Disadvantaged Multi-County Local Coordinating Board  
serving DeSoto, Hardee, Highlands, and Okeechobee Counties**

Agency/Individual Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

**1. Please provide a clear statement describing the grounds for your grievance. (Attach additional pages if needed, and all of your supporting documentation)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Please explain what steps you have taken to resolve this issue. (Please attach additional pages if needed)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**3. Please explain the outcome that would resolve this issue. (Please attach additional pages if needed)**

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**I hereby attest that these statements are true and correct.**

Printed Name: \_\_\_\_\_

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



**Exhibit B**

**Grievance Tracking Form  
Transportation Disadvantaged Multi-County Local Coordinating Board  
serving DeSoto, Hardee, Highlands, and Okeechobee Counties**

CTC File Number: \_\_\_\_\_

**Step 1 of the Grievance Process**

Date Grievance Received by the CTC: \_\_\_\_\_

Received by: \_\_\_\_\_ Date File Established: \_\_\_\_\_

Date Mediation held: \_\_\_\_\_ Was the Issue Resolved? Yes or No

Date Mediation Reports Mailed to client and HRTPO: \_\_\_\_\_

**Step 2 & 3 of the Grievance Process**

Date Grievance Received: \_\_\_\_\_ Received by: \_\_\_\_\_

Date DOPA met with Parties: \_\_\_\_\_ Was the Issue Resolved? Yes or No

Date Report Mailed to Complainant, CTC and Grievance Committee Chair: \_\_\_\_\_

**Step 4, 5, & 6 of the Grievance Process**

Date Grievance Report Received by the Grievance Committee: \_\_\_\_\_

Received by: \_\_\_\_\_ Date: \_\_\_\_\_

Date of Grievance Committee Meeting: \_\_\_\_\_ Was the Issue Resolved? Yes or No

Date Report Mailed to Complainant, CTC and LCB: \_\_\_\_\_

**Step 7, 8, & 9 of the Grievance Process**

Date Grievance Report Received by the LCB: \_\_\_\_\_

Received by: \_\_\_\_\_ Date of LCB Hearing: \_\_\_\_\_

Was the Issue Resolved? Yes or No

Date Report Mailed to Complainant and CTC: \_\_\_\_\_

# Appendix H

## Trip Rate Calculator

**Preliminary Information Worksheet** Version 1.4

<b>CTC Name:</b>	MV Contract Transportation, Inc
<b>County (Service Area):</b>	DeSoto, Hardee, Highlands, Okeechobee
<b>Contact Person:</b>	Kelly Kirk Brooks
<b>Phone #</b>	863-382-6004

Check Applicable Characteristic:

ORGANIZATIONAL TYPE:	NETWORK TYPE:
<input type="radio"/> Governmental	<input checked="" type="radio"/> Fully Brokered
<input type="radio"/> Private Non-Profit	<input type="radio"/> Partially Brokered
<input checked="" type="radio"/> Private For Profit	<input type="radio"/> Sole Source

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

**Comprehensive Budget Worksheet**

Version 1.4

CTC: MV Contract Transportation, Inc  
County: DeSoto, Hardee, Highlands, Okeechobee

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

	Prior Year's <b>ACTUALS</b> from July 1st of <b>2017</b> to June 30th of <b>2018</b>	Current Year's <b>APPROVED</b> Budget, as amended from July 1st of <b>2018</b> to June 30th of <b>2019</b>	Upcoming Year's <b>PROPOSED</b> Budget from July 1st of <b>2019</b> to June 30th of <b>2020</b>	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  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	\$ 63,060	\$ 52,490	\$ 60,746	-16.8%	15.7%	
Medicaid Co-Pay Received						
Donations/Contributions						
In-Kind, Contributed Services						
Other						
<b>Bus Pass Program Revenue</b>						

**Local Government**

District School Board						
Compl ADA Services						
County Cash	\$ 87,618	\$ 116,800	\$ 95,654	33.3%	-18.1%	
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
<b>Bus Pass Program Revenue</b>						

**CTD**

Non-Spons. Trip Program	\$ 1,283,796	\$ 1,203,000	\$ 1,248,067	-6.3%	3.7%	
Non-Spons. Capital Equipment						
Rural Capital Equipment	\$ 79,006	\$ 80,914	\$ 81,000	2.4%	0.1%	
Other TD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

**USDOT & FDOT**

49 USC 5307						Other DOT 5310 grant
49 USC 5310						
49 USC 5311 (Operating)	\$ 659,806	\$ 655,000	\$ 671,400	-0.7%	2.5%	
49 USC 5311(Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)	\$ 320,633	\$ 373,000	\$ 312,475	16.3%	-16.2%	
<b>Bus Pass Program Revenue</b>						

**AHCA**

Medicaid						MTM contract
Other AHCA (specify in explanation)	\$ 210,866	\$ 199,236	\$ 205,233	-5.5%	3.0%	
<b>Bus Pass Program Revenue</b>						

**DCF**

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

**DOH**

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

**DOE (state)**

Carl Perkins						
Div of Blind Services						
Vocational Rehabilitation	\$ 754	\$ 1,911	\$ 377	153.4%	-80.3%	
Day Care Programs						
Other DOE (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

**AWI**

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

**DOEA**

Older Americans Act						Other DOEA - Nu Hope and OSS
Community Care for Elderly						
Other DOEA (specify in explanation)	\$ 31,585	\$ 54,400	\$ 50,565	72.2%	-7.0%	
<b>Bus Pass Program Revenue</b>						

**DCA**

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

**APD**

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

**DJJ**

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

**Other Fed or State**

State Discretionary Funds	\$ 1,563			-100.0%		We no longer receive these funds.
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# Comprehensive Budget Worksheet

Version 1.4

CTC: MV Contract Transportation, Inc  
 County: DeSoto, Hardee, Highlands, Okeechobee

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

1	2	3	4	5	6	7
	Prior Year's <b>ACTUALS</b> from July 1st of <b>2017</b> to June 30th of <b>2018</b>	Current Year's <b>APPROVED</b> Budget, as amended from July 1st of <b>2018</b> to June 30th of <b>2019</b>	Upcoming Year's <b>PROPOSED</b> Budget from Historical <b>2019</b> to June 30th of <b>2020</b>	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000

XXXX						
XXXX						
<b>Bus Pass Program Revenue</b>						
<b>Other Revenues</b>						
Interest Earnings						
XXXXX						
XXXXX						
<b>Bus Pass Program Revenue</b>						
<b>Balancing Revenue to Prevent Deficit</b>						
Actual or Planned Use of Cash Reserve						
<b>Balancing Revenue is Short By =</b>						
<b>Total Revenues =</b>	<b>\$2,738,687</b>	<b>\$2,736,750</b>	<b>\$2,725,517</b>	<b>-0.1%</b>	<b>-0.4%</b>	

<b>EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors!)</b>						
<b>Operating Expenditures</b>						
Labor	\$ 192,673	\$ 218,700	\$ 218,895	13.5%	0.1%	
Fringe Benefits	\$ 21,312	\$ 20,500	\$ 21,250	-3.8%	3.7%	
Services	\$ 10,304	\$ 21,950	\$ 21,998	113.0%	0.2%	
Materials and Supplies	\$ 74,585	\$ 83,398	\$ 75,512	11.8%	-9.5%	
Utilities	\$ 32,156	\$ 41,500	\$ 41,740	29.1%	0.6%	
Casualty and Liability	\$ 47,043	\$ 13,300	\$ 15,316	-71.7%	15.2%	
Taxes	\$ 19,004	\$ 5,248	\$ 9,470	-72.4%	80.4%	
<b>Purchased Transportation:</b>						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services	\$ 2,062,941	\$ 2,031,447	\$ 2,035,332	-1.5%	0.2%	
Other						
Miscellaneous	\$ 43,062	\$ 7,350	\$ 12,934	-82.9%	76.0%	
Operating Debt Service - Principal & Interest	\$ 6,915	\$ 8,775	\$ 7,415	26.9%	-15.5%	
Leases and Rentals	\$ 21,242	\$ 23,300	\$ 23,412	9.7%	0.5%	
Contrib. to Capital Equip. Replacement Fund		\$ 1,600			-100.0%	
In-Kind, Contributed Services	\$ -	\$ -	\$ -			
Allocated Indirect	\$ 128,429	\$ 145,400	\$ 133,280	13.2%	-8.3%	
<b>Capital Expenditures</b>						
Equip. Purchases with Grant Funds		\$ 89,904	\$ 90,000		0.1%	
Equip. Purchases with Local Revenue						
Equip. Purchases with Rate Generated Rev.						
Capital Debt Service - Principal & Interest						
<b>PROFIT</b>	<b>\$ 79,021</b>	<b>\$ 24,378</b>	<b>\$ 18,963</b>	<b>-69.1%</b>	<b>-22.2%</b>	
<b>Total Expenditures =</b>	<b>\$2,738,687</b>	<b>\$2,736,750</b>	<b>\$2,725,517</b>	<b>-0.1%</b>	<b>-0.4%</b>	
<b>See NOTES Below.</b>						

Once completed, proceed to the Worksheet entitled "Budgeted Rate Base"

ACTUAL year PROFIT above that formerly planned or approved must be reinvested as a trip or system subsidy. Adjustments are to be ID'd and explained in a following period, OR applied as a Rate Base Adjustment to proposed year's rates on the next sheet.



**Budgeted Rate Base Worksheet**

Version 1.4

CTC: MV Contract Transportation, Inc  
 County: DeSoto, Hardee, Highlands, Okeechobee

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		What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for those type revenues?		What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?	
from July 1st of 2019 to June 30th of 2020		Budgeted Rate Subsidy Revenue Excluded from the Rate Base			
1	2	3	4	5	
State Discretionary Funds	\$ -		\$ -		
xxx	\$ -		\$ -		
xxx	\$ -		\$ -		
<b>Bus Pass Program Revenue</b>	\$ -		\$ -		
<b>Other Revenues</b>					
Interest Earnings	\$ -		\$ -		
xxxx	\$ -		\$ -		
xxxx	\$ -		\$ -		
<b>Bus Pass Program Revenue</b>	\$ -		\$ -		
Balancing Revenue to Prevent Deficit					
Actual or Planned Use of Cash Reserve	\$ -		\$ -		
<b>Total Revenues =</b>	<b>\$ 2,725,517</b>		<b>\$ 2,633,694</b>	<b>\$ 91,823</b>	<b>\$ 81,000</b>

**EXPENDITURES (CTC/Operators ONLY)**

Operating Expenditures	
Labor	\$ 218,895
Fringe Benefits	\$ 21,250
Services	\$ 21,998
Materials and Supplies	\$ 75,512
Utilities	\$ 41,740
Casualty and Liability	\$ 15,316
Taxes	\$ 9,470
<b>Purchased Transportation:</b>	
Purchased Bus Pass Expenses	\$ -
School Bus Utilization Expenses	\$ -
Contracted Transportation Services	\$ 2,035,332
Other	\$ -
Miscellaneous	\$ 12,834
Operating Debt Service - Principal & Interest	\$ 7,415
Leases and Rentals	\$ 23,412
Contrib. to Capital Equip. Replacement Fund	\$ -
In-Kind, Contributed Services	\$ -
Allocated Indirect	\$ 133,280
<b>Capital Expenditures</b>	
Equip. Purchases with Grant Funds	\$ 90,000
Equip. Purchases with Local Revenue	\$ -
Equip. Purchases with Rate Generated Rev.	\$ -
Capital Debt Service - Principal & Interest	\$ -
<b>PROFIT</b>	<b>\$ 18,993</b>
<b>Total Expenditures =</b>	<b>\$ 2,725,517</b>
<b>minus EXCLUDED Subsidy Revenue =</b>	<b>\$ 91,823</b>
<b>Budgeted Total Expenditures INCLUDED in Rate Base =</b>	<b>\$ 2,633,694</b>
Rate Base Adjustment <sup>1</sup> =	
<b>Adjusted Expenditures Included in Rate Base =</b>	<b>\$ 2,633,694</b>

\$ 10,823

Amount of Budgeted Operating Rate Subsidy Revenue

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

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

<sup>1</sup> The Difference between Expenses and Revenues for Fiscal Year: 2017 - 2018

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

## Worksheet for Program-wide Rates

CTC: MV Contract Trans Version 1.4  
 County: DeSoto, Hardee, Highlands, Okeechobee

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		Fiscal Year
Total <u>Projected</u> Passenger Miles =	1,228,205	2019 - 2020
<b>Rate Per Passenger Mile = \$</b>	<b>2.14</b>	
Total <u>Projected</u> Passenger Trips =	60,208	
<b>Rate Per Passenger Trip = \$</b>	<b>43.74</b>	<b>Avg. Passenger Trip Length = 20.4 Miles</b>
Rates If No Revenue Funds Were Identified As Subsidy Funds		
<b>Rate Per Passenger Mile = \$</b>	<b>2.22</b>	
<b>Rate Per Passenger Trip = \$</b>	<b>45.27</b>	

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

### Vehicle Miles

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

### Vehicle Revenue Miles (VRM)

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

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

### Passenger Miles (PM)

The cumulative sum of the distances ridden by each passenger.

**Worksheet for Multiple Service Rates**

CTC: MV Contract Tri Version 1.4  
 County: DeSoto, Hardee, Highlands, Okeechobee

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

**SECTION I: Services Provided**

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

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

**SECTION II: Contracted Services**

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

Ambulatory	Wheelchair	Stretcher	Group
<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No
Answer # 2 for Ambulatory Service	Answer # 2 for Wheelchair Service	Answer # 2 for Stretcher Service	Do NOT Complete Section II for Group Service

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

<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No

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

Ambulatory	Wheelchair	Stretcher	Group
Leave Blank	Leave Blank	Leave Blank	Do NOT Complete Section II for Group Service

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

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

4. If you answered # 3 & want a Combined Rate per Trip PLUS e 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 II for Ambulatory Service	Leave Blank and Go to Section II for Wheelchair Service	Leave Blank and Go to Section II for Stretcher Service	Do NOT Complete Section II for Group Service

**SECTION III: Escort Service**

1. Do you want to charge all escorts a fee?.....

<input type="radio"/> Yes
<input type="radio"/> No

Skip #2, 4 and Section IV and Go to Section V

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

<input type="radio"/> Pass Trip	Leave Blank
<input type="radio"/> Pass Mile	



**Worksheet for Multiple Service Rates**

CTC: **MV Contract Tra Version 1.4**  
 County: **DuSoto, Hardee, Highlands, Okeechobee**

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

3. If you answered Yes to # 1 and completed # 2, for how many of the projected Passenger Trips / Passenger Miles will a passenger be accompanied by an escort?  Leave Blank

4. How much will you charge each escort?  Leave Blank

**SECTION IV: Group Service Loading**

Do NOT Complete Section IV

1. If the message "You Must Complete This Section" appears to the right, what is the projected total number of Group Service Passenger Miles? (otherwise leave blank)

..... And what is the projected total number of Group Vehicle Revenue Miles?  Leading Rate  to 1.00

**SECTION V: Rate Calculations for Multiple Services:**

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

		RATES FOR FY: 2019 - 2020			
		Ambul	Wheel Chair	Stretcher	Group
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	1,228,205	1,047,896	178,850	3,500	Leave Blank
Rate per Passenger Mile =		\$1.92	\$3.31	\$6.80	\$0.00
					per passenger per group
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	60,208	54,600	5,200	397	Leave Blank
Rate per Passenger Trip =		\$40.66	\$69.61	\$144.82	\$0.00
					per passenger per group
2. If you answered # 1 above and want a COMBINED Rate per Trip <u>PLUS</u> a per Mile add on for 1 or more services...		Combination Trip and Mile Rate			
...INPUT the Desired Rate per Trip (but must be <u>less</u> than per trip rate above) =					Leave Blank
Rate per Passenger Mile for Balance =		\$1.93	\$3.21	\$6.90	\$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 =		\$2.00	\$3.43	\$7.14	\$0.00
					per passenger per group
Rate per Passenger Trip =		\$41.66	\$71.94	\$148.87	\$0.00
					per passenger per group

Program: **Three Lines One Total Medicaid Enrollment Set**