Lee County Transportation Disadvantaged Local Coordinating Board- Public Hearing

10:00 AM, May 6, 2016
City of Cape Coral Public Works – Green Room
815 Nicholas Pkwy E, Cape Coral FL 33990
239-330-2240

AGENDA

Call to Order

Pledge of Allegiance

Introductions

Public Hearing

1. *CTC Evaluation (Brian Raimondo)

2. *Minor Update of the TDSP (Brian Raimondo)

Other Business

3. Public Comments on Items not on the Agenda

Adjournment

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*Action Items +May Require Action

All meetings of the Lee County Metropolitan Planning Organization (MPO) are open to the public. In accordance with the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting should contact Brian Raimondo at the Lee MPO 48 hours prior to the meeting by calling (239) 244-2220; if you are hearing or speech impaired call (800) 955-8770 Voice / (800) 955-8771 TDD. Or, e-mail braimondo@leempo.com

The MPO's planning process is conducted in accordance with Title VI of the Civil Rights Act of 1964 and related statutes. Any person or beneficiary who believes he has been discriminated against because of race, color, religion, sex, age, national origin, disability, or familial status may file a complaint with the Florida Department of Transportation District One Title VI Coordinator Robin Parrish at (863) 519-2675 or by writing her at P.O. Box 1249, Bartow, Florida 33831.

CTC Evaluation

RECOMMENDED ACTION: Review and approve the Draft CTC Evaluation

The CTC Evaluation Committee which consisted of Linda Carter, Deb Reardon, Brian Raimondo and Good Wheels staff met on January 29th at the offices of Good Wheels.

The Draft CTC Evaluation Report contains findings, suggestions and recommendations. LCB input will be added prior to the document being sent to the Commission for the Transportation Disadvantaged.

CTC

EVALUATION WORKBOOK

Florida Commission for the

Transportation Disadvantaged

CTC BEING REVIEWED: Good Wheels, Inc.

COUNTY (IES): Lee

ADDRESS: 10075 Bavaria Road Fort Myers, FL 33913

CONTACT: Alan Mandel **PHONE:** 239-768-7190

REVIEW PERIOD: FY 2014-2015 **REVIEW DATES:** 1-29-2016

PERSON CONDUCTING THE REVIEW: Brian Raimondo & LCB committee

CONTACT INFORMATION: Lee MPO

FORMATTED 2011 – 2012

LCB EVALUATION WORKBOOK

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REVIEW CHECKLIST & SCHEDULE

COLLECT FOR REVIEW:

- ☒ APR Data Pages
- ☒ QA Section of TDSP
- ☒ Last Review (Date: 2/3/15)
- ☒ List of Omb. Calls
- ☒ QA Evaluation
- ☒ Status Report (from last review)
- ☒ AOR Submittal Date
- ☒ TD Clients to Verify
- ☒ TDTF Invoices
- ☒ Audit Report Submittal Date

ITEMS TO REVIEW ON-SITE:

- ☒ SSPP
- ☒ Policy/Procedure Manual
- ☒ Complaint Procedure
- ☒ Drug & Alcohol Policy (see certification)
- ☒ Grievance Procedure
- ☒ Driver Training Records (see certification)
- ☒ Contracts
- ☒ Other Agency Review Reports
- ☒ Budget
- ☒ Performance Standards
- ☒ Medicaid Documents

ITEMS TO REQUEST:

☒ **REQUEST INFORMATION FOR RIDER/BENEFICIARY SURVEY** (Rider/Beneficiary Name, Agency who paid for the trip [sorted by agency and totaled], and Phone Number)

☒ **REQUEST INFORMATION FOR CONTRACTOR SURVEY** (Contractor Name, Phone Number, Address and Contact Name)

☒ **REQUEST INFORMATION FOR PURCHASING AGENCY SURVEY** (Purchasing Agency Name, Phone Number, Address and Contact Name)

☒ **REQUEST ANNUAL QA SELF CERTIFICATION** (Due to CTD annually by January 15th).

☒ **MAKE ARRANGEMENTS FOR VEHICLES TO BE INSPECTED** (Only if purchased after 1992 and privately funded).

INFORMATION OR MATERIAL TO TAKE WITH YOU:

☒ Measuring Tape ☐ Stop Watch

EVALUATION INFORMATION

An LCB review will consist of, but is not limited to the following pages:

1	Cover Page
5 - 6	Entrance Interview Questions
12	Chapter 427.0155 (3) Review the CTC monitoring of contracted operators
13	Chapter 427.0155 (4) Review TDSP to determine utilization of school buses and public transportation services
19	Insurance
23	Rule 41-2.011 (2) Evaluation of cost-effectiveness of Coordination Contractors and Transportation Alternatives
25 - 29	Commission Standards and Local Standards
39	On-Site Observation
40 – 43	Surveys
44	Level of Cost - Worksheet 1
45- 46	Level of Competition – Worksheet 2
47 - 48	Level of Coordination – Worksheet 3

Notes to remember:

- **The CTC should not conduct the evaluation or surveys. If the CTC is also the PA, the PA should contract with an outside source to assist the LCB during the review process.**
- **Attach a copy of the Annual QA Self Certification.**

ENTRANCE INTERVIEW QUESTIONS

INTRODUCTION AND BRIEFING:

☑ Describe the evaluation process (LCB evaluates the CTC and forwards a copy of the evaluation to the CTD).

☑ The LCB reviews the CTC once every year to evaluate the operations and the performance of the local coordinator.

The LCB will be reviewing the following areas:

- ☑ Chapter 427, Rules 41-2 and 14-90, CTD Standards, and Local Standards
- ☑ Following up on the Status Report from last year and calls received from the Ombudsman program.
- ☑ Monitoring of contractors.
- ☑ Surveying riders/beneficiaries, purchasers of service, and contractors

☑ The LCB will issue a Review Report with the findings and recommendations to the CTC no later than 30 working days after the review has concluded.

☑ Once the CTC has received the Review Report, the CTC will submit a Status Report to the LCB within 30 working days.

☑ Give an update of Commission level activities (last meeting update and next meeting date), if needed.

USING THE APR, COMPILE THIS INFORMATION:

1. OPERATING ENVIRONMENT:

   ☐ RURAL ☑ URBAN

2. ORGANIZATION TYPE:

   - ☐ PRIVATE-FOR-PROFIT
   - ☑ PRIVATE NON-PROFIT
   - ☐ GOVERNMENT
   - ☐ TRANSPORTATION AGENCY

3. NETWORK TYPE:

- ☐ SOLE PROVIDER
- ☒ PARTIAL BROKERAGE
- ☐ COMPLETE BROKERAGE

4. NAME THE OPERATORS THAT YOUR COMPANY HAS CONTRACTS WITH:

5. NAME THE GROUPS THAT YOUR COMPANY HAS COORDINATION CONTRACTS WITH:

Coordination Contract Agencies				
Name of Agency	**Address**	**City, State, Zip**	**Telephone Number**	**Contact**
United Cerebral Palsy of SW	9040 Sunset Drive	Miami Florida 33173	(305) 273-3055	James Weeks
Light House of SW Florida	35 West Marianna Ave.	North Fort Myers, Fl 33903	(239) 997-7797	Doug Fowler

6. NAME THE ORGANIZATIONS AND AGENCIES THAT PURCHASE SERVICE FROM THE CTC AND THE PERCENTAGE OF TRIPS EACH REPRESENTS? (Recent APR information may be used)

Name of Agency	% of Trips	Name of Contact	Telephone Number
AHCA	42.84%	John Irvine	850-410-5712
TD Trust Fund (CTD)	20.00%	John Irvine	850-410-5712
APD	15.56%	Jeff Smith	239-338-1370
Dept Elder Affairs	1.66%	Melissa Higgins	239-275-1881
Other (Local Non-gov)	19.93%	n/a	

7. REVIEW AND DISCUSS TD HELPLINE CALLS:

	Number of calls	Closed Cases	Unsolved Cases
Cost	0	0	0
Medicaid	0	0	0
Quality of Service	0	0	0
Service Availability	0	0	0
Toll Permit	0	0	0
Other	0	0	0

GENERAL QUESTIONS

Use the TDSP to answer the following questions. If these are not addressed in the TDSP, follow-up with the CTC.

1. DESIGNATION DATE OF CTC: July 1, 2013

2. WHAT IS THE COMPLAINT PROCESS?

   Customers may fill out form or provide verbal input. (Form in TDSP) Deb Heck researches and compiles reports. If it needs more resolution D Heck forwards to Carolyn Battle. She researches and resolves. If it needs to go higher, Carolyn Battle forwards to Alan Mandel. All complaints are tabulated by type of problem and funding agency.

   IS THIS PROCESS IN WRITTEN FORM? ☒ Yes ☐ No
   (Make a copy and include in folder)

   Is the process being used? ☒ Yes ☐ No

3. DOES THE CTC HAVE A COMPLAINT FORM? ☒ Yes ☐ No
   (Make a copy and include in folder)

4. DOES THE COMPLAINT FORM INCORPORATE ALL ELEMENTS OF THE CTD'S UNIFORM SERVICE REPORTING GUIDEBOOK?

   ☒ Yes ☐ No

5. DOES THE FORM HAVE A SECTION FOR RESOLUTION OF THE COMPLAINT?

   ☒ Yes ☐ No

   Review completed complaint forms to ensure the resolution section is being filled out and follow-up is provided to the consumer.

6. IS A SUMMARY OF COMPLAINTS GIVEN TO THE LCB ON A REGULAR BASIS?

   ☒ Yes ☐ No

7. WHEN IS THE DISSATISFIED PARTY REFERRED TO THE TD HELPLINE?

   Problems are resolved before they get to this level. Phone numbers are posted in buses and on brochures.

8. WHEN A COMPLAINT IS FORWARDED TO YOUR OFFICE FROM THE OMBUDSMAN PROGRAM, IS THE COMPLAINT ENTERED INTO THE LOCAL COMPLAINT FILE/PROCESS?

   ☒ Yes ☐ No

   If no, what is done with the complaint?

9. DOES THE CTC PROVIDE WRITTEN RIDER/BENEFICIARY INFORMATION OR BROCHURES TO INFORM RIDERS/ BENEFICIARIES ABOUT TD SERVICES?

☒ Yes ☐ No If yes, what type?

Brochure and passenger guides, and FaceBook.

10. DOES THE RIDER/ BENEFICIARY INFORMATION OR BROCHURE LIST THE OMBUDSMAN NUMBER?

☒ Yes ☐ No

11. DOES THE RIDER/ BENEFICIARY INFORMATION OR BROCHURE LIST THE COMPLAINT PROCEDURE?

☒ Yes ☐ No

12. WHAT IS YOUR ELIGIBILITY PROCESS FOR TD RIDERS/ BENEFICIARIES?

See Attachment

Please Verify These Passengers Have an Eligibility Application on File:

TD Eligibility Verification			
Name of Client	**Address of client**	**Date of Ride**	**Application on File?**
Info removed for HIPAA.	Info removed for HIPAA.	1/19/15	yes
		5/4/15	yes
		6/4/15	yes
		5/21/15	yes
Info removed for HIPAA.	Info removed for HIPAA.	6/3/15	yes
		6/22/15	yes
		5/15/15	yes
		5/7/15	yes
		6/11/15	yes
Info removed for HIPAA.	Info removed for HIPAA.	5/27/15	yes

13. WHAT INNOVATIVE IDEAS HAVE YOU IMPLEMENTED IN YOUR COORDINATED SYSTEM?

In GW's present software for Trip Coordination they are integrating an automated scheduling system that allows trips to be put on a tablet where the driver can perform the trip and get a client signature. Then, GW can do system processing and run reports used to bill a broker online.

14. ARE THERE ANY AREAS WHERE COORDINATION CAN BE IMPROVED?

Good Wheels feels that coordination can be improved between Medicaid and TD, by the CTC.

15. WHAT BARRIERS ARE THERE TO THE COORDINATED SYSTEM?

The new Medicaid broker changes create greater costs in worker hours and printing costs. As a result of each broker having their own driver training requirements and vehicle affidavit requirement. Reservation complications affect dispatch as well as billing complications for each broker.

16. ARE THERE ANY AREAS THAT YOU FEEL THE COMMISSION SHOULD BE AWARE OF OR CAN ASSIST WITH?

n/a

17. WHAT FUNDING AGENCIES DOES THE CTD NEED TO WORK CLOSELY WITH IN ORDER TO FACILITATE A BETTER-COORDINATED SYSTEM?

The Agency for Health Care Administration (AHCA), with the Commission for the Transportation Disadvantaged, FDOT and local funding agencies such as the United Way and the municipalities, as well as the County.

18. HOW ARE YOU MARKETING THE VOLUNTARY DOLLAR?

Brochures, FaceBook page (FB). Planning Agency announces it on its print media. Not a very high return on investment of time.

Brochures are placed at the:
Lee Memorial Health Park
Rosa Parks
VA Hospital

GENERAL QUESTIONS

Findings:

Recommendations:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC contracts for compliance with 427.0155(1), F.S.
"Execute uniform contracts for service using a standard contract, which includes performance standards for operators."

ARE YOUR CONTRACTS UNIFORM? ☒ Yes ☐ No

IS THE CTD'S STANDARD CONTRACT UTILIZED? ☒ Yes ☐ No

DO THE CONTRACTS INCLUDE PERFORMANCE STANDARDS FOR THE TRANSPORTATION OPERATORS AND COORDINATION CONTRACTORS?

☒ Yes ☐ No

DO THE CONTRACTS INCLUDE THE PROPER LANGUAGE CONCERNING PAYMENT TO SUBCONTRACTORS? (Section 21.20: Payment to Subcontractors, T&E Grant, and FY)

☒ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Operator Name	Exp. Date	SSPP	AOR Reporting	Insurance
NA				

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC last AOR submittal for compliance with 427. 0155(2)
"Collect Annual Operating Data for submittal to the Commission."

REPORTING TIMELINESS

Were the following items submitted on time?

a. Annual Operating Report ☒ Yes ☐ No

Any issues that need clarification? ☐ Yes ☒ No

Any problem areas on AOR that have been re-occurring?

List: n/a

b. Memorandum of Agreement ☒ Yes ☐ No

c. Transportation Disadvantaged Service Plan ☒ Yes ☐ No

d. Grant Applications to TD Trust Fund ☒ Yes ☐ No

e. All other grant application (5 %) ☒ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC monitoring of its transportation operator contracts to ensure compliance with 427.0155(3), F.S.
"Review all transportation operator contracts annually."

WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS OPERATOR(S) AND HOW OFTEN IS IT CONDUCTED?

An annual audit (review) is conducted. Last one was conducted in 2015.

Is a written report issued to the operator? ☒ Yes ☐ No

If **NO**, how are the contractors notified of the results of the monitoring?

WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS COORDINATION CONTRACTORS AND HOW OFTEN IS IT CONDUCTED?

No official monitoring is conducted. Issues are discussed and addressed as they come up. If something needs to be done in writing, it would be.

Is a written report issued? ☒ Yes ☐ No

If **NO**, how are the contractors notified of the results of the monitoring?

WHAT ACTION IS TAKEN IF A CONTRACTOR RECEIVES AN UNFAVORABLE REPORT?

Review and work on corrective actions.

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

ASK TO SEE DOCUMENTATION OF MONITORING REPORTS.

COMPLIANCE WITH CHAPTER 427, F.S.

Review the TDSP to determine the utilization of school buses and public transportation services [Chapter 427.0155(4)]
"Approve and coordinate the utilization of school bus and public transportation services in accordance with the TDSP."

HOW IS THE CTC USING SCHOOL BUSES IN THE COORDINATED SYSTEM?

N/A

Rule 41-2.012(5)(b): *"As part of the Coordinator's performance, the local Coordinating Board shall also set an annual percentage goal increase for the number of trips provided within the system for ridership on public transit, where applicable. In areas where the public transit is not being utilized, the local Coordinating Board shall set an annual percentage of the number of trips to be provided on public transit."*

HOW IS THE CTC USING PUBLIC TRANSPORTATION SERVICES IN THE COORDINATED SYSTEM?

☒ N/A

IS THERE A GOAL FOR TRANSFERRING PASSENGERS FROM PARATRANSIT TO TRANSIT?

☐ Yes ☒ No

If YES, what is the goal?

Is the CTC accomplishing the goal? ☒ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS REQUIREMENT? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review of local government, federal and state transportation applications for TD funds (all local, state or federal funding for TD services) for compliance with 427.0155(5).
"Review all applications for local government, federal, and state transportation disadvantaged funds, and develop cost-effective coordination strategies."

IS THE CTC INVOLVED WITH THE REVIEW OF APPLICATIONS FOR TD FUNDS, IN CONJUNCTION WITH THE LCB? (TD Funds include *all* funding for transportation disadvantaged services, i.e. Section 5310 [formerly Sec.16] applications for FDOT funding to buy vehicles granted to agencies who are/are not coordinated)

☒ Yes ☐ No

If Yes, describe the application review process.

The grant applicants provide their FTA 5310 and FTA 5311 applications to the Planning Agency, who provides them to the LCB for review for coordination purposes. The CTC provides input to the LCB on whether the grant applications would further the goals of coordination. (If approved, would this assist the CTC in providing services in the service area, or not.)

If no, is the LCB currently reviewing applications for TD funds (any federal, state, and local funding)? ☐ Yes ☐ No

If no, is the planning agency currently reviewing applications for TD funds?

☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review priorities listed in the TDSP, according to Chapter 427.0155(7).
"Establish priorities with regard to the recipients of non-sponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust monies."

REVIEW THE QA SECTION OF THE TDSP (ask CTC to explain):

The LCB appoints two or three members to a Committee for the Evaluation of the CTC, composed of voting members of the LCB. The Draft Evaluation Report contains findings, suggestions and recommendations. These are distributed to the Local Coordinating Board for its review and approval. If the LCB has additional recommendations, planning staff adds these to the Report, and then Planning staff sends the LCB's approved evaluation report on the Coordinator to the CTD, and uses the recommendations to prepare the annual update of the TDSP.

WHAT ARE THE PRIORITIES FOR THE TDTF TRIPS?

The Priorities are ranked as shown on Add-In Page. In Lee, Good Wheels only has enough TD Trust funds to cover some medical trips, mostly of the dialysis and chemo patients. The TDTF funds are allocated in a monthly spending plan. Trips are scheduled based on route efficiency and seating availability and available funds.

HOW ARE THESE PRIORITIES CARRIED OUT?

When the passenger applies for service.
Letter sent indicating medical trips only.
When a trip is requested, Scheduling checks destination to make sure it is a medical destination.

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Ensure CTC compliance with the delivery of transportation services, 427.0155(8).
"Have full responsibility for the delivery of transportation services for the transportation disadvantaged as outlined in s. 427.015(2)."

Review the Operational section of the TDSP

1. Hours of Service:

   Office 8 AM to 5 PM M-F. General Service, 5 AM to 8 PM Mon - Sat. Demand Response 6 AM to 630 PM Monday-Friday.

2. Hours of Intake:

   9 AM to 5 PM Mon - Friday

3. Provisions for After Hours Reservations/Cancellations?

   Phone numbers are provided to call. There's an 800- number and a local number for Fort Myers.

4. What is the minimum required notice for reservations?

   Before noon the day before the trip

5. How far in advance can reservations be place (number of days)?

   Three days for TD.

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the cooperative agreement with the local WAGES coalitions according to Chapter 427.0155(9).
"Work cooperatively with local WAGES coalitions established in Chapter 414 to provide assistance in the development of innovative transportation services for WAGES participants."

WHAT TYPE OF ARRANGEMENT DO YOU HAVE WITH THE LOCAL WAGES COALITION?

The WAGES Board is represented on the Lee LCB.

HAVE ANY INNOVATIVE WAGES TRANSPORTATION SERVICES BEEN DEVELOPED?

N/A

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

Findings:

Recommendations:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.006(1), Minimum Insurance Compliance
"...ensure compliance with the minimum liability insurance requirement of $100,000 per person and $200,000 per incident…"

WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS?

$100,000 / $300,000

WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS IN THE OPERATOR AND COORDINATION CONTRACTS?

$100,000 / $300,000

HOW MUCH DOES THE INSURANCE COST (per operator)?

Operator	Insurance Cost
n/a	

DOES THE MINIMUM LIABILITY INSURANCE REQUIREMENTS EXCEED $1 MILLION PER INCIDENT?

☐ Yes ☒ No

If yes, was this approved by the Commission? ☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.006(2), Safety Standards.
"…shall ensure the purchaser that their operations and services are in compliance with the safety requirements as specified in Section 341.061(2)(a), F.S. and 14-90, F.A.C."

Date of last SSPP Compliance Review January 2015 *, Obtain a copy of this review.*

Review the last FDOT SSPP Compliance Review, if completed in over a year, check drivers' records. If the CTC has not monitored the operators, check drivers' files at the operator's site.

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

ARE THE CTC CONTRACTED OPERATORS IN COMPLIANCE WITH THIS SECTION?
☒ Yes ☐ No

DRIVER REQUIREMENT CHART

Driver Last Name	Driver License	Last Physical	CPR/1st Aid	Def. Driving	ADA Training	Other BG Check- Done or Expires
Silvano	On File	10/12/15	1/16/16	10/12/15	10/24/15	10/20/15
Munoz	One File	10/6/17	7/11/17	5/16/15	11/2015	9/15/14
Mikkelsen	On File	2/10/16	1/16/18	5/16/17	10/20/18	11/7/11
Jackson	One File	On File	TBD	9/21/15	11/2018	9/2/15
Johnson	On File	4/30/16	10/2018	10/18/16	10/2018	4/17/06
Hicks	On File	1/29/17	8/23/16	5/16/17	11/2018	4/16/13
Pinette	One File	10/14/16	9/11/17	6/30/12	10/2018	11/2011
Dorta Mulet	On File	8/27/14	3/14/17	5/16/17	11/2018	8/25/14
Clark	On File	1/2/16	4/11/17	5/16/15	11/2018	11/13/14
Berkholtz	On File	12/4/14	3/14/17	5/16/17	11/2018	12/11/14

Sample Size: 1-20 Drivers – 50-100% 21-100 Drivers – 20-50% 100+ Drivers – 5-10%

Driver Last Name	Driver License	Last Physical	CPR/1st Aid	Def. Driving	ADA Training	Other-

Sample Size: 1-20 Drivers – 50-100% 21-100 Drivers – 20-50% 100+ Drivers – 5-10%

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.006(3), Drug and Alcohol Testing
"…shall assure the purchaser of their continuing compliance with the applicable state or federal laws relating to drug testing…"

With which of the following does the CTC (and its contracted operators) Drug and Alcohol Policy comply?

- ☒ FTA (Receive Sect. 5307, 5309, or 5311 funding)
- ☐ FHWA (Drivers required to hold a CDL)
- ☐ Neither

REQUEST A COPY OF THE DRUG & ALCOHOL POLICY AND LATEST COMPLIANCE REVIEW.

DATE OF LAST DRUG & ALCOHOL POLICY REVIEW: April 2015

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

Comments:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with 41-2.011(2), Evaluating Cost-Effectiveness of Coordination Contractors and Transportation Alternatives.
"...contracts shall be reviewed annually by the Community Transportation Coordinator and the Coordinating Board as to the effectiveness and efficiency of the Transportation Operator or the renewal of any Coordination Contracts."

1. IF THE CTC HAS COORDINATION CONTRACTORS, DETERMINE THE COST-EFFECTIVENESS OF THESE CONTRACTORS.

Cost [CTC and Coordination Contractor (CC)]

	CTC	CC #1	CC #2	CC #3	CC #4
Flat contract rate (s) ($ amount / unit)		UCP	Light House		
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)					
Special or unique considerations that influence costs?					
Explanation: no funding changes hands					

2. DO YOU HAVE TRANSPORTATION ALTERNATIVES? ☐ Yes ☒ No
(Those specific transportation services approved by rule or the Commission as a service not normally arranged by the Community Transportation Coordinator, but provided by the purchasing agency. Example: a neighbor providing the trip)

Cost [CTC and Transportation Alternative (Alt.)]

	CTC	**Alt. #1**	**Alt. #2**	**Alt. #3**	**Alt. #4**
Flat contract rate (s) ($ amount / unit)					
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)					
Special or unique considerations that influence costs?					
Explanation: N/A					

IS THE CTC IN COMPLIANCE WITH THIS SECTION? ☒ Yes ☐ No

RULE 41-2

Findings:

Recommendations:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with Commission Standards
"...shall adhere to Commission approved standards…"

Review the TDSP for the Commission standards.

Commission Standards	Comments
Local toll free phone number must be posted in all vehicles.	A local toll free number is posted in all the buses, and is on the brochures. It is (800) 741-1570.
Vehicle Cleanliness	All vehicles are cleaned, inside and out, on a regular schedule
Passenger/Trip Database	For each passenger transported within the coordinated system, the CTC collects in its database: the passenger's name, address, telephone number, funding source(s), eligibility, and other special requirements.

Adequate seating	Vehicle seating does not exceed the manufacturer's recommended capacity.
Driver Identification	All drivers have a photo ID badge. All drivers greet passengers.
Passenger Assistance	Drivers provide boarding assistance, if requested. Assistance may include holding hands or allowing a passenger to hold an arm; opening the vehicle door; fastening seatbelt or securing the wheelchair; storage of mobility assistive devices; and closing the vehicle door. Drivers do not move wheel chair up or down steps; only ramps are used.
Smoking, Eating and Drinking	Smoking is not allowed. Neither is eating or drinking.

Two-way Communications	Good Wheels amended its Wireless Communications Plan on 10/11/2013, to be in compliance with the Department of Transportation's Rule 14-90.004 (FAC) and Florida Ban on Texting While Driving Law" which went into effect October 1, 2013. All Drivers signed the document.
Air Conditioning/Heating	All vehicles are equipped with A/C and heating systems.
Billing Requirements	The CTC pays its carriers on the 15th and the 30th of each month. These are NOT partial payments, but payments do run 45 days behind. For example, on August 30th, they are paid for all trips found to be eligible from June 16th to June 30th.

COMMISSION STANDARDS

Findings:

Recommendations:

COMPLIANCE WITH 41-2, F.A.C.

Compliance with Local Standards
"...shall adhere to Commission approved standards..."

Review the TDSP for the Local standards.

Local Standards	Comments
Transport of Escorts and dependent children policy	Escorts are transported at no additional charge, as long as they are picked up and dropped off with the passenger. The need for an escort is determined in advance of the trip. "Traveling companion" is not the same as an escort. An escort who must be picked up/ dropped off at places other than the passenger, is not an escort, that's a regular trip.
Use, Responsibility, and cost of child restraint devices	All passengers under the age of 5, or under 45 pounds must use a child restraint device. These must be provided by the parent/guardian, or by Good WHeels upon arrangement.
Out-of-Service Area trips	Out of county trips must be verified by contacting the passenger's Medicaid provider.
CPR/1st Aid	All drivers are trained in First Aid every two years. All vehicles are equipped with a First Aid kit. All drivers are trained in CPR every two years.
Driver Criminal Background Screening	All drivers in the coordinated system have a "favorable" FDLE background, according to Department of Children and Families policies and procedures.
Rider Personal Property	Passenger personal property that can be carried onto the bus in one trip by the passenger or the Driver, and that can be safely stowed on the vehicle, is permitted.
Advance reservation requirements	There will be a minimum 24 hour notice requirement for all trips scheduled within the coordinated system. Reservations must be made before Noon the day before the requested trip. Passengers with an urgent need to travel should call the CTC. Same day trip requests cannot be guaranteed, however, the CTC will attempt to assist the passenger.
Pick-up Window	Passengers are not given a set pick-up time. Instead, they are told to be ready for their ride to arrive up to an hour before their APPOINTMENT time. The CTC may negotiate special pick-up arrangements with the customer, in advance, as the situation dictates. Passengers will be dropped off at their appointment before the appointment with certain exceptions negotiated in advance. Passengers can expect their return trip to take up to 90 minutes from the time they are seated on the vehicle.

Measurable Standards/Goals	*Standard/Goal*	*Latest Figures*	*Is the CTC/Operator meeting the Standard?*
Public Transit Ridership	CTC	CTC	
	Operator A	Operator A	Goal is 2.2%
	Operator B	Operator B	CTC results is 1.76%
	Operator C	Operator C	no
On-time performance	CTC	CTC	
	Operator A	Operator A	Goal is 85%
	Operator B	Operator B	
	Operator C	Operator C	
Passenger No-shows	CTC	CTC	
	Operator A	Operator A	CTC results is 4047.
	Operator B	Operator B	(no measurable standard.)
	Operator C	Operator C	(but fewer than last year)
Accidents	CTC	CTC	
	Operator A	Operator A	Goal is 1.2 or fewer Accidents per 100,000 miles
	Operator B	Operator B	33 accidents per 1,733,387. Divided by 100,000.
	Operator C	Operator C	= 1.90 (Y)
Roadcalls	CTC	CTC	
	Operator A	Operator A	Goal = 10,000 mi between roadcalls
Average age of fleet:	Operator B	Operator B	50 road calls/ 1,733,387 miles =34,668
	Operator C	Operator C	Yes
Complaints	CTC	CTC	
	Operator A	Operator A	Goal = Less Than 1% of trips
Number filed: 0	Operator B	Operator B	67 complaints. 1% of 137,344=1373
	Operator C	Operator C	Yes
Call-Hold Time	CTC	CTC	
	Operator A	Operator A	45 - 120 seconds
	Operator B	Operator B	
	Operator C	Operator C	

LOCAL STANDARDS

Findings:

Recommendations:

COMPLIANCE WITH AMERICANS WITH DISABILITIES ACT

REVIEW COPIES OF THE PUBLIC INFORMATION PROVIDED.

DOES PUBLIC INFORMATION STATE THAT ACCESSIBLE FORMATS ARE AVAILABLE UPON REQUEST? ☒ Yes ☐ No

ARE ACCESSIBLE FORMATS ON THE SHELF? ☐ Yes ☒ No

IF NOT, WHAT ARRANGEMENTS ARE IN PLACE TO HAVE MATERIAL PRODUCED IN A TIMELY FASHION UPON REQUEST?

Good Wheels works with local agencies to get accessible formats provided in two weeks time.

DO YOU HAVE TTY EQUIPMENT OR UTILIZE THE FLORIDA RELAY SYSTEM?

☒ Yes ☐ No

IS THE TTY NUMBER OR THE FLORIDA RELAY SYSTEM NUMBERS LISTED WITH THE OFFICE PHONE NUMBER? ☒ Yes ☐ No

Florida Relay System:
Voice- 1-800-955-8770
TTY- 1-800-955-8771

EXAMINE OPERATOR MANUALS AND RIDER INFORMATION. DO CURRENT POLICIES COMPLY WITH ADA PROVISION OF SERVICE REQUIREMENTS REGARDING THE FOLLOWING:

Provision of Service	Training Provided	Written Policy	Neither
Accommodating Mobility Aids	Yes	Yes	
Accommodating Life Support Systems (O_2 Tanks, IV's...)	Yes	Yes	
Passenger Restraint Policies	Yes	Yes	
Standee Policies (persons standing on the lift)	Yes	Yes	
Driver Assistance Requirements	Yes	Yes	
Personal Care Attendant Policies	Yes	Yes	
Service Animal Policies	Yes	Yes	
Transfer Policies (From mobility device to a seat)	Yes	Yes	
Equipment Operation (Lift and securement procedures)	Yes	Yes	
Passenger Sensitivity/Disability Awareness Training for Drivers	Yes	Yes	

RANDOMLY SELECT ONE OR TWO VEHICLES PER CONTRACTOR (DEPENDING ON SYSTEM SIZE) THAT ARE IDENTIFIED BY THE CTC AS BEING ADA ACCESSIBLE AND PURCHASED WITH PRIVATE FUNDING, AFTER 1992. CONDUCT AN INSPECTION USING THE ADA VEHICLE SPECIFICATION CHECKLIST.

INSPECT FACILITIES WHERE SERVICES ARE PROVIDED TO THE PUBLIC (ELIGIBILITY DETERMINATION, TICKET/COUPON SALES, ETC…).

IS A RAMP PROVIDED? ☒ Yes ☐ No

ARE THE BATHROOMS ACCESSIBLE? ☒ Yes ☐ No

Bus and Van Specification Checklist

Name of Provider: Goodwheels

Vehicle Number (either VIN or provider fleet number): 1GBE4V1999413294

Type of Vehicle:
- ☐ Minivan
- ☐ Van
- ☐ Bus (>22')
- ☒ Minibus (<= 22')
- ☐ Minibus (>22')

Person Conducting Review: Linda Carter

Date: 1/29/2016

Review the owner's manual, check the stickers, or ask the driver the following:

- ☒ The lift must have a weight limit of at least 600 pounds.
- ☒ The lift must be equipped with an emergency back-up system (in case of loss of power to vehicle). Is the pole present?
- ☒ The lift must be "interlocked" with the brakes, transmission, or the door, so the lift will not move unless the interlock is engaged. Ensure the interlock is working correctly.

Have the driver lower the lift to the ground:

- ☒ Controls to operate the lift must require constant pressure.
- ☒ Controls must allow the up/down cycle to be reversed without causing the platform to "stow" while occupied.
- ☒ Sufficient lighting shall be provided in the step well or doorway next to the driver, and illuminate the street surface around the lift, the lighting should activate when the door/lift is in motion. Turn light switch on, to ensure lighting is working properly.

Once the lift is on the ground, review the following:

- ☒ Must have an inner barrier to prevent the mobility aid from rolling off the side closest to the vehicle until the platform is fully raised.
- ☒ Side barriers must be at least 1 ½ inches high.
- ☒ The outer barrier must be sufficient to prevent a wheelchair from riding over it.
- ☒ The platform must be slip-resistant.
- ☒ Gaps between the platform and any barrier must be no more than 5/8 of an inch.
- ☒ The lift must have two handrails.
- ☒ The handrails must be 30-38 inches above the platform surface.
- ☒ The handrails must have a useable grasping area of 8 inches, and must be at least 1 ½ inches wide and have sufficient knuckle clearance.
- ☒ The platform must be at least 28 1/2 inches wide measured at the platform surface, and 30 inches wide and 48 inches long measured 2 inches above the platform surface.

- ☒ If the ramp is not flush with the ground, for each inch off the ground the ramp must be 8 inches long.
- ☒ Lifts may be marked to identify the preferred standing position (suggested, not required)

Have the driver bring the lift up to the fully raised position (but not stowed):

- ☒ When in the fully raised position, the platform surface must be horizontally within 5/8 inch of the floor of the vehicle.
- ☒ The platform must not deflect more than 3 degrees in any direction. To test this, stand on the edge of the platform and carefully jump up and down to see how far the lift sways.
- ☒ The lift must be designed to allow boarding in either direction.

While inside the vehicle:

- ☒ Each securement system must have a clear floor area of 30 inches wide by 48 inches long.
- ☒ The securement system must accommodate all common wheelchairs and mobility aids.
- ☒ The securement system must keep mobility aids from moving no more than 2 inches in any direction.
- ☒ A seat belt and shoulder harness must be provided for each securement position, and must be separate from the security system of the mobility aid.

Vehicles under 22 feet must have:

- ☒ One securement system that can be either forward or rear-facing.
- ☒ Overhead clearance must be at least 56 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.

Vehicles over 22 feet must have:

- ☐ Must have 2 securement systems, and one must be forward-facing, the other can be either forward or rear-facing.
- ☐ Overhead clearance must be at least 68 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.

- ☐ Aisles, steps, and floor areas must be slip resistant.
- ☐ Steps or boarding edges of lift platforms must have a band of color which contrasts with the step/floor surface.

COMPLIANCE WITH AMERICANS WITH DISABILITIES ACT

Table 1. ADA Compliance Review - Provider/Contractor Level of Service Chart

Name of Service Provider/ Contractor	Total # of Vehicles Available for CTC Service	# of ADA Accessible Vehicles	Areas/Sub areas Served by Provider/Contractor
Good Wheels	58	54	Lee, Glades, Hendry

BASED ON THE INFORMATION IN TABLE 1, DOES IT APPEAR THAT INDIVIDUALS REQUIRING THE USE OF ACCESSIBLE VEHICLES HAVE EQUAL SERVICE?

☒ Yes ☐ No

ADA COMPLIANCE

Findings:

Recommendations:

FY 14/15 GRANT QUESTIONS

The following questions relate to items specifically addressed in the FY 14/15 Trip and Equipment Grant.

DO YOU KEEP ALL RECORDS PERTAINING TO THE SPENDING OF TDTF DOLLARS FOR FIVE YEARS? (Section 7.10: Establishment and Maintenance of Accounting Records, T&E Grant, and FY 14/15)

☒ Yes ☐ No

ARE ALL ACCIDENTS THAT HAVE RESULTED IN A FATALITY REPORTED TO THE COMMISSION WITHIN 24 HOURS AFTER YOU HAVE RECEIVED NOTICE? (Section 14.80: Accidents, T/E Grant, and FY 14/15)

☒ Yes ☐ No

ARE ALL ACCIDENTS THAT HAVE RESULTED IN $1,000 WORTH OF DAMAGE REPORTED TO THE COMMISSION WITHIN 72 HOURS AFTER YOU HAVE RECEIVED NOTICE OF THE ACCIDENT? (Section 14.80: Accidents, T/E Grant, and FY 14/15)

☒ Yes ☐ No

STATUS REPORT FOLLOW-UP FROM LAST REVIEW(S)

DATE OF LAST REVIEW: new cycle STATUS REPORT DATED: n/a

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

ON-SITE OBSERVATION OF THE SYSTEM

RIDE A VEHICLE WITIN THE COORDINATED SYSTEM. REQUEST A COPY OF THE MANIFEST PAGE THAT CONTAINS THIS TRIP.

Date of Observation: 1/29/2016

Please list any special guests that were present: L Carter, Passenger

Location: Ft Myers, Florida

Number of Passengers picked up/dropped off: 1

Ambulatory

Non-Ambulatory 1

Was the driver on time? ☒ Yes ☐ No - How many minutes late/early?

Did the driver provide any passenger assistance? ☒ Yes ☐ No

Was the driver wearing any identification? ☒ Yes: ☒ Uniform ☒ Name Tag ☒ ID Badge ☐ No

Did the driver render an appropriate greeting?

☒ Yes ☐ No ☐ Driver regularly transports the rider, not necessary

If CTC has a policy on seat belts, did the driver ensure the passengers were properly belted?

☒ Yes ☐ No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects? ☒ Yes ☐ No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations? ☒ Yes ☐ No

Does the vehicle have working heat and air conditioning? ☒ Yes ☐ No

Does the vehicle have two-way communications in good working order? ☒ Yes ☐ No

If used, was the lift in good working order? ☒ Yes ☐ No

Was there safe and appropriate seating for all passengers? ☒ Yes ☐ No

Did the driver properly use the lift and secure the passenger? ☒ Yes ☐ No

If No, please explain:

CTC: Good Wheels, Inc County: Lee

Date of Ride: 1/29/16

Funding Source	No. of Trips	No. of Riders/Beneficiaries	No. of Calls to Make	No. of Calls Made
CTD	1	1	1	1
Medicaid				
Other				
Other				
Other)				
Other				
Totals	1	1	1	1

Number of Round Trips	Number of Riders/Beneficiaries to Survey
0 – 200	30%
201 – 1200	10%
1201 +	5%

Note: Attach the manifest

RIDER/BENEFICIARY SURVEY

Staff making call: _____ County:_____
Date of Call: / / Funding Source: _____

1) Did you receive transportation service on _____? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☐ No

If so, how much?

3) How often do you normally obtain transportation?

☐ Daily 7 Days/Week ☐ Other ☐ 1-2 Times/Week ☐ 3-5Times/Week

4) Have you ever been denied transportation services?

☐ Yes

☐ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

☐ None ☐ 3-5 Times

☐ 1-2 Times ☐ 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

☐ Ineligible ☐ Space not available

☐ Lack of funds ☐ Destination outside service area

☐ Other _____

5) What do you normally use the service for?

☒ Medical ☐ Education/Training/Day Care

☐ Employment ☐ Life-Sustaining/Other

☐ Nutritional

6) Did you have a problem with your trip on _____?

☐ Yes. If yes, please state or choose problem from below

☐ No. If no, skip to question # 6

What type of problem did you have with your trip?

☐ Advance notice ☐ Cost

☐ Pick up times not convenient ☐ Late pick up-specify time of wait

☐ Assistance ☐ Accessibility

☐ Service Area Limits ☐ Late return pick up - length of wait

[redacted]

RIDER/BENFICIARY SURVEY

Staff making call: [illegible]
Date of Call: 2/12/16

County: Lee
Funding Source: _____

1) Did you receive transportation service on 6/4/15? ☐ Yes or ☐ No — Stroke Cost [illegible]

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☑ No If so, how much?

3) How often do you normally obtain transportation?
☐ Daily 7 Days/Week ☐ Other
☐ 1-2 Times/Week ☑ 3-5Times/Week

4) Have you ever been denied transportation services?
☐ Yes
☑ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?
☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times
If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?
☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?
☑ Medical ☐ Education/Training/Day Care
☐ Employment ☐ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on _____?
☐ Yes. If yes, please state or choose problem from below
☐ No. If no, skip to question # 6

What type of problem did you have with your trip?
☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait
☐ Drivers - specify ☐ Reservations - specify length of wait
☐ Vehicle condition ☐ Other

Scheduling She had to be there early

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10

Drivers are good

8) What does transportation mean to you? (Permission granted by LIFE for use in publications.)

Additional Comments: COULD Be Flexible & drop off Sooner instead of driving around to other stops

No complaints

RIDER/BENFICIARY SURVEY

Staff making call: DEB R. County: Lee
Date of Call: 2/5/16 Funding Source: _____

1) Did you receive transportation service on 05/21/15? ☑ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☑ No If so, how much?

3) How often do you normally obtain transportation?
☐ Daily 7 Days/Week ☐ Other
☐ 1-2 Times/Week ☑ 3-5Times/Week T, THR, SAT

- LOVES DRIVERS
- LOVES SERVICE
- APPRECIATES SERVICES

4) Have you ever been denied transportation services?
☐ Yes
☑ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?
☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times
If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?
☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

- GREAT people
- GO OUT OF THEIR WAY

5) What do you normally use the service for?
☑ Medical ☐ Education/Training/Day Care
☐ Employment ☑ Life-Sustaining/Other
☐ Nutritional Kidney

6) Did you have a problem with your trip on _____?
☐ Yes. If yes, please state or choose problem from below
☑ No. If no, skip to question # 6

What type of problem did you have with your trip?
☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait
☐ Drivers - specify ☐ Reservations - specify length of wait
☐ Vehicle condition ☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10

8) What does transportation mean to you? (Permission granted by LIFE SAVING for use in publications.) Yes! SERVICES

Additional Comments: _____

☐ When will DR. Visits be provided or covered?

[redacted]

RIDER/BENFICIARY SURVEY

Staff making call: [illegible] R.
Date of Call: 2/12/16

County: Lee
Funding Source: _____

1) Did you receive transportation service on 6/13/15? ☐ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☑ No If so, how much?

3) How often do you normally obtain transportation?
☐ Daily 7 Days/Week ☐ Other
☐ 1-2 Times/Week ☑ 3-5Times/Week

Waiting for pick is issue
Manor Care
Crying

4) Have you ever been denied transportation services?
☐ Yes
☑ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?
☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times
If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?
☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?
☑ Medical ☐ Education/Training/Day Care
☐ Employment ☑ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on _____?
☐ Yes. If yes, please state or choose problem from below
☐ No. If no, skip to question # 6

What type of problem did you have with your trip?
☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☑ Late pick up-specify time of wait over 30 M.
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait
☐ Drivers - specify ☐ Reservations - specify length of wait
☐ Vehicle condition ☐ Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
9 Loves the Drivers

8) What does transportation mean to you? (Permission granted by N/A for use in publications.)

Additional Comments: _____

[redacted]

RIDER/BENFICIARY SURVEY

Staff making call: DEB Reardon County: Lee
Date of Call: / / Funding Source: _____

1) Did you receive transportation service on 2/22/15? ☑ Yes or ☐ No

2) Where you charged an amount in addition to the co-payment? ☐ Yes or ☑ No If so, how much?
$2.00 TRIP

3) How often do you normally obtain transportation?
☐ Daily 7 Days/Week ☐ Other
☐ 1-2 Times/Week ☑ 3-5Times/Week

4) Have you ever been denied transportation services?
☐ Yes
☑ No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?
☐ None ☐ 3-5 Times
☐ 1-2 Times ☐ 6-10 Times
If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?
☐ Ineligible ☐ Space not available
☐ Lack of funds ☐ Destination outside service area
☐ Other _____

5) What do you normally use the service for?
☑ Medical ☐ Education/Training/Day Care
☐ Employment ☑ Life-Sustaining/Other
☐ Nutritional

6) Did you have a problem with your trip on _____?
☐ Yes. If yes, please state or choose problem from below
☑ No. If no, skip to question # 6

What type of problem did you have with your trip?
☐ Advance notice ☐ Cost
☐ Pick up times not convenient ☐ Late pick up-specify time of wait
☐ Assistance ☐ Accessibility
☐ Service Area Limits ☐ Late return pick up - length of wait
☐ Drivers - specify ☐ Reservations - specify length of wait
☐ Vehicle condition ☐ Other

* HOLIDAYS - Med Schedule thank giving, Christ., PV times change very EARLY just need to be informed of Schedule change

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.
10 Very willing to ADJUST & SERVE customers.

8) What does transportation mean to you? (Permission granted by LIFE for use in publications.)

Additional Comments: _____

Contractor Survey

Lee County

Contractor name (optional)

1. Do the riders/beneficiaries call your facility directly to cancel a trip?

   ☒ Yes ☐ No

2. Do the riders/beneficiaries call your facility directly to issue a complaint?

   ☒ Yes ☐ No

3. Do you have a toll-free phone number for a rider/beneficiary to issue commendations and/or complaints posted on the interior of all vehicles that are used to transport TD riders?

   ☒ Yes ☐ No

   If yes, is the phone number posted the CTC's?

   ☒ Yes ☐ No

4. Are the invoices you send to the CTC paid in a timely manner?

   ☒ Yes ☐ No

5. Does the CTC give your facility adequate time to report statistics?

   ☒ Yes ☐ No

6. Have you experienced any problems with the CTC?

   ☐ Yes ☒ No

   If yes, what type of problems?

Comments:

Currently do not have any contractors.

PURCHASING AGENCY SURVEY

Staff making call: Linda Carter
Purchasing Agency name: Dept of Elder Affairs
Representative of Purchasing Agency: Angela Woods

1) Do you purchase transportation from the coordinated system?

☒ YES

☐ NO If no, why?

2) Which transportation operator provides services to your clients?

Goodwheels

3) What is the primary purpose of purchasing transportation for your clients?

- ☒ Medical
- ☐ Employment
- ☐ Education/Training/Day Care
- ☐ Nutritional
- ☐ Life Sustaining/Other

4) On average, how often do your clients use the transportation system?

- ☒ 7 Days/Week
- ☐ 1-3 Times/Month
- ☐ 1-2 Times/Week
- ☐ Less than 1 Time/Month
- ☐ 3-5 Times/Week

5) Have you had any unresolved problems with the coordinated transportation system?

- ☐ Yes
- ☒ No If no, skip to question 7

6) What type of problems have you had with the coordinated system?

- ☐ Advance notice requirement [specify operator (s)]
- ☐ Cost [specify operator (s)]
- ☐ Service area limits [specify operator (s)]
- ☐ Pick up times not convenient [specify operator (s)]
- ☐ Vehicle condition [specify operator (s)]
- ☐ Lack of passenger assistance [specify operator (s)]
- ☐ Accessibility concerns [specify operator (s)]
- ☐ Complaints about drivers [specify operator (s)]
- ☐ Complaints about timeliness [specify operator (s)]
- ☐ Length of wait for reservations [specify operator (s)]
- ☐ Other [specify operator (s)] _____

7) Overall, are you satisfied with the transportation you have purchased for your clients?

- ☒ Yes
- ☐ No If no, why? _____

Level of Cost
Worksheet 1

Insert Cost page from the AOR.

FLCTD
Annual Operations Report
Section I: Face Sheet

County: Lee	Fiscal Year: **July 1, 2014 - June 30, 2015**
Status: Ready	
Report Date:	08/18/2015
Period Covered:	July 1, 2014 - June 30, 2015
Coordinator's Name:	Good Wheels, Inc.
Address:	10075 Bavaria Rd.
City:	Fort Myers
Zip Code:	33913
Service Area:	Lee
Contact Person:	Alan M. Mandel
Title:	CEO/CFO
Phone:	(239) 768 - 6184
Fax:	(239) 768 - 0334
Email:	amandel@goodwheels.org
Network Type:	Partial Brokerage
Organization Type:	Private Non-Profit

CTC Certification:

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

CTC Representative Signature Alan M Mandel

LCB Statement:

I, Rick Williams, as the local Coordinating Board Chairperson, hereby, certify in accordance with Rule 41-2.007(7) F.S. that the local Coordinating Board has reviewed this report and the Planning Agency has received a copy.

LCB Signature

FLCTD
Annual Operations Report
Section II: General Info

County: **Lee** Fiscal Year: **July 1, 2014 - June 30, 2015**

Status: Ready

Section II: Coordinated System General Information

1. Provider Listing (include the CTC, if the CTC provides transportation services)

Number of Private Non-Profits:	3
Number of Private For-Profits:	0
Public Entities:	
School Board:	0
Municipality:	0
County:	0
Transit Authority:	1
Other:	0
Total:	4

2. How many of the providers listed in 1 are coordination contractors?

2

FLCTD
Annual Operations Report
Section III: Passenger Trip Info

County: **Lee**			Fiscal Year: **July 1, 2014 - June 30, 2015**
Status: Saved with Issues			
Section III: Passenger Trip Information			
1a. One-Way Passenger Trips			
Type of Service	**Service Area**		
Fixed Route/Fixed Schedule	**Within**	**Outside**	**Total**
Daily Trip Tickets	0	0	0
Weekly Passes	0	0	0
Monthly Passes	55	0	55
Deviated Fixed Route Service	0	0	0
Paratransit			
Ambulatory	65081	1094	66175
Non-Ambulatory	15064	28	15092
Stretcher	6	0	6
Other Services			
School Board Trips	0	0	0
Total Trips	80206	1122	81328
1b. How many of the total trips were provided by contracted transportation providers (do not include the CTC, if the CTC provides transportation services)?			63
1c. How many of the total trips were provided by coordination contractors?			1284
2. One-Way Trips by Funding Source			
Agency for Health Care Administration			26457
Agency for Persons with Disabilities			22948
Agency for Workforce Innovation			0
Commission for the Transportation Disadvantaged			26903
Department of Children and Families			0
Department of Community Affairs			0
Department of Education			0
Department of Elder Affairs			5020
Department of Health			0

Department of Juvenile Justice	0
Florida Department of Transportation	0
Local Government	0
Local Non-Government	0
Other Federal Programs	0
Total:	81328
3. One-Way Trips by Passenger Type	
Was this information obtained by sampling?	no
Elderly	
Low Income:	8331
Disabled:	7015
Low Income and Disabled:	8408
Other:	7787
Children	
Low Income:	2556
Disabled:	1300
Low Income and Disabled:	2830
Other:	427
Other	
Low Income:	1655
Disabled:	9025
Low Income and Disabled:	21259
Other:	10735
Total:	81328
4. One-Way Passenger Trips - by Purpose	
Was this information obtained by sampling?	no
Medical Purpose	53904
Employment Purpose	0
Education/Training/Daycare Purpose	23466
Nutritional Purpose	3544
Life-Sustaining/Other Purpose	414
Total:	81328
5. Unduplicated Passenger Head Count	
5a. Paratransit/Deviated Fixed Route/ School Brd	600

5b. Fixed Route	0
Total:	600
6. Number of Unmet Trip Requests	4215
Unmet Trip Requests by Type of Trip	
Unmet Medical	4111
Unmet Employment	0
Unmet Education/Training/Daycare	40
Unmet Nutritional	64
Unmet Life-Sustaining/Other	0
Reason Trip was Denied (Optional)	
Lack of Funding:	4215
Lack of Vehicle Availability:	0
Lack of Driver Availability:	0
Other:	0
7.) Number of Passenger No-shows	1713
Passenger No-Shows by Funding Source (optional)	
CTD:	0
AHCA:	0
AWI:	0
DCF:	0
APD:	0
DOE:	0
DOEA:	0
Other:	0
8. Complaints	
Complaints by Service	43
Complaints by Policy	0
Complaints by Vehicle	0
Complaints by Other	7
Complaint Total:	50
9. Commendations	
Commendations by CTC	41

Commendations by Transportation Providers	0
Commendations by Coordination Contractors	0
Total Commendations:	41

FLCTD
Annual Operations Report
Section IV: Vehicle Info

County: **Lee**	Fiscal Year: **July 1, 2014 - June 30, 2015**
Status: Saved with Issues	

Section IV: Vehicle Information

1. Mileage Information

	Vehicle Miles		**Revenue Miles**
CTC:	1147246		957319
Transportation Providers:	5040		4132
Coordination Contractors:	18639		5810
School Bus Utilization Agreement:	0		0
Total:	1170925		967261

2. Roadcalls	36

3. Accidents

	Chargeable		**Non-Chargeable**
Total Accidents Person Only:	0		2
Total Accidents Vehicle Only:	0		1
Total Accidents Person & Vehicle:	0		0
Total Accidents:	0		3

Grand Total:	3
4. Total Number of Vehicles	36

	Count	**Percentage**
a. Total vehicles that are wheelchair accessible:	35	97.00%
b. Total vehicles that are stretcher equipped:	1	2.00%

FLCTD
Annual Operations Report
Section V: Employee Info

County: **Lee**		Fiscal Year: **July 1, 2014 - June 30, 2015**	
Status: Saved with Issues			
Section V: Employee Information			
1. CTC and Transportation Provider Employee Information			
			Hours
Full-Time Drivers	32		58321
Part-Time Drivers	15		11203
Volunteer Drivers	0		0
		Total Hours:	69524
Maintenance Employees	5		
Dispatchers	3		
Schedulers	1		
Call Intake/Reserv./Cust. Serv.	3		
Other Operations Employees	2		
			Hours
Other Volunteers	0		0
Administrative Support	6		
Management Employees	3		
Total	70		
2. Coordination Contractors Employee Information			
			Hours
Full-Time Drivers	0		0
Part-Time Drivers	4		3036
Volunteer Drivers	0		0
		Total Hours:	3036
Maintenance Employees	1		
Dispatchers	0		
Schedulers	0		
Call Intake/Reserv./Cust. Serv.	0		

Other Operations Employees	0		
			Hours
Other Volunteers	0		0
Administrative Support	0		
Management Employees	0		
Total	5		
		TOTAL HOURS:	72560

FLCTD
Annual Operations Report
Section VI: Revenue Sources

County: **Lee**		Fiscal Year: **July 1, 2014 - June 30, 2015**	
Status: Saved with Issues			
Section VI: Financial Data			
1. Detailed Revenue and Trips Provided by Funding Source			
Revenue Source	**CTC and Transportation Providers**	**Coordination Contractors**	**TOTAL REVENUES**
Agency for Health Care Administration			
Medicaid Non-Emergency	$212,602.00	$0.00	$212,602.00
Medicaid Non-Emergency (under fixed fee service with AHCA)	$0.00	$0.00	$0.00
Agency for Persons with Disabilities			
Comm Care for Dis Adults/Aging & Adult Services	$0.00	$0.00	$0.00
Developmental Services	$28,200.00	$75,074.00	$103,274.00
Other (specify)	$0.00	$0.00	$0.00
Agency for Workforce Innovation			
WAGES/Workforce Board	$0.00	$0.00	$0.00
Other (specify)	$0.00	$0.00	$0.00
Commission for the Transportation Disadvantaged			
Non-Sponsored Trip Program	$700,173.00	$0.00	$700,173.00

Non-Sponsored Cap. Equip.	$0.00	$0.00	$0.00
Rural Capital Equip.	$0.00	$0.00	$0.00
TD Other (specify)	$0.00	$0.00	$0.00
Department of Children and Families			
Alcohol, Drug Abuse & Mental Health Program	$0.00	$0.00	$0.00
Family Safety & Preservation	$0.00	$0.00	$0.00
Other (specify)	$0.00	$0.00	$0.00
Department of Community Affairs			
Community Services	$0.00	$0.00	$0.00
Other (specify)	$0.00	$0.00	$0.00
Department of Education			
Carl Perkins Vocational Ed. Act	$0.00	$0.00	$0.00
Division of Blind Services	$0.00	$0.00	$0.00
Vocational Rehabilitation	$0.00	$0.00	$0.00
Day Care Programs	$0.00	$0.00	$0.00
Other (specify)	$0.00	$0.00	$0.00
Department of Elder Affairs			
Older Americans Act	$0.00	$0.00	$0.00
Community Care for the Elderly	$0.00	$0.00	$0.00
Other (specify)Senior Friendship Center	$93,665.00	$0.00	$93,665.00
Department of Health			
Children's Medical Services	$0.00	$0.00	$0.00
Office of Disability Deter.	$0.00	$0.00	$0.00

County Public Health Unit	$0.00	$0.00	$0.00
Other (specify)	$0.00	$0.00	$0.00
Department of Juvenile Justice			
(specify)	$0.00	$0.00	$0.00
Department of Transportation			
49 USC 5307 (Section 9)	$0.00	$0.00	$0.00
49 USC 5310 (Section 16)	$43,765.00	$14,355.00	$58,120.00
49 USC 5311 (Section 18)	$0.00	$0.00	$0.00
490USC 5311(f) (Section 18i)	$0.00	$0.00	$0.00
Block Grant	$0.00	$0.00	$0.00
Service Development	$0.00	$0.00	$0.00
Commuter Assistance Program	$0.00	$0.00	$0.00
Other DOT (Specify)	$0.00	$0.00	$0.00
Local Government			
School Board Service	$0.00	$0.00	$0.00
Complementary ADA Service	$0.00	$0.00	$0.00
County Cash	$0.00	$0.00	$0.00
County In-Kind	$0.00	$0.00	$0.00
City Cash	$0.00	$0.00	$0.00
City In-Kind	$0.00	$0.00	$0.00
Other Cash (specify)	$0.00	$0.00	$0.00
Other In-Kind (specify)	$0.00	$0.00	$0.00
Local Non-Government			
Farebox	$16,788.00	$0.00	$16,788.00

Donations, Contributions	$43,559.00	$0.00	$43,559.00
In-Kind Services	$0.00	$0.00	$0.00
Other Non-Government	$85,326.00	$0.00	$85,326.00
Other Federal or State Programs			
(specify)	$0.00	$0.00	$0.00
(specify)	$0.00	$0.00	$0.00
(specify)	$0.00	$0.00	$0.00
GRAND TOTAL:	$1,224,078.00	$89,429.00	$1,313,507.00

FLCTD
Annual Operations Report
Section VII: Expense Sources

County: **Lee**		Fiscal Year: **July 1, 2014 - June 30, 2015**	
Status: Saved with Issues			
Section VII: Financial Data			
2. Expense Sources			
Expense Item	**Community Transportation Coordinator**	**Coordination Contractor**	**TOTAL EXPENSES**
Labor (501):	$1,238,953.00	$327,188.00	$1,566,141.00
Fringe Benefits (502):	$375,898.00	$85,429.00	$461,327.00
Services (503):	$190,891.00	$70,639.00	$261,530.00
Materials and Supplies Cons. (504):	$566,919.00	$29,531.00	$596,450.00
Utilities (505):	$11,682.00	$1,920.00	$13,602.00
Casualty and Liability (506):	$174,041.00	$73,962.00	$248,003.00
Taxes (507):	$0.00	$21,367.00	$21,367.00
Purchased Transportation Services (508)			
Bus Pass Expenses:	$2,060.00	$0.00	$2,060.00
School Bus Expenses:	$0.00	$0.00	$0.00
Other:	$0.00	$0.00	$0.00
Miscellaneous (509):	$0.00	$0.00	$0.00
Interest (511):	$57,579.00	$0.00	$57,579.00
Leases and Rentals (512):	$0.00	$6,501.00	$6,501.00
Annual Depreciation (513):	$267,903.00	$113,725.00	$381,628.00
Contributed Services (530):	$0.00	$0.00	$0.00
Allocated Indirect Expenses:	$0.00	$6,624.00	$6,624.00
GRAND TOTAL:	$2,885,926.00	$736,886.00	$3,622,812.00

Level of Competition
Worksheet 2

1. Inventory of Transportation Operators in the Service Area

	Column A Operators Available	Column B Operators Contracted in the System.	Column C Include Trips	Column D % of all Trips
Private Non-Profit		3		
Private For-Profit		1		
Government		0		
Public Transit Agency		1	2,416	1.76%
Total		5	137,344	100%

2. How many of the operators are coordination contractors? 2

3. Of the operators included in the local coordinated system, how many have the capability of expanding capacity? all

   Does the CTC have the ability to expand? Yes

4. Indicate the date the latest transportation operator was brought into the system. June 2008

5. Does the CTC have a competitive procurement process? Yes

6. In the past five (5) years, how many times have the following methods been used in selection of the transportation operators?

0	Low bid	0	Requests for proposals
0	Requests for qualifications	0	Requests for interested parties
0	Negotiation only		

Which of the methods listed on the previous page was used to select the current operators?

Continuing contract on a year to year basis.

7. Which of the following items are incorporated in the review and selection of transportation operators for inclusion in the coordinated system?

x	Capabilities of operator		x	Scope of Work
x	Age of company		x	Safety Program
x	Previous experience			Capacity
x	Management			Training Program
x	Qualifications of staff			Insurance
x	Resources			Accident History
	Economies of Scale			Quality
x	Contract Monitoring			Community Knowledge
x	Reporting Capabilities			Cost of the Contracting Process
x	Financial Strength			Price
	Performance Bond			Distribution of Costs
	Responsiveness to Solicitation			Other: (list)

8. If a competitive bid or request for proposals has been used to select the transportation operators, to how many potential operators was the request distributed in the most recently completed process? n/a

How many responded? _____

The request for bids/proposals was distributed:

_____ Locally _____ Statewide _____ Nationally

9. Has the CTC reviewed the possibilities of competitively contracting any services other than transportation provision (such as fuel, maintenance, etc…)? yes

Level of Availability (Coordination)
Worksheet 3

Planning – What are the coordinated plans for transporting the TD population?

Planning is carried out in conjunction with the Planning Agency and the Local Coordinating Board.

Public Information – How is public information distributed about transportation services in the community?

Public information is distributed through media, brochures, bus-side advertising and FaceBook

Certification – How are individual certifications and registrations coordinated for local TD transportation services?

Applicants - 1) must have a disability; 2) income below poverty level, 3) Elderly and no other vehicle available.

Eligibility Records – What system is used to coordinate which individuals are eligible for special transportation services in the community?

TD trust fund application is used. State agency relies on passenger authorization. Rely on agency information.

Call Intake – To what extent is transportation coordinated to ensure that a user can reach a Reservationist on the first call?

There are only 2 reservationists. Telephone messages are checked before noon, and again before the end of the business day. There is also a web-based intake.

Reservations – What is the reservation process? How is the duplication of a reservation prevented?

Duplication is prevented because there is only one intake system, and it will identify if a reservation has already been made.

Trip Allocation – How is the allocation of trip requests to providers coordinated?

NA

Scheduling – How is the trip assignment to vehicles coordinated?

Coordinated through a Task Flow Chart and Timeline. Reservationist records and sends to Scheduler.

Transport – How are the actual transportation services and modes of transportation coordinated?

Trips are assigned to the vehicle type needed (wheel chair or ambulatory.) Most vehicles are wheel chair accessible.

Dispatching – How is the real time communication and direction of drivers coordinated?

Two-way communication

General Service Monitoring – How is the overseeing of transportation operators coordinated?

This is done through the Task Flow Chart (Set 3).

Additionally, M.H. maintains a spreadsheet to track SSPP related information.

Daily Service Monitoring – How are real-time resolutions to trip problems coordinated?

Through dispatch. The Operations Manager handles any trip problems that may arise.

Trip Reconciliation – How is the confirmation of official trips coordinated?

Confirmation that trips were taken, is coordinated by using the Trip Manifests, checked by Finance and data entry.

Billing – How is the process for requesting and processing fares, payments, and reimbursements coordinated?

This is an 8 step process. Steps 4, 5, and 6 are Execution, Reconciliation and Billing/Invoice preparation.

Reporting – How is operating information reported, compiled, and examined?

Operating information is obtained from the manifests and reported to the Operations Manager.

Cost Resources – How are costs shared between the coordinator and the operators (s) in order to reduce the overall costs of the coordinated program?

Very few trips are allocated to the subcontractors. The costs are not shared.

Information Resources – How is information shared with other organizations to ensure smooth service provision and increased service provision?

Through constant telephonic or e-mail communication with the funding/purchasing agencies.

Overall – What type of formal agreement does the CTC have with organizations, which provide transportation in the community?

N/A.

Add-Ins to Lee LCB Evaluation of the CTC, Good Wheels' – FY 14-15.

Page 10 - #12. The TD Riders/Beneficiaries are notified through a letter of approval. Everyone is required to complete a form entitled, "Transportation Disadvantaged and/or Medicaid Transportation Determination Form" which is submitted to Good Wheels for processing and approval.

Page 18 – Prioritization Policy:

1. Medical.
    a. Critical trips
        i. Kidney dialysis
        ii. Cancer treatment
        iii. Mental health care
    b. Other
        i. General medical appointments
        ii. Therapy
        iii. Prescriptions
        iv. Children at risk
2. Nutritional.
3. Employment.
4. Training/Education.
5. Life sustaining
6. Recreation.

CUSTOMER SERVICE GRIEVANCE PROCEDURES

INCOMING CALLS:

- TAKE NOTES (NATURE OF GRIEVANCE)
- ASK FOR NAME, PHONE NUMBER, ADDRESS AND CLIENT NAME
- FILL OUT GRIEVANCE FORM
    - Include any information from : dispatch, reservationists, and drivers
- FILL OUT GRIEVANCE LOG
- Make two copies of grievance
    - One goes to Mr. Mandel
    - Original goes in the Grievance Log Book

VOICE MAIL CALLS

- TAKE NOTES
    - INCLUDE PHONE NUMBER
    - CALL PERSON THAT LEFT THE MESSAGE
    - FOLLOW THE STEPS ABOVE

IF NEEDED MAKE FOLLOW UP CALL PERSON INVOLVED IN GREIVANCE WITH ANY UP DATE ON THE SITUATION THAT CAUSED THE GRIEVANCE.

TASK FLOW CHART & TIMELINE

	TASK	TIMELINE
Step 1	Authorization	Trip Day (-) Infinity
	↓	
Step 2	Reservation	Trip Day – 1 to 30
	↓	
Step 3	Scheduling	Trip Day - 1
	↓	
Step 4	Execution	Trip Day
	↓	
Step 5	Reconciliation	Trip Day + 1 to 3
	↓	
Step 6	Billing	Trip Day + 5 to 10
	↓	
Step 7	Receiving	Trip Day + 10 to 30
	↓	
Step 8	Payment	Trip Day + Infinity

Service Standards

Lee County CTC – Policies and Standards, Evaluation and Monitoring		
Rule	**41-2.006(4)(a), FAC:** Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident and reasonable suspicion, return to duty and follow-up as required by Federal Highway Administration (FTA).	Reviews are conducted according to FTA. Conducted by FDOT reps.
Compliance	All safety sensitive job positions comply with the pre-employment, randomization, post-accident and reasonable suspicion testing requirements of the Federal Transit Administration.	
Monitoring	Annual reviews conducted by FDOT, FHWA or FTA will determine compliance with this standard.	
Rule	**41-2.006(4)(b), FAC:** An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the Local Service Plan.	Verified by bus ride
Compliance	In order to enhance the safety of passengers and drivers, children under age 15 or other people who, due to age or disabilities may be at risk to themselves or others, must be accompanied by an escort or attended to by an attendant. Escorts must be provided by the passenger or the agency paying for their trip. The escort must be able to provide the necessary assistance to the passenger. Escorts are transported at no additional charge. The CTC reserves the right to refuse to transport a passenger or group of passengers if they need an escort, but do not have one. The need for an escort is determined in advance of the trip. "Traveling companions" are not the same as required. Escorts that have to be picked up or dropped off before/after passengers are not considered escorts, but are regular trips.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(c), FAC:** Use of child restraint devices in Florida is a State law.	Verified by bus ride (car seat on bus)
Compliance	All passengers under the age of 5 and/or less than 45 pounds will be required to use a child restraint device. This device will be provided by parent or sponsoring agency, or by Good Wheels upon arrangement.	
Monitoring	Annual reviews conducted by FDOT, FHWA or FTA will determine compliance with this standard.	

Rule	**41-2.006(4)(d), FAC:** Passenger property that can be carried by the passenger and/or driver in one trip and can safely bestowed on the vehicle, shall be allowed to be transported with the passenger at no additional charge. Additional requirements may be negotiated for carrying and loading rider property beyond this amount.	Verified by bus ride
Compliance	Evaluated at the CTC Annual Review.	
Monitoring	Passengers shall be allowed to have four pieces of personal property which they can place on their lap or stow under their seat. Passengers must be able to independently carry all items brought onto the vehicle. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices or intravenous devices.	
Rule	**41-2.006(4)(e), FAC:** Vehicle transfer points shall provide shelter, security and safety of passengers.	VA Center Rosa Parks Edison Mall Hospitals
Compliance	The CTC does not generally use transfers in the coordinated system, but if they are used, vehicle transfer points shall be located in a safe, secured place that provides shelter.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(f), FAC:** 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. This shall include advising the unsatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the Local Coordinating Board.	Verified by bus ride, sticker on bus
Compliance	The local toll free phone number will be included in the complaint process. This number will be posted on right visor of all vehicles in 3" sized numbers: (800) 741-1570.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(g), FAC:** Out of service area trips shall be provided when determined locally and approved by the Local Coordinating Board, except in instances where local ordinances prohibit such trips.	Verified by bus ride
Compliance	The local toll free phone number will be included in the complaint process. This number will be posted on right visor of all vehicles in 3" sized numbers: (800) 741-1570.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(h), FAC:** Interior of all vehicles shall 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 passenger.	Verified by bus ride
Compliance	All vehicles shall be cleaned and maintained (interior and exterior) on a regular schedule.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	**41-2.006((4)(i), FAC:** Billing requirements of the CTC subcontractors shall be determined locally by the Local Coordinating Board and provided in the Local Service Plan. All payments shall be paid to subcontractors within seven calendar days after receipt of said payment by the CTC. If the contractor receives less than full payment, then the contractor shall be required to disburse only the funds received on a pro rata basis with each subcontractor receiving a prorated portion based on the amount due on the payment.	Verified by operators
Compliance	The CTC shall pay all bills to the subcontracted transportation operator within seven days after receipt of payment. Operator payments will be addressed as a standard LCB agenda item.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	
Rule	**41-2.006(4)(j), FAC:** Passenger/trip database must be maintained or accessible by the CTC on each rider being transported within the system.	Verified by review of records
Compliance	For each passenger transported within the system, the CTC will collect the name, phone number, address, funding source eligibility and special requirements on each passenger in a database. See 2.10 (2.15) for HIPPA Compliance.	
Monitoring	Evaluated at the CTC Annual Review	
Rule	**41-2.006(4)(k), FAC:** Adequate seating for para-transit services shall be provided to each rider and escort, child or personal care attendant, and no more passengers than the registered passenger seating capacity shall be scheduled or transported in a vehicle at any time. For transit services provided by transit vehicles, adequate seating or standing space will be provided to each rider and escort, child or personal care attendant, and no more passengers than the registered passenger seating or standing capacity shall be scheduled or transported in a vehicle at any time.	Verified by bus ride
Compliance	Vehicle seating will not exceed the manufacturer's recommended capacity.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	**41-2.006(4)(l), FAC:** Drivers for para-transit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle.	Verified by bus ride
Compliance	Drivers shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with specific passengers, upon pickup except in situations where the driver regularly transports the rider on a recurring basis. All drivers will have a name badge displayed at all times when transporting passengers. Drivers have photo-id on their person that they can show to the passenger upon request.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**Rule 41-2.006(4)(m), FAC:** The para-transit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seatbelt or utilization of wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. In door-through-door para-transit 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 passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian and driver.	Verified by bus ride
Compliance	All drivers shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include holding hands, or allowing the passenger 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. Other assistance may be provided as needed and accepted. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down any steps; only ramps are to be used.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**Rule 41-2.006(4)(n), FAC**: Smoking is prohibited in any vehicle. Requirements for drinking and eating on board the vehicle will be addressed in the Local Service Plan.	Verified by bus ride; signage is on bus
Compliance	Smoking, eating and drinking is prohibited on any vehicle in the coordinated system.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	**Rule 41-2.006(4)(o), FAC**: The CTC and the LCB shall jointly develop a policy on passenger no shows**.** Assessing fines to passengers for no shows is acceptable but such policy and process shall be identified in the local Service Plan.	Mr. Mandel reports the frequency is decreasing.
Compliance	Passenger no-shows are defined as trips not canceled one hour before scheduled pickup. When a passenger is considered a no-show, the driver will attempt to communicate with them through CTC dispatch. They will be notified through the use of a door hanger which notes the time the driver arrived. For a TD Grant non-sponsored trip, upon the third no-show, the CTC will send a letter to the person to provide notice that their service will be suspended for thirty days. For trips sponsored by other funding sources, the CTC shall contact the agency when a no-show occurs. Agencies should also contact the CTC when they become aware of cancellations or no-show situations. The Policy on no-shows shall be communicated to the passengers and agencies by the CTC when adopted, and thereafter to all newly enrolled passengers. The information shall be distributed in the appropriate format and shall be available in alternative formats upon request.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**Rule 41-2.006(4)(p), FAC**: All vehicles ordered or put into service after the adoption of this section of the Rule, and providing service within the coordinated system, shall be equipped with two-way communications in good working order and be audible to the driver at all times to the base.	Verified by bus ride
Compliance	All vehicles are equipped with two-way radios or cell phones.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**Rule 41-2.006(4)(q), FAC**: All vehicles ordered or put into service after the adoption of this section of the rule and providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.	Verified by bus ride
Compliance	All vehicles have working air conditioning and heating. Vehicles that do not have a working air conditioner and heater will be scheduled for repair or replacement as soon as possible. Should a vehicle incur a problem, it will be repaired as soon as possible. The priority of the LCB is that the CTC provide transportation. If a vehicle's air conditioning or heating is not functioning properly, and if there are no other vehicles available, the passengers will be transported.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	**41-2.006(4)(r), FAC**: First Aid policy shall be determined locally and provided in the local Service Plan.	1st Aid kit on bus, Verified by bus ride. Also, driver training records were verified.
Compliance	All drivers will be trained in First Aid every three years by the National Safety Council. All vehicles are equipped with a First Aid kit.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(s), FAC**: Cardiopulmonary Resuscitation [CPR] policy shall be determined locally and provided in the Local Service Plan.	Driver training records were verified.
Compliance	All drivers will be trained in Cardiopulmonary Resuscitation [CPR] every two years.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(t), FAC**: Driver criminal background screening shall be determined locally, dependent upon purchasing agencies' requirements and provided in the local TDSP.	Driver records were verified.
Compliance	All drivers in the coordinated system have a favorable FDLE background, using DCF policies and procedures.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(u), FAC**: In areas where fixed route transportation is available, the CTC should jointly establish with the LCB a percentage of total trips that will be placed on the fixed route system.	Per APR the rate is 5.4% on fixed route.
Compliance	The LCB has established a goal of 2.2% to be placed with the fixed-route transit system.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(v), FAC**: The CTC should establish and address the passenger pick-up window in the local TDSP. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.	Complaint log was reviewed.
Compliance	Passengers are not given a set pick-up time. Instead, they are told to be ready for their ride to arrive up to an hour before their destination appointment time. The CTC may negotiate special pick-up arrangements with the customer, in advance, as the situation dictates. Passengers will be dropped off at their appointment with certain exceptions negotiated in advance. All return trips are scheduled in advance. Passengers should expect their return vehicle to arrive at the scheduled time, up to 30 minutes after the scheduled return time. Passengers can expect their return trip to take up to 60 minutes from the time they are seated on the vehicle.	
Monitoring	Evaluated from the annual CTC customer complaint surveys. Doesn't apply to ADA trips.	

Rule	**41-2.006(4)(w), FAC**: The CTC and the LCB should jointly establish and address the percentage of trips that will be on-time in the local Transportation Disadvantaged Service Plan. This performance measure should be communicated to contracted operators, drivers, purchasing agencies and passengers.	Records verified.
Compliance	The CTC will have an 85% on-time performance rate for all completed trips. The Evaluations of the CTC's on-time performance will be measured based upon the time the person is to be dropped off for their appointment and the time the person is to be picked up on a scheduled return trip. These are considered separate trips.	
Monitoring	Evaluated from the annual CTC customer complaint surveys. Doesn't apply to ADA trips.	
Rule	**41-2.006(4)(x), FAC**: The CTC should establish and address in the TDSP a minimum 24 hour advanced notification time to obtain services. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.	TDSP reviewed
Compliance	There will be a minimum 24 hour notice requirement for all trips scheduled within the coordinated system. (72 business hours for Medicaid trips.) Non-Medicaid reservations must be made before Noon the day before the requested trip. Passengers with an urgent need to travel should call the CTC. Same day trip requests cannot be guaranteed, however, the CTC will attempt to assist the passenger.	
Monitoring	As established.	
Rule	**41-2.006(4)(y), FAC**: The CTC and the LCB should jointly establish and address in the service plan a performance measure to evaluate the safety of the coordinated system. This measure should be used in the CTC evaluation of its contracted operators and the LCB's evaluation of the CTC.	Yes, per AOR and APR
Compliance	The standards for crashes will be 1.2, or fewer, accidents per 100,000 miles for the evaluation period, based on the AOR definitions of crashes.	
Monitoring	This information is part of the annual AOR.	
Rule	**41-2.006(4)(z), FAC**: The CTC and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the reliability of the vehicles used in the coordinated system. This measure should be used in the CTC evaluation of its contracted operators and the LCB's evaluation of the CTC.	Yes, per AOR and APR
Compliance	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).	
Monitoring	This information is part of the annual AOR.	

Rule	**41-2.006(4)(aa), FAC**: This performance measure can be used to address the accessibility of the service. The CTC and the LCB should jointly determine if a standard for call hold time is needed in the coordinated system and address this in the local service plan. If determined to be necessary, this standard should be included in the LCB's evaluation of the CTC.	Yes, this has been verified.
Compliance	The customer should not be put on hold for more than 3 minutes on average.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(bb), FAC**: The CTC and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the quality of service provided within the coordinated system. This measure should be used in the CTC's evaluation of its contracted operators, and the LCB's evaluation of the CTC.	Yes, per AOR and APR
Compliance	Complaints shall not exceed 1% of total trips provided during the evaluation period. The LCB should evaluate the CTC based upon the number of complaints that are resolved, versus unresolved.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	

Lee County CTC – Policies and Standards, Evaluation and Monitoring - Other		
Policy	**2.01 Service Effectiveness** 2.01a – Expense, 2.01b – Revenue, 2.01c – Subsidy, 2.01d – Ridership, 2.01.e – Service Quality, 2.01f – Level of Service, 2.01g -- Safety	Yes, per AOR and APR
Compliance	The CTC shall continually look for methods to: 1. Increase the number of passenger trips per driver hour; 2) Minimize any yearly increase to the cost per passenger trip; and 3) Minimize any yearly increase to the cost per driver hour.	
Monitoring	This information is part of the annual AOR.	
Policy	**2.02 Contract Monitoring**	Monitoring is conducted annually in June
Compliance	The CTC will perform an annual evaluation of the contracted operators using the LCB evaluation process, using applicable portions of the evaluation materials, and provide a copy of the annual evaluation of the operators.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.03 Ride time**	Yes, per review of complaint log
Compliance	The CTC will make every effort to abide by funding agencies stated ride times. Passengers can expect to return home within 60 minutes of their pick up. In situations where it becomes apparent that the ride time will exceed this (crashes or vehicular breakdowns), the CTC will make every effort to contact the families of the passengers by telephone.	
Monitoring	The CTC needs to document which agencies have ride time limits and other exceptions. Community Care for the Elderly (CCE) = 90 minutes. This Policy does not apply to ADA trips.	

Policy	**2.04 Voice Mail Changes**	Yes, this takes place when needed
Compliance	The CTC must ensure that customers are provided with sufficient notification of pending major changes to the phone system for scheduling trips or for reporting complaints. The recording should offer in English and in Spanish, the date of the change and describing the changes that will take place.	
Monitoring	Voice mail changes need to be announced in advance and detailed.	
Policy	**2.05 Standardization of Transportation Operator and Coordination Contracts.**	Yes, the suggested formats are being used.
Compliance	The suggested contract format is used.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.06 Eligibility Criteria**	Yes, the records were reviewed.
Compliance	Persons are eligible for transportation if their trip is sponsored by a funding agency. If no funding agency is available and if the person meets the definitions of transportation disadvantaged, then they are eligible for transportation. The LCB's policy is for the CTC to provide transportation to persons whose household income is at 200% of the poverty levels. Persons to be transported contact the CTC for an application. The CTC will transport the general public who shall be charged the going rate for trips.	
Monitoring	As established	
Policy	**2.07 Prioritization of Trips**	Yes, the records were reviewed.
Compliance	The CTC, LCB and planning staff have prioritized trips in the TDSP.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.08 Insurance:** The CTD requires that the CTC carry $100,000 per person/$200,000 per incident in insurance, pursuant to Rule 41-2.006, FAC.	Yes, the records were reviewed.
Compliance	The CTC carries $1 million per County regulations. The CTC requires its subcontracted operators to carry $100,000/$200,000. The subcontractors must have the CTC named as an additional insured. Insurance requirements for subcontractors are covered in more detail in the operators' contracts. The CTC carries $1 million per County regulations. The CTC requires its subcontracted operators to carry $100,000/$200,000. The subcontractors must have the CTC named as an additional insured. Insurance requirements for subcontractors are covered in more detail in the operators' contracts.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.09 System Safety Program Plans (SSPP)**	Yes, the records were reviewed.
Compliance	Updated annually.	
Monitoring	Evaluated at the CTC Annual Review.	

Policy	**2.10 Co-pays:** LCB's Policy on the $2.00 fare co-payment on the non-sponsored trip grant; other copayment issues.	Yes, the records were reviewed.
Compliance	The CTC charges a $2.00 fare on each non-sponsored trip. The monies collected are used for the local match for the trip grant. All co-payments are $2.00 except Medicaid, which has a $1.00 copayment.	
Monitoring	As established	
Policy	**2.11 Inclement Weather**	Yes, the records were reviewed.
Compliance	The LCB has a policy regarding provision of transportation to persons during storms. Components of the policy include: 1. The CTC is closed when LeeTran is closed; when ADA services stop. The CTC becomes a member of the Lee County Emergency Operations Team. 2. The CTC has the right to not transport clients of a center, if they believe that they will not be able to get a person back. (The CTC has the right to cancel trips.) 3. An agency program director has the right to call the CTC the morning of the trip and cancel trips for the day, if they feel the weather is too severe. This is based on if the Lee County Schools are not transporting that day. (On weekends, or days when schools are shut, the CTC shall use its best judgment.) 4. Centers must work with the CTC to develop a contingency plan that outlines what the center will do with its clients, in the event that the CTC cannot come pick the clients up at the appointed time due to severe storms. The contingency plan should be developed with the understanding that the delay may be for an unknown length of time. Centers should make sure that the family members of clients receive a copy of the contingency plan (or a page that outlines what the family members should expect.) 5. The features in 2, 3 and 4 should free up enough trips to allow the CTC to go get people who were transported out to a location without a contingency plan. 6. Clients at centers will be picked up as soon as it is safe to do so, and as soon as there are trips available. 7. For the purpose of this policy, a storm was defined as "sustained wind of 39 miles per hour or more, and/or major flooding of streets." "Gale force" winds are 39 to 46 mph.	
Monitoring	Presence of letters on file; Copies of Agencies' contingency plans on file with the CTC; CTC is to monitor storm warnings and weather conditions.	

Policy	**2.12 Distribution of Replacement Vehicles Acquired Through Grants.**	All of Good Wheels' vehicles are ADA compliant. The updated Vehicle inventory is supplied to the Planning Agency annually .
Compliance	Vehicles received through any grant funding source will be used to replace existing ADA-compliant or non-ADA regulation compliant vehicles currently in the system, according to the following priorities: 1.) Gasoline vehicles with over 175,000 miles, or diesel vehicles with over 225,000 miles, or vehicles over 5 years old; 2.) Non-ADA accessible vehicles; 3.) All other vehicles including sedans, standard vans, and other ADA accessible vehicles. It is the goal to have each vehicle in our system ADA compliant.	
Monitoring	The CTC will update the TDSP annually with an inventory of all vehicles used in the coordinated transportation system as Exhibit D.	
Policy	**2.13 Required Use of Seatbelts**	Yes, all vehicles are equipped with seatbelts and all passengers use them. And, all vehicles have wheel chair securement systems for the common wheel chairs.
Compliance	Passengers riding vehicles equipped with seatbelts will be required to use them. Persons utilizing wheelchairs will have the chair restrained, and will be required to utilize a personal securement device to ensure that they stay in the chair**.** All wheelchairs for transport must be complete and well maintained and in good working order to include fully operational brakes**.** Section 37.165©(3) of the DOT's ADA regulations allows a transit operator to establish a policy that requires all riders to have their common wheelchairs secured while aboard a transit vehicle. Therefore, service will be denied to a rider who refuses to allow his or her common wheelchair to be secured. Wheelchairs will be adequately secured or stored. If a passenger refuses to be secured, the passenger will not be transported. The CTC is to communicate it to all passengers and funding agencies. Under Section 37.5 of the DOT's ADA regulations, a transit operator is not permitted to mandate the use by wheelchair users of seatbelts and shoulder harnesses, unless the operator mandates the use of these devices by all passengers, including those sitting in vehicle seats. All passengers are required to use seatbelts.	
Monitoring	CTC will ensure that all appropriate vehicles are equipped with functioning seatbelts.	

Policy	**2.14 Disruptive Passengers**	The CTC reports this to the LCB on a case by case basis.
Compliance	When an agency has an existing policy regarding behavioral problems, the CTC abides by the agencies' existing policy, unless such behavior endangers other passengers, the driver or other motorists. In that case, the CTC may take whatever action is necessary to insure the safety of all concerned. If no policy exists and for TD passengers, the CTC will deal with behavioral problems including, but not limited to: fighting, intoxication and abusive behaviors as follows: First incident, a written warning to advise the person or his/her parent, guardian or responsible agency that an incident has occurred. (Unless the First Incident is of a serious, life threatening nature, then skip immediately to Step 2. It is also understood that the Driver may call 911 if ever needed. Second incident, the CTC will meet with all concerned parties and decide if transportation on the para-transit system is appropriate. Third incident, the CTC will meet with all concerned parties and decide if transportation on the para-transit system is appropriate.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	
Policy	**2.15 Compliance with HIPPA**	CTC is in compliance with HIPPA
Compliance	The CTC is compliant with HIPPA regulations.	
Monitoring	As required	
Policy	**2.16 Use of Scooter Mobility Devices**	Monitored during bus rides. Compliant.
Compliance	Good Wheels is unable to transport clients in scooters because they cannot be secured safely in our vehicles. Passengers who ride in scooters must be able to transfer to a seat or use an approved wheelchair when being transported by Good Wheels, Inc. This is a safety issue and we are concerned for your safety as well as other passengers and our driver.	
Monitoring	As established	
Policy	**2.17 Definition of Group Trip**	Monitored during bus rides. Compliant.
Compliance	A group trip shall be defined as 5 individuals or more.	
Monitoring	As established	

TDSP Minor Update

RECOMMENDED ACTION: Review and approve the Draft TDSP Minor Update

The TDSP Major Update was drafted and approved during the summer of 2013. For the Minor update staff, Good Wheels and LeeTran made minor updates to the document, which are listed below.

TDSP FY15-16 Changes:

- Date change to cover page
- Pg 17 and 18: Cert pg.
- Pg19: Updated TDSP Roll Call and date
- Pg25-27: Existing conditions/Unemployment/Housing info
- Pg 28: Organizational Structure
- Pg 29 2040 MPO LRTP update
- Pg 34: Population figures and city square miles. Waiting on figures from PA.
- Pg 35-37: Major employers and types of companies expected to grow in Florida
- Pg 38-39: Table 6 and Table 7 and Table 71 – Trip Purpose and Trip Funding
- Pg 42-43: Taxi services
- Pg 46-47: Needs Assessment
- Pg58: LeeTran fare rate and ADA trip numbers
- Pg58: Coordination Contract Agencies

LEE COUNTY LOCAL COORDINATING BOARD MEMBERSHIP CERTIFICATION

MPO Name: Lee County Metropolitan Planning Organization; 815 Nicholas Parkway East, Cape Coral, Florida 33990

The Lee County Metropolitan Planning Organization named above hereby certifies to the following:

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

Signature: _____ Date: February 19, 2016

Commissioner Brian Hamman, MPO Chair

	The Lee LCB has a Representative of:	Voting Member	Term Expires	Alternate's Name	Term Expires
1	The MPO or DOPA shall appoint one elected official to serve as the official Chairperson for all Coordinating Board meetings.	Rick Williams	December 2016	No alternate by law	
2	A. A local representative of the Florida Department of Transportation (FDOT)	Debra Stephens	Agency	Richard Shine	Agency
3	B. A local representative of the Florida Department of Children and Families (DCF)	Donna Torres	Agency	Nicole Negron	Agency
4	C. A local representative of the Public Education Community which could include, but not be limited to, a representative of the District School Board, School Board Transportation Office, or Headstart Program in areas where the School District is responsible	Roger Lloyd	Agency	Vacant	
5	D. In areas where they exist, a local representative of the Division of Vocational Rehabilitation Services or the Division of Blind Services, representing the Department of Education	Mary Watford	Agency	Flora Gonzalez	Agency
6	E. A person recommended by the local Veterans Service Office, representing Veterans of the county	Vacant		Vacant	
7	F. A person recognized by the Florida Association for Community Action representing the economically disadvantaged	Kim Hustad	Agency	Robin Jewett	Agency
8	G. A person over age 60 representing the Elderly in the county	Linda Carter	July 2016	Vacant	

	The Lee LCB has a Representative of:	Voting Member	Term Expires	Alternate's Name	Term Expires
9	H. A person with a disability representing the disabled in the county	Vacant		Vacant	
10	I--1.[One of Two] Citizen Advocates in the County	Michael Pierce	July 2017	Vacant	
11	I--2. [One of two] Citizen Advocates this one must be a person who uses the transportation service(s) of the system as their primary means of transportation.	David Lane	July 2016	Vacant	
12	J. A local representative for children at risk	Lorena Rodriguez	Agency	Sally Kreuscher	Agency
13	K. In areas where they exist, the Chairperson or designee of the local Mass Transit or Public Transit System's Board, except in cases where they are also the Community Transportation Coordinator.	Steve Myers	Agency	Peter Gajdjis Jill Brown	Agency
14	L. A local representative of the Florida Department of Elder Affairs	Elizabeth Severo	Agency	Chris Gorgon	Agency
15	M. An experienced representative of the local private for profit transportation industry. In areas where such representative is not available, a local private non-profit representative will be appointed, except where said representative is also the Community Transportation Coordinator.	Michael Griffin	December 2017	Anna Callwood	March 2018
16	N. A local representative of the Florida Agency for Health Care Administration	Joe Martinez	Agency	Patricia Brooks	Agency
17	O. A representative of the Regional Workforce Development Board established in Chapter 445, *Florida Statutes*	Deborah Reardon	Agency	Jim Wall	Agency
18	P. A representative of the local medical community, which may include, but not be limited to, kidney dialysis centers, long term care facilities, hospitals, local health department or other home and community based services, etc.	Heidi Shoriak	Agency	Vacant	Agency

TDSP ROLL CALL VOTE

REPRESENTATION	MEMBER	YES	NO	ALTERNATE	YES	NO	ABSENT
Chairperson	Cncl Williams						
FDOT	Deb Stephens			Richard Shine			
DCF	Donna Stephens			Nicole Negron			
Lee School District	Roger Lloyd			Vacant			
FDOE	Mary Watford			Flora Gonzalez			
Veterans	Vacant			Vacant			
Community Action	Kim Hustad			Robin Jewett			
Elderly	Linda Carter			Vacant			
Representing the Disabled	Vacant			Vacant			
Citizen Advocate	Michael Pierce			Vacant			
Citizen Advocate Using System	Vacant			Vacant			
Children at Risk	Lorena Rodriguez			Sally Kreuscher			
Public Transit	Steve Myers			Peter Gajdjis			
DEA	Elizabeth Severo			Chris Gorgon			
Private Transportation Industry	Michael Griffin			Anna Callwood			
AHCA	Joe Martinez			Patricia Brooks			
Career Source SWFL	Deb Reardon			Jim Wall			
Local medical community	Heidi Shoriak						

The Coordinating Board hereby certifies 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 on May 6, 2015.

Approved by the Lee County Local Coordinating Board for the Transportation Disadvantaged

Date **Rick Williams – Cape Coral City Council**

Approved by the Commission for the Transportation Disadvantaged

Date **Steven Holmes, Executive Director**

Existing Conditions

STATE OF FLORIDA
LOCAL AREA UNEMPLOYMENT STATISTICS BY METROPOLITAN STATISTICAL AREA (MSA) AND METROPOLITAN DIVISION (MD)
(NOT SEASONALLY ADJUSTED)

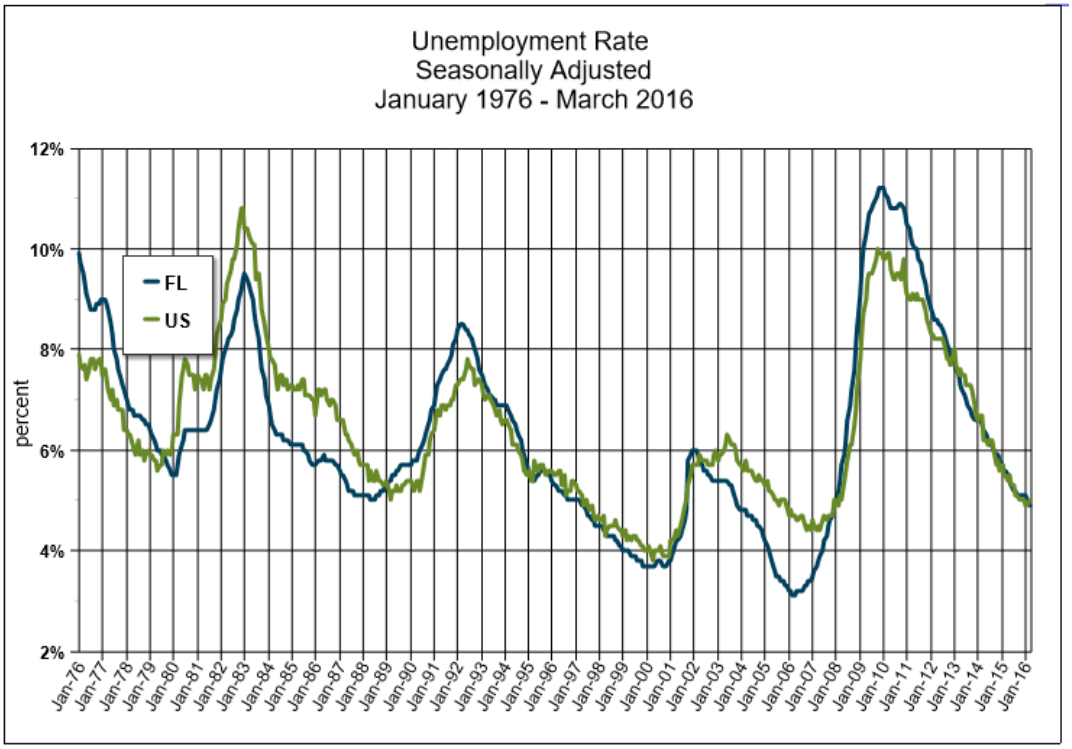
	MARCH 2016				FEBRUARY 2016				MARCH 2015			
	LABOR	EMPLOY-	UNEMPLOYMENT		LABOR	EMPLOY-	UNEMPLOYMENT		LABOR	EMPLOY-	UNEMPLOYMENT	
MSA/MD	FORCE	MENT	LEVEL	RATE	FORCE	MENT	LEVEL	RATE	FORCE	MENT	LEVEL	RATE
Cape Coral-Fort Myers MSA	327,564	313,615	13,949	4.3%	327,216	313,043	14,173	4.3%	321,223	305,384	15,839	4.9%
Crestview-Fort Walton Beach-Destin MSA	118,950	114,122	4,828	4.1%	116,119	111,182	4,937	4.3%	118,571	113,149	5,422	4.6%
Deltona-Daytona Beach-Ormond Beach MSA	287,843	273,703	14,140	4.9%	285,467	271,077	14,390	5.0%	282,082	265,604	16,478	5.8%
Gainesville MSA	138,375	132,806	5,569	4.0%	137,584	132,035	5,549	4.0%	136,336	130,194	6,142	4.5%
Homosassa Springs MSA	47,714	44,590	3,124	6.5%	47,372	44,169	3,203	6.8%	47,975	44,377	3,598	7.5%
Jacksonville MSA	730,809	698,575	32,234	4.4%	727,367	694,502	32,865	4.5%	717,870	679,913	37,957	5.3%
Lakeland-Winter Haven MSA	282,197	267,518	14,679	5.2%	280,791	265,808	14,983	5.3%	278,322	261,443	16,879	6.1%
Miami-Fort Lauderdale-West Palm Beach MSA	3,019,337	2,870,216	149,121	4.9%	3,029,126	2,883,616	145,510	4.8%	2,993,460	2,827,437	166,023	5.5%
Fort Lauderdale-Pompano Beach-Deerfield Beac	1,002,796	959,031	43,765	4.4%	1,002,682	958,604	44,078	4.4%	984,798	934,775	50,023	5.1%
Miami-Miami Beach-Kendall MD	1,316,704	1,242,709	73,995	5.6%	1,325,675	1,255,998	69,677	5.3%	1,318,451	1,235,639	82,812	6.3%
West Palm Beach-Boca Raton-Delray Beach MD	699,837	668,476	31,361	4.5%	700,769	669,014	31,755	4.5%	690,211	657,023	33,188	4.8%
Naples-Immokalee-Marco Island MSA	165,774	158,645	7,129	4.3%	165,325	158,067	7,258	4.4%	165,531	157,693	7,838	4.7%
North Port-Sarasota-Bradenton MSA	347,335	332,358	14,977	4.3%	346,033	330,826	15,207	4.4%	343,782	326,892	16,890	4.9%
Ocala MSA	131,326	124,043	7,283	5.5%	130,154	122,714	7,440	5.7%	131,122	122,677	8,445	6.4%
Orlando-Kissimmee-Sanford MSA	1,241,241	1,187,802	53,439	4.3%	1,234,918	1,180,894	54,024	4.4%	1,209,122	1,147,722	61,400	5.1%
Palm Bay-Melbourne-Titusville MSA	256,344	243,141	13,203	5.2%	256,267	242,905	13,362	5.2%	257,022	241,809	15,213	5.9%
Panama City MSA	93,420	89,055	4,365	4.7%	91,654	87,024	4,630	5.1%	94,148	89,053	5,095	5.4%
Pensacola-Ferry Pass-Brent MSA	213,594	203,709	9,885	4.6%	212,307	202,286	10,021	4.7%	210,707	199,570	11,137	5.3%
Port St. Lucie MSA	202,971	192,873	10,098	5.0%	202,747	192,409	10,338	5.1%	200,943	189,527	11,416	5.7%
Punta Gorda MSA	68,572	65,077	3,495	5.1%	68,219	64,641	3,578	5.2%	67,726	63,759	3,967	5.9%
Sebastian-Vero Beach MSA	61,967	58,540	3,427	5.5%	61,920	58,395	3,525	5.7%	61,498	57,706	3,792	6.2%
Sebring MSA	36,550	34,345	2,205	6.0%	36,653	34,407	2,246	6.1%	35,806	33,273	2,533	7.1%
Tallahassee MSA	188,056	179,727	8,329	4.4%	187,179	178,856	8,323	4.4%	186,679	177,215	9,464	5.1%
Tampa-St. Petersburg-Clearwater MSA	1,465,418	1,400,753	64,665	4.4%	1,456,173	1,390,735	65,438	4.5%	1,439,545	1,365,035	74,510	5.2%
The Villages MSA	29,033	27,076	1,957	6.7%	28,976	26,988	1,988	6.9%	28,646	26,463	2,183	7.6%
Florida (Not Seasonally Adjusted)	9,748,000	9,291,000	456,000	4.7%	9,722,000	9,264,000	458,000	4.7%	9,620,000	9,101,000	519,000	5.4%
Florida (Seasonally Adjusted)	9,809,000	9,331,000	478,000	4.9%	9,794,000	9,309,000	485,000	5.0%	9,602,000	9,067,000	535,000	5.6%
United States (Not Seasonally Adjusted)	158,854,000	150,738,000	8,116,000	5.1%	158,279,000	150,060,000	8,219,000	5.2%	156,318,000	147,635,000	8,682,000	5.6%
United States (Seasonally Adjusted)	159,286,000	151,320,000	7,966,000	5.0%	158,890,000	151,074,000	7,815,000	4.9%	156,890,000	148,333,000	8,557,000	5.5%

Released April 15, 2016

NOTE: Items may not add to totals or compute to displayed percentages due to rounding. All data are subject to revision.

FL Department of Economic Opportunity: http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/local-area-unemployment-statistics#

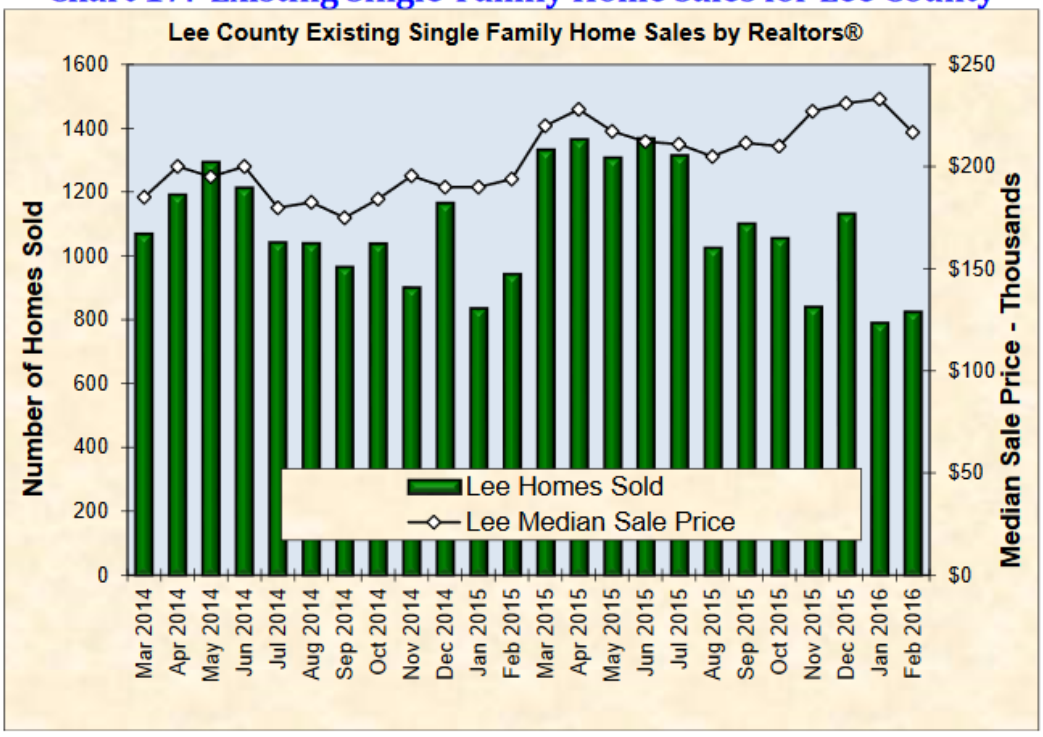
Below is the seasonally adjusted unemployment rate (seasonally adjusted) from January 1976 to March 2016.



Source: U.S. Department of Labor, Bureau of Labor Statistics, Local Area Unemployment Statistics Program (LAUS)
Prepared by: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, released **Friday, April 15, 2016**
Next Scheduled Release: **Friday, May 20, 2016**

The chart below shows Lee County had sales of 825 single family units in February 2016, a decrease of 13% from February 2015. Although they fluctuated, median prices are up 12% higher than a year ago.

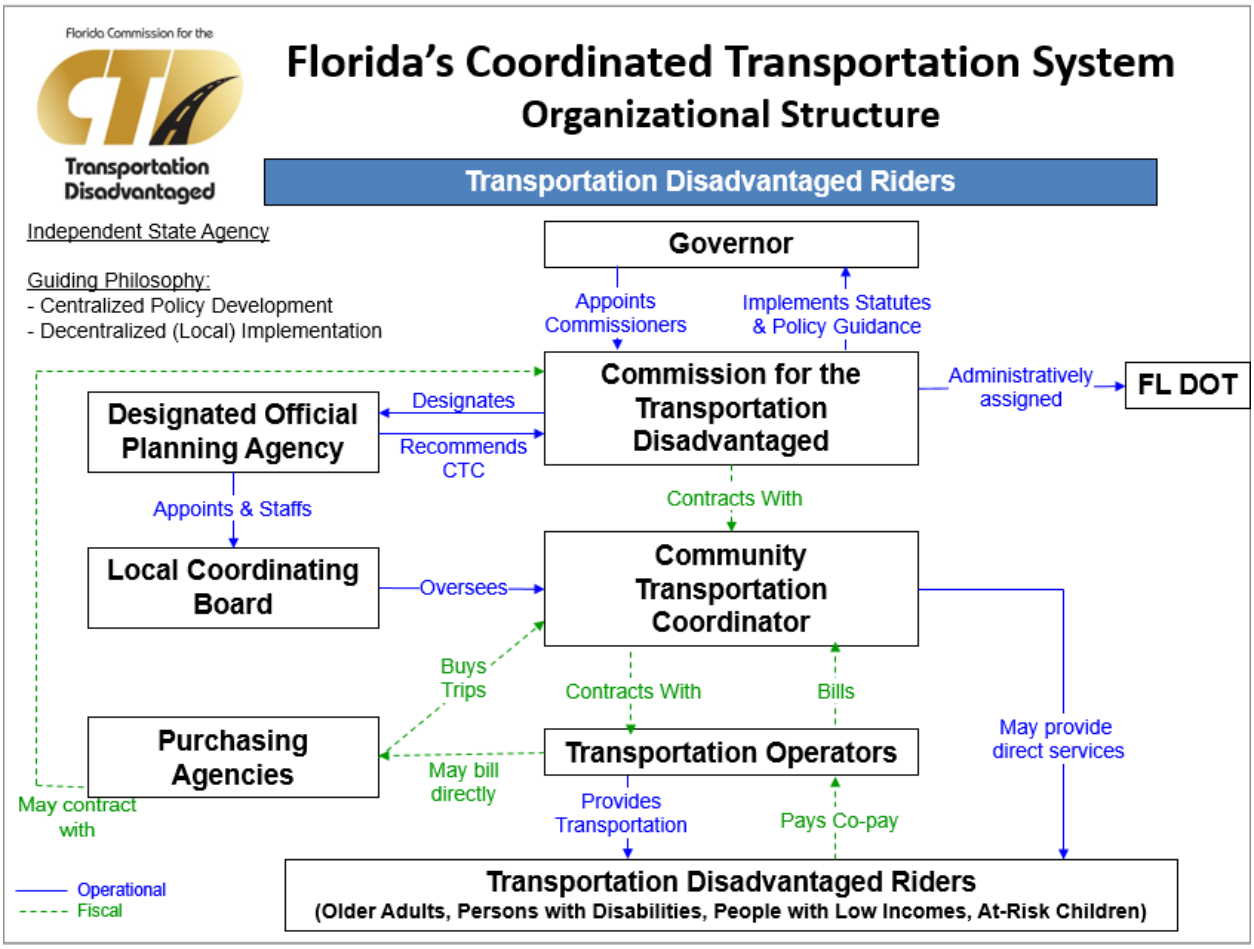
Chart 17: Existing Single-Family Home Sales for Lee County



Source: Realtor® Association of Greater Fort Myers and the Beach, Inc.

SWFL Regional Economic Indicators: FGCU

Organization Structure



e. ~~2035~~ 2040 Long Range Transportation Plan for the Fort Myers-Cape Coral Metropolitan Area
Adopted: ~~December 8, 2010~~ December 18, 2015

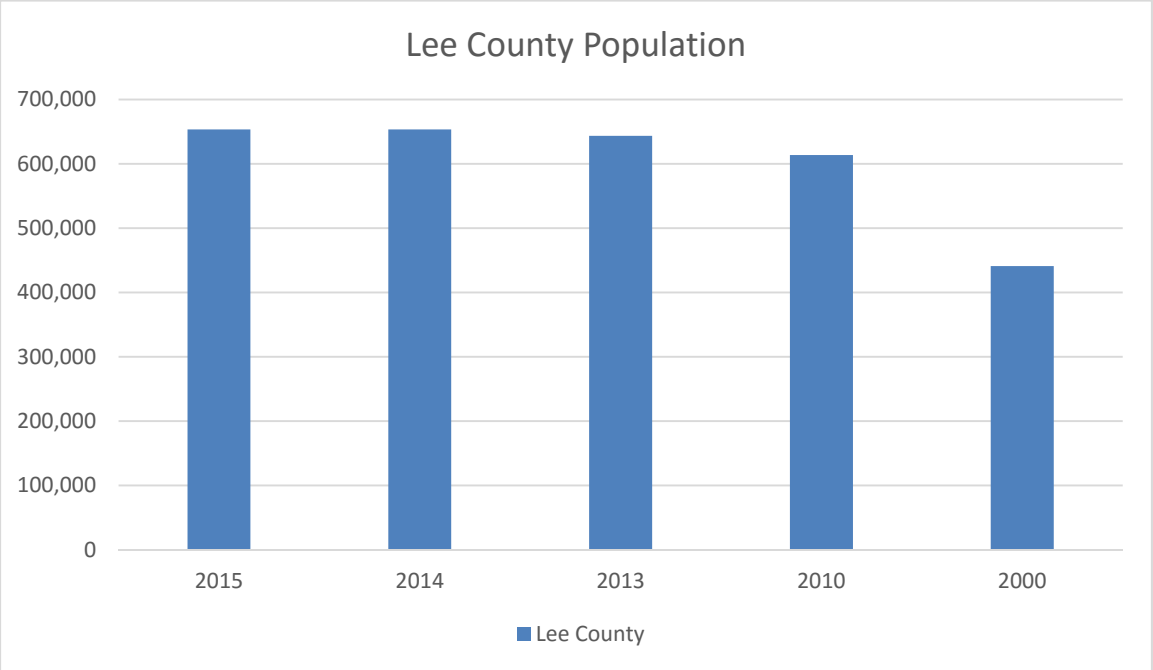
TABLE 1
Square Miles For Each Incorporated Municipality and the County

Land Area	Square Miles
Fort Myers	48.865
Cape Coral	109.9
Sanibel	15.3
Fort Myers Beach	2.5
Bonita Springs	39.6
Village of Estero	20.0?
Unincorporated Area	603.8?
Total Square Miles	**839.965**

Source: Lee County Property Appraiser's Office GIS Dept. (2016)

Area	2015 Estimate	2014 Estimate	2013 Estimate	2010 Estimate	2000 Actual
Florida	20,271,272*	19,507,369	19,317,568	18,537,969	15,982,378
Lee County	665,845	653,485	643,367	613,546	440,888
Bonita Springs	46,568	45,819	45,229	44,793	32,797
FM Beach	6,624	6,250	6,323	6,767	6,561
Fort Myers	72,395	69,437	67,081	68,190	48,208
Sanibel	6,502	6,490	6,497	6,211	6,064
Cape Coral	166,508	163,599	161,069	164,673	102,286

Source: US Census/BEBR April 2015/*July 1, 2015



Source: BEBR April 2015

TABLE 4
LEE COUNTY MAJOR EMPLOYERS 2013

Rank	Company	Product/Service	Employees
1	Lee Memorial Health System	Non-profit hospital/healthcare system	10425
2	Lee County School District	Public schools	10333
3	Publix Super Markets	Grocer, retail	4404
4	Lee County Administration	County government	2358
5	Wal-Mart	General merchandise--retail	1967
6	Chicos	Nat. store support center for women's apparel	1703
7	Lee County Sheriff's Office	Sheriff	1535
8	USPS	Postal Service	1477
9	FGCU	State University	1323
10	City of Cape Coral	Government	1197
11	Target	Retail	1100
12	Hope HealthCare Services	Care/services for people at the end of life	1000
13	Shell Point Retirement Comm.	Life care facility	952
14	City of Fort Myers	Life care facility	868
15	Lowes	Building materials	757
16	Comcast	Telecommunications	705
17	Edison State College	State college	635
18	21st Century Oncology	Corporate Headquarters	627
19	Alorica, Inc.	Customer service provider	592
20	South Seas	Resorts, call center	500
21	CenturyLink	Telephone local communications, wireless/PCS, broadband	500
22	Bank of America	Financial institution	500
23	Hyatt Regency Coconut Point	Hotel	494
24	Goodwill Industries	Non-profit organizations	494
25	Gartner	IT business, intelligence, finance and inside sales	469

Source: Lee County Economic Development Office, July 2013

Types of companies expected to grow in Florida

Industry	Annual Growth Rate
Construction of Buildings	4.1%
Specialty Trade Contractors	3.9%
Ambulatory Health Care Services	3.3%
Nonmetallic Mineral Product Mfg	3.0%
Nursing and Residential Care Facilities	2.8%
Heavy and Civil Engineering Construction	2.6%
Professional and Technical Services	2.4%
Wood Product Manufacturing	2.1%
Clothing and Clothing Accessories Stores	2.1%
Social Assistance	2.1%
Building Material & Garden Supply Stores	2.0%
Furniture and Home Furnishings Stores	2.0%
Administrative and Support Services	1.9%
Educational Services	1.9%
Electronics and Appliance Stores	1.8%
Motor Vehicle and Parts Dealers	1.8%
Support Activities for Transportation	1.8%
Real Estate	1.7%
Food Services and Drinking Places	1.7%
Electronic Markets and Agents/Brokers	1.7%

Companies expected to grow are based on a minimum of (100) openings and a growth rate of (1.55%) per year.

Source: Florida Department of Economic Opportunity - Bureau of Labor Market Statistics
Industry Projection Data 2015-2023
This page was last updated 04/20/2016 13:27:42

WPAA What People Are Asking.

TABLE 6
TD PASSENGER TRIPS BY PURPOSE IN LEE COUNTY

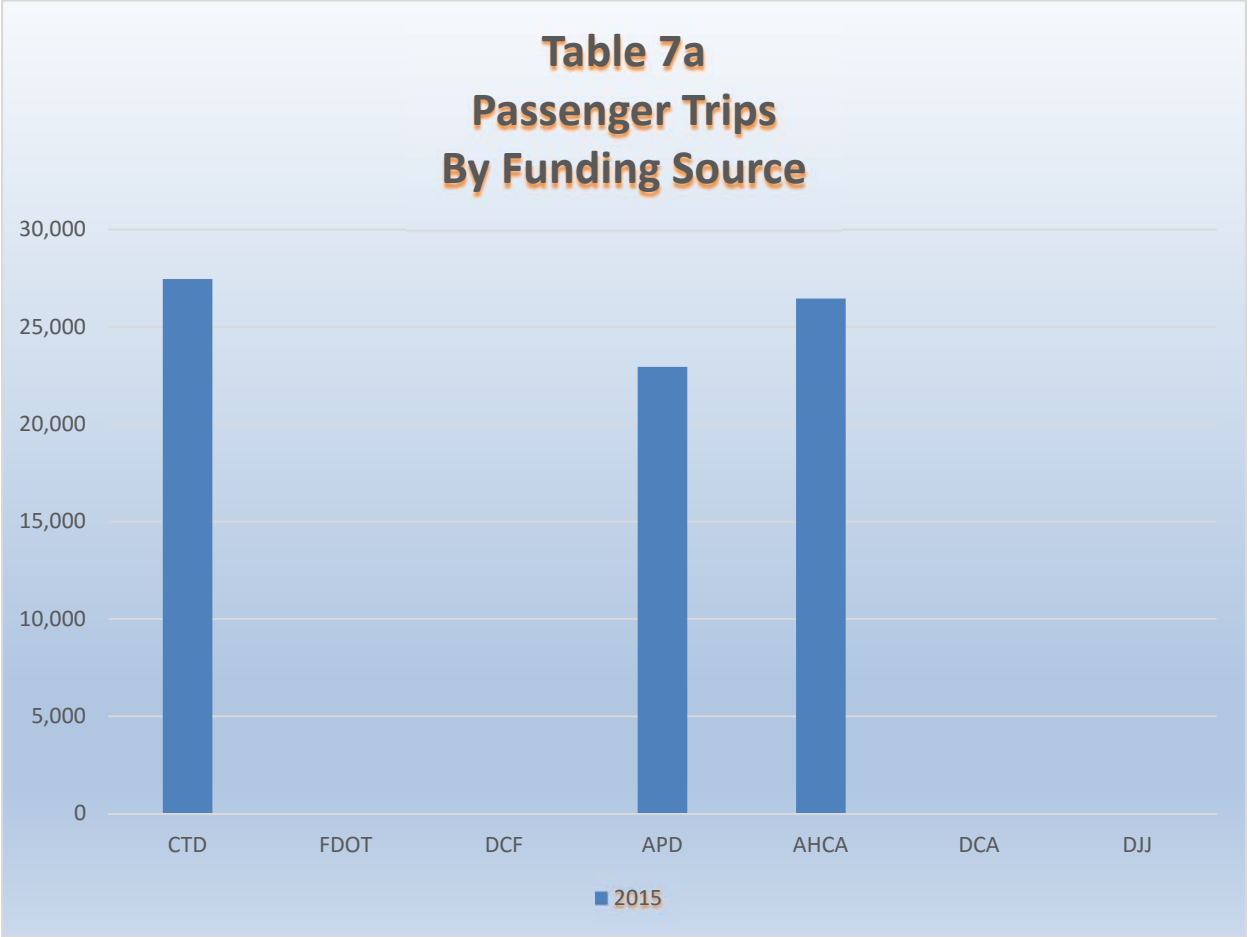
Purpose	Number of Trips 2013	Number of Trips 2014	Number of Trips 2015
Medical	78,274	95,041	54,559
Employment	0	0	0
Ed./Training/Daycare	29,345	10,512	23,466
Nutritional	1,014	0	3,544
Life Sustaining/Other	2,318	31,791	414
Total Trips	**110,951**	**137,344**	**81,983**

Source: CTD Lee ARP 2014

TABLE 7
PASSENGER TRIPS PROVIDED FUNDING SOURCE

Source	Number of Trips 2015
CTD	27,489
FDOT	0
DCF	0
APD	22,948
AHCA	26,457
DCA	0
DJJ	0

Source: CTD Lee ARP 2015



Source: CTD Lee ARP 2014

Lee County Taxi Services 2015		
24/7 AIRPORT EXPRESS	Airport TransportationShuttle Service	A-1 Cadillac Transportation
A-1 Taxi	A Aardvark Svc	A Better Taxi
A Flat Rate Airport Taxi Inc	A OnTime Ride OR 30% OFF LLC	AA Skyline Taxicabs Inc
AAA Airport Causeway Cab Co	AAA Palm Taxi Service	Aaron Airport Transportation

Aaron Airport Transportation	Aaron Nonsmoking Airport Limo & Taxi	Academy Taxi
Academy Taxi & Car Service	Academy Taxi & Car Svc	Air Port Shuttles & Trnsprtn
Airport Express	Airport Express Inc	Airport Taxi
Airport Taxi Inc	Airport Trans & Majestic Limousine Service	Alibi Transport LLC
AlleyGator Transport Express	Ambassador Transportation	Amber Airport Transportation
Amber Taxi	Angel Transportation Svc	Anytime Taxi
BEACH TAXI INC	Bluebird Taxi	C & C Taxi of Lehigh
C-4p's Inc	Captiva Island Shuttle Inc	Cape Cab
Cape Coral 2 RSW	Cape Coral Airport	Cape Coral Airport Shuttle
Cape Coral Taxi	Captiva Limousine Svc Inc	Caribean Taxi
Checker Airport Transportation	Coconut Airport Transportation	Coconut Cab Taxi
Comfort Transportation	Cuffley Cars	Dannyboys Airport Transportation
DannyBoys Transportation	Designatedd Drivers A Limo & Taxi Service	Diamond Limousine Transportation
Discount Transportation	Errol's Taxi Service	Fort Myers Beach Limo and Airport Shuttle
Fort Myers Beach Taxi	Fort Myers express taxi service	Fort Myers Limousine Service
Ft Myers Beach Taxi	Gregorio Taxi Inc	Hawks Taxicabs
Hawks Transportation	HIGHLANDER TAXI & LIMO	Lee Express Taxi
Lluberes Exec Chaufeer & Taxi Ser	Local Motion Taxi	Locomotion Taxi
Loris Coupon Cab	Lou's Taxi & Airport Trnsprtn	Majestic Transport
Maximum Taxi	MBA Airport Transportation	Me-And-U Cab Trans Inc
My Taxi	NightOwl Taxi of Fort Myers FLA.	Only Way To Go Transport LLC
Orange Taxi	Paradise Beach Taxi	Parrot Taxi Inc
Patriots Airport Transportation Services	Pedro's Transportation	Pine Island Taxi & Limo Inc
Porter's Taxi	Preferred Platinum Limousine	Proximiti Communications Inc
Rapid Transportation Services	Ron's Airport Transportation of Cape Coral	Royal Palm Transportation
Safeway Taxi Corp	Sanibel Island Taxi Inc	Santiva Cab Company
Superior Airport Shuttle	Taxi Tim Transportation	Taxista El Sol Y La Estrella
Tesla Transportation LLC	Thrifty Car Service	Tropical Breeze Taxi
Union Cab Inc	Uschi's Gulfcoast Transportation	Veterans Car Service
Yellow Cab	-	-
Source: Yellowpages.com		

Immediate Capital Needs Lee County:
In 2015, FDOT awarded 6 mini vans. These are on order and delivery is expected by May. Tire changing equipment and a balancer was awarded, ordered, and delivered. We anticipate a savings of $3,000 per month.

In 2016, capital funds of $902,042.58 were requested for:

- 7 paratransit vehicles and 1 van to replace vehicles with over 300,000 miles.
- To expand fleet by 5 vans for Medicaid
- IT scheduling software
- Replacement equipment for existing vehicles – AC/compressors and dryers and seat cushions

Good Wheels, in 2016, requested operating funds to:

- hire and train 30 additional drivers and provide continuing education to all drivers
- provide dialysis and chemo patients transportation in Lee County
- retain a grant management person

- upgrade the Good Wheels website, include ADA compliant features, as well as providing communication apps on social media for clients and others

Of the $395,000 requested, the allocation is as follows:

- driver training 19.1%
- transportation in Lee County 63.3%
- grant management 8.8%
- upgrade website 8.8%

More passengers are requesting trips than funding provided in 2015. As of July, 2016, The CTD, Commission Transportation Disadvantaged will increase funding for TD in Lee County. The permanent increase is approximately $20,000; the one year "Proviso" increase is $125,750.50. The $145,750.50 represents 90% of the grant. A local match of 10% is required which amounts to $16,194.50. The $161,945.00 increase will provide approximately 6,000 trips per year based on ambulatory rates.

Automated software which permits phone calls to confirm next day pick up has been developed and is now operational. It is anticipated this will mitigate No Shows.

Good Wheels received and fully invoiced for $88,000 in New Freedom Grant operating funds for new trips for the period of April 2015 through March 2016.

Good Wheels has been a recipient of funds through the new BOCC Partnering for Transportation Results Program that was implemented October 1, 2015 (Fy15/16) in the annual amount of $321,000. These funds are available for the CTC and other non-profit agencies to assist them in meeting their local match requirements for their respective 5310 Grant applications and awards from FDOT. As of April 21, 2016, the first round of funding was allocated in the amount of $100,000, with the second round of funding occurring soon. Recipients were as follows:

- Good Wheels: $40,000 in BOCC funds to be used as capital match against their 5310 capital grant projects.
- Hope Hospice: $20,000 in Bocc funds for operationg match.
- Dr. Piper: $20,000 in Bocc funds for operating match.
- Lighthouse of SWFL : $20,000 in BOCC funds for operating match.

LeeTran is going to the BOCC to execute agreements with agencies in May 2016.

LeeTran ADA Paratransit Service Ridership Numbers

FY	Trips	Vehicle Miles
2016*	118,000	1,556,000
2015	113,789	1,476,936
2014	109,281	1,488,560
2013	104,303	1,369,823
2012	102,274	1,310,353
2011	99,568	1,252,054

COORDINATION CONTRACT AGENCIES

Name of Agency	Address	City, State, Zip	Telephone Number	Contact
Lighthouse of SW Florida	35 West Marianna Ave	North Fort Myers, Fl 33903	239 997-7797	Douglas Fowler, Ex Dir

UCF	9040 Sunset Dr	Miami, FL 33713	305-273-3055	James Week

FY 2016/17 LEE COUNTY TRANSPORTATION DISADVANTAGED SERVICE PLAN

Prepared by:

Lee County Metropolitan Planning Organization

Good Wheels, Inc., Lee County Community Transportation Coordinator

Lee County Local Coordinating Board

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Florida Commission for the

Transportation Disadvantaged

COMMISSION FOR THE TRANSPORTATION DISADVANTAGED
GLOSSARY OF TERMS, STATUTES 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 $1000.00 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.

(AHCA) **Agency for Healthcare Administration:** Our mission is Better Health Care for All Floridians, and together we are responsible for the administration of the Medicaid program, for the licensure and regulation of health facilities and for providing information to Floridians about the quality of the health care they receive in Florida.

(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.

(APD) **Agency for Persons with Disabilities:** The Agency Supports Persons with Developmental Disabilities in Living, Learning and Working in their Community. The APD works in partnership with local communities and private providers to assist people who have developmental disabilities and their families. APD also provides assistance in identifying the needs of people with developmental disabilities for supports and services.

(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.
(AWI)	**Agency for Workforce Innovation:** The Agency for Workforce Innovation is Florida's lead state workforce agency and directly administers the state's Labor Market Statistics program, Unemployment Compensation, Early Learning and various workforce development programs.
	Bus: any motor vehicle designed for carrying more than 10 passengers 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 passengers (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: passenger 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 CTC and an 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.

(DCA) **Department of Community Affairs:** The Department of Community Affairs is the state's land planning and community development agency. Its role is to assist Florida's communities as they meet the needs of Florida's ever-expanding population. Expand use of public transportation including buses, commuter rail, waterborne transit and other alternative transportation modes that provide services for pedestrians, bikers and the transportation disadvantaged and increase its role as a major component in the overall regional transportation system.

(DCF) **Department of Children & Families:** The Department of Children & Families' Mission is to protect the vulnerable, promote strong and economically self-sufficient families, and advance personal and family recovery and resiliency.

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.**

(DJJ) **Department of Juvenile Justice:** Their vision is that the children and families of Florida will live in safe, nurturing communities that provide for their needs, recognize their strengths and support their success. The mission of the DJJ is to increase public safety by reducing juvenile delinquency through effective prevention, intervention and treatment services that strengthen families and turn around the lives of troubled youth.

(DOE) **The Department of Education** assists with the following programs for those with disabilities: 1) The Division of Blind Services helps to ensure blind and visually impaired persons living in Florida to have the tools, support and opportunity to achieve success; 2) Exceptional Education & Student services administers programs for students with disabilities and for gifted student. Additionally, the bureau coordinates student services throughout the state participates in multiple inter-agency efforts designed to strengthen the quality and variety of services available to students with special needs; 3) The Division of Vocational Rehabilitation serves as an employment resource for businesses and people with disabilities. Our mission is to enable individuals with disabilities to obtain and keep employment.

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 Passenger: 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.

DOEA **Department of Elder Affairs:** The Florida Department of Elder Affairs has been constitutionally designated by Florida voters to "serve as the primary state agency" responsible for administering human services programs for the elderly. The Department's purpose, as set out in section 430.03, Florida Statutes, is to serve elders in all possible ways to help them keep their self-sufficiency and self-determination.

DOH **Department of Health:** Their mission is to promote, protect and improve the health of all people in Florida.

Children's Medical Services (CMS) provides care for children with special health care needs and their families. Through two divisions, CMS Network and CMS Prevention and Intervention, CMS strives to protect the health and safety of Florida's youngest citizen's children. Health care of the sick and disabled is a role that public health undertakes when individuals are too poor or otherwise lack access to health care services.

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

(E&D) **Elderly & Disabled Program:** provides funding, allocated by a formula, to states for capital projects to assist in meeting the transportation needs of older adults and persons with disabilities.

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. Passenger trips per vehicle mile is 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 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 number 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 users request (e.g. conventional city bus, fixed guideway).

(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: passenger 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.

(JARC) **Job Access and Reverse Commute Program:** provides formula funding to states and designated recipients to support the development and maintenance of job access projects

designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment.

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).

(LCHSTP) **Lee County Human Services Transportation Plan:** should promote a people-based approach to planning, coordinating, and funding transportation services.

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, govern, 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 Coordinating 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.

(NF) **New Freedom Program:** provides new public transportation services and public transportation alternatives beyond those required by the Americans with Disabilities Act of 1990 (42 USC. 12101 et seq.) that assist individuals with disabilities with transportation, including transportation to and from jobs and employment support services.

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.

Non-sponsored 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 Passenger Trip: operating costs divided by the total number of passenger 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 passenger trips, vehicle miles, operating costs, revenues, vehicles, employees, accidents, and roadcalls.

Operator Contract: a written contract between the community transportation coordinator and a 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.

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

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

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

Passenger Trips per Vehicle Mile: a performance measure used to evaluate service effectiveness by calculating the total number of passenger 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 passenger trip supplied or sponsored by a human service agency for the purpose of transporting clients 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 passenger transportation, excluding deadhead time.

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

Ridesharing: the sharing of a vehicle by clients 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 passenger 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 passenger 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 or 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 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.

(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 three-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 passenger vehicle in demand-response service. Also known as a driver log.

(UPHC) **Unduplicated Passenger 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 passenger will call to request his/her trip.

LEE COUNTY LOCAL COORDINATING BOARD MEMBERSHIP CERTIFICATION

MPO Name: Lee County Metropolitan Planning Organization; 815 Nicholas Parkway East, Cape Coral, Florida 33990

The Lee County Metropolitan Planning Organization named above hereby certifies to the following:

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

Signature: _____ Date: February 19, 2016

Commissioner Brian Hamman, MPO Chair

	The Lee LCB has a Representative of:	Voting Member	Term Expires	Alternate's Name	Term Expires
1	The MPO or DOPA shall appoint one elected official to serve as the official Chairperson for all Coordinating Board meetings.	Rick Williams	December 2016	No alternate by law	
2	A. A local representative of the Florida Department of Transportation (FDOT)	Debra Stephens	Agency	Richard Shine	Agency
3	B. A local representative of the Florida Department of Children and Families (DCF)	Donna Torres	Agency	Nicole Negron	Agency
4	C. A local representative of the Public Education Community which could include, but not be limited to, a representative of the District School Board, School Board Transportation Office, or Headstart Program in areas where the School District is responsible	Roger Lloyd	Agency	Vacant	
5	D. In areas where they exist, a local representative of the Division of Vocational Rehabilitation Services or the Division of Blind Services, representing the Department of Education	Mary Watford	Agency	Flora Gonzalez	Agency
6	E. A person recommended by the local Veterans Service Office, representing Veterans of the county	Vacant		Vacant	
7	F. A person recognized by the Florida Association for Community Action representing the economically disadvantaged	Kim Hustad	Agency	Robin Jewett	Agency
8	G. A person over age 60 representing the Elderly in the county	Linda Carter	July 2016	Vacant	

	The Lee LCB has a Representative of:	Voting Member	Term Expires	Alternate's Name	Term Expires
9	H. A person with a disability representing the disabled in the county	Vacant		Vacant	
10	I--1.[One of Two] Citizen Advocates in the County	Michael Pierce	July 2017	Vacant	
11	I--2. [One of two] Citizen Advocates this one must be a person who uses the transportation service(s) of the system as their primary means of transportation.	David Lane	July 2016	Vacant	
12	J. A local representative for children at risk	Lorena Rodriguez	Agency	Sally Kreuscher	Agency
13	K. In areas where they exist, the Chairperson or designee of the local Mass Transit or Public Transit System's Board, except in cases where they are also the Community Transportation Coordinator.	Steve Myers	Agency	Peter Gajdjis Jill Brown	Agency
14	L. A local representative of the Florida Department of Elder Affairs	Elizabeth Severo	Agency	Chris Gorgon	Agency
15	M. An experienced representative of the local private for profit transportation industry. In areas where such representative is not available, a local private non-profit representative will be appointed, except where said representative is also the Community Transportation Coordinator.	Michael Griffin	December 2017	Anna Callwood	March 2018
16	N. A local representative of the Florida Agency for Health Care Administration	Joe Martinez	Agency	Patricia Brooks	Agency
17	O. A representative of the Regional Workforce Development Board established in Chapter 445, *Florida Statutes*	Deborah Reardon	Agency	Jim Wall	Agency
18	P. A representative of the local medical community, which may include, but not be limited to, kidney dialysis centers, long term care facilities, hospitals, local health department or other home and community based services, etc.	Heidi Shoriak	Agency	Vacant	Agency

TDSP ROLL CALL VOTE

REPRESENTATION	MEMBER	YES	NO	ALTERNATE	YES	NO	ABSENT
Chairperson	Cncl Williams						
FDOT	Deb Stephens			Richard Shine			
DCF	Donna Stephens			Nicole Negron			
Lee School District	Roger Lloyd			Vacant			
FDOE	Mary Watford			Flora Gonzalez			
Veterans	Vacant			Vacant			
Community Action	Kim Hustad			Robin Jewett			
Elderly	Linda Carter			Vacant			
Representing the Disabled	Vacant			Vacant			
Citizen Advocate	Michael Pierce			Vacant			
Citizen Advocate Using System	Vacant			Vacant			
Children at Risk	Lorena Rodriguez			Sally Kreuscher			
Public Transit	Steve Myers			Peter Gajdjis			
DEA	Elizabeth Severo			Chris Gorgon			
Private Transportation Industry	Michael Griffin			Anna Callwood			
AHCA	Joe Martinez			Patricia Brooks			
Career Source SWFL	Deb Reardon			Jim Wall			
Local medical community	Heidi Shoriak						

The Coordinating Board hereby certifies 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 on May 6, 2015.

Approved by the Lee County Local Coordinating Board for the Transportation Disadvantaged

Date **Rick Williams – Cape Coral City Council**

Approved by the Commission for the Transportation Disadvantaged

Date **Steven Holmes, Executive Director**

I. DEVELOPMENT PLAN

A. INTRODUCTION TO THE SERVICE AREA

1. Background of the Transportation Disadvantaged Program

The purpose of this section is to provide information about the organization and development of Florida's Transportation Disadvantaged Program in Lee County. This Plan shall serve as the Coordinated Public Transit-Human Services Transportation Plan.

The transportation disadvantaged are defined in Chapter 427, Florida Statutes as:

> ***"those persons who because of physical or mental disability, income status, age are unable to transport themselves or 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 person with a disability or high-risk or at risk as defined in s. 422.202, Florida Statutes."***

The 1979 Florida Legislature passed the Transportation Services Act, (Chapter 427, *Florida Statutes*), which called for the coordination at the County level of all Federal and State expenditures for the "transportation disadvantaged." At that time, the Coordinating Council of the Transportation Disadvantaged (CCTD) was formed. Besides overseeing the coordination of state and federally funded programs that provided or purchased transportation for its clients, the Council also provided evaluation and identification of policies, laws, and rule changes to improve mobility for those people in need of access to transportation for their daily living.

In 1989, the Florida Legislature reviewed Chapter 427, *Florida Statutes*, according to the States Regulatory Sunset Act, Chapter 11.61, *Florida Statutes*. During this legislative review, the Legislature reenacted Chapter 427, *Florida Statutes*, with major revisions. As a result, the Commission for the Transportation Disadvantaged is the agency authorized to implement the transportation disadvantaged program in Florida. Through Chapter 427, *Florida Statutes*, and Rule 41-2, *Florida Administrative Code*, the Commission for the Transportation Disadvantaged is responsible for accomplishing the coordination of transportation services provided to transportation disadvantaged individuals in the state of Florida.

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 Commission is responsible for establishing policies, procedures and standards for the delivery of statewide coordinated transportation disadvantaged services; administering the Transportation Disadvantaged Trust Fund; providing statewide training and technical assistance to local partners in establishing coordinated transportation systems, managing contracts, and developing a five-year plan to address the transportation needs of transportation disadvantaged persons.

The commission works cooperatively with state, local and federal agencies to assure that state agencies purchase transportation services from within the coordinated system unless a more cost-effective provider outside the system can be found. Currently, all of Florida's 67 counties have coordinated systems managed by 49 community transportation coordinators. Some of these community transportation coordinators serve regional areas.

The Florida Commission for the Transportation Disadvantaged (CTD) is comprised of seven (7) members all of whom are appointed by the Governor, five (5) of the members must have significant experience in the operation of a business, and it is the intent of the Legislature that, when making an appointment, the Governor selects persons who reflect the broad diversity of the business community in this state, as well as the racial, ethnic, geographical and gender diversity of the population of this state. Two of the members must have a disability and use the transportation disadvantaged system.

Each member shall represent the needs of the transportation disadvantaged throughout the state. A member may not subordinate the needs of the transportation disadvantaged in general in order to favor the needs of others residing in a specific location in the state.

Members are appointed to a term of four years and may be reappointed for one additional four year term. According to Florida Statute 427.012, at any given time, at least one member must be at least 65 years of age. The Governor may remove any member of the Commission for cause.

The Chairperson shall be appointed by the Governor and the Vice-Chairperson of the Commission shall be elected annually from the membership of the Commission.

Designated Official Planning Agencies (DOPA)

LEE COUNTY MPO
METROPOLITAN PLANNING ORGANIZATION

The designated official planning agency is responsible for transportation disadvantaged planning in a given area. In the urbanized areas of the state, the planning agencies are metropolitan planning organizations (MPOs).

The Lee County Metropolitan Planning Organization (MPO) was designated by the CTD to oversee the TD planning functions for Lee County.

The planning agency is responsible for:

- Preparing a Transportation Improvement Program that includes a TD element.
- Recommending a Community Transportation Coordinator to the TD Commission.
- Appointing a Local Coordinating Board for the Transportation Disadvantaged.
- Providing staff support to the Local Coordinating Board.
- Preparing and submitting grant applications to the Commission.
- Preparing and submitting the Coordinated Transportation Development Plan (TDSP) and its annual updates to the Commission.

Local Coordinating Board (LCB)

The designated official planning agency is responsible for appointing a local coordinating board in each county. The purpose of the coordinating board is to provide advice and direction to the Community Transportation Coordinator (CTC) concerning the coordination of transportation services. According to Rule 41-2 of the Florida Administrative Code, there are 16 members appointed to the local coordinating board. The designated official planning agency appoints an elected official to serve as the official chairperson for all local coordinating board meetings. The Vice-Chairperson is elected annually by the voting members of the Board.

The duties of the Local Coordinating Board include:

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

- Evaluate services provided by the CTC under the approved Transportation Disadvantaged Service Plan.
- 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.
- Evaluated multi-county or regional transportation opportunities.
- Appoint a Grievance Committee to serve as a mediator.
- Prepare a consolidated Annual Budget Estimate.
- Review and approve the Coordinated Transportation Development Service Plan (TDSP) and its updates for consistency with approved guidelines, goals and objectives of the Local Coordinating Board.
- Work in conjunction with the planning agencies in the recommended selection of the Community Transportation Coordinator.

Ms. Linda Carter, long time member, and currently representing the veterans.

Community Transportation Coordinator (CTC)

The Community Transportation Coordinator 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 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 may provide all or a portion of transportation disadvantaged service in a designated service area. Community Transportation Coordinators may also subcontract or broker services if it is cost effective and efficient. The Community Transportation Coordinator (CTC) 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. In that context they have the following powers and duties:

- 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 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 Coordinating Board, develop and implement and monitor a one year approved Transportation Disadvantaged Service Plan.
- In cooperation with the Coordinating Board, develop and negotiate a Memorandum of Agreement outlining the services planned for submittal to the Commission.
- Have full responsibility for the delivery of transportation services for the transportation disadvantaged as outlined in Chapter 427.015(2), *F.S.*

Based on either negotiations or a 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.

Good Wheels, Inc. is the designated CTC for Lee County. The CTC contracts out some of the service to transportation operators.

2. Community Transportation Coordinator Designation Date/History

Lee County's Transportation Disadvantaged program has a long history. In the late 1970's and early 1980's, service was provided through the Dr. Ella Piper Center and the Senior Friendship Center with assistance from Lee County Transit's "Help Bus." Later, Community Transit was designated the Community Coordinated Transportation Provider, and then their parent company, Care Cab, provided the service. When Care Cab resigned in May of 1990, Goodwill of Southwest Florida, Inc. was appointed the Community Transportation Coordinator. Goodwill formed a separate organization, Good Wheels, Inc., to perform the duties of the TD program. In March 1995, the Lee County Local Coordinating Board completed its Request for Proposal for a Community Transportation Coordinator by selecting COMSIS as the CTC for Lee County. That selection was recommended by the Lee County MPO, and then COMSIS

was designated the CTC for Lee County by the Commission for the Transportation Disadvantaged in April 1995. COMSIS began their brokerage operations in Lee County on July 1, 1995. Later in 1995, COMSIS became Comsis Mobility Services, Inc. and, during FY 1996-97, Comsis Mobility Services, Inc, also known as COMSIS, or CMS, became, *Intelitran, Inc*.

During the 1999-2000 FY, the Lee MPO conducted a competitive procurement process for a complete brokerage community transportation coordinator. Through that process, on May 18, 2000 the Commission for the Transportation Disadvantaged designated *Intelitran* to be the CTC for Lee County for a three year contract starting July 1, 2000. (*Intelitran* eventually became ATC-Paratransit.)

During the 2002-03 FY, the Lee MPO conducted a competitive procurement process for a community transportation coordinator. Through that process, on April 25, 2003 the Commission for the Transportation Disadvantaged designated Good Wheels, Inc. to be the CTC for Lee County for a three year contract starting July 1, 2003. In September 2003 that contract was extended through a CTD executive order to June 30, 2008.

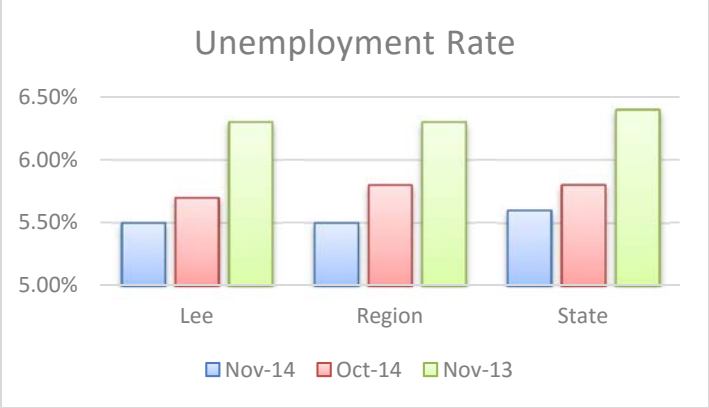
During the 2007-08 FY, the Lee MPO conducted a competitive procurement process for a community transportation coordinator. Through that process, on June 20, 2008, the Commission for the Transportation Disadvantaged designated Good Wheels, Inc. to be the CTC for Lee County for a five-year contract for the period of July 1, 2008 through June 30, 2013.

During the 2012-13 FY, the Lee MPO conducted a competitive procurement process for a community transportation coordinator. Through that process, on May 21, 2013, the Commission for the Transportation Disadvantaged designated Good Wheels, Inc. to be the CTC for Lee County for a five-year contract for the period of July 1, 2013 through June 30, 2018. A copy of the letter dated July 9, 2013 in which the Commission designated Good Wheels, Inc. as the CTC for Lee County is attached in ***Exhibit A.***

Existing Conditions

Area	Nov 2014	Oct 2014	Nov 2013	Monthly Change	Annual Change
Lee	5.5%	5.7%	6.3%	-3.5%	-12.7%
Region	5.5%	5.8%	6.3%	-5.8%	-12.5%
State	5.6%	5.8%	6.4%	-3.4%	-12.5%

Source: SWFRPC Econoviews Jan 2015



Source: SWFRPC Econoviews Jan 2015

STATE OF FLORIDA
LOCAL AREA UNEMPLOYMENT STATISTICS BY METROPOLITAN STATISTICAL AREA (MSA) AND METROPOLITAN DIVISION (MD)
(NOT SEASONALLY ADJUSTED)

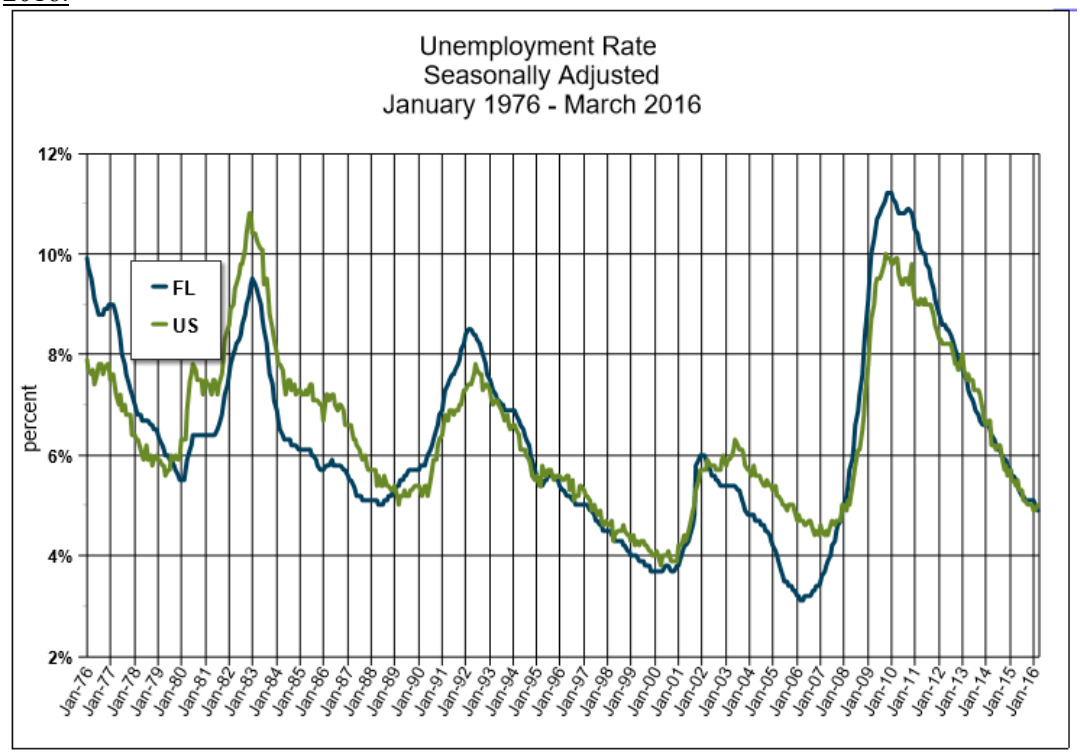
	MARCH 2016				FEBRUARY 2016				MARCH 2015			
	LABOR	EMPLOY-	UNEMPLOYMENT		LABOR	EMPLOY-	UNEMPLOYMENT		LABOR	EMPLOY-	UNEMPLOYMENT	
MSA/MD	FORCE	MENT	LEVEL	RATE	FORCE	MENT	LEVEL	RATE	FORCE	MENT	LEVEL	RATE
Cape Coral-Fort Myers MSA	327,564	313,615	13,949	4.3%	327,216	313,043	14,173	4.3%	321,223	305,384	15,839	4.9%
Crestview-Fort Walton Beach-Destin MSA	118,950	114,122	4,828	4.1%	116,119	111,182	4,937	4.3%	118,571	113,149	5,422	4.6%
Deltona-Daytona Beach-Ormond Beach MSA	287,843	273,703	14,140	4.9%	285,467	271,077	14,390	5.0%	282,082	265,604	16,478	5.8%
Gainesville MSA	138,375	132,806	5,569	4.0%	137,584	132,035	5,549	4.0%	136,336	130,194	6,142	4.5%
Homosassa Springs MSA	47,714	44,590	3,124	6.5%	47,372	44,169	3,203	6.8%	47,975	44,377	3,598	7.5%
Jacksonville MSA	730,809	698,575	32,234	4.4%	727,367	694,502	32,865	4.5%	717,870	679,913	37,957	5.3%
Lakeland-Winter Haven MSA	282,197	267,518	14,679	5.2%	280,791	265,808	14,983	5.3%	278,322	261,443	16,879	6.1%
Miami-Fort Lauderdale-West Palm Beach MSA	3,019,337	2,870,216	149,121	4.9%	3,029,126	2,883,616	145,510	4.8%	2,993,460	2,827,437	166,023	5.5%
Fort Lauderdale-Pompano Beach-Deerfield Beac	1,002,796	959,031	43,765	4.4%	1,002,682	958,604	44,078	4.4%	984,798	934,775	50,023	5.1%
Miami-Miami Beach-Kendall MD	1,316,704	1,242,709	73,995	5.6%	1,325,675	1,255,998	69,677	5.3%	1,318,451	1,235,639	82,812	6.3%
West Palm Beach-Boca Raton-Delray Beach MD	699,837	668,476	31,361	4.5%	700,769	669,014	31,755	4.5%	690,211	657,023	33,188	4.8%
Naples-Immokalee-Marco Island MSA	165,774	158,645	7,129	4.3%	165,325	158,067	7,258	4.4%	165,531	157,693	7,838	4.7%
North Port-Sarasota-Bradenton MSA	347,335	332,358	14,977	4.3%	346,033	330,826	15,207	4.4%	343,782	326,892	16,890	4.9%
Ocala MSA	131,326	124,043	7,283	5.5%	130,154	122,714	7,440	5.7%	131,122	122,677	8,445	6.4%
Orlando-Kissimmee-Sanford MSA	1,241,241	1,187,802	53,439	4.3%	1,234,918	1,180,894	54,024	4.4%	1,209,122	1,147,722	61,400	5.1%
Palm Bay-Melbourne-Titusville MSA	256,344	243,141	13,203	5.2%	256,267	242,905	13,362	5.2%	257,022	241,809	15,213	5.9%
Panama City MSA	93,420	89,055	4,365	4.7%	91,654	87,024	4,630	5.1%	94,148	89,053	5,095	5.4%
Pensacola-Ferry Pass-Brent MSA	213,594	203,709	9,885	4.6%	212,307	202,286	10,021	4.7%	210,707	199,570	11,137	5.3%
Port St. Lucie MSA	202,971	192,873	10,098	5.0%	202,747	192,409	10,338	5.1%	200,943	189,527	11,416	5.7%
Punta Gorda MSA	68,572	65,077	3,495	5.1%	68,219	64,641	3,578	5.2%	67,726	63,759	3,967	5.9%
Sebastian-Vero Beach MSA	61,967	58,540	3,427	5.5%	61,920	58,395	3,525	5.7%	61,498	57,706	3,792	6.2%
Sebring MSA	36,550	34,345	2,205	6.0%	36,653	34,407	2,246	6.1%	35,806	33,273	2,533	7.1%
Tallahassee MSA	188,056	179,727	8,329	4.4%	187,179	178,856	8,323	4.4%	186,679	177,215	9,464	5.1%
Tampa-St. Petersburg-Clearwater MSA	1,465,418	1,400,753	64,665	4.4%	1,456,173	1,390,735	65,438	4.5%	1,439,545	1,365,035	74,510	5.2%
The Villages MSA	29,033	27,076	1,957	6.7%	28,976	26,988	1,988	6.9%	28,646	26,463	2,183	7.6%
Florida (Not Seasonally Adjusted)	9,748,000	9,291,000	456,000	4.7%	9,722,000	9,264,000	458,000	4.7%	9,620,000	9,101,000	519,000	5.4%
Florida (Seasonally Adjusted)	9,809,000	9,331,000	478,000	4.9%	9,794,000	9,309,000	485,000	5.0%	9,602,000	9,067,000	535,000	5.6%
United States (Not Seasonally Adjusted)	158,854,000	150,738,000	8,116,000	5.1%	158,279,000	150,060,000	8,219,000	5.2%	156,318,000	147,635,000	8,682,000	5.6%
United States (Seasonally Adjusted)	159,286,000	151,320,000	7,966,000	5.0%	158,890,000	151,074,000	7,815,000	4.9%	156,890,000	148,333,000	8,557,000	5.5%

Released April 15, 2016

NOTE: Items may not add to totals or compute to displayed percentages due to rounding. All data are subject to revision.

FL Department of Economic Opportunity: http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/local-area-unemployment-statistics#

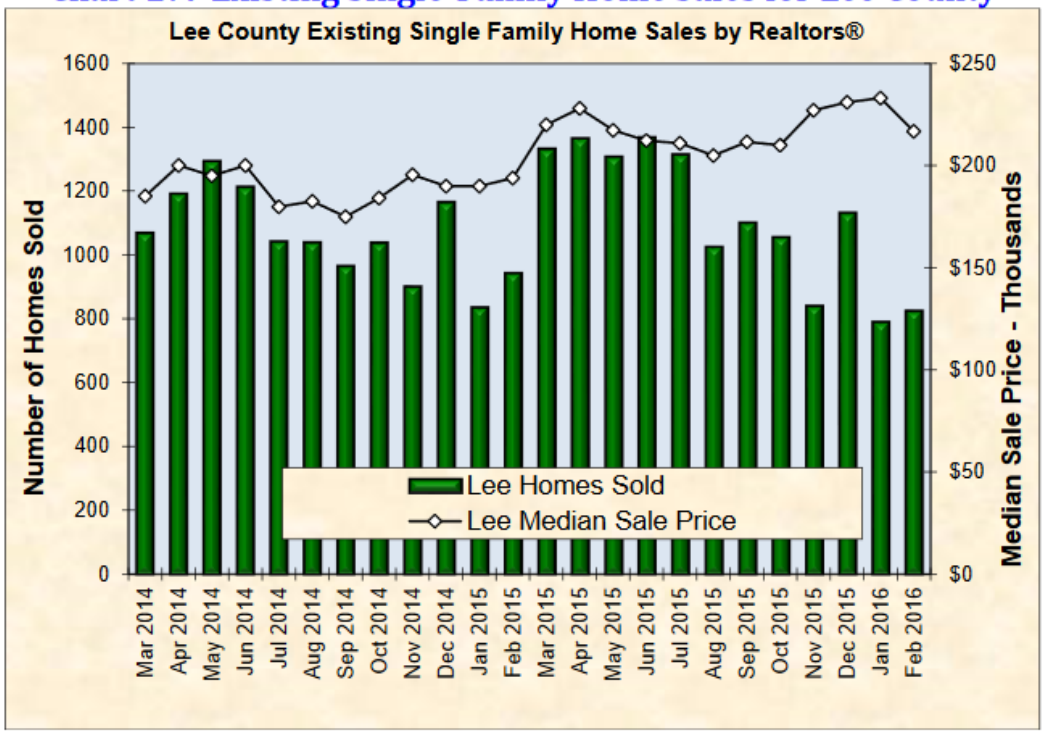
Below is the seasonally adjusted unemployment rate (seasonally adjusted) from January 1976 to March 2016.



Source: U.S. Department of Labor, Bureau of Labor Statistics, Local Area Unemployment Statistics Program (LAUS)
Prepared by: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, released **Friday, April 15, 2016**
Next Scheduled Release: **Friday, May 20, 2016**

The chart below shows Lee County had sales of 825 single family units in February 2016, a decrease of 13% from February 2015. Although they fluctuated, median prices are up 12% higher than a year ago.

Chart 17: Existing Single-Family Home Sales for Lee County



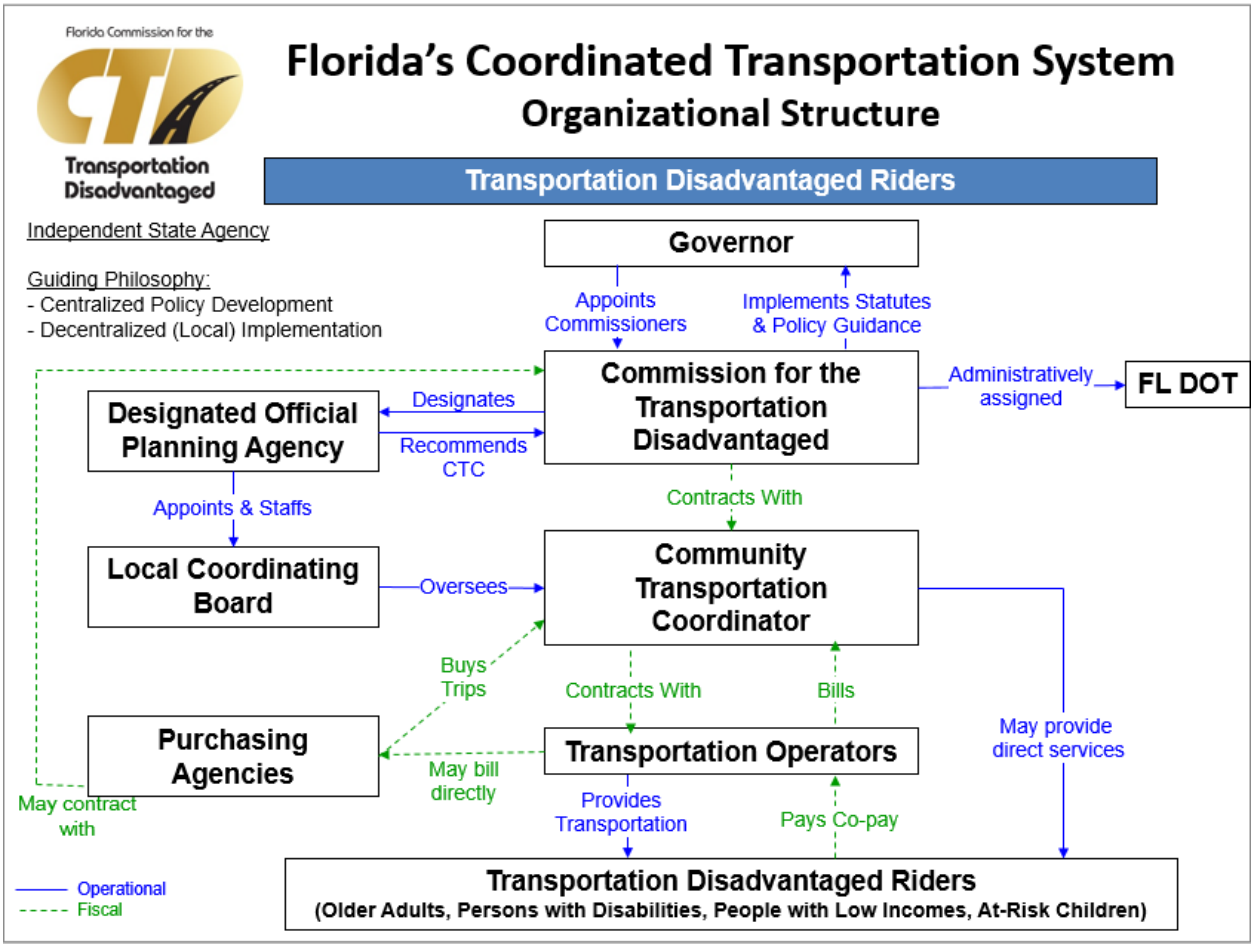
Source: Realtor® Association of Greater Fort Myers and the Beach, Inc.

SWFL Regional Economic Indicators: FGCU

~~The Lee County area has also experienced positive indicators in the housing market, there were 257 single family building permits issued in June of 2013 which is an increase of 22% over June of 2012. For the first six months of 2013, there has been a 36% increase in building permit activity over the first six months of 2012. The sales of existing homes are down about 4% from June 2012 to June 2013 but the median house price has increased 32% over the same time period.~~

The unemployment rate for the transportation disadvantaged is much higher than the countywide average and for those prospective workers transportation is a big issue and a barrier for them finding work. At the current time the funding available for the TD program is not even enough to cover all of the necessary medical trips, let alone transportation to work or to the store. Future trends on funding and need are expected to widen as the population of Lee County and Florida gets older and the funding continues to decrease. The percentage of people over 65 years of age in Florida is currently at 17% and this is expected to increase to over 27% by 2030 further exacerbating the problem.

3. Organization Structure



4. Consistency Review of Other Plans

a. Local Government Comprehensive Plans

The local comprehensive planning process involves essentially four basic steps:

1) The collection and analysis of pertinent data concerning the physical and socio-economic characteristics of the study area;
2) The formulation of goals for future growth and development;
3) The development of objectives and policies guided by the goals which are the essence of the Comprehensive Plan; and
4) The implementation of the Comprehensive Plan.

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Lee County Comprehensive Plan, "*The Lee Plan 2012 Codification As amended through June 2012.*"

b. Strategic Regional Policy Plan

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the *Strategic Regional Policy Plan* of the Southwest Florida Regional Planning Council, Adopted September 15, 2011.

c. LeeTran Ten-Year Transit Development Plan 2012-2021

The transit development plan (TDP) is the long-range financial and planning document of Lee County's transit system (LeeTran), and must be consistent with local government comprehensive plans. Transit providers must develop and maintain a TDP in accordance with state statutes in order to remain eligible for state transit block grants. The transit agency must provide an annual progress report to the Florida Department of Transportation in September of every year. A major update is required every five years. The current effort for which this TDP has been prepared for is the **2012-2021** TDP major update. The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Lee County Transit Development Plan.

d. Commission for the Transportation Disadvantaged 5 yr/20 yr Plan

"Our Mission" – To insure the availability of efficient, cost-effective and quality transportation services for transportation disadvantaged persons."

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Commission for the Transportation Disadvantaged's 5 year/20 year plan.

e. ~~2035~~ 2040 Long Range Transportation Plan for the Fort Myers-Cape Coral Metropolitan Area Adopted: ~~December 8, 2010~~ December 18, 2015

The purpose of the Lee County Metropolitan Planning Organization's (MPO) ~~2035~~ 2040 Long Range Transportation Plan (LRTP) is to develop a process and a plan to address the future multimodal transportation needs of the Lee County area. It is a plan which coordinates and guides the capital improvement programs of the Florida Department of Transportation (FDOT) and its member local governments, as well as recognizes the ongoing maintenance and operational activities of these entities. The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Lee County MPO Long Range Plan.

f. Transportation Improvement Program (TIP)

The TIP lists those highway, aviation, transportation enhancement, transit, transportation disadvantaged program, and intermodal projects that are currently programmed in the Florida Department of Transportation (FDOT) *Five-Year Work Program*, including the amount and source of funding, the implementation phases for which funds have been allocated (i.e., design, right-of-way acquisition and construction) and the years in which each phase is currently programmed. In order for these projects to be eligible for federal transportation funding, they must appear in this TIP. Projects programmed in the Lee County, City of Cape Coral, City of Fort Myers, City of Bonita Springs, Town of Fort Myers Beach and City of Sanibel capital improvement programs are also included in the TIP, for information purposes only. The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Lee County MPO Transportation Improvement Program, TIP.

g. LeeTran TLC Plan Locally Coordinated Human Services Transportation Plan

In 2008, LeeTran together with the Lee County MPO developed the Locally Coordinated Human Services Transportation Plan (LCHSTP) to meet the criteria outlined in the SAFETEA-LU legislation regarding the Federal Transit Administration (FTA) Section 5316 "Job Access Reverse Commute (JARC)" Program, the Federal Transit Administration (FTA) Section 5317 New Freedoms (NF) Program, and Federal Transit Administration (FTA) Section 5310 Special Needs of Elderly and Individuals with Disabilities (E&D) funding programs. The LCHSTP assists the County in taking a broader perspective for coordinating public transportation services in the area and is specifically meant to ensure that public transportation services and improvements benefit elderly, disabled, low income and unemployed populations. The JARC funding allocation was $147,513 in FY 2006, $155,494 in FY 2007 $168,452 in FY 2008, $197,719 in FY 2009, $189,042 in FY 2010, $188,758 in FY 2011, $190,561 in FY 2012 and $19,056 in FY 2013 and the New Freedom funding allocation was $102,886 in FY 2006, $117,307 in FY 2007, $126,721 in FY 2008, $146,069 in FY 2009, $143,358 in FY 2010, $144,098 in FY 2011, $145,773 in FY 2012, and $145,773 in FY 2013.

The LCHSTP was developed using an extensive public involvement process to gain input on transportation deficiencies. Two public workshops were held to help shape the LCHSTP (on May 13, 2008 and June 17, 2008) as well additional public input that was received through the TAC, CAC and MPO Board meetings prior to finalizing the document. A project selection process and scoring criteria was developed using the input that was provided and a selection committee was formed and approved by the MPO Board. The LCHSTP was adopted in August 2008 and the entire document can be found on the MPO's website at www.leempo.com under documents.

List of the priorities from the TLC Plan:

- Increased Fixed Route Frequencies;
- Increased Fixed Route Weekend Service;
- Subsidized Vanpools; Educational Programs;
- Expand Para-transit Service;
- Later Evening Fixed Route Service;
- Transit Infrastructure;
- Circulator/Flexible Routes;
- Park & Ride Lots; and
- Connection of Service to Collier County.

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Lee County MPO Locally Coordinated Human Services Transportation Plan.

Additionally, the coordinated transportation disadvantaged program as coordinated by the Community Transportation Coordinator, (CTC) has identified these funding needs:

- Operating assistance
- Match for operating assistance
- Capital assistance for vehicles
- Match for capital assistance for vehicles
- Capital assistance to upgrade and maintain the CTC facility
- Match for capital to upgrade and maintain the CTC facility

1. Public Participation

The Lee County Transportation Disadvantaged Coordinating Board includes representatives of public, private and non-profit transportation and human services providers as well as the public to participate in the development and update of the Lee County Transportation Disadvantaged Service Plan. The Transportation Disadvantaged Service Plan is developed through input of the Lee County Transportation Disadvantaged Board whose membership includes citizens and human service providers.

The Local Coordinating Board meetings are held in ADA accessible locations and open to the public. In addition to the membership listed above, the mailing list for the LCB quarterly agendas include transportation partners, transportation disadvantaged passengers and advocates, human service organizations, faith-based and community based organizations, local school districts and others. The Lee County LCB seeks input from the public at all its meetings and makes a concerted 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.

As part of the development of the Transportation Disadvantaged Service Plan, input was solicited from the Lee County Metropolitan Planning Organization (MPO), the MPO's Technical Advisory Committee and the MPO's Citizen Advisory Committee. All these meetings are open to the public too.

B. SERVICE AREA PROFILE/DEMOGRAPHICS

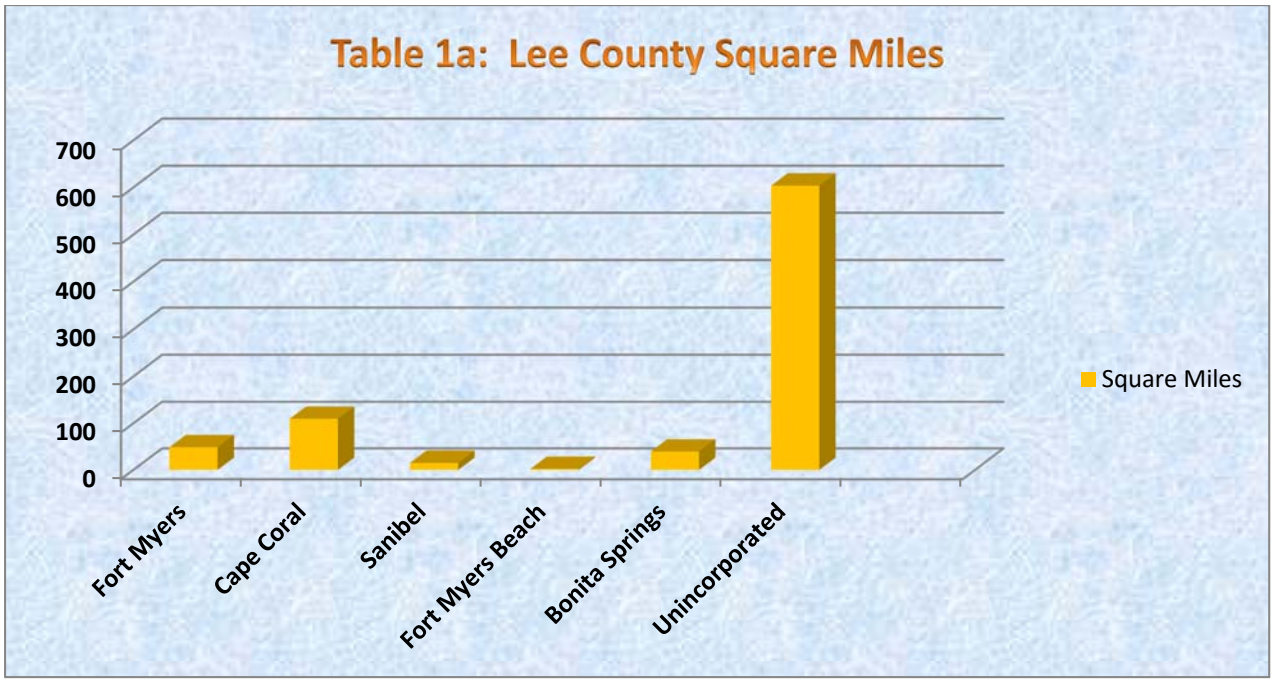
1. Service Area Description

Lee County, Florida was founded on May 12, 1887 and named in honor of General Robert E. Lee. The County, located on the Gulf coast of Florida, encompasses approximately 811 square miles including several small islands in the Gulf of Mexico. The County is bordered by Charlotte County to the north, Hendry County to the east, Collier County to the south and the Gulf of Mexico to the west. Three incorporated municipalities are located on the mainland: Fort Myers (the county seat); Bonita Springs and Cape Coral. Fort Myers Beach, a fourth municipality, is located on Estero Island and a fifth municipality, Sanibel, is situated on the island of the same name. A map showing the municipalities and the unincorporated area is on page. The unincorporated communities include Alva, Captiva Island, Estero, Lehigh Acres, Matlacha, North Fort Myers, Pine Island and Tice.

TABLE 1
Square Miles For Each Incorporated Municipality and the County

Land Area	Square Miles
Fort Myers	48.865
Cape Coral	109.9
Sanibel	15.3
Fort Myers Beach	2.5
Bonita Springs	39.6
Village of Estero	21.1
Unincorporated Area	582.7
Total Square Miles	**839.965**

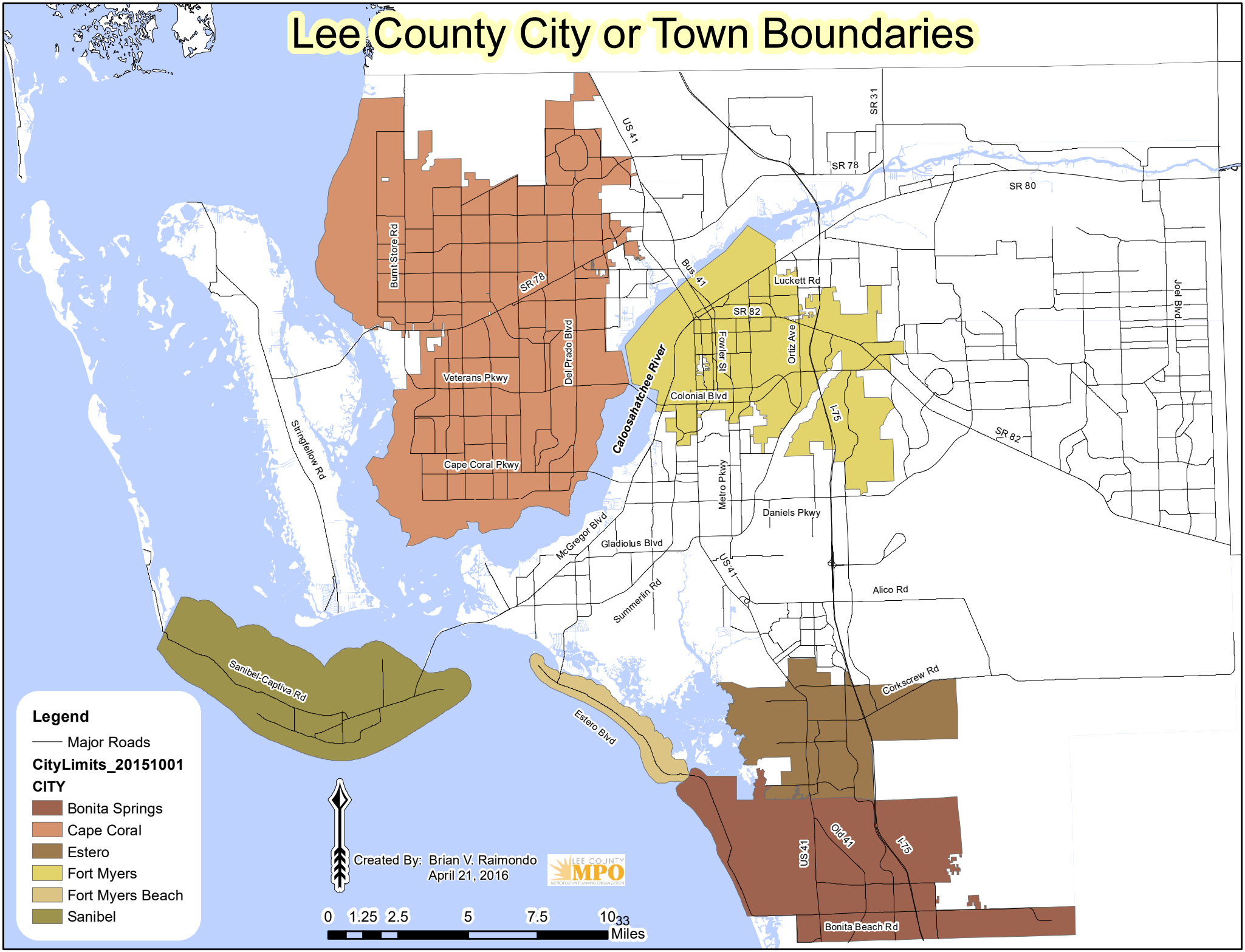
Source: Lee County Property Appraiser's Office GIS Dept. (2016)



Demographics

a. **Land Use**

Several years ago Lee County was ranked as one of the fastest growing areas in the nation. Current large scale developments of regional impact (DRIs) included Coconut Point, Gateway, Pelican Landing, Bonita Bay and Arborwood. However, after the 2008 national economic downturn, Lee County was negatively impacted relative to land development and DRI sized projects. Over the past several years there have been no new DRIs submitted for review and approval in the region. Currently, all the previously approved DRIs are still on-going and continue to grow although at a slower rate than previously. These existing DRIs remain important to the Transportation Disadvantaged program in Lee County because the demand for TD trips are still increasing as the DRI's are building out and population in those areas continue to grow.


Lee County City or Town Boundaries
US 41
SR 31
SR 78
SR 80
Burnt Store Rd
SR 78
Bus. 41
Luckett Rd
SR 82
Joel Blvd
Fowler St
Ortiz Ave
Del Prado Blvd
Veterans Pkwy
Caloosahatchee River
Colonial Blvd
I-75
SR 82
Stringfellow Rd
Cape Coral Pkwy
Metro Pkwy
Daniels Pkwy
McGregor Blvd
Gladiolus Blvd
US 41
Alico Rd
Summerlin Rd
Sanibel-Captiva Rd
Corkscrew Rd
Estero Blvd
US 41
Old 41
I-75
Bonita Beach Rd
Legend
Major Roads
CityLimits_20151001
CITY
Bonita Springs
Cape Coral
Estero
Fort Myers
Fort Myers Beach
Sanibel
Created By: Brian V. Raimondo
April 21, 2016
LEE COUNTY MPO
0 1.25 2.5 5 7.5 10
Miles
33

Population/Composition

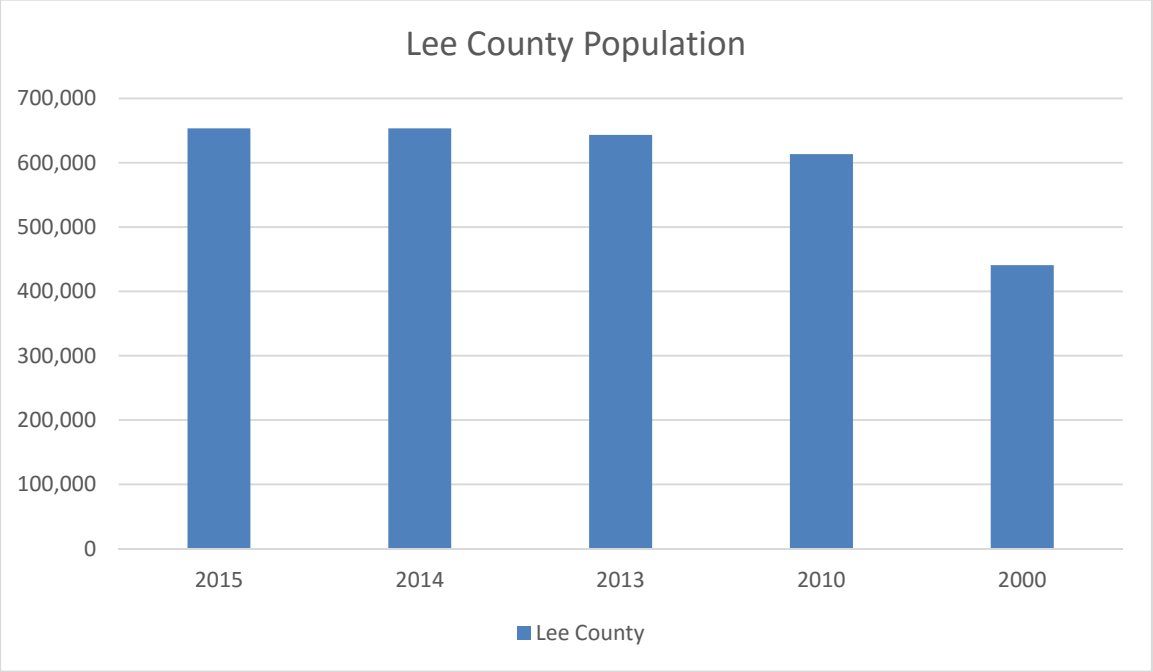
TABLE 2
POPULATION

~~Area~~	~~2014 Estimate~~	~~2013 Estimate~~	~~2012 Estimate~~	~~2010 Estimate~~	~~2000 Actual~~
~~Florida~~	~~19,507,369~~	~~19,317,568~~	~~18,827,664~~	~~18,537,969~~	~~15,982,378~~
~~Lee County~~	~~653,485~~	~~643,367~~	~~638,029~~	~~613,546~~	~~440,888~~
~~Bonita Springs~~	~~45,819~~	~~45,229~~	~~45,129~~	~~44,793~~	~~32,797~~
~~FM Beach~~	~~6,250~~	~~6,323~~	~~6,253~~	~~6,767~~	~~6,561~~
~~Fort Myers~~	~~69,437~~	~~67,081~~	~~62,298~~	~~68,190~~	~~48,208~~
~~Sanibel~~	~~6,490~~	~~6,497~~	~~6,489~~	~~6,211~~	~~6,064~~
~~Cape Coral~~	~~163,599~~	~~161,069~~	~~160,184~~	~~164,673~~	~~102,286~~

~~Source: US Census/BEBR April 2014~~

Area	2015 Estimate	2014 Estimate	2013 Estimate	2010 Estimate	2000 Actual
Florida	20,271,272*	19,507,369	19,317,568	18,537,969	15,982,378
Lee County	665,845	653,485	643,367	613,546	440,888
Bonita Springs	46,568	45,819	45,229	44,793	32,797
FM Beach	6,624	6,250	6,323	6,767	6,561
Fort Myers	72,395	69,437	67,081	68,190	48,208
Sanibel	6,502	6,490	6,497	6,211	6,064
Cape Coral	166,508	163,599	161,069	164,673	102,286

Source: US Census/BEBR April 2015/*July 1, 2015



Source: BEBR April 2015

TABLE 3
LEE COUNTY POPULATION PROJECTIONS - 2010 THROUGH 2035

	2010	2015	2020	2025	2030	2035
Low	585,600	620,400	649,800	667,800	673,800	668,500
Medium	622,900	701,000	789,600	875,700	957,100	1,034,400

High	660,300	789,600	935,000	1,089,500	1,251,400	1,420,700

Source: Office of Economic & Demographic Research, the Florida Legislature
http://edr.state.fl.us (Demographic Estimating Conference Database – January 2011)

b. Employment

Good Wheels, Inc., Community Transportation Coordinator for Lee County, does not have the funding to provide employment transportation in Lee County. Table 4 provides a listing of the top private employers in Lee County. Some of the companies on the listing have a centralized employment center, e.g., one big office. Other companies have locations throughout the County, for example the Publix Supermarkets have numerous locations in Lee County.

~~TABLE 4~~
~~LEE COUNTY MAJOR EMPLOYERS 2012~~

Rank	Company	Product/Service	Employees
~~1~~	~~Lee Memorial Health System~~	~~Non-profit hospital/healthcare system~~	~~10,249~~
~~2~~	~~Lee County School District~~	~~Public schools~~	~~9,394~~
~~3~~	~~Publix Super Markets~~	~~Grocer, retail~~	~~4,362~~
~~4~~	~~Lee County Administration~~	~~County government~~	~~2,538~~
~~5~~	~~Wal-Mart~~	~~General merchandise - retail~~	~~1,967~~
~~6~~	~~Lee County Sheriff's Office~~	~~Public safety, sheriff~~	~~1,585~~
~~7~~	~~U.S. Postal Service~~	~~Postal Service~~	~~1,291~~
~~8~~	~~Chico's FAS, Inc.~~	~~National store support center for women's apparel companies~~	~~1,253~~
~~9~~	~~City of Cape Coral~~	~~City Government~~	~~1,197~~
~~10~~	~~Target~~	~~General Merchandise-retail~~	~~1,100~~
~~11~~	~~Florida Gulf Coast University~~	~~State University~~	~~1,083~~
~~12~~	~~Hope HealthCare Services~~	~~Care/services for people at the end of life~~	~~1,000~~
~~13~~	~~City of Fort Myers~~	~~City Government~~	~~908~~
~~14~~	~~Shell Point Retirement Comm.~~	~~Life care facility~~	~~900~~
~~15~~	~~Comcast~~	~~Telecommunications~~	~~705~~
~~16~~	~~21st Century Oncology~~	~~Hqs. for radiation facilities across the US~~	~~627~~
~~17~~	~~Lowe's Home Improvement~~	~~Building materials~~	~~602~~
~~18~~	~~Edison State College~~	~~State college~~	~~596~~
~~19~~	~~Alorica, Inc.~~	~~Customer service provider~~	~~520~~
~~20~~	~~South Seas~~	~~Resorts, call center~~	~~500~~
~~21~~	~~CenturyLink~~	~~Telephone local communications, wireless/PCS, broadband~~	~~500~~
~~22~~	~~Bank of America~~	~~Financial institution~~	~~500~~
~~23~~	~~Gartner, Inc.~~	~~IT business intelligence, finance & inside sales~~	~~469~~
~~24~~	~~Hyatt Regency Coconut Point~~	~~Hotel~~	~~450~~
~~25~~	~~Crowther Roofing~~	~~Roofing company, light gauge truss framing~~	~~428~~

Source: Lee County Economic Development Office, February 2013

TABLE 4
LEE COUNTY MAJOR EMPLOYERS 2013

Rank	Company	Product/Service	Employees
1	Lee Memorial Health System	Non-profit hospital/healthcare system	10425
2	Lee County School District	Public schools	10333
3	Publix Super Markets	Grocer, retail	4404
4	Lee County Administration	County government	2358
5	Wal-Mart	General merchandise--retail	1967
6	Chicos	Nat. store support center for women's apparel	1703

7	Lee County Sheriff's Office	Sheriff	1535
8	USPS	Postal Service	1477
9	FGCU	State University	1323
10	City of Cape Coral	Government	1197
11	Target	Retail	1100
12	Hope HealthCare Services	Care/services for people at the end of life	1000
13	Shell Point Retirement Comm.	Life care facility	952
14	City of Fort Myers	Life care facility	868
15	Lowes	Building materials	757
16	Comcast	Telecommunications	705
17	Edison State College	State college	635
18	21st Century Oncology	Corporate Headquarters	627
19	Alorica, Inc.	Customer service provider	592
20	South Seas	Resorts, call center	500
21	CenturyLink	Telephone local communications, wireless/PCS, broadband	500
22	Bank of America	Financial institution	500
23	Hyatt Regency Coconut Point	Hotel	494
24	Goodwill Industries	Non-profit organizations	494
25	Gartner	IT business, intelligence, finance and inside sales	469

Source: Lee County Economic Development Office, July 2013

Table 5
LEE COUNTY MAJOR MANUFACTURERS 2012

Rank	Company	Product/Service	Employees
1	The News-Press Media Group	Daily newspaper; weekly community newspaper;web publ.	320
2	Pall Corporation	Manufacturing of aerospace & industrial filtration	300
3	Heinz North America	Mfg., frozen food snacks	237
4	Raymond Building Supply	Lumber & millwork	200
5	Shaw Development LLC	Manufacturing	141
6	JRL Ventures, Inc	Fiberglass design, tooling & parts	125
7	Breeze Newspapers	Newspaper publishing	115
8	Smart Companies	Retail shutter/windows, hurricane screen mgf, impact windows	115
9	West Coast Florida Enterprises	Roofingcontractor & steel truss manufacturing	100
10	Saminco, Inc.	Electric traction drives for vehicles	90
11	Fusion Industries	Cabinetry, casework, solid surface & stone countertops	85
12	Cornerstone Kitchens, Inc.	Kitchen cabinet re-facing, remodeling & granite counters	80
13	AJAX Paving Industries of FL	Paving	78
14	Kings Brand LLC	Food processing	75
15	Creative Door & Millwork	Hardware, doors, millwork, windows, hollow metal	70
16	Forestry Resources, Inc.	Horticultural products, mulch, fertilizers, landscape supplies	62
17	Munters Corporation	Humidification/dehumidification equipment mfg.	60
18	Cement Industries, Inc.	Manufacturer pre-cast & pre-stressed concrete bldg. product	60
19	Air Science USA, LLC	Import, manufacture, distribution, sales lab equip	60
20	Nor-Tech Hi-Performance	Boat Builder, custom high performance	58
21	Gulf Paving Company, Inc.	Ready mix, emulsified & hot mix asphalt	57

22	Dean Steel Buildings, Inc.	Pre-engineered buildings	53
23	Suncoast Aluminum Furniture	Manufacturing of pool and patio furniture	50
24	Klocke of America, Inc.	Packaging of samples & uni-dose items	50
25	Fox Electronics	Manufacture of electric crystals, oscillators, filters	50

Source: Lee County Economic Development Office, February 2013

Types of companies expected to grow in Florida

Industry	Annual Growth Rate
Construction of Buildings	4.1%
Specialty Trade Contractors	3.9%
Ambulatory Health Care Services	3.3%
Nonmetallic Mineral Product Mfg	3.0%
Nursing and Residential Care Facilities	2.8%
Heavy and Civil Engineering Construction	2.6%
Professional and Technical Services	2.4%
Wood Product Manufacturing	2.1%
Clothing and Clothing Accessories Stores	2.1%
Social Assistance	2.1%
Building Material & Garden Supply Stores	2.0%
Furniture and Home Furnishings Stores	2.0%
Administrative and Support Services	1.9%
Educational Services	1.9%
Electronics and Appliance Stores	1.8%
Motor Vehicle and Parts Dealers	1.8%
Support Activities for Transportation	1.8%
Real Estate	1.7%
Food Services and Drinking Places	1.7%
Electronic Markets and Agents/Brokers	1.7%

Companies expected to grow are based on a minimum of (100) openings and a growth rate of (1.55%) per year.

Source: Florida Department of Economic Opportunity - Bureau of Labor Market Statistics
Industry Projection Data 2015-2023
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~~**TABLE 6**~~
~~**TD PASSENGER TRIPS BY PURPOSE IN LEE COUNTY**~~

~~Purpose~~	~~Number of Trips 2012~~	~~Number of Trips 2013~~	~~Number of Trips 2014~~
~~Medical~~	~~72,361~~	~~78,274~~	~~95,041~~
~~Employment~~	~~0~~	~~0~~	~~0~~
~~Ed./Training/Daycare~~	~~34,763~~	~~29,345~~	~~10,512~~
~~Nutritional~~	~~3,457~~	~~1,014~~	~~0~~
~~Life Sustaining/Other~~	~~120~~	~~2,318~~	~~31,791~~
~~**Total Trips**~~	~~**110,701**~~	~~**110,951**~~	~~**137,344**~~

~~Source: CTD Lee ARP 2014~~

TABLE 6
TD PASSENGER TRIPS BY PURPOSE IN LEE COUNTY

Purpose	Number of Trips 2013	Number of Trips 2014	Number of Trips 2015
Medical	78,274	95,041	54,559
Employment	0	0	0
Ed./Training/Daycare	29,345	10,512	23,466
Nutritional	1,014	0	3,544
Life Sustaining/Other	2,318	31,791	414
Total Trips	**110,951**	**137,344**	**81,983**

Source: CTD Lee ARP 2014

~~TABLE 7~~
~~PASSENGER TRIPS PROVIDED FUNDING SOURCE~~

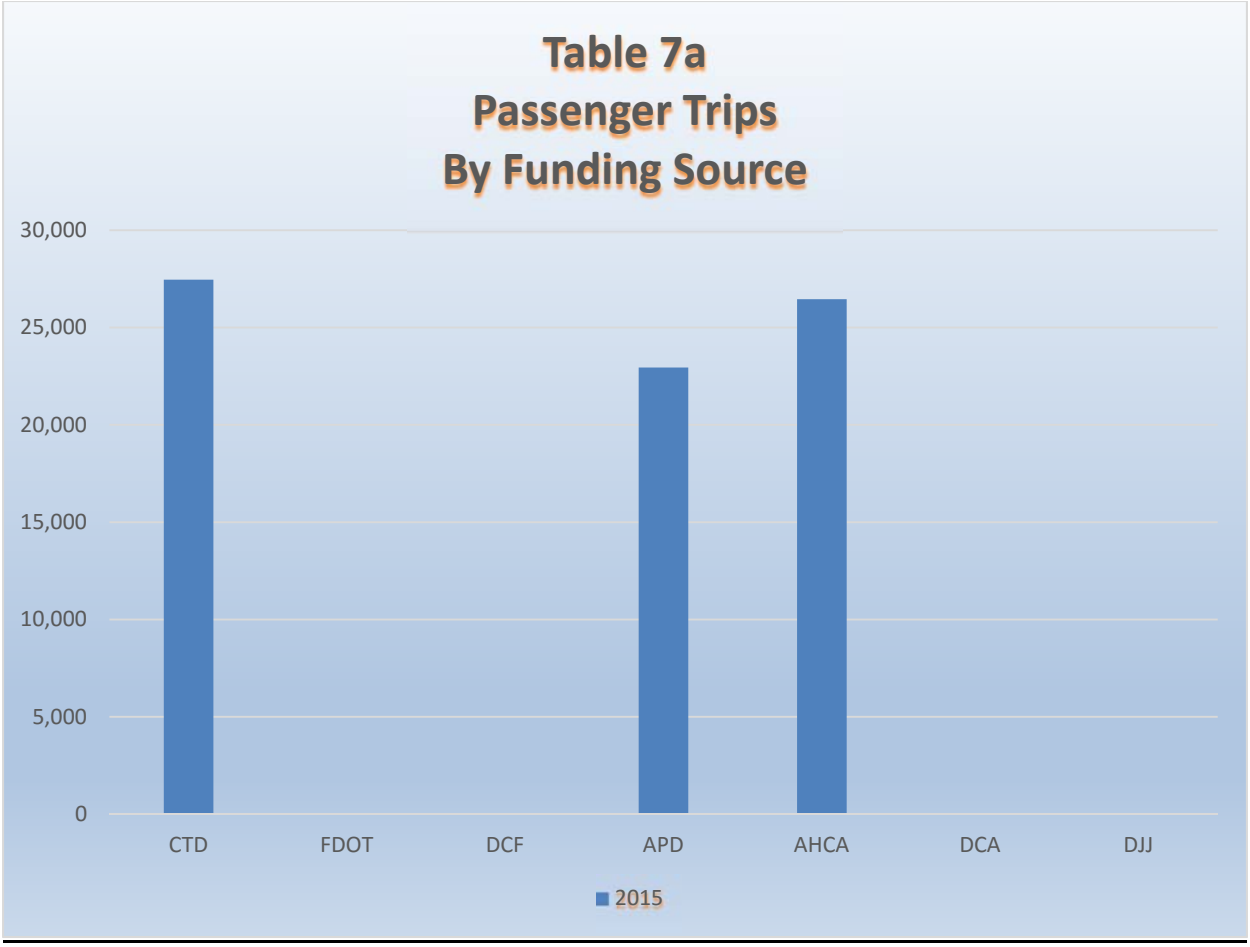
~~Source~~	~~Number of Trips 2015~~	~~Number of Trips 2014~~	~~Number of Trips 2015~~
~~CTD~~	~~27,489~~	~~27,461~~	~~27,558~~
~~AHCA~~	~~53,593~~	~~58,832~~	~~26,457~~
~~APD~~	~~22,534~~	~~21,396~~	~~22.948~~
~~DOEA~~	~~3,829~~	~~2,281~~	
~~DOE~~	~~0~~	~~0~~	
~~Other~~	~~3,506~~	~~39,269~~	
~~**Total Trips**~~	~~**110,951**~~	~~**149,239**~~	

~~Source: CTD Lee ARP 2014~~

TABLE 7
PASSENGER TRIPS PROVIDED FUNDING SOURCE

Source	Number of Trips 2015
CTD	27,489
FDOT	0
DCF	0
APD	22,948
AHCA	26,457
DCA	0
DJJ	0

Source: CTD Lee ARP 2015



Source: CTD Lee ARP 2014

Major Trip Generators/Attractors

As the TDSP is annually updated, it is the opportunity for the Local Coordinating Board, the Community Transportation Coordinator, as well as the Designated Official Planning Agency, to identify new facilities that have been opened, or are in the planning stages and to identify whether it is feasible for the CTC to provide service to these locations.

Tables 8, 9, 10 and 11 and the following map show the major trip generators and attractors in Lee County.

TABLE 8
SHOPPING/ENTERTAINMENT

Edison Mall	Page Field Commons	Gulf Coast Town Center	Coconut Point Mall
Miromar Outlets	Wal-Mart (US 41 North)	Coral Point Mall (Cape Coral)	Coralwood Mall (Cape Coral)
Lee County Sports Complex	Lakes Regional Park	City of Palms Park	Lovers Key State Park
Lee Civic Center	Koreshan State Park	Sunsplash Water Park (Cape Coral)	Harborside Convention Center
Greyhound Track	Lynn Hall Park	Edison Home	Southwest Florida International Airport
Bonita Beach Park	Ding Darling Refuge	jetBlue Park	

Source: Lee County MPO 2013

TABLE 9
RECREATION FACILITIES

Facility Type	Facility Amount
Regional Parks (including 11 beach parks and 4 sports complexes)	29
Community parks (including 14 rec. centers or community centers)	28
Neighborhood parks	8
Large boat ramps	7
School shared park sites	21
Pools	11
Total	**104**

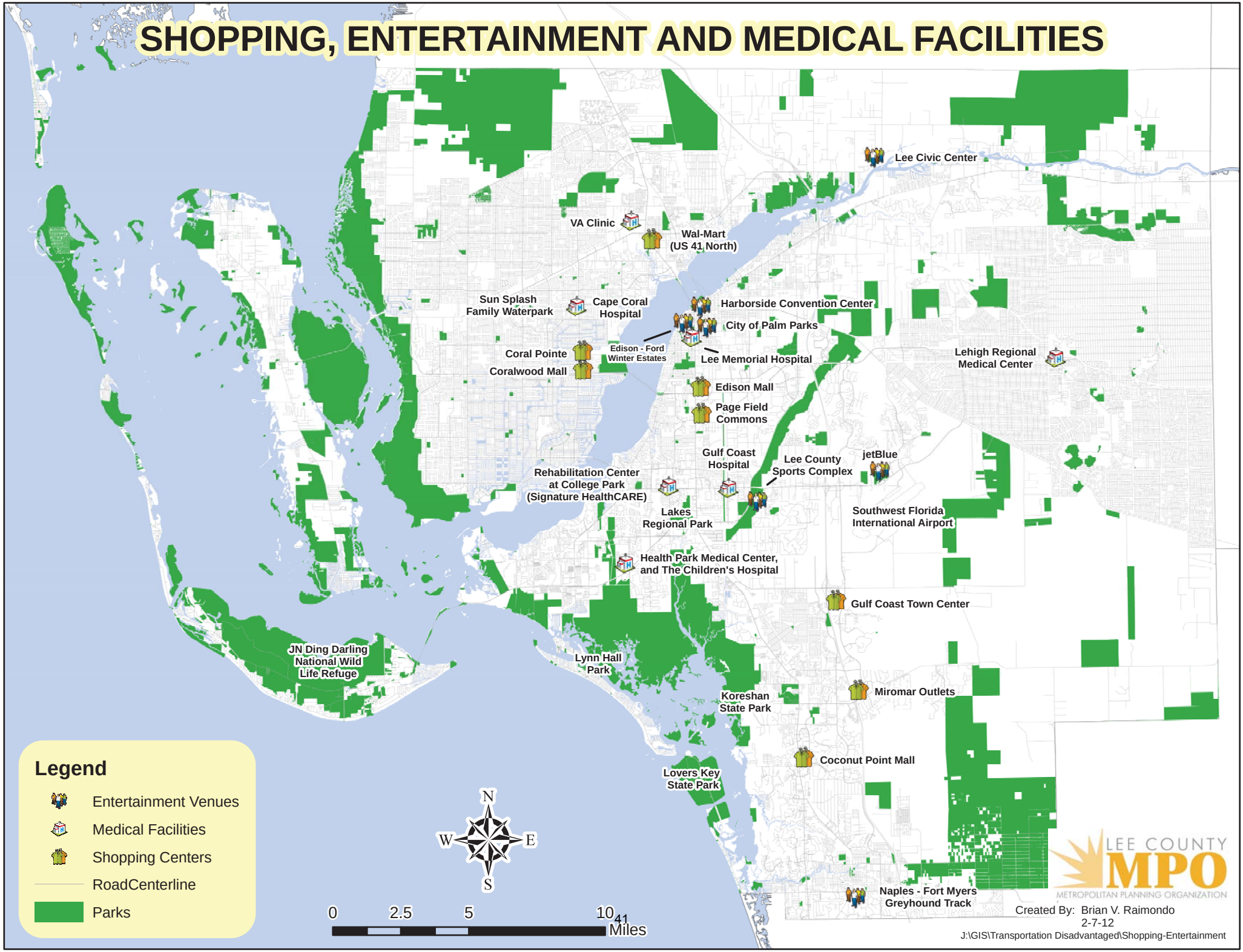
Source: Lee County Office of Economic Development 2008

TABLE 10
MEDICAL FACILITIES

Lee Memorial Hospital	Health Park Medical Center	Cape Coral Hospital	Rehabilitation Center
Children's Hospital	Health Park Care Center	Lehigh Reg. Medical Center	Gulf Coast Hospital
VA Hospital	Park Royal Hospital		

Source: Lee County MPO 2013

SHOPPING, ENTERTAINMENT AND MEDICAL FACILITIES



Education

As of January 2013, The Lee County school system operates 118 schools, 45 elementary, 17 middle, 4 K-8, 13 high schools, 16 Special Centers, 2 High Tech Centers and 21 charter schools. A total of 85,466 students were enrolled. Sixty private schools are also located in the County.

The following colleges and universities serve the region: Edison State College, Florida Gulf Coast University, Barry University, Hodges University, Southwest Florida College, Rasmussen College, Keiser University and Nova Southeastern University. Florida Gulf Coast University offers bachelor and graduate degrees while Edison State College offers certificate, associate and bachelor degrees. Barry University offers certificates, bachelor degrees and master degrees. Hodges University offers associate, bachelor and master degrees while Southwest Florida College offers certificates and associate degrees. Rasmussen College offers bachelor, associate and certificates. Keiser University offers certificates, associate, bachelor and master degrees. Nova Southeastern University offers bachelor, master and professional degrees.

TABLE 11
UNIVERSITIES/COLLEGES

Edison State College	Florida Gulf Coast University	Barry University	Hodges University
Southwest Florida College	Rasmussen College	Keiser University	Nova Southeastern

Source: Economic Development Office of Lee County 2011

e. Inventory of Available Transportation Services

TABLE 12
CAB / TAXI / LIMO SERVICES

~~Aaron Airport Limo & Taxi~~	~~1st Class Limo~~	~~24/7 Airport Transportation~~	~~A - 1 Cadillac Transportation~~
~~A Aardvark Svc~~	~~A Flat Rate Airport Taxi~~	~~A On Time Ride or 30% OFF~~	~~A Platinum Ride~~
~~AAA Airport Causeway Cab~~	~~AAA Palm Taxi Service~~	~~Above All Airport Rides, LLC~~	~~Airport Taxi Inc~~
~~Airport Express~~	~~Airport Taxi~~	~~Airpot Express 24/7~~	~~Ambassador Transportation~~
~~Amber Taxi~~	~~Angel Transportation Service~~	~~Beach Taxi~~	~~Bluebird Checker Yellow~~
~~Bluebird Taxi~~	~~C - 4 P's Inc~~	~~C & C Taxi of Lehigh~~	~~Cape Cab~~
~~Captiva Limo~~	~~Carribean Taxi~~	~~Christopher Graham Taxi Service~~	~~Coconut Cab Taxi~~

~~Cuffley Cars~~	~~Danny Boys~~	~~Errol's Taxi Svc~~	~~Fort Myers Express Taxi~~
~~Hawks Transportation~~	~~John's Where U Wantta Go~~	~~Local Motion Taxi~~	~~Lou's Taxie & Airport~~
~~Manuel Jesus Taxi~~	~~Maxi Transportation~~	~~Metro Cab~~	~~Metro Cars~~
~~Naples Florida Airport Shuttle & Taxi~~	~~Naples Luxury Taxi~~	~~Only Way to Go~~	~~Orange Taxi~~
~~Paradise Taxi~~	~~Parrot Taxi Inc~~	~~Perfect Gentlemen Taxi & Shuttle~~	~~Pine Island Taxi and Limo~~
~~Porter's Taxi~~	~~Preferrred Platinum Limousine~~	~~Ron's Airport Transportation~~	~~Royal Taxi Service USA~~
~~Sanibel Limo~~	~~Skyline Taxicabs~~	~~Top Limo Inc~~	~~Union Cab Inc~~
~~Uschi's Gulfcoast Trnsptrn~~	~~Veterans Car Service~~	~~Yellow Cab~~	~~Yellow Group~~

Lee County Taxi Services 2015		
24/7 AIRPORT EXPRESS	Airport TransportationShuttle Service	A-1 Cadillac Transportation
A-1 Taxi	A Aardvark Svc	A Better Taxi
A Flat Rate Airport Taxi Inc	A OnTime Ride OR 30% OFF LLC	AA Skyline Taxicabs Inc
AAA Airport Causeway Cab Co	AAA Palm Taxi Service	Aaron Airport Transportation
Aaron Airport Transportation	Aaron Nonsmoking Airport Limo & Taxi	Academy Taxi
Academy Taxi & Car Service	Academy Taxi & Car Svc	Air Port Shuttles & Trnsprtn
Airport Express	Airport Express Inc	Airport Taxi
Airport Taxi Inc	Airport Trans & Majestic Limousine Service	Alibi Transport LLC
AlleyGator Transport Express	Ambassador Transportation	Amber Airport Transportation
Amber Taxi	Angel Transportation Svc	Anytime Taxi
BEACH TAXI INC	Bluebird Taxi	C & C Taxi of Lehigh
C-4p's Inc	Captiva Island Shuttle Inc	Cape Cab
Cape Coral 2 RSW	Cape Coral Airport	Cape Coral Airport Shuttle
Cape Coral Taxi	Captiva Limousine Svc Inc	Caribean Taxi
Checker Airport Transportation	Coconut Airport Transportation	Coconut Cab Taxi
Comfort Transportation	Cuffley Cars	Dannyboys Airport Transportation

DannyBoys Transportation	Designatedd Drivers A Limo & Taxi Service	Diamond Limousine Transportation
Discount Transportation	Errol's Taxi Service	Fort Myers Beach Limo and Airport Shuttle
Fort Myers Beach Taxi	Fort Myers express taxi service	Fort Myers Limousine Service
Ft Myers Beach Taxi	Gregorio Taxi Inc	Hawks Taxicabs
Hawks Transportation	HIGHLANDER TAXI & LIMO	Lee Express Taxi
Lluberes Exec Chaufeer & Taxi Ser	Local Motion Taxi	Locomotion Taxi
Loris Coupon Cab	Lou's Taxi & Airport Trnsprtn	Majestic Transport
Maximum Taxi	MBA Airport Transportation	Me-And-U Cab Trans Inc
My Taxi	NightOwl Taxi of Fort Myers FLA.	Only Way To Go Transport LLC
Orange Taxi	Paradise Beach Taxi	Parrot Taxi Inc
Patriots Airport Transportation Services	Pedro's Transportation	Pine Island Taxi & Limo Inc
Porter's Taxi	Preferred Platinum Limousine	Proximiti Communications Inc
Rapid Transportation Services	Ron's Airport Transportation of Cape Coral	Royal Palm Transportation
Safeway Taxi Corp	Sanibel Island Taxi Inc	Santiva Cab Company
Superior Airport Shuttle	Taxi Tim Transportation	Taxista El Sol Y La Estrella
Tesla Transportation LLC	Thrifty Car Service	Tropical Breeze Taxi
Union Cab Inc	Uschi's Gulfcoast Transportation	Veterans Car Service
Yellow Cab		
Source: Yellowpages.com		

C. SERVICE ANALYSIS

This section provides estimates of the need and demand for transportation services within the Transportation Disadvantaged (TD) population in Lee County, Florida.

1. TD Population Forecasts

There are two categories of TD population in the State of Florida – "Potential TD Population" also known as TD Category I. This category includes disabled, elderly, low-income persons and children who are "high-risk" or "at risk". TD Category II includes persons who are unable to transport themselves or to purchase transportation. These individuals are eligible to receive the same subsidies as those in Category I, plus they're eligible to receive TD Trust Fund monies for non-sponsored general trips. The following tables provide TD Population forecasts.

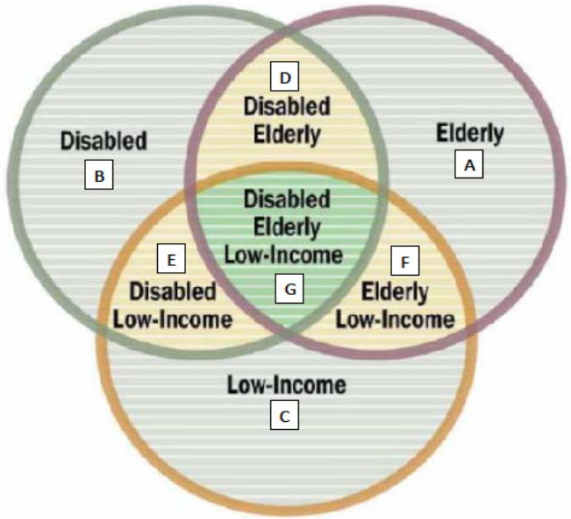
CALCULATION OF GENERAL TRANSPORTATION DISADVANTAGED POPULATION

Lee County **Census Data fron 2013**

County Pop. By Age	Total Pop by Age	% of Total Pop (136,400)	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	32,038	5.0%	9,218	1.5%	512	0.6%	291	1.82%
5-17	89,113	14.0%	23,591	3.7%	3,855	0.6%	1,557	0.24%
18-34	112,336	17.7%	22,362	3.5%	6,627	1.0%	1,652	0.26%
35-64	242,732	38.2%	35,418	5.6%	32,047	5.0%	8,611	1.35%
Total Non Elderly	**476,219**	**74.9%**	**90,589**	**14.3%**	**43,041**	**6.8%**	**12,111**	**1.91%**
65-74	90,230	14.2%	6,457	1.0%	18,087	2.8%	1,533	0.24%
75+	69,117	10.9%	4,429	0.7%	29,445	4.6%	2,312	0.36%
Total Elderly	**159,347**	**25.1%**	**10,886**	**1.7%**	**47,532**	**7.5%**	**3,845**	**0.60%**
Total	**635,566**	**100%**	**101,475**	**16.0%**	**90,573**	**14.3%**	**15,956**	**2.51%**

Double Counts Calculations		
E - Estimate non-elderly/disabled/ low income	From Base Data (I11)	12,111
B - Estimate non-elderly/ disabled/not low income	Subtract I11 from G11	30,930
G - Estimate elderly/disabled/low income	From Base Data (I14)	3,845
D- Estimate elderly/ disabled/not low income	Subtract I14 from G14	43,687
F - Estimate elderly/non-disabled/low income	Subtract I14 from E14	7,041
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C14	104,774
C - Estimate low income/not elderly/not disabled	Subtract I11 from E11	78,478
Total - Non-Duplicated		**280,866**

General TD Population		**% of Total**
Non-Duplicated General TD Population Estimate	**280,866**	44.2%



CALCULATION OF CRITICAL NEED TRANSPORTATION DISADVANTAGED POPULATION

Lee 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	% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
< 5 Years of Age	512	4.20%	22	0		
5-17	3,855	4.20%	162	0.18%		
18-34	6,627	6.30%	418	0.37%		
35-64	32,047	13.84%	4,435	1.83%		
Total Non Elderly	**43,041**		**5,036**	**1.06%**	**28.60%**	**1,440**
65-74	18,087	27.12%	4,905	5.44%		
75+	29,445	46.55%	13,707	19.83%		
Total Elderly	**47,532**		**18,612**	**11.68%**	**11.70%**	**2,178**
Total	**90,573**		**23,648**	**3.72%**		**3,618**

Critical Need - Severely Disabled TD Population			
	Not Low Income	***Low Income***	***Totals***
Non-Elderly	3,596	1,440	5,036
Elderly	16,434	2,178	18,612
TOTAL	**20,030**	**3,618**	**23,648**

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

Low Income & Not Disabled = C + F

Assumes	**85,519**	
27.2%	**xx % without auto access**	
	23,261	
28.0%	**xx % without transit access**	
	6,513	

CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION

Calculation of Daily Trips

Total Actual Critical TD Population		Daily Trip Rates Per Person	Total Daily Trips
Severely Disabled	**23,648**	**0.049**	**1,159**
Low Income ND	**6,513**	**1.899**	**12,368**
Totals	**30,161**		**13,527**

FORECAST OF GENERAL AND CRITICAL NEED TRANSPORTATION DISADVANTAGED POPULATIONS

Lee County

General TD Population Forecast	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Overlapping Circle Component											
E - Estimate non-elderly/disabled/ low income	12,111	12,433	12,763	13,102	13,450	13,808	14,174	14,551	14,938	15,334	15,742
B - Estimate non-elderly/ disabled/not low income	30,930	31,752	32,595	33,461	34,350	35,263	36,200	37,161	38,149	39,162	40,203
G - Estimate elderly/disabled/low income	3,845	3,947	4,052	4,160	4,270	4,384	4,500	4,620	4,742	4,868	4,998
D- Estimate elderly/ disabled/not low income	43,687	44,848	46,039	47,262	48,518	49,807	51,130	52,488	53,883	55,314	56,784
F - Estimate elderly/non-disabled/low income	7,041	7,228	7,420	7,617	7,820	8,027	8,241	8,460	8,684	8,915	9,152
A - Estimate elderly/non-disabled/not low income	104,774	107,558	110,415	113,348	116,360	119,451	122,625	125,882	129,227	132,660	136,184
C - Estimate low income/not elderly/not disabled	78,478	80,563	82,703	84,900	87,156	89,471	91,848	94,289	96,794	99,365	102,005
TOTAL GENERAL TD POPULATION	**280,866**	**288,328**	**295,988**	**303,851**	**311,924**	**320,211**	**328,718**	**337,451**	**346,416**	**355,619**	**365,067**
TOTAL POPULATION	**635,566**	**652,451**	**669,785**	**687,579**	**705,846**	**724,598**	**743,849**	**763,611**	**783,898**	**804,723**	**826,103**

Critical Need TD Population Forecast	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total Critical TD Population											
Disabled	23,648	24,276	24,921	25,583	26,263	26,961	27,677	28,412	29,167	29,942	30,738
Low Income Not Disabled No Auto/Transit	6,513	6,686	6,864	7,046	7,233	7,426	7,623	7,825	8,033	8,247	8,466
Total Critical Need TD Population	***30,161***	***30,962***	***31,785***	***32,630***	***33,496***	***34,386***	***35,300***	***36,238***	***37,200***	***38,189***	***39,203***
Daily Trips - Critical Need TD Population											
Severely Disabled	1,159	1,190	1,221	1,254	1,287	1,321	1,356	1,392	1,429	1,467	1,506
Low Income - Not Disabled - No Access	12,368	12,697	13,034	13,381	13,736	14,101	14,476	14,860	15,255	15,660	16,076
Total Daily Trips Critical Need TD Population	**13,527**	**13,756**	**13,988**	**14,225**	**14,465**	**14,721**	**14,982**	**15,247**	**15,517**	**15,791**	**16,039**
Annual Trips	4,829,204	4,910,818	4,993,811	5,078,206	5,164,028	5,255,431	5,348,452	5,443,120	5,539,463	5,637,512	5,726,021

Assumes Annual Service Days = ***357***

Annual Population Growth (as a percent) ***2.66%***

2. Needs Assessment

~~The purpose of this section is to assess the transportation needs and demand for individuals with disabilities, elderly, low income and high risk and at risk children. This section attempts to identify any gaps in transportation services that are needed in the service area.~~

~~Good Wheels is applying for 2015 FTA 5310 Capital, to replace 5 vehicles and add 25 vehicles. The application is also to add a tire changer and tire balancer machines for the Maintenance Department. And, to upgrade the PtMS trip scheduling and dispatch and fiscal reconciliation software. This package is badly outdated and Good Wheels would be more efficient if it had new software.~~

~~Good Wheels is applying for 2015 FTA 5310 Operating assistance, to cover the cost of training 10 new drivers. This would also provide more operating assistance in the Good Wheels service area, to meet more of the unmet need trips. These unmet needs are documented in the Annual Operating Reports and the TDSP.~~

~~If Good Wheels only receives Replacement vehicles, then the net effect will be no increase in services. However, if Good Wheels receives all the vehicles it is requesting, it estimates that as a result of adding 30 vehicles, and the additional operating assistance, it will be able to bring on 10 new drivers this year, and provide 108,000 additional trips per year (a total of 263,362 trips over existing data.)~~

~~The incremental value is 4,320 trips per year, per vehicle, and, 30,000 miles per year, for each additional mini-van added.~~

~~Good Wheels is only able to provide trips for 50% of the Medicaid clients needing trips daily.~~

Immediate Capital Needs Lee County:
In 2015, FDOT awarded 6 mini vans. These are on order and delivery is expected by May. Tire changing equipment and a balancer was awarded, ordered, and delivered. We anticipate a savings of $3,000 per month.

In 2016, capital funds of $902,042.58 were requested for:

- 7 paratransit vehicles and 1 van to replace vehicles with over 300,000 miles.
- To expand fleet by 5 vans for Medicaid
- IT scheduling software
- Replacement equipment for existing vehicles – AC/compressors and dryers and seat cushions

Good Wheels, in 2016, requested operating funds to:

- hire and train 30 additional drivers and provide continuing education to all drivers
- provide dialysis and chemo patients transportation in Lee County
- retain a grant management person
- upgrade the Good Wheels website, include ADA compliant features, as well as providing communication apps on social media for clients and others

Of the $395,000 requested, the allocation is as follows:

- driver training 19.1%
- transportation in Lee County 63.3%
- grant management 8.8%
- upgrade website 8.8%

More passengers are requesting trips than funding provided in 2015. As of July, 2016, The CTD, Commission Transportation Disadvantaged will increase funding for TD in Lee County. The permanent increase is approximately $20,000; the one year "Proviso" increase is $125,750.50. The $145,750.50

represents 90% of the grant. A local match of 10% is required which amounts to $16,194.50. The $161,945.00 increase will provide approximately 6,000 trips per year based on ambulatory rates.

Automated software which permits phone calls to confirm next day pick up has been developed and is now operational. It is anticipated this will mitigate No Shows.

Good Wheels received and fully invoiced for $88,000 in New Freedom Grant operating funds for new trips for the period of April 2015 through March 2016.

Good Wheels has been a recipient of funds through the new BOCC Partnering for Transportation Results Program that was implemented October 1, 2015 (Fy15/16) in the annual amount of $321,000. These funds are available for the CTC and other non-profit agencies to assist them in meeting their local match requirements for their respective 5310 Grant applications and awards from FDOT. As of April 21, 2016, the first round of funding was allocated in the amount of $100,000, with the second round of funding occurring soon. Recipients were as follows:

- Good Wheels: $40,000 in BOCC funds to be used as capital match against their 5310 capital grant projects.
- Hope Hospice: $20,000 in Bocc funds for operationg match.
- Dr. Piper: $20,000 in Bocc funds for operating match.
- Lighthouse of SWFL : $20,000 in BOCC funds for operating match.

LeeTran is going to the BOCC to execute agreements with agencies in May 2016.

3. Challenges to Coordination

Each CTC territory has differing components. Lee County's mix of LeeTran providing county sponsored/funded fixed route and ADA specialized para-transit services along with the not-for-profit, private Good Wheels corporation providing coordinated para-transit services, has proven to be an effective formula for a number of years now.

The new Medicaid regulations no longer permit the CTC to coordinate and oversee trips for the disadvantaged. There is no standardization amongst the Medicaid Brokers making it costly for the CTC to comply with their rules and regulations. Payments are slow and often in dispute.

D. GOALS, OBJECTIVES AND STRATEGIES

Goal 1: Coordination of Service

Strategy 1: Coordinate all public transportation services funded with local, state or federal funds.

1.1 The CTC will provide the local TD planning staff with a report that shows the number of sponsored and non-sponsored passenger trips coordinated by the CTC and delivered with each funding source by month. Local TD planning staff will provide these reports to the LCB at their next meeting.

1.2 Continue to utilize wheelchair accessible, air-conditioned, comfortable vehicles in order to better serve all riders.

1.3 Continue the TD Bus Pass Program, to move eligible TD passengers on to the County fixed-route transportation system, pursuant to the LCB's policy on fixed-route utilization.

1.4 The CTC together with the LCB and the DOPA shall conduct an ongoing monitoring of the service area, in order to ensure that routes and services are expanded to the areas of the County where growth is occurring.

1.5 The CTC will monitor subcontracted operators on a continuous basis and evaluate annually, according to the CTC's Evaluation process, contained in the TDSP.

1.6 The CTC, as the CTD's subcontracted Medicaid non-emergency transportation provider ("MED-NET STP") will comply with the LCB's adopted compromise agreement for provision of services involving Lee Tran and the ADA program.

Goal 2: Provision of Service

Strategy 2: Provide a comfortable, cost-efficient and cost-effective coordinated transportation service that meets the needs of the transportation disadvantaged within funding limitations.

2.1 Should the need for additional funded capacity arise, as determined by the LCB, the CTC will initiate a competitive procurement process and subcontract with qualified operators to provide needed service.

2.2 Provide on-time service as defined in the Lee TDSP standards.

2.3 Deploy sufficient quantity of vehicles each day to meet the demand for scheduled trips, mindful of the peak periods.

Goal 3: Service Quality

Strategy 3: Assure that quality transportation service is being provided.

3.1 The CTC will conduct random sample ridership surveys in order to evaluate customer satisfaction with transportation service. The CTC will tabulate the surveys and provide the report to the LCB at their next meeting.

3.2 The CTC will handle complaints and grievances in a timely fashion as detailed in the CTC's complaint and Grievance Procedures.

3.3 Monthly, the CTC will provide reports to the local TD planning staff of the number of complaints and grievances received, the nature of the complaints and grievances, and a summary of how they were resolved. These will be submitted to the LCB for their next meeting.

Goal 4: Training about and Marketing of Service

Strategy 4: Continue to market and promote transportation service that can be provided within the limits of available resources.

4.1 Carry out a public information program to assist current and prospective riders in the proper use of the transportation system.

4.2 Have brochures, reservation information, complaint and grievance procedures and other useful information available to riders on all vehicles and at agencies.

4.3 Provide opportunities designed to educate the community regarding the need for sponsored transportation, the services available and the need for the expansion of services, by speaking to clubs and other networks.

4.4 Investigate and implement new training programs and topics, as appropriate, such as Passenger Travel training.

Goal 5: Resource Management

Strategy 5: Maximize the use of human and financial resources and equipment.

5.1 Increase revenue by identifying and taking advantage of existing and new private and public funding sources.

5.2 To reduce and/or control expenses, continue to monitor and analyze the cost of administration and operations.

5.3 Plan for the acquisition of air conditioned, comfortable and ADA accessible vehicles to replace an aging fleet or to expand services.

5.4 Continue to monitor the price of fuel per gallon and make adjustments to the rate model, price quotes, cost formulas, etc. as needed.

Goal 6: Safety

Strategy 6: Continue to operate a safe transportation system as set forth in the CTC's Systems Safety Program Plan (SSPP).

6.1 Update the SSPP at least on an annual basis.

6.2 Continue to make safety and loss prevention the responsibility of all personnel.

6.3 Continue to conduct annual safety checks on all equipment.

6.4 Continue to provide a hazard-free environment and a safe, drug and alcohol free workplace.

6.5 Require physical examinations for all personnel as set forth in the SSPP.

6.6 Continue drug and alcohol testing as set forth in the Substance Abuse Policy (an addendum to the SSPP, ***Appendix A***).

6.7 To improve its awareness of crashes, the CTC shall contact the subcontractors annually to obtain reports including any police reports as appropriate.

6.8 The subcontractors should have Good Wheels be a named insured in their insurance policies.

6.9 Monitor subcontracted transportation operators to ensure that vehicles are maintained in accordance with Florida Department of Transportation's recommended Preventive Maintenance and Safety Programs.

6.10 Ensure that subcontracted transportation operators carry out appropriate training programs for all driving personnel including sensitivity training, basic First Aid and CPR.

E. IMPLEMENTATION SCHEDULE

The Implementation Schedule is tied directly into the goals, objectives and strategies. The implementation schedule is updated annually.

STRATEGY	IMPLEMENTATION DATE
1.1 Provide the number of trips coordinated by the CTC by funding source to the LCB.	Ongoing
1.2 Continue to utilize wheelchair accessible, air-conditioned, comfortable vehicles in order to better serve all riders.	Ongoing
1.3 Continue the TD Bus Pass Program to move TD passengers to the County fixed-route transportation system.	Ongoing
1.4 Conduct an ongoing monitoring of the service in order to ensure that routes and services are expanded to the areas of the County where growth is occurring.	Ongoing
1.5 Monitor subcontracted operators on a continuous basis and evaluate annually according to the CTC's evaluation process contained in the TDSP.	Annually
1.6 The CTC as the subcontracted Medicaid non-emergency transportation provider shall comply with the LCB's adopted compromise agreement for provision of services involving Lee Tran and the ADA Program.	Ongoing
2.1 If the LCB and CTC determine a need for additional funded capacity in the system, the CTC shall initiate a competitive procurement process and subcontract with qualified operators to provide needed service.	As Needed
2.2 The CTC shall provide on-time service as defined in the TDSP standards.	Ongoing
2.3 The CTC shall deploy a sufficient quantity of vehicles each day to meet the demand for scheduled trips being mindful of peak periods.	Ongoing
3.1 The CTC will conduct random sample ridership surveys in order to evaluate customer satisfaction with transportation service. The surveys will be provided to the Planning Agency and the LCB.	Ongoing
3.2 The CTC will handle complaints and grievances in a timely fashion as detailed in the CTC Complaint and Grievance Procedures.	Ongoing
3.3 The CTC will, at LCB meetings, provide monthly, quarterly and cumulative reports to the Planning Agency staff of the number of complaints and grievances received the nature of the complaints and grievances and a summary of how they were resolved.	Ongoing
4.1 Carry out a public information program to assist current and prospective riders in the proper use of the transportation system.	Ongoing
4.3 Provide opportunities designed to educate the community regarding the need for sponsored transportation, the service available and the need for the expansion of services, by speaking to clubs and other networks.	Ongoing
4.4 Investigate and implement new training programs and topics, as appropriate, such as	Ongoing

passenger travel training.	
5.1 Increase revenue by identifying and taking advantage of existing and new private and public funding sources.	Ongoing
5.2 To reduce and/or control expenses, continue to monitor and analyze the cost of administration and operations.	Ongoing
5.3Plan for the acquisition of air conditioned, comfortable and accessible vehicles to replace an aging fleet or to expand services.	Annually
5.4 Continue to monitor the price of fuel per gallon and make business adjustments as needed.	As Needed
6.1 Update the SSPP.	Annually
6.2 Continue to make safety and loss prevention the responsibility of all personnel.	Ongoing
6.3 Continue to conduct safety checks on all equipment.	Ongoing
6.4 Continue to provide a hazard-free environment and a safe drug and alcohol free workplace.	Ongoing
6.5 Require physical examinations for all personnel as set forth in the SSPP.	Ongoing
6.6 Continue drug and alcohol testing as set forth in the Substance Abuse Policy.	Ongoing
6.7 To improve its awareness of accidents, the CTC shall contact the subcontractors quarterly to obtain reports including any police reports as appropriate.	Quarterly
6.8 The subcontractors should have Good Wheels named insured in their insurance policies.	As Needed
6.9 Monitor subcontracted transportation operators to ensure that vehicles are maintained in accordance with FDOT recommended preventative maintenance and safety programs.	Annually
6.10 Ensure that subcontracted transportation operators carry out appropriate training programs for all driving personnel including sensitivity training, basic First Aid and CPR.	As Needed

Source: Good Wheels, Inc. (2013)

5-Year Transportation Disadvantaged Capital Improvement Program

The TD Transportation Capital Improvement Program identifies transportation improvements in the way of purchases, such as vehicles and communications equipment. It groups improvements into staging periods and includes realistic estimates of costs and revenues for the program period. This section will be updated on an annual basis.

GOOD WHEELS FY 2014/15 TO 2018/19 CIP

Implementation Date	Estimated Cost	Description of Purchase	Anticipated Funding Source	New or Replacement	Date Priority Established
2014-15	$450,175	5 Wide Body	FTA 5310 funds	Replacement	June 2014
2015-16	$231,210	5 Low-Floor mini vans	FTA 5310 funds	Replacement	June 2015
2015-16	$1,156,050	25 Low-Floor mini vans	FTA 5301 funds	Expansion	June 2015
2016-17	$450,175	5 wide Body	FTA 5310 funds	Replacement	June 2015
2017-18	$450,175	5 Wide Body	FTA 5310 funds	Replacement	June 2015
2018-19	$450,175	5 Wide Body	FTA 5310 funds	Replacement	June 2015

Source: Good Wheels 2015

II. SERVICE PLAN

A. Operations Element

1. Types, Hours and Days of Service

a) Types of Service

Provider	Ambulatory	Wheelchair	Stretcher	Advance Reservation	Subscription	Door to Door	Curb to Curb	Door through Door
Good Wheels	√	√	√	√	√	√		√
LeeTran	√	√		√	√	√		

1) Group Trips

A group trip is defined as five or more individuals traveling on a vehicle at the same time.

2) Subscription Service (Standing Order)

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.

Passengers must submit requests for subscription service no later than noon the day before service is to start (72 hour advance notification is required for Medicaid Program sponsored trips). The purchaser or passenger shall submit timely revisions to the subscription service request in writing to Good Wheels. Standing orders are encouraged for regularly scheduled Medicaid trips.

3) Demand Responsive Service

Demand response trips are trips scheduled for the next day of service no later than noon the day before (72 hour advance notification is required for Medicaid Program sponsored trips).

Demand responsive service is generally available from 6:00 a.m. until 6:30 p.m. Monday through Friday.

4) Non-Emergency Medical Stretcher Service

Requests for non-emergency medical stretcher service must be made at least two hours before the required time of travel. Those accessing service can expect to be picked up from 1 to 2 hours before their appointment time depending on travel distance.

5) Wheelchair Service

Wheelchair service is offered countywide. Drivers are not permitted to assist persons in wheelchairs up or down any steps. When a wheelchair, scooter or other assistance device is needed, passengers must notify the reservationist making the trip reservation.

6) Florida Agency for Health Care Administration Medicaid Program Trips

Good Wheels is the designated Medicaid Subcontracted Transportation Provider to the Florida Commission for the Transportation Disadvantaged (CTD). The Florida Commission for the Transportation Disadvantaged, is the designated vendor to The Florida Agency for Health Care Administration Medicaid Program. Under this arrangement, Medicaid pays the CTD to make sure that Medicaid trips are provided, according to Medicaid policies.

b) Hours and Days of Service

Office Hours: 9:00 a.m. to 6:00 p.m. Monday through Friday excluding holidays (see below).

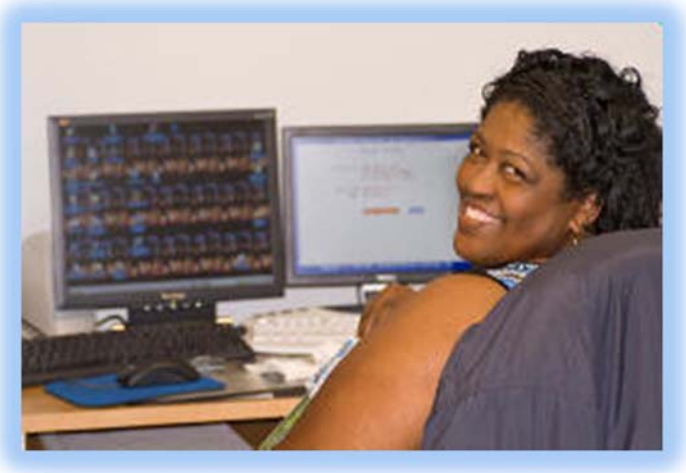
General Service hours are 5:00 a.m. to 8:00 p.m. Monday through Saturday. Passengers are advised to be ready for pickup one hour before their scheduled appointment time. All return trips are scheduled in advance. There is a 30 minute pickup window for return trips. Passengers should expect their return trip to arrive at the scheduled time or up to 30 minutes after their scheduled pickup time. Passengers can expect their return trip to take up to 90 minutes from the time they are seated on the vehicle.

Demand responsive service is generally available from 6:00 a.m. to 6:30 p.m. Monday through Friday.

Non-emergency medical stretcher service is available under the Medicaid Program 24 hours per day, seven days per week.
After hours service is provided to Medicaid Program sponsored individuals. Phone numbers to call for after hours service are: 239-768-2900 or 1-800-741-1570. Bluebird is contracted by Good Wheels to provide after hours dispatch service. Bluebird is able to determine passenger eligibility and authorize transportation.

2. Accessing Services

Reservations:



Requests for transportation are made with Good Wheels. Trip reservations must be made Monday through Friday from 8:00 a.m. to 5:00 p.m. Special arrangements may be made for trips outside of these hours of operation. Trips must be scheduled by noon the day before service is provided. 72 hour advance notification is required for Medicaid Program sponsored service.

Return trips must be scheduled in advance. Passengers should also be advised that some trips cannot be picked up before 10:00 a.m., and "take homes" are based on when the vehicle is available (not when the person is ready). Passengers should be advised there will be extended waits for their return pickups.

Peak travel times are 7:30 a.m. to 9:30 a.m. and 3:30 p.m. to 5:30 p.m. Good Wheels has limited capacity to transport passengers during these times. Therefore, passengers are encouraged to schedule their reservations for trips during these times as soon as possible.

Holidays:

Service will not be provided on the following days: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and Christmas.

No-Shows:

When the passenger fails to cancel their pick-up arrangement more than an hour prior to a driver's arrival, then their trip is defined as a no-show. No-shows effect the provision of service, because the no-show takes up resources (of time, fuel, vehicles, etc.) that could be otherwise used to transport an actual client.

Cancellations:

Trip cancellations must be made to Good Wheels at least one hour prior to the driver's arrival. If a passenger needs to cancel a trip, they should call Good Wheels as soon as they know this, at 239-768-2900 in Fort Myers or 800-741-1570, to make a cancellation. Cancellations affect the efficiency that can be achieved through coordination. A cancellation is defined as a trip reservation made but canceled more than an hour, prior to the drivers' arrival. If a passenger does not call to cancel their trip, they may be fined.

Passenger Fares:

Coordinated transportation is offered to the general public. Any individual may call Good Wheels to schedule a trip, and pay the full cost of the services provided. Generally, the cost of this service is comparable to taxi service.

Passengers sponsored by Florida's Transportation Disadvantaged Program must pay a $2.00 passenger fare. Medicaid Non-Emergency Program sponsored passengers must pay a $1.00 per trip fare.

Transportation Disadvantaged Program Eligibility:

- No other means of transport
- Age
- Disability
- Income: The LCB's policy is for the CTC to provide transportation to persons' whose household income is at 200% of the health and human services poverty levels.

Individuals must apply for Transportation Disadvantaged Program eligibility for their transportation to be sponsored by the Florida Commission for the Transportation Disadvantaged. Good Wheels shall implement the application/eligibility process. ***Exhibit B*** is an example of the application used for Transportation Disadvantaged Program eligibility.

Transportation Disadvantaged Program Trip Priorities Policy:

Only medical trips are provided with the Transportation Disadvantaged Trust Funds.

Service Complaints:

People with complaints can call either the Good Wheels 1-800-741-1570 phone number or the Florida Commission for the Transportation Disadvantaged's Ombudsman Hotline number at 1-

800-983-2435. Both numbers are posted in the vehicles.

3. Transportation Operators and Coordination Contractors

According to Rule 41-2, F.A.C., the CTC shall jointly develop and enter into a coordination contract with agencies who receive government transportation disadvantaged funds and who, from a total system approach, can meet more effectively and efficiently their own transportation needs than the CTC. The contract shall include the requirements of reporting, insurance, safety, and other terms outlined in the MOA that apply equally to any transportation operator. The contract also shall include any relevant information regarding joint utilization and cost arrangements for the provision of transportation services to and from the coordinator.

The CTC may provide the trips itself, or subcontract them to qualified operators. The rates paid to transportation operators are negotiated between each transportation provider and the CTC. The rates are covered in the sample carrier contract, a copy of which can be obtained from the CTC.

Lee County Transit (LeeTran)

Lee County Transit, known as LeeTran, is operated by Lee County and is responsible to the Lee County Board of County Commissioners. The County assumed official ownership of the transit service in February of 1977. At that time, the system consisted of several fixed-route bus lines connecting the City of Cape Coral, the City of Fort Myers and the unincorporated County. Since the beginning of transit service operations in Lee County, many improvements and service expansions have been implemented that have assisted in improving the public transportation services provided within the county.

LeeTran operates the fixed route public transportation service in Lee County, as a department of Lee County Government. Lee Tran currently operates 25 bus routes. Twenty-three of the bus routes operate on a scheduled fixed-route system at least six days per week. Four of the routes are either seasonal or are adjusted for seasonal service. Routes 15, 50, 100, 120, 140, 150, 400, 590, 595, and 600 operate on Sundays. The final route, Route 160, provides limited reservation bus service to Pine Island on Thursdays only. LeeTran provides trolley service, branded as The Trollee, along Fort Myers Beach and seasonal trolley service in the Riverfront District of Downtown Fort Myers. There are two park-and-ride trolleys that connect the Town of Fort Myers Beach during season. One provides access to the park-and-ride lots located on the mainland side of the Mantanza Bridge, the other provides service along Estero Blvd on Fort Myers Beach. The trolley system operates as two separate routes during seasonal service and the two routes are combined into one during non-seasonal months. The seasonal Riverfront District Trolley service in the downtown of the City of Fort Myers is also run as seasonal service with one route providing service within the downtown area of the City of Fort Myers and the other connecting the downtown condominiums with the downtown area and local grocery shopping.

The regular one-way bus fare is $1.50. Half-fares are available to youths (under 17 years) and to seniors and persons with disabilities, with a LeeTran ID. The bus service is marketed to riders of all age groups. Passengers must be able to board, disembark and carry their own packages on and off the vehicles. Most routes operate between 5:00 a.m. and 10:00 p.m. Monday through Saturday, with limited corridor service and service to the beach areas on Sundays between 6:00 a.m. until 9:45 p.m., as well as service to the Southwest Florida International Airport.

ADA Paratransit Service

The ADA (American Disabilities Act) requires that entities that operate fixed-route transit service also provide complementary door-to-door paratransit service for individuals living within a ¾ mile of fixed bus routes who are unable to use the fixed-route service due to a disability. To meet the requirements of the ADA, LeeTran has created Passport, LeeTran's ADA paratransit service. This service is available to ADA-eligible persons in Lee County during regular fixed bus route service hours seven days a week. Passport is used to complement the fixed-route system by serving ADA-eligible elderly and persons with a disability who live within the prescribed distance from a fixed bus route.

Up until February 2005, LeeTran met its provision of the complementary paratransit service by subcontracting it out to a series of different contractors. The last of these was the County's CTC, Good Wheels, Inc., which had been operating the ADA service since July 2003. In February 2005, LeeTran began managing its own ADA program trips. LeeTran now takes reservations, schedules and provides its own transportation for all ADA-related trips.

LeeTran ADA Paratransit Service Ridership Numbers

FY	Trips	Vehicle Miles
2016*	118,000	1,556,000
2015	113,789	1,476,936
2014	109,281	1,488,560
2013	104,303	1,369,823
2012	102,274	1,310,353
2011	99,568	1,252,054

Senior Friendship Centers of Southwest Florida

Services provided by Senior Friendship Centers of Southwest Florida include adult day care and health care, personal care, case management, home making, respite care, medical transportation, and emergency alert response services. The agency was one of the major specialized transportation providers in Lee County before Chapter 427, *F.S.* took effect. Currently, SFC purchases approximately 3,800 trips a year through the CTC.

The agency's clients come mainly from South and North Fort Myers and the Lehigh area. The destination of the Fort Myers residents is the main Senior Friendship Center in Fort Myers, while the clients in the Lehigh area receive services at the Senior Friendship Center in Lehigh.

COORDINATION CONTRACT AGENCIES

~~Name of Agency~~	~~Address~~	~~City, State, Zip~~	~~Telephone Number~~	~~Contact~~
~~Dr. Piper Center~~	~~2607 Dr. Ella Piper Way~~	~~Fort Myers, FL 33916~~	~~239 332 5346~~	~~Nida Eluna, Ex Dir~~

~~Lighthouse of SW Florida~~	~~35 West Marianna Ave~~	~~North Fort Myers, Fl 33903~~	~~239 997-7797~~	~~Douglas Fowler, Ex Dir~~

COORDINATION CONTRACT AGENCIES

Name of Agency	Address	City, State, Zip	Telephone Number	Contact
Lighthouse of SW Florida	35 West Marianna Ave	North Fort Myers, Fl 33903	239 997-7797	Douglas Fowler, Ex Dir
UCF	9040 Sunset Dr	Miami, FL 33713	305-273-3055	James Week

At the time of the development of the 2015/16-Lee County TDSP, Good Wheels, Inc. had Coordination Contracts with the above mentioned agencies.

4. Public Transit Utilization

The CTC initiated a bus pass program during November, 1996. When appropriate, the CTC will arrange for a person to travel on LeeTran's Fixed Route system rather than on the door-to-door system. The passenger is issued a monthly bus pass, saving money for the Transportation Disadvantaged Non-sponsored Trip Grant.

LeeTran- Lee County Transit **Mr. Steve Myers, Director** **LeeTran** **6035 Landing View Rd** **Fort Myers, FL 33907**	**LeeTran- ADA Paratransit/ "Passport"** **Mr. Peter Gajdjis** **LeeTran Passport** **5711-1 Independence Circle** **Fort Myers, FL 333912**

5. School Bus Utilization

School buses are not currently utilized in the coordinated system. LeeTran is working with the School District to address joint use topics.

6. Vehicle Inventory

Vehicle inventories are shown as ***Exhibit C***.

7. System Safety Program Plan Certification

Good Wheels Annual Safety Certification is shown as ***Exhibit D***.

8. Inter-county Services

Inter-county services are provided by local carriers. Medicaid passengers traveling to medical appointments may arrange transportation by contacting the CTC. The necessity to travel out of the service area will be verified by the CTC. In the past, Good Wheels operated an intercounty service between the cities of Clewiston, LaBelle and Fort Myers from September 1995 to April 1999. This was discontinued in April 1999.

Good Wheels is presently operating a Dial-A-Ride program. This service is funded through FTA 5311 funds. A passenger calls Good Wheels to schedule a trip. This service operates in the Hendry/Glades service area and passengers can arrange trips to Lehigh Acres. The Dial-A-Ride flyer is provided at the end of the Service Plan component.

Good Wheels receives federal and state grant funds to operate a regularly scheduled route from Clewiston in Hendry County to Belle Glade in Palm Beach County. This service connects to routes operated by Palm Tran.

9. Emergency Preparedness & Response

Procedures for transportation in the time period before an evacuation due to natural disasters and/ or emergencies are addressed by the LCB's Standard/Policy 2.11.

Good Wheels, Inc**.** takes an active role in Lee County's Emergency Transportation Operations Plan during emergencies. (A copy of the Plan is available upon request.)

The CTC, through contractual agreements with carriers and in the System Safety Program Plan (SSPP) establishes policies for the handling of emergencies, accidents and delays. 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. 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 U.S. DOT, the driver is required to undergo drug and alcohol testing as per Federal guidelines. If delays occur, the CTC may reassign trips. Where possible, passengers will be notified of extended delays and alternate arrangements.

In the event of an accident, the carrier must follow up with a written accident report and a management analysis within 24 hours. In the event of bodily injury or property damage in excess of U.S. DOT guidelines, the driver must submit to drug and alcohol testing in accordance 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 passenger will be notified and a satisfactory resolution will be reached.

10. Educational Efforts/Marketing:

Good Wheels has public information brochures and "Passenger's Guide Transportation Disadvantaged and Medicaid". In addition to the brochure, Good Wheels visits various government, community and social service agency meetings.

The LCB has identified the need for Good Wheels to keep the community informed. Reaching out to the customary user groups of the coordinated system will continue to be an important part of this effort. Good Wheels and the LCB will work together to keep the passengers, the sponsoring agencies and the public informed regarding changes in service delivery.

Along with continually educating the users and the LCB, another important aspect of training is for Good Wheels to maintain its program to train its employees. The types of training conducted are for new employees, continuing driver education for current staff, and on-going operations training for current staff.

Good Wheels has brochures describing the coordinated transportation system briefly discussing

eligibility criteria and the scope of the services provided are distributed to social service agencies within the service area.

11. Acceptable Alternatives

There have been no acceptable alternatives for the provision of transportation service identified in Lee County.

Service Standards

Lee County CTC – Policies and Standards, Evaluation and Monitoring		
Rule	**41-2.006(4)(a), FAC:** Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident and reasonable suspicion, return to duty and follow-up as required by Federal Highway Administration (FTA).	
Compliance	All safety sensitive job positions comply with the pre-employment, randomization, post-accident and reasonable suspicion testing requirements of the Federal Transit Administration.	Reviews are conducted according to FTA. Conducted by FDOT reps.
Monitoring	Annual reviews conducted by FDOT, FHWA or FTA will determine compliance with this standard.	
Rule	**41-2.006(4)(b), FAC:** An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the Local Service Plan.	
Compliance	In order to enhance the safety of passengers and drivers, children under age 15 or other people who, due to age or disabilities may be at risk to themselves or others, must be accompanied by an escort or attended to by an attendant. Escorts must be provided by the passenger or the agency paying for their trip. The escort must be able to provide the necessary assistance to the passenger. Escorts are transported at no additional charge. The CTC reserves the right to refuse to transport a passenger or group of passengers if they need an escort, but do not have one. The need for an escort is determined in advance of the trip. "Traveling companions" are not the same as required. Escorts that have to be picked up or dropped off before/after passengers are not considered escorts, but are regular trips.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.
Rule	**41-2.006(4)(c), FAC:** Use of child restraint devices in Florida is a State law.	
Compliance	All passengers under the age of 5 and/or less than 45 pounds will be required to use a child restraint device. This device will be provided by parent or sponsoring agency, or by Good Wheels upon arrangement.	
Monitoring	Annual reviews conducted by FDOT, FHWA or FTA will determine compliance with this standard.	Verified by bus ride (car seat on bus).
Rule	**41-2.006(4)(d), FAC:** Passenger property that can be carried by the passenger and/or driver in one trip and can safely bestowed on the vehicle, shall be allowed to be transported with the passenger at no additional charge. Additional requirements may be negotiated for carrying and loading rider property beyond this amount.	
Compliance	Evaluated at the CTC Annual Review.	
Monitoring	Passengers shall be allowed to have four pieces of personal property which they can place on their lap or stow under their seat. Passengers must be able to independently carry all items brought onto the vehicle. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices or intravenous devices.	Verified by bus ride.

Rule	**41-2.006(4)(e), FAC:** Vehicle transfer points shall provide shelter, security and safety of passengers.	
Compliance	The CTC does not generally use transfers in the coordinated system, but if they are used, vehicle transfer points shall be located in a safe, secured place that provides shelter.	VA Center Rosa Parks Edison Mall Hospitals
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(f), FAC:** 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. This shall include advising the unsatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the Local Coordinating Board.	
Compliance	The local toll free phone number will be included in the complaint process. This number will be posted on right visor of all vehicles in 3" sized numbers: (800) 741-1570.	Verified by bus ride, sticker on bus.
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(g), FAC:** Out of service area trips shall be provided when determined locally and approved by the Local Coordinating Board, except in instances where local ordinances prohibit such trips.	
Compliance	The local toll free phone number will be included in the complaint process. This number will be posted on right visor of all vehicles in 3" sized numbers: (800) 741-1570.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.
Rule	**41-2.006(4)(h), FAC:** Interior of all vehicles shall 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 passenger.	
Compliance	All vehicles shall be cleaned and maintained (interior and exterior) on a regular schedule.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.
Rule	**41-2.006((4)(i), FAC:** Billing requirements of the CTC subcontractors shall be determined locally by the Local Coordinating Board and provided in the Local Service Plan. All payments shall be paid to subcontractors within seven calendar days after receipt of said payment by the CTC. If the contractor receives less than full payment, then the contractor shall be required to disburse only the funds received on a pro rata basis with each subcontractor receiving a prorated portion based on the amount due on the payment.	
Compliance	The CTC shall pay all bills to the subcontracted transportation operator within seven days after receipt of payment. Operator payments will be addressed as a standard LCB agenda item.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	Verified by operators.
Rule	**41-2.006(4)(j), FAC:** Passenger/trip database must be maintained or accessible by the CTC on each rider being transported within the system.	
Compliance	For each passenger transported within the system, the CTC will collect the name, phone number, address, funding source	Verified by review of records.

	eligibility and special requirements on each passenger in a database. See 2.10 (2.15) for HIPPA Compliance.	
Monitoring	Evaluated at the CTC Annual Review	
Rule	**41-2.006(4)(k), FAC:** Adequate seating for para-transit services shall be provided to each rider and escort, child or personal care attendant, and no more passengers than the registered passenger seating capacity shall be scheduled or transported in a vehicle at any time. For transit services provided by transit vehicles, adequate seating or standing space will be provided to each rider and escort, child or personal care attendant, and no more passengers than the registered passenger seating or standing capacity shall be scheduled or transported in a vehicle at any time.	
Compliance	Vehicle seating will not exceed the manufacturer's recommended capacity.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.
Rule	**41-2.006(4)(l), FAC:** Drivers for para-transit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle.	
Compliance	Drivers shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with specific passengers, upon pickup except in situations where the driver regularly transports the rider on a recurring basis. All drivers will have a name badge displayed at all times when transporting passengers. Drivers have photo-id on their person that they can show to the passenger upon request.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.
Rule	**Rule 41-2.006(4)(m), FAC:** The para-transit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seatbelt or utilization of wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. In door-through-door para-transit 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 passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian and driver.	
Compliance	All drivers shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include holding hands, or allowing the passenger to hold an arm; opening the	Verified by bus ride.

	vehicle door, fastening the seat belt or utilization of wheelchair securement devices, storage of mobility assistive devices and closing the vehicle door. Other assistance may be provided as needed and accepted. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down any steps; only ramps are to be used.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**Rule 41-2.006(4)(n), FAC**: Smoking is prohibited in any vehicle. Requirements for drinking and eating on board the vehicle will be addressed in the Local Service Plan.	
Compliance	Smoking, eating and drinking is prohibited on any vehicle in the coordinated system.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride; signage is on bus.
Rule	**Rule 41-2.006(4)(o), FAC**: The CTC and the LCB shall jointly develop a policy on passenger no shows**.** Assessing fines to passengers for no shows is acceptable but such policy and process shall be identified in the local Service Plan.	
Compliance	Passenger no-shows are defined as trips not canceled one hour before scheduled pickup. When a passenger is considered a no-show, the driver will attempt to communicate with them through CTC dispatch. They will be notified through the use of a door hanger which notes the time the driver arrived. For a TD Grant non-sponsored trip, upon the third no-show, the CTC will send a letter to the person to provide notice that their service will be suspended for thirty days. For trips sponsored by other funding sources, the CTC shall contact the agency when a no-show occurs. Agencies should also contact the CTC when they become aware of cancellations or no-show situations. The Policy on no-shows shall be communicated to the passengers and agencies by the CTC when adopted, and thereafter to all newly enrolled passengers. The information shall be distributed in the appropriate format and shall be available in alternative formats upon request.	
Monitoring	Evaluated at the CTC Annual Review.	Committee spoke with Mr. Bowman about this. The frequency is decreasing.
Rule	**Rule 41-2.006(4)(p), FAC**: All vehicles ordered or put into service after the adoption of this section of the Rule, and providing service within the coordinated system, shall be equipped with two-way communications in good working order and be audible to the driver at all times to the base.	
Compliance	All vehicles are equipped with two-way radios or cell phones.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.
Rule	**Rule 41-2.006(4)(q), FAC**: All vehicles ordered or put into service after the adoption of this section of the rule and providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.	
Compliance	All vehicles have working air conditioning and heating.	Verified by bus ride.

	Vehicles that do not have a working air conditioner and heater will be scheduled for repair or replacement as soon as possible. Should a vehicle incur a problem, it will be repaired as soon as possible. The priority of the LCB is that the CTC provide transportation. If a vehicle's air conditioning or heating is not functioning properly, and if there are no other vehicles available, the passengers will be transported.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(r), FAC**: First Aid policy shall be determined locally and provided in the local Service Plan.	1st Aid kit on bus, Verified by bus ride. Also, driver training records were verified.
Compliance	All drivers will be trained in First Aid every three years by the National Safety Council. All vehicles are equipped with a First Aid kit.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(s), FAC**: Cardiopulmonary Resuscitation [CPR] policy shall be determined locally and provided in the Local Service Plan.	Driver training records were verified.
Compliance	All drivers will be trained in Cardiopulmonary Resuscitation [CPR] every two years.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(t), FAC**: Driver criminal background screening shall be determined locally, dependent upon purchasing agencies' requirements and provided in the local TDSP.	Driver records were verified.
Compliance	All drivers in the coordinated system have a favorable FDLE background, using DCF policies and procedures.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(u), FAC**: In areas where fixed route transportation is available, the CTC should jointly establish with the LCB a percentage of total trips that will be placed on the fixed route system.	Per APR the rate is 5.4% on fixed route.
Compliance	The LCB has established a goal of 2.2% to be placed with the fixed-route transit system.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(v), FAC**: The CTC should establish and address the passenger pick-up window in the local TDSP. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.	Complaint log was reviewed.
Compliance	Passengers are not given a set pick-up time. Instead, they are told to be ready for their ride to arrive up to an hour before their destination appointment time. The CTC may negotiate special pick-up arrangements with the customer, in advance, as the situation dictates. Passengers will be dropped off at their appointment with certain exceptions negotiated in advance. All return trips are scheduled in advance. Passengers should expect their return vehicle to arrive at the scheduled time, up to 30 minutes after the scheduled return time. Passengers can expect their return trip to take up to 60 minutes from the time they are seated on the vehicle.	
Monitoring	Evaluated from the annual CTC customer complaint surveys. Doesn't apply to ADA trips.	
Rule	**41-2.006(4)(w), FAC**: The CTC and the LCB should jointly establish and address the percentage of trips that will be on-	Records verified.

	time in the local Transportation Disadvantaged Service Plan. This performance measure should be communicated to contracted operators, drivers, purchasing agencies and passengers.	
Compliance	The CTC will have an 85% on-time performance rate for all completed trips. The Evaluations of the CTC's on-time performance will be measured based upon the time the person is to be dropped off for their appointment and the time the person is to be picked up on a scheduled return trip. These are considered separate trips.	
Monitoring	Evaluated from the annual CTC customer complaint surveys. Doesn't apply to ADA trips.	
Rule	**41-2.006(4)(x), FAC**: The CTC should establish and address in the TDSP a minimum 24 hour advanced notification time to obtain services. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.	
Compliance	There will be a minimum 24 hour notice requirement for all trips scheduled within the coordinated system. (72 business hours for Medicaid trips.) Non-Medicaid reservations must be made before Noon the day before the requested trip. Passengers with an urgent need to travel should call the CTC. Same day trip requests cannot be guaranteed, however, the CTC will attempt to assist the passenger.	
Monitoring	As established.	TDSP reviewed.
Rule	**41-2.006(4)(y), FAC**: The CTC and the LCB should jointly establish and address in the service plan a performance measure to evaluate the safety of the coordinated system. This measure should be used in the CTC evaluation of its contracted operators and the LCB's evaluation of the CTC.	
Compliance	The standards for crashes will be 1.2, or fewer, accidents per 100,000 miles for the evaluation period, based on the AOR definitions of crashes.	
Monitoring	This information is part of the annual AOR.	Yes, per AOR and APR.
Rule	**41-2.006(4)(z), FAC**: The CTC and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the reliability of the vehicles used in the coordinated system. This measure should be used in the CTC evaluation of its contracted operators and the LCB's evaluation of the CTC.	
Compliance	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).	
Monitoring	This information is part of the annual AOR.	Yes, per AOR and APR.
Rule	**41-2.006(4)(aa), FAC**: This performance measure can be used to address the accessibility of the service. The CTC and the LCB should jointly determine if a standard for call hold time is needed in the coordinated system and address this in the local service plan. If determined to be necessary, this standard should be included in the LCB's evaluation of the CTC.	
Compliance	The customer should not be put on hold for more than 3 minutes on average.	Yes, this has been verified.

Monitoring	Evaluated at the CTC Annual Review.	
Rule	**41-2.006(4)(bb), FAC**: The CTC and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the quality of service provided within the coordinated system. This measure should be used in the CTC's evaluation of its contracted operators, and the LCB's evaluation of the CTC.	
Compliance	Complaints shall not exceed 1% of total trips provided during the evaluation period. The LCB should evaluate the CTC based upon the number of complaints that are resolved, versus unresolved.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	Yes, per AOR and APR.

Lee County CTC – Policies and Standards, Evaluation and Monitoring - Other		
Policy	**2.01 Service Effectiveness** 2.01a – Expense, 2.01b – Revenue, 2.01c – Subsidy, 2.01d – Ridership, 2.01.e – Service Quality, 2.01f – Level of Service, 2.01g -- Safety	
Compliance	The CTC shall continually look for methods to: 1. Increase the number of passenger trips per driver hour; 2) Minimize any yearly increase to the cost per passenger trip; and 3) Minimize any yearly increase to the cost per driver hour.	
Monitoring	This information is part of the annual AOR.	Yes, per AOR and APR.
Policy	**2.02 Contract Monitoring**	
Compliance	The CTC will perform an annual evaluation of the contracted operators using the LCB evaluation process, using applicable portions of the evaluation materials, and provide a copy of the annual evaluation of the operators.	
Monitoring	Evaluated at the CTC Annual Review.	Monitoring is conducted annually in June.
Policy	**2.03 Ride time**	
Compliance	The CTC will make every effort to abide by funding agencies stated ride times. Passengers can expect to return home within 60 minutes of their pick up. In situations where it becomes apparent that the ride time will exceed this (crashes or vehicular breakdowns), the CTC will make every effort to contact the families of the passengers by telephone.	
Monitoring	The CTC needs to document which agencies have ride time limits and other exceptions. Community Care for the Elderly (CCE) = 90 minutes. This Policy does not apply to ADA trips.	Yes, per review of complaint log.
Policy	**2.04 Voice Mail Changes**	
Compliance	The CTC must ensure that customers are provided with sufficient notification of pending major changes to the phone system for scheduling trips or for reporting complaints. The recording should offer in English and in Spanish, the date of the change and describing the changes that will take place.	
Monitoring	Voice mail changes need to be announced in advance and detailed.	Yes, this takes place when needed.
Policy	**2.05 Standardization of Transportation Operator and Coordination Contracts.**	
Compliance	The suggested contract format is used.	
Monitoring	Evaluated at the CTC Annual Review.	Yes, the suggested formats are being used.
Policy	**2.06 Eligibility Criteria**	
Compliance	Persons are eligible for transportation if their trip is sponsored by a funding agency. If no funding agency is available and if the person meets the definitions of transportation disadvantaged, then they are eligible for transportation. The LCB's policy is for the CTC to provide transportation to persons whose household income is at 200% of the poverty levels. Persons to be transported contact the CTC for an application. The CTC will transport	Yes, the records were reviewed.

	the general public who shall be charged the going rate for trips.	
Monitoring	As established	
Policy	**2.07 Prioritization of Trips**	
Compliance	The CTC, LCB and planning staff have prioritized trips in the TDSP.	Yes, the records were reviewed.
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.08 Insurance:** The CTD requires that the CTC carry $100,000 per person/$200,000 per incident in insurance, pursuant to Rule 41-2.006, FAC.	
Compliance	The CTC carries $1 million per County regulations. The CTC requires its subcontracted operators to carry $100,000/$200,000. The subcontractors must have the CTC named as an additional insured. Insurance requirements for subcontractors are covered in more detail in the operators' contracts. The CTC carries $1 million per County regulations. The CTC requires its subcontracted operators to carry $100,000/$200,000. The subcontractors must have the CTC named as an additional insured. Insurance requirements for subcontractors are covered in more detail in the operators' contracts.	Yes, the records were reviewed.
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.09 System Safety Program Plans (SSPP)**	
Compliance	Updated annually.	Yes, the records were reviewed.
Monitoring	Evaluated at the CTC Annual Review.	
Policy	**2.10 Co-pays:** LCB's Policy on the $2.00 fare co-payment on the non-sponsored trip grant; other copayment issues.	
Compliance	The CTC charges a $2.00 fare on each non-sponsored trip. The monies collected are used for the local match for the trip grant. All co-payments are $2.00 except Medicaid, which has a $1.00 copayment.	Yes, the records were reviewed.
Monitoring	As established	
Policy	**2.11 Inclement Weather**	
Compliance	The LCB has a policy regarding provision of transportation to persons during storms. Components of the policy include: 1. The CTC is closed when LeeTran is closed; when ADA services stop. The CTC becomes a member of the Lee County Emergency Operations Team. 2. The CTC has the right to not transport clients of a center, if they believe that they will not be able to get a person back. (The CTC has the right to cancel trips.) 3. An agency program director has the right to call the CTC the morning of the trip and cancel trips for the day, if they feel the weather is too severe. This is based on if the Lee County Schools are not transporting that day. (On weekends, or days when schools are shut, the CTC shall use its best judgment.) 4. Centers must work with the CTC to develop a contingency plan that outlines what the center will do with its clients, in the event that the CTC cannot come pick the clients up at the appointed time due to severe storms. The contingency plan should be developed with the understanding that the delay may be for an unknown length of time. Centers should make sure that the family	Yes, the records were reviewed.

	members of clients receive a copy of the contingency plan (or a page that outlines what the family members should expect.) 5. The features in 2, 3 and 4 should free up enough trips to allow the CTC to go get people who were transported out to a location without a contingency plan. 6. Clients at centers will be picked up as soon as it is safe to do so, and as soon as there are trips available. 7. For the purpose of this policy, a storm was defined as "sustained wind of 39 miles per hour or more, and/or major flooding of streets." "Gale force" winds are 39 to 46 mph.	
Monitoring	Presence of letters on file; Copies of Agencies' contingency plans on file with the CTC; CTC is to monitor storm warnings and weather conditions.	
Policy	**2.12 Distribution of Replacement Vehicles Acquired Through Grants.**	All of Good Wheels' vehicles are ADA compliant. The updated Vehicle inventory is supplied to the Planning Agency annually .
Compliance	Vehicles received through any grant funding source will be used to replace existing ADA-compliant or non-ADA regulation compliant vehicles currently in the system, according to the following priorities: 1.) Gasoline vehicles with over 175,000 miles, or diesel vehicles with over 225,000 miles, or vehicles over 5 years old; 2.) Non-ADA accessible vehicles; 3.) All other vehicles including sedans, standard vans, and other ADA accessible vehicles. It is the goal to have each vehicle in our system ADA compliant.	
Monitoring	The CTC will update the TDSP annually with an inventory of all vehicles used in the coordinated transportation system as Exhibit D.	
Policy	**2.13 Required Use of Seatbelts**	Yes, all vehicles are equipped with seatbelts and all passengers use them. And, all vehicles have wheel chair securement systems for the common wheel chairs.
Compliance	Passengers riding vehicles equipped with seatbelts will be required to use them. Persons utilizing wheelchairs will have the chair restrained, and will be required to utilize a personal securement device to ensure that they stay in the chair**.** All wheelchairs for transport must be complete and well maintained and in good working order to include fully operational brakes**.** Section 37.165©(3) of the DOT's ADA regulations allows a transit operator to establish a policy that requires all riders to have their common wheelchairs secured while aboard a transit vehicle. Therefore, service will be denied to a rider who refuses to allow his or her common wheelchair to be secured. Wheelchairs will be adequately secured or stored. If a passenger refuses to be secured, the passenger will not be transported. The CTC is to communicate it to all passengers and funding agencies. Under Section 37.5 of the DOT's ADA regulations, a transit operator is not permitted to mandate the use by wheelchair users of seatbelts and shoulder harnesses, unless the operator mandates the use of these devices by all passengers, including those sitting in vehicle seats. All passengers are required to use seatbelts.	
Monitoring	CTC will ensure that all appropriate vehicles are equipped with functioning seatbelts.	

Policy	**2.14 Disruptive Passengers**	
Compliance	When an agency has an existing policy regarding behavioral problems, the CTC abides by the agencies' existing policy, unless such behavior endangers other passengers, the driver or other motorists. In that case, the CTC may take whatever action is necessary to insure the safety of all concerned. If no policy exists and for TD passengers, the CTC will deal with behavioral problems including, but not limited to: fighting, intoxication and abusive behaviors as follows: First incident, a written warning to advise the person or his/her parent, guardian or responsible agency that an incident has occurred. (Unless the First Incident is of a serious, life threatening nature, then skip immediately to Step 2. It is also understood that the Driver may call 911 if ever needed. Second incident, the CTC will meet with all concerned parties and decide if transportation on the para-transit system is appropriate. Third incident, the CTC will meet with all concerned parties and decide if transportation on the para-transit system is appropriate.	The CTC reports this to the LCB on a case by case basis.
Monitoring	The LCB will evaluate this at its quarterly meetings.	
Policy	**2.15 Compliance with HIPPA**	
Compliance	The CTC is compliant with HIPPA regulations.	CTC is in compliance with HIPPA
Monitoring	As required	
Policy	**2.16 Use of Scooter Mobility Devices**	
Compliance	Good Wheels is unable to transport clients in scooters because they cannot be secured safely in our vehicles. Passengers who ride in scooters must be able to transfer to a seat or use an approved wheelchair when being transported by Good Wheels, Inc. This is a safety issue and we are concerned for your safety as well as other passengers and our driver.	Monitored during bus rides. Compliant.
Monitoring	As established	
Policy	**2.17 Definition of Group Trip**	
Compliance	A group trip shall be defined as 5 individuals or more.	Monitored during bus rides. Compliant.
Monitoring	As established	

Standard/Policy (2.07) LEE COUNTY LCB PRIORITIZATION POLICY FOR NON-SPONSORED TRIPS BY TRIP PUPOSE

Annually, the LCB prioritizes non-sponsored trips by purpose. For the past several years, due to funding, only medical trips have been provided by the CTC. However, since not all of the medical trips can be provided the rest of the priorities remain unmet.

TD TRUST FUND TRIP PRIORITIES

Priority Order	Trip Purposes – Categories and Definitions
1	**MEDICAL**: Critical- a. Kidney Dialysis b. Cancer Treatment c. Mental Health Care Other- d. General Medical Appointments e. Therapy f. Prescriptions g. Children at Risk
2	**NUTRITIONAL** – Food/grocery shopping/meal site/food stamps
3	**EMPLOYMENT** (In County Only)
4	**TRAINING/EDUCATION**
5	**LIFE-SUSTAINING/OTHER**: a. Non-food Shopping b. Banking/Social Security c. Visits to hospitals/nursing homes d. Recreational
6	**RECREATION** – non-essential, non-employment related trips to activities such as: bowling, bingo, beach, parks, restaurants, libraries, theaters, etc.

13. LOCAL SERVICE COMPLAINT AND FORMAL GRIEVANCE PROCEDURE/PROCESS

This section was reviewed by the LCB and approved on May 6, 2016.

The LCB has a service complaint procedure, and a formal grievance procedure. This section of the TDSP has four parts, and is reviewed annually:

- A summary of the Service Complaint process is provided.
- A summary of the Formal Grievance Procedures is provided.
- The summaries are designed to fit on brochures. The CTC must make its brochures available in alternative formats, upon request.
- The Service Complaint Process is provided in full, and
- The Formal Grievance Procedures is provided in full.

The LCB's complete Service Complaint and Formal Grievance Procedures as contained in the TDSP, are consistent with the Commission for the Transportation Disadvantaged's *Uniform Service Reporting*; January 1996; this document is available upon request from the Commission for the Transportation Disadvantaged.

Existence of Complaint Policy and Procedures:

The Lee County Local Coordinating Board for the Transportation Disadvantaged has adopted procedures for the Community Transportation Coordinator to use to address complaints from agencies, users, potential users, subcontractors, and other interested parties. The policies are to be followed by the Community Transportation Coordinator (CTC) – Good Wheels, Inc. and any of its operators. These procedures provide definitions of terms used in the process, identify how complaints are received by the CTC; provide a process and forms for the CTC to record complaints,

and how the complaints were resolved; explains how the CTC is to collect monthly and annual data for reporting to the LCB, and explains what to do when a complaint cannot be resolved. The procedures also provide contact names and addresses.

Definitions:

Service inquiries are requests for information about the service and can occur once or several times in the course of a day's service. An example of a service inquiry is when a customer calls the CTC and says, "My bus is a few minutes late, where is it?" Service inquiries are reported to the driver or dispatcher or to other individuals involved with the daily operations, and are usually resolved by the CTC immediately or within the course of a reasonable time period suitable to the complainant. Service inquiries do not have to be 'recorded' as a complaint.

Service complaints are routine incidents that occur on a daily basis, 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. Service complaints should be recorded as 'complaints.' The CTC is to total these service complaints on a yearly basis for the CTD's Annual Operating Report, (AOR). Service Complaints may include but are not limited to:

- "My bus is late." [beyond the On-Time Policy for the service area.] Late trips (late pickup 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 client without an explanation as to why, e.g. may not qualify, lack of TD funds, etc.)

If unresolved, a routine service complaint can result in a formal grievance. (The Local Coordinating Board has a separate "Formal Grievance Procedure," contained in the TDSP. Please review it for additional information.) 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.

The Lee County Local Coordinating Board for the Transportation Disadvantaged has established rules and procedures to address grievances from agencies, users, potential users, subcontractors, and other interested parties relating to the coordination of non-emergency transportation services.

A formal grievance is a concern regarding the operation or administration of coordinated transportation disadvantaged services by transportation operators, the CTC, the Designated Official Planning Agency, or the LCB. A formal grievance may also be a service complaint that has been left unresolved for more than 45 days. A sample of this form is attached in ***Exhibit E***.

The LCB shall "appoint a Grievance Committee to serve as a mediator to process and investigate complaints, from agencies, users, potential users of the system and the CTC in the designated service area, and make recommendations to the Coordinating Board for improvement of service. The Coordinating Board shall establish procedures to provide ... opportunities for issues to be brought before such committee and to address them in a timely manner..."

The LCB does not have "adjudicative" or "determinative" powers.

Forms to Use to record a complaint:

The CTC shall utilize the form below to log complaints. This form is consistent with that provided by the Commission for the Transportation Disadvantaged's Uniform Service Reporting [for Service

Complaints] January 1996. This document, which is available upon request from the Commission for the Transportation Disadvantaged, is a guide to the proper method to identify a complaint, determine its validity, complete a service report, and achieve customer satisfaction. Carriers are to use the same forms. Each complaint shall be assigned a Log Number to assist in tracking the resolution of each complaint. All service complaints should be recorded.

Letting the Consumer know how to complain:

The CTC shall make reasonable efforts to ensure that its customers know how to submit a complaint. The CTC should announce the existence of its complaint process in its brochures and other printed material, in its telephone recordings, and in signs posted inside of the vehicles. Multiple formats should be accessible.

Posting Of Contacts in the Vehicles:

The CTC must ensure that the contact numbers for the CTC, for the CTD's Ombudsman Hotline, are posted in each vehicle.

Reporting Complaints:

Quarterly, a summary of all complaints and their status of resolution should be provided by the CTC to the Planning Agency. The Planning Agency will then provide the most current summaries to the LCB for its next meeting:

SAMPLE COMPLAINT FORM

Log #	Date of Contact	Involved What? (Service, Policy or Vehicle)	Which Contracted Operator?	Status of Resolution

- **Service** (ride time, schedules, timeliness, attitude/conduct)
- **Policy** (fares, co-payments, operation hours, prioritization, "won't go to...")
- **Vehicle** (safety, equipment, cleanliness)

Surveying customers to determine satisfaction levels and to make route improvements based on future demand:

The LCB requires the CTC to conduct periodic surveys of consumers in order to determine their level of satisfaction with services. These surveys are also used by the LCB to evaluate the CTC on factors associated with customer satisfaction. The surveys also can be used to determine where the demand for service is. The CTC is to conduct random surveys of consumers each year. It is suggested that they conduct some surveys each month. In addition to this, the Commission for the Transportation Disadvantaged's Quality Assurance team conducts random sample surveys of passengers by telephone, during the biannual review of the CTC's.

The CTC will tabulate the surveys and provide a report to the LCB for its next meeting.

Agency Surveys:

The DOPA will conduct mailed out surveys of the agencies each September to determine their levels of satisfaction with the County TD Program. The CTC shall provide the DOPA with current mailing list of agencies they provide transportation to by September 15th.

Standards & Policies:

The Local Coordinating Board sets performance standards for the Community Transportation Coordinator. The Local Coordinating Board evaluates the Community Transportation Coordinator's performance based upon these standards and policies.

Commission's Ombudsman Hotline:

The Commission for the Transportation Disadvantaged has an Ombudsman Program to assist individuals with complaints. The toll-free Ombudsman Hotline is-1-800-983-2435.

LEE COUNTY LCB
CONTACTS FOR SERVICE COMPLAINTS

ENTITY	CONTACT INFORMATION	PHONE
Community Transportation Coordinator	Alan Mandel, CEO/CFO Good Wheels, Inc.	Customer Service: (239) 768-2900 Reservations: (239) 768-2900 General: (800) 741-1570
Lee County MPO -- Designated Official Planning Agency	Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220
Local Coordinating Board Chairperson	Hon. Rick Williams c/o Mr. Brian Raimondo Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220
Commission for the Transportation Disadvantaged	Ombudsman Hotline	(800) 983-2435 TDD (800) 648-4084
Medicaid	Ombudsman Hotline and Local	(800) 983-2435 or (239) 335-1300

The Lee County Local Coordinating Board for the Transportation Disadvantaged has established the following rules and procedures to address grievances from agencies, users, potential users, subcontractors, and other interested parties.

Authority

According to Rule 41-2.012(5)(c), *Florida Administrative Code*, the Local Coordinating Board shall "appoint a Grievance Committee to serve as a mediator to process and investigate complaints, from agencies, users, potential users of the system and the Community Transportation Coordinator in the designated service area, and make recommendations to the Coordinating Board for improvement of service. The Coordinating Board shall establish procedures to provide ... opportunities for issues to be brought before such committee and to address them in a timely manner..."

It should be noted that there is a difference between "hearing" a grievance and "hearing and determining" a grievance. Neither the Grievance Resolution Committee nor the Local Coordinating Board has the authority to "hear and determine" a grievance. They only have the authority to "Hear" and advise. When an entity makes a determination of the rights, duties,

privileges, benefits, or legal relationships of a specified person or persons, it is exercising "adjudicative" or "determinative" powers. Deciding a grievance between two independent parties may fall within these parameters, depending on the nature of the grievance. Chapter 427, *Florida Statutes*, grants no adjudicative powers to anyone.

Even though the Local Coordinating Board does not have determinative authority, the recognition of problems by the various members of the Local Coordinating Board is a very useful method to resolve many issues. In addition, it should be noted that since the Local Coordinating Board is involved in the development and approval of the Community Transportation Coordinator's Transportation Disadvantaged Service Plan, and since the Local Coordinating Board also conducts the annual evaluation of the Community Transportation Coordinator, there are significant opportunities for the Local Coordinating Board to make changes where needed.

Formal Grievance Policy and Procedures:

Section 1: Creation

1.1 There is hereby created a formal grievance procedure for the Lee County transportation disadvantaged program as specified by the Commission for the Transportation Disadvantaged pursuant to Chapter 427, *Florida Statutes,* 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 Coordinated Community Transportation System in Lee County.

Section 2: Definitions

2.1 As used in these rules and procedures the following words and terms shall have the meanings assigned therein. Additional transportation disadvantaged 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 Chapter 427 *Florida Statutes*, in an area outside the purview of a Metropolitan Planning Organization and approved by the Commission for the Transportation Disadvantaged, to ensure that coordinated transportation services are provided to serve the transportation disadvantaged population in a designated service area.

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 in areas not covered by a Metropolitan Planning Organization. The Metropolitan Planning Organization shall serve as the designated official planning agency in areas covered by such organizations.

C) **Transportation Disadvantaged** (TD) user of the system, "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 upon others to obtain access to health care, employment, education, shopping, social activities, or other life sustaining activities, or children who are disabled or high risk or at risk as defined in Chapter 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 non-profit 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**: events that may occur on a daily basis and are reported to the driver or dispatcher or other individuals involved with the daily operations, and are resolved within the course of a reasonable time period suitable to the complainant. For more information, see the Local Coordinating Board's policy on Complaints, (elsewhere in the TDSP).

G) **Formal Grievance** documents any concerns regarding the operation or administration of Transportation Disadvantaged services by the transportation operator, the Community Transportation Coordinator, the Designated Official Planning Agency, or the Local Coordinating Board. A formal grievance may also be a service complaint that has been left unresolved for more than 45 days. The formal grievance should demonstrate or establish their concerns as clearly as possible. 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 *F.A.C.* and accompanying documents, Sunshine Law, Americans with Disabilities Act, (ADA;)
- Coordination disputes;
- Agency compliance;
- Conflicts of interest;
- Supplanting of funds;
- Billing and/or accounting procedures;
- Policies of the Local Coordinating Board, particularly the Prioritization Policy.

H.) **Administrative Hearing process**: Chapter 120, *Florida Statutes*.

I.) **Ombudsman Program** means a toll free phone number established and administered by the Commission for the Transportation Disadvantaged to enable persons to access information and /or file complaints or grievances regarding transportation services provided under the coordinated effort of the community transportation coordinator. See contact information for phone numbers.

Section 3: Objectives

3.1 The objective of the LCB's grievance process shall be to process, investigate and make recommendations in a timely manner on formal grievances that are not resolved between the grievant and the other party or parties. It is not the objective of the grievance process to have "adjudicative" or "determinative" powers.

3.2 The CTC and its service operators and other transportation subcontractors must post the contact person's name and telephone number regarding the reporting of complaints (and the reporting of grievances) in each vehicle.

3.3 The grievance procedures and all documents pertaining to the grievance process will be made available to the grieving party.

3.4 The grievance procedures and all documents pertaining to the grievance process will be made available, upon request, in a format accessible to persons with disabilities.

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

Section 4: Membership

4.1 The local coordinating board's ad hoc grievance resolution committee shall be composed of a minimum of three (3) voting members or alternates of the LCB. Members shall be appointed to the ad hoc grievance resolution committee by the LCB chairperson or his/her designee. The ad hoc grievance resolution committee membership shall include a representative of users of the coordinated transportation system. The LCB chairperson or his/her designee reserves the right to make reappointments to the ad hoc grievance resolution committee should any conflicts of interest arise.

4.2 The LCB chairperson or his/her designee shall appoint one member of the ad hoc grievance resolution committee to serve as its chairperson.

4.3 The LCB chairperson's designee shall be a member of the TD planning staff from the planning agency. The TD planning staff serves as facilitators to the grievance process. Every effort shall be made by the participants of the ad hoc grievance resolution committee to conduct the process as diplomatically as possible.

4.4 In cases where a grievance involves the private or personal or professional interests of a member of the ad hoc grievance resolution committee, such member shall be disqualified from hearing such a grievance.

4.5 Local Coordinating Board members who represent affected agencies will be invited to grievance hearings as advisors.

4.6 No member of the Local Coordinating Board shall appear before the Grievance Committee as an agent or attorney for any person.

Section 5: Terms of Members

5.1 The members of the ad hoc grievance resolution committee shall serve at the pleasure of the LCB chairperson or his/her designee, for the duration of the grievance for which they are appointed.

5.2 The members of the ad hoc grievance resolution committee may be removed for cause by the LCB chairperson or his/her designee.

5.3 The quorum shall be a simple majority. Meetings shall be held at such times as the ad hoc grievance resolution committee may determine and/or as necessitated by the formally filed grievance.

Section 6: Grievance Procedures

6.1 Grievance procedures have been developed by the Local Coordinating Board, based upon guidelines from the Commission for the Transportation Disadvantaged.

6.2 The Local Coordinating Board's grievance procedures are for the purposes of listening to the grievance, providing advice and making recommendations to the affected parties of the grievance. The Local Coordinating Board may not exercise adjudicative powers. Aggrieved parties with proper standing may also have recourse through Chapter 120, *Florida Statutes*, Administrative Hearing Process, or the judicial court.

6.3 When necessary, the designated official Planning agency's Transportation Disadvantaged Program staff shall provide assistance to individuals to prepare written grievances.

6.4 The formal grievance process shall be open to any person or agency wishing to address concerns involving: purchasing agencies, users, potential users, private for-profit operators, private non-profit operators, the Coordinator, the Designated Official Planning Agency, elected officials, and drivers.

6.5 The administrators of the grievance process shall make every effort to ensure that the grieving party has exercised the other procedures in place, including the LCB's Complaint procedures or the CTC's internal complaints procedures for its subcontractors.

Note: If it is an unresolved service complaint, the grievant will be asked if they have contacted the CTC for assistance in resolving their complaint. The grievant should have made reasonable effort to have their service complaint resolved by the CTC. The CTC is responsible for resolving service complaints.

If the CTC has an internal grievance policy, appropriate grievances will be forwarded back to the CTC for resolution, prior to being considered as a formal grievance for the local coordinating board.

Section 7: Filing the formal grievance

7.1 The grievant should demonstrate or establish their concerns as clearly as possible. The grievance should try to demonstrate or establish a clear violation of a specific law, regulation, or contractual arrangement. Copies of pertinent laws and regulations may be obtained from the Designated Official Planning Organization's Transportation Disadvantaged Program staff.

7.2 The grievance must be filed to the Grievance Committee within ninety (90) days after the occurrence of the event giving rise to the grievance. The grievance shall be sent to:

Lee County Metropolitan Planning Organization, PO BOX 150045, Cape Coral, FL 33915

7.3 The grievance shall include:

a. the name and address and telephone number of the grievant; They do not have to have an address or phone in order to file a grievance, but they need a place which will receive mail for them, and a phone where we may contact them.

b. a statement of the grounds for the grievance, supplemented by supporting documentation, made in a clear and concise manner. This shall include a description of the efforts taken by the grievant to resolve the issue; and

c. an explanation by the relief desired by the grievant.

If the grievant does not supply the above information to substantiate the grievance(s) no further action will be taken. [See section 6.3, above, about assistance in getting formal grievances reduced to writing,]

7.4 The date the formal grievance containing items a, b, and c, above is received in writing shall be the date the formal grievance was filed.

7.5 Upon receipt of the formal grievance, the designated official planning agency transportation disadvantaged planning staff will have 10 working days to contact the grievant by telephone*, to discuss the materials received, and ask for additional information which may be necessary in order to file the grievance. (* when the designated official planning agency makes or attempts to make these telephonic contacts, they will enter records of the calls into a log for that grievance.)

7.6 If the designated official planning agency transportation disadvantaged planning staff is unable to establish contact by telephone within the 10 working days; they will write a letter to the grievant, and send it by certified mail to the grievant. The letter will indicate that the formal grievance has been received, and that telephonic contact was unsuccessful, and that the grievance has either been filed, or that additional information is necessary in order to file the grievance.

7.7 The designated official planning agency will have 10 working days from the date the grievance was filed to contact the Chairperson of the LCB, by telephone to inform of the receipt of the formal grievance, and proceed with the selection of the ad hoc grievance resolution committee. If the chairperson is not available, the DOPA staff may then contact the Vice-Chairperson.

7.8 The designated official planning agency will have ten 10 working days from the date the grievance was filed to contact the CTC (if the grievance involves the CTC) to inform that a formal grievance has been filed.

7.9 The designated official planning agency will have 10 working days from the date the LCB chair was contacted about the grievance [in Section 7.7] to contact members of the LCB to establish the membership of the ad hoc grievance resolution committee. Pursuant to Section 4.2 of this Process, the chairperson of the ad hoc grievance resolution committee will be established at this time.

7.10 After the designated official planning agency has received an agreement to serve as a member of the ad hoc grievance resolution committee from the sufficient amount of LCB members, the designated official planning agency will have ten 10 working days to set up a meeting to mediate the grievance. The grievant, the chairperson of the ad hoc grievance resolution committee, and the designated official planning agency staff will attend the mediation. (The CTC will be included in this meeting, if the grievance involves the CTC.)

7.11 After the mediation meeting, the DOPA shall prepare a report regarding the meeting outcome. The report shall be sent to the grievant, the LCB chairperson, and the chairperson (and all members) of the ad hoc grievance resolution committee within 10 working days of the date of the meeting.

7.12 The Chairperson of the ad-hoc Grievance Committee or DOPA staff will check with the grieving party in 10 working days, to determine whether they are resolved.

7.13 If mediation is successful, the grievance is closed.

Section 8: If Mediation is not successful:

8.1 If the grievance is not resolved through mediation the grievant may request in writing that their

grievance be heard by the ad hoc grievance resolution committee. The grievant has 10 days from their receipt of the report (mentioned in Section 7.11) to notify the chairperson of the ad hoc grievance resolution committee through the DOPA.

8.2 Upon receipt of the written notice described in Section 8.1, the designated official planning agency has 15 working days to contact the chairperson and other members of the ad hoc grievance resolution committee, the grievant, and the involved parties, to set a grievance meeting date and location.

8.3 The grievant and all involved parties shall be notified of the meeting date and location at least seven working days prior to the meeting date by certified mail, return receipt requested.

Section 9: A meeting of the ad hoc grievance resolution committee is held:

9.1 All involved parties have a right to present their views to the Grievance Committee, either orally or in writing. In addition, all parties may present evidence.

9.2 The Grievance Committee may at any time during the course of the meeting question the parties and their witnesses on any facts which it deems material to the alleged improper action.

9.3 The entire meeting shall be recorded electronically. Any party requesting a copy of the transcription shall pay all costs incurred in furnishing the copy of the transcription.

9.4 The Grievance Committee will follow a meeting agenda in accordance with the procedures herein set forth:

A. Call to Order;

B. Presentation of Grievance;

1. Presentation of Grievance by Grievant, which will also include witnesses, if applicable

2. Response of concerned parties, which will include witnesses, if applicable.

C. Discussion of grievance, which shall take place in accordance with Roberts Rules of Order amongst the Grievance Committee, staff, the grievant and other interested parties. Discussion shall focus solely on the grievance as filed by the grievant;

D. Following discussion of the grievance, the Grievance Committee may submit a recommendation to the Coordinating Board in response to the grievance; and

E. Close meeting.

9.5 Upon conclusion of the grievance meeting, the ad hoc grievance resolution committee must submit a written report of the meeting proceedings to the chairperson of the local coordinating board within 10 working days. The report must outline the grievance, and provide the findings/recommendations of the ad hoc grievance resolution committee.

9.6 If the grievance is resolved through the Meeting process, the grievance process will end. The final report will be forwarded to the members of the local coordinating board.

Section 10: If the grievance is not resolved through the meeting of the ad hoc grievance resolution committee

10.1 If the grievance is not resolved through the meeting of the ad hoc grievance resolution committee, the grievant may request in writing that their grievance be heard by the local coordinating board. This request shall be sent to the Chairperson of the Local Coordinating Board, through the designated official planning agency, and must be made within 10 working days of their receipt of the ad hoc grievance resolution committee's report (in Section 9.5) Immediately following the meeting of the ad hoc grievance resolution committee, the grievant may make their request that their grievance be heard by the Local Coordinating Board, however, the time frame will "wait" until the ad hoc grievance resolution committee's report is prepared and received, as described in 9.5.

10.2 The Local Coordinating Board chairperson shall have 15 working days to set a meeting date. Members of the Local Coordinating Board shall have at least 10 working days notice of such meeting. The meeting of the local coordinating board shall be advertised appropriately (14 days in advance).

10.3 The grievance shall be presented at the meeting of the local coordinating board. The Local Coordinating Board will follow a meeting agenda in accordance with the procedures herein set forth:

A. Call to Order;

B. Presentation of Grievance;

1. Presentation of Grievance by Grievant, which will also include witnesses, if applicable

2. Response of concerned parties, which will include witnesses, if applicable.

C. Discussion of grievance, which shall take place in accordance with Roberts Rules of Order amongst the Local Coordinating Board, staff, the grievant and other interested parties. Discussion shall focus solely on the grievance as filed by the grievant;

D. Following discussion of the grievance, the Local Coordinating Board may submit a recommendation to the appropriate parties in response to the grievance; and

E. Close meeting.

10.4 The results, findings and recommendations of the LCB shall be outlined in a final report to be completed within 10 working days of the meeting. The report shall be forwarded to the grievant, members of the Local Coordinating Board, the Community Transportation Coordinator, and all other persons/agencies directly involved in this grievance process.

10.5 If the grievance has not been resolved through these LCB procedures, the grievant may request that their grievance be heard by the Commission for the Transportation Disadvantaged.

Section 11: Prohibition against Retaliation

11.1 No individual shall be unlawfully denied Transportation Disadvantaged services because such individual has filed a grievance related to the Transportation Disadvantaged Program or has testified or is about to testify in any such proceeding or investigation related to the Transportation Disadvantaged Program. (This shall be monitored by the DOPA.)

Appeals to the Commission for the Transportation Disadvantaged

Should a grievant remain dissatisfied with the Local Coordinating Board or Community Transportation Coordinator's recommendation, he or she may contact the Commission for the Transportation Disadvantaged at the following address:

Commission for the Transportation Disadvantaged
605 Suwannee Street, MS-49
Tallahassee, Florida 32399-0450

The Commission for the Transportation Disadvantaged also has an Ombudsman Program to assist individuals with complaints. The CTD's toll-free Ombudsman Hotline is-1-800-983-2435.

Chapter 427, *F.S.* does not expressly confer the power or authority for the Commission for the Transportation Disadvantaged to "hear and determine" a grievance between two third parties. The Commission for the Transportation Disadvantaged may choose to listen to grievances and it can investigate them from a fact-finding perspective. It cannot be the "judge" or "arbiter" of the grievance in the sense of determining that one party's version of the facts is right and the other is wrong, and order the wrong party to somehow compensate the right party. On the other hand, the grievance may bring to light a problem within the system.

However, if the grievance showed that one of the parties with whom the Commission for the Transportation Disadvantaged contracts was acting so aberrantly as to not be in compliance with its contract, the Commission for the Transportation Disadvantaged could exercise whatever contractual rights it has to correct the problem. Accordingly, the Commission for the Transportation Disadvantaged may take part in the grievance process, if it wants to, for purposes of listening to the grieving parties and gathering the facts of the matter. It may not decide the grievance, where doing so would amount to an exercise of adjudicative powers.

LEE COUNTY LCB
GRIEVANCE RESOLUTION CONTACTS

ENTITY	CONTACT INFORMATION	PHONE
Community Transportation Coordinator	Alan Mandel, CEO/CFO Good Wheels, Inc.	Customer Service: (239) 768-2900 Reservations: (239) 768-2900 General: (800) 741-1570
Lee County MPO -- Designated Official Planning Agency	Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220
Local Coordinating Board Chairperson	Hon. Rick Williams c/o Mr. Brian Raimondo Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220
Commission for the Transportation Disadvantaged	Ombudsman Hotline	(800) 983-2435 TDD (800) 648-4084
Medicaid	Ombudsman Hotline and Local	(800) 983-2435 or (239) 335-1300

14. CTC Monitoring Procedures of Operators and Coordination Contractors

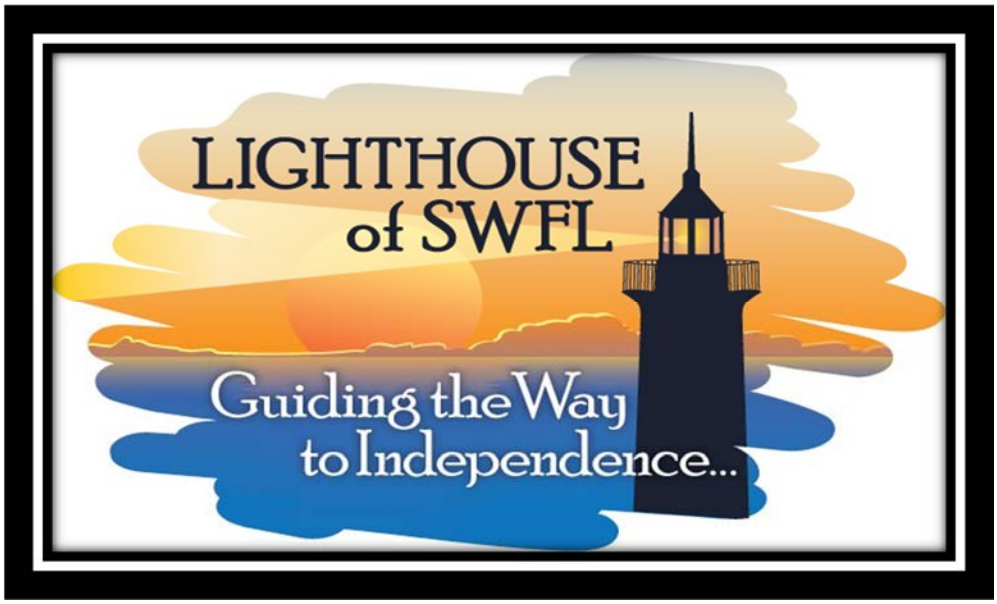
The Community Transportation Coordinator will perform an annual evaluation of contracted operators ensuring compliance with the System Safety Program Plan, locally approved standards, Commission for the Transportation Disadvantaged standards, annual operating data and insurance requirements.

15. Coordination Contract Evaluation Criteria

Good Wheels in cooperation with the LCB will determine whether agencies, from a total system approach, can perform more effectively and more efficiently their own transportation.

B. Cost/Revenue Allocation and Rate Structure Justification

Good Wheels' FY 2016/17 rate model is shown in ***Exhibit F.***



III. QUALITY ASSURANCE

A. ANNUAL EVALUATION OF THE COMMUNITY TRANSPORTATION COORDINATOR

The purpose of this section is to identify the process used by the Local Coordinating Board and the planning agency in the evaluation of the Community Transportation Coordinator. This section will address what steps the Local Coordinating Board will take to monitor and evaluate the services provided by or coordinated through the Coordinator, based on the locally established service standards, and consistent with those of the Florida Commission for the Transportation Disadvantaged Commission.

Pursuant to Chapter 427 *Florida Statutes* 427.015(2), the performance of the coordinator shall be valuated based on the commission's approved evaluation criteria by the coordinating board at least annually.

Although a committee is not required by Rule 41-2, *Florida Administrative Code (FAC)* in order to conduct the required annual evaluation, the LCB makes use of a subcommittee to carry out the evaluation. In those cases this is the process the committee follows:

At the December LCB meeting, the LCB appoints two or three members to a Committee for the Evaluation of the CTC, composed of voting members of the LCB. The Committee will be assisted by DOPA Planning staff and the staff of the CTC.

DOPA planning staff is responsible for providing the committee with the materials needed to conduct the evaluation. This includes gathering documents such as the annual operating reports, previous evaluation

reports, system safety plan reports, lists of contacts, and other documents from the CTC.

The CTC's staff is responsible for conducting surveys of passengers and of agency representatives during the course of their fiscal year. The CTC is also responsible for providing the results of these surveys to the planning staff. The CTC is encouraged to sample a random 10% of the passengers in each survey year.

Planning staff and the CTC also work together on preparing the blank evaluation booklet for the committee to use. Planning staff locates the last evaluation report and updates it so that the previous year contains the most current information, and the evaluation year is blank. Planning staff also locates the most current reports with recommendations and accompanying status reports, and updates the blank evaluation report in those sections.

There are significant constraints to when the evaluation must be completed. The TDSP must be annually updated and submitted by June 30th each year, and the Evaluation process is part of the TDSP update. The TDSP must be approved by the LCB and endorsed by the MPO advisory committees and MPO Board prior to submitting it to the CTD by June 30th. Therefore, the Evaluation process must be completed in time for the draft evaluation report to go to the LCB in March. Since much of the data for the evaluation year column in the Evaluation Report is taken from the CTD's *Annual Performance Report*, which is not published until January, the Evaluation must be completed in February.

The Evaluation Committee makes use of several resources in order to conduct the Evaluation. These resources include standardized worksheets and reports from the Commission for the Transportation Disadvantaged; material from different sections of the TDSP, including the goals and objectives and standards and policies, and passenger surveys compiled by the CTC, and previous evaluations.

Committee members and Planning staff conduct interviews with the CTC's staff to complete the Worksheets. Then the Committee evaluates the CTC based on the findings obtained during these interviews. The Committee communicates findings, suggestions, and develops recommendations which are forwarded through planning staff to the LCB as draft final report.

The Draft Evaluation Report contains findings, suggestions and recommendations. These are distributed to the Local Coordinating Board, for its review and approval. If the LCB has additional recommendations, planning staff adds these to the Report, and then Planning staff sends the LCB's approved evaluation report on the Coordinator to the CTD, and uses the recommendations to prepare the annual update of the Transportation Disadvantaged Service Plan.

EXHIBIT A

LEE COUNTY'S COMMUNITY TRANSPORTATION COORDINATOR DESIGNATION MEMORANDUM OF AGREEMENT TD#1312

Florida Commission for the Transportation Disadvantaged

Rick Scott
Governor

David Darm
Chairperson

Mike Willingham
Vice Chairman

Steven Holmes
Executive Director

July 9, 2013

Mr. Tom Nolan
Good Wheels, Inc.
10075 Bavaria Road Southeast
Ft. Myers, FL 33913

Subject: Lee County's Community Transportation Coordinator Designation Memorandum of Agreement (MOA) # TD1312

Dear Mr. Nolan:

Enclosed is the executed MOA for your records. As you know, the Commission for the Transportation Disadvantaged (Commission) approved Good Wheels, Inc., to serve as the Community Transportation Coordinator for Lee County. This designation is effective July 1, 2013 through June 30, 2018.

Pursuant to the MOA, a new 2013-18 Transportation Disadvantaged Service Plan (TDSP) shall be submitted to the Commission no later than 120 calendar days from July 1, 2013 (October 28, 2013). This TDSP must be approved by the Local Coordinating Board prior to submission to us for approval. Please coordinate this effort with the Lee County MPO as your Designated Official Planning Organization. As a reference, the Instruction Manual for the MOA and TDSP is located on our website at: http://www.dot.state.fl.us/ctd/programinfo/programdevelopmentsection.

Thank you for your continued support and participation in the coordinated transportation system of Lee County. If you have any questions or need any additional information, please contact me at (850) 410-5712.

Sincerely,

John Irvine
Area 6 Project Manager

Enclosure: Executed Memorandum of Agreement
cc: Mr. Brian Raimondo, Lee County MPO (email only)

Suwannee Street, MS-49 ⋈ Tallahassee, FL 32399-0450
Phone: (850) 410-5700 ⋈ Toll Free: (800) 983-2435 ⋈ Fax: (850) 410-5752
www.dot.state.fl.us/ctd

EXHIBIT B

TRANSPORTATION DISADVANTAGED/MEDICAID NON-EMERGENCY TRANSPORTATION PROGRAM ELIGIBILITY APPLICATION

Good Wheels
Transportation for the Disabled and Disadvantaged

TRANSPORTATION DISADVANTAGED AND/OR MEDICAID TRANSPORTATION DETERMINATION FORM

All items must be completed.
Failure to include "*TOTAL MONTHLY INCOME*" will cause application to be rejected.

SECTION I - IDENTIFYING INFORMATION

Medicaid Gold Card No.:_____ S.S.# ___/___/____ Phone #: _____
Last Name: _____ First Name: _____
Home Street Address: _____ Apt. #: _____
Mailing Address: _____
Is this a: ☐ House ☐ Apartment ☐ Nursing Facility ☐ ACLF ☐ Boarding Home
City: _____ County: _____ Zip Code: _____
Date of Birth: ___/___/___ Your Current Age: _____ ☐ Male ☐ Female
Total Monthly Income: _____
Optional: ☐ White ☐ Black ☐ Hispanic ☐ Native American ☐ Asian ☐ Other _____

SECTION II - NEED DETERMINATION

Have you applied for ADA Transportation with Lee County: ☐ Yes ☐ No
If yes, were you: ☐ Approved ☐ Disapproved
Are you eligible for Medicaid Non-Emergency Transportation? ☐ Yes ☐ No
Are you able to operate an automobile, even for short distances? ☐ Yes ☐ No
Do you or anyone in your household own a car? ☐ Yes ☐ No
What are your vehicle license plate(s) number(s)? _____
Total # of persons who reside in your household: _____ Please list below:

Name	Is this person Related to you	Social Security No.	Does this person Own a car
_____	☐ Yes ☐ No	___/___/____	☐ Yes ☐ No
_____	☐ Yes ☐ No	___/___/____	☐ Yes ☐ No
_____	☐ Yes ☐ No	___/___/____	☐ Yes ☐ No

If you lived in a Assisted Care Living Facility, Nursing Home, ICFMR or Boarding Home,
Does this facility have a vehicle? ☐ Yes ☐ No
Have you ever been transported by the facility? ☐ Yes ☐ No
Do you have any family or friends who live in the County you reside in? ☐ Yes ☐ No
Has this person(s) ever transported you to the doctor? ☐ Yes ☐ No
Would this person(s) take you to the doctor if you asked them? ☐ Yes ☐ No
Do you know someone who would transport you if you paid for the gas? ☐ Yes ☐ No
Have you ever taken the LeeTran bus to the doctor or to other places? ☐ Yes ☐ No
Can you travel on a LeeTran bus? ☐ Yes ☐ No
If NO, please explain why: _____
Would you use the LeeTran bus if you could ride free? ☐ Yes ☐ No
Can you walk without help to the distances below? (Check those that apply)
☐ Across a room ☐ One block ☐ Two blocks ☐ Three blocks ☐ One mile

SECTION III - DISABILITY

Are you currently receiving Supplemental Security Income (SSI)? ☐ Yes ☐ No
Are you currently receiving Social Security Disability? ☐ Yes ☐ No
Do you consider yourself to be disabled? ☐ Yes ☐ No

If YES, what is the nature of your disability? (Check all the apply)

☐ Blind/Legally Blind
☐ Arthritis
☐ Neuromuscular Disease
☐ Epilepsy
☐ Muscular Dystrophy
☐ Wheelchair User
☐ Cerebral Palsy
☐ Alzheimer's Disease
☐ Respirator or Oxygen Dependent
☐ Mentally Challenged
☐ Difficulty Walking
☐ Multiple Sclerosis
☐ Stoke
☐ Other (describe) _____

Do you require mobility aids? ☐ Yes ☐ No

If YES, which aids do you require? (Check all that apply)

☐ Walker
☐ Scooter
☐ Other _____
☐ Guide Dog
☐ Cane
☐ Personal Care Attendant
☐ Wheelchair

SECTION IV - FREQUENCY OF USE/DESTINATIONS

What doctors or medical clinics do you visit on a regular basis?

NAME AND ADDRESS OF HOSPITAL, DOCTOR OR CLINIC	**NUMBER OF VISITS EACH MONTH OR WEEK**

SECTION V - SIGNATURE, PREPARER AND WITNESS

I affirm that the information provided in this application for services is true and correct and understand that making false statements, having others make false statements, or making false statements on behalf of others constitutes welfare fraud and is considered **a felony under the laws of the State of Florida**.

Medicaid and/or Transportation Disadvantaged Recipient's

Signature: _____ Date: ____/____/____

Preparer's Signature: _____ Date: ____/____/____

RETURN COMPLETED FORM TO: ***(DID YOU INCLUDE MONTHLY INCOME?)***

Good Wheels, Inc.
Community Transportation Coordinator
10075 Bavaria Rd., SE
Fort Myers, FL 33913
1-239-768-2900
1-800-741-1570 (Toll Free)

Florida Relay System:
1-800-955-8770 - Voice
1-800-955-8771 - TTY

ACCESSIBLE FORMATS ARE AVAILABLE UPON REQUEST

EXHIBIT C

VEHICLE INVENTORIES

CURRENT VEHICLE INVENTORY FORM

	Unit #	Assigned To	Location	Model Year	Vehicle Make and Type	Manufacturer Vehicle Identification Number	Tag Number	EXP. Date	GVWR	Current Odometer	Fuel Type	DOT Contr No. / GWI	Passengers Amb. - W/C
1	12	Admin.	Lee	2006	Ford Taurus	1FAFP53U56A135081	688LWU	06/30/15	3,170	165,222.0	Gas	GWI	4 AMB
2	15		Lee	2012	Ford E-250 Van	1FTNE2EL3CDA28751	X3808C	06/30/15	5,833	36,200.0	Gas		8 - Amb.
3	16	Lstretcher	Lee	2009	Ford E-250 Van	1FTNE24L89DA92603	X2873B	06/30/15	9,000	81,895.0	Gas	96113	4 & Stretcher
4	17	Long Dist.	LB	2010	Grand Caravan-Dodge	2D4RN4DE6AR155376	X7134B	06/30/15	6,050	168,649.0	Gas	96115	3 & 1 WC
5	18	Long Dist.	Lee	2010	Grand Caravan-Dodge	2D4RN4DEXAR155378	X7135B	06/30/15	6,050	213,550.0	Gas	96114	3 & 1 WC
6	19	Long Dist.	Lee	2010	Grand Caravan-Dodge	2D4RN4DE1AR155379	X7139B	06/30/15	6,050	209,403.0	Gas	GWI	3 & 1 WC
7	21	Long Dist.	Clew	2011	Grand Caravan-Dodge	2D4RN4DG3BR778957	X7990B	06/30/15	6,050	99,689.0	Gas	96175	3 & 1 WC
8	22	Long Dist.	Lee	2012	Grand Caravan-Dodge	2C4RDGBG3CR369802	X2051C	06/30/15	6,050	65,605.0	Gas	97127	3 & 1 WC
9	23	Long Dist.	Clew	2012	Grand Caravan-Dodge	2C4RDGBG5CR369803	X2053C	06/30/15	6,050	62,203.0	Gas	97128	3 & 1 WC
10	24	Long Dist.	Clew	2013	Grand Caravan-Dodge	2C7WDGBG1DR661407	X2052C	06/30/15	6,050	35,289.0	Gas	97129	3 & 1 WC
11	25	Long Dist.	Lee	2014	Grand Caravan-Dodge	2C7WDGBGXER476581	X4468C	06/30/15	6,050	4,065.0	Gas	97159	3 & 1 WC
12	401	ParaTrans	Lee	2014	Chevy Express Cutaway	1GB6G5BL5E1162707	X1655C	06/30/15	14,200	24,031.0	Diesel	Shirley Conroy	12 & 2
13	402	ParaTrans	Lee	2014	Chevy Express Cutaway	1GB6G5BL4E1163542	X1656C	06/30/15	14,200	27,942.0	Diesel	Shirley Conroy	12 & 2
14	403	ParaTrans	Lee	2006	Chevy/Glaval Bus	1GBE4V1226F415113	884QWC	06/30/15	17,500	247,759.0	Diesel	GWI	12&2 or 10&3
15	404	ParaTrans	Lee	2006	Chevy/Glaval Bus	1GBE4V1276F419450	089QWD	06/30/15	17,500	256,887.0	Diesel	GWI	12&2 or 10&3
16	405	ParaTrans	Clew	2006	Chevy/Glaval Bus	1GBE4V1216F419573	090QWD	06/30/15	17,500	266,164.0	Diesel	GWI	16 & 1
17	406	ParaTrans	Clew	2009	Chevy/Glaval Bus	1GBE5V19X9R407615	X3807C	06/30/15	14,678	83,300.0	Diesel		26 & 4
18	426	ParaTrans	LB	2007	Chevy/Glaval Bus	1GBE4V1277F410684	X0210A	06/30/15	17,500	280,354.0	Diesel	GWI	12&2 or 10&3
19	429	ParaTrans	Lee	2007	Chevy/Glaval Bus	1GBE4V1297F411562	X0211A	06/30/15	17,500	278,364.0	Diesel	GWI	12&2 or 10&3
20	430	ParaTrans	Lee	2007	Chevy/Glaval Bus	1GBE4V1227F411497	X0214A	06/30/15	17,500	323,840.0	Diesel	GWI	12&2 or 10&3
21	434	ParaTrans	Lee	2007	Chevy/Glaval Bus	1GBE4V1297F414882	X1378A	06/30/15	17,500	336,732.0	Diesel	GWI	12&2 or 10&3
22	440	ParaTrans	Lee	2007	Chevy/Glaval Bus	1GBE4V1987F424896	X6908A	06/30/15	17,500	249,803.0	Diesel	GWI	12&2 or 10&3
23	441	ParaTrans	Clew	2007	Chevy/Glaval Bus	1GBE4V1907F424343	X7620A	06/30/15	17,500	284,836.0	Diesel	GWI	12&2 or 10&3
24	442	ParaTrans	Clew	2007	Chevy/Glaval Bus	1GBE4V1917F424402	X7618A	06/30/15	17,500	124,319.0	Diesel	GWI	12&2 or 10&3
25	445	ParaTrans	LB	2007	Chevy/Glaval Bus	1GBE4V1987F426065	X0367B	06/30/15	17,500	279,917.0	Diesel	GWI	12&2 or 10&3
26	447	ParaTrans	Lee	2007	Chevy/Glaval Bus	1GBE4V1917F426263	X0369B	06/30/15	17,500	277,942.0	Diesel	GWI	12&2 or 10&3
27	448	ParaTrans	Clew	2009	Chevy/Glaval Bus	1GBE4V1939F402355	X6473B	06/30/15	17,500	219,406.0	Diesel	80109	12&2 or 10&3
28	449	ParaTrans	Clew	2009	Chevy/Glaval Bus	1GBE4V19X9F403647	X6475B	06/30/15	17,500	197,170.0	Diesel	80113	12&2 or 10&3
29	450	ParaTrans	LB	2009	Chevy/Glaval Bus	1GBE4V1939F403716	X6474B	06/30/15	17,500	219,987.0	Diesel	80110	14 or 10&2
30	451	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1979F403802	X6477B	06/30/15	17,500	218,471.0	Diesel	80112	14 or 10&2
31	452	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1959F403653	X6476B	06/30/15	17,500	196,436.0	Diesel	80111	14 or 10&2

32	453	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1949F403983	X6478B	06/30/15	17,500	205,668.0	Diesel	80119	14 or 10&2
33	454	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1939F403960	X6479B	06/30/15	17,500	202,846.0	Diesel	80118	14 or 10&2
34	455	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1939F403991	X7140B	06/30/15	17,500	178,212.0	Diesel	96116	14 or 10&2
35	456	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1959F404513	X7141B	06/30/15	17,500	192,796.0	Diesel	96117	14 or 10&2
36	457	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1919F407814	X2880B	06/30/15	17,500	167,962.0	Diesel	96118	14 or 10&2
37	458	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V19X9F407696	X2881B	06/30/15	17,500	188,022.0	Diesel	96119	14 or 10&2
38	460	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V19X9F407620	X2883B	06/30/15	17,500	198,685.0	Diesel	96121	14 or 10&2
39	461	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1969F408005	X2884B	06/30/15	17,500	200,606.0	Diesel	96122	14 or 10&2
40	462	ParaTrans	Lee	2009	Chevy/Glaval Bus	1GBE4V1999F413294	X2885B	06/30/15	17,500	176,104.0	Diesel	96123	14 or 10&2
41	463	ParaTrans	Lee	2011	Chevy/Express Cutaway	1GB6G5BL0C1160960	X7979B	06/30/15	14,200	105,556.0	Diesel	97105	12 / 2
42	464	ParaTrans	Lee	2011	Chevy/Express Cutaway	1GB6G5BL6C1159604	X7978B	06/30/15	14,200	87,115.0	Diesel	97106	12 / 2
43	496	ParaTrans	Lee	2010	Chevy/Express Cutaway	1GB9G5BL9A1173037	X2926B	06/30/15	14,200	115,201.0	Diesel	iting on FD	12 / 2
44	498	ParaTrans	Lee	2011	Chevy/Express Cutaway	1GB6G5BL8B1144259	X9893B	06/30/15	14,200	121,870.0	Diesel	96172	12 / 2
45	701	Sch-Bus	Lee	2007	GMC/TITAN	1GBJ5V1937F418838	X1388A	06/30/15	26,500	116,900.0	Diesel	GWI	33
46	702	Sch-Bus	Lee	2008	Blue Bird	1BAKFCPAO8F254107	310IAK	06/30/15	31,000	58,702.0	Diesel	GWI	65
47	703	Sch-Bus	Lee	2008	Blue Bird	1BAKFCPA28F254108	311IAK	06/30/15	31,000	81,523.0	Diesel	GWI	65
48	704	Sch-Bus	Lee	2008	Blue Bird	1BAKFCPA18F254116	589JQW	06/30/15	31,000	67,342.0	Diesel	GWI	65

EXHIBIT D

ANNUAL SAFETY CERTIFICATION

goes in both TDSP Updates

Good Wheels
Transportation for the Disabled and Disadvantaged
10075 Bavaria Road • Fort Myers, Florida 33913

Alan M. Mandel
CEO

Board of Directors

Joni Logan
Chairman of the Board

Glee Duff
Vice Chairman

Gen. James L. Dozier
Secretary

Fred Atkins
Treasurer

Rosalie Berlin

Viva Robinson

Lucinda Tevlin

Alan Katzman
Emeritus

BUS TRANSIT SYSTEM

ANNUAL SAFETY AND SECURITY CERTIFICATION

Date: January 27, 2015

Name: Good Wheels, Inc.

Address: 10075 Bavaria Road
Fort Myers, FL 33913

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

1. The adoption of a Safety System Program Plan (SSPP) pursuant to Florida Department of Transportation safety standards set forth in Rule Chapter 14-90, Florida Administrative Code, revised February 2014.

2. The adoption of a System Hazard and Security Program Plan (HSP) pursuant to Florida Department of Transportation safety standards set forth in Rule Chapter 14-90, Florida Administrative Code, revised January 2015.

3. Compliance with adopted safety standards in the SSPP and SHSPP.

4. Performance of annual safety inspections on all operational buses in accordance with Rule 14-902.009.

Signature: Alan M Mandel

Name: **Alan M. Mandel**
Title: **CEO**

United Way
Partner Agency

SOUTHWEST FLORIDA COMMUNITY FOUNDATION

Cape Coral Community Foundation

EXHIBIT E

SERVICE COMPLAINT FORM

SERVICE REPORT

County _____ Log # _____

Date of contact: _____ Time: _____ Received by: _____

Commendation [ ] Suggestion [ ] Complaint [ ] Valid?: Yes [ ] No [ ]

Name: _____ Phone: _____
Address: _____
Contact: _____

WHERE? Fixed Route: _____ ADA _____ Paratransit: _____Operator: _____
Vehicle Number _____. Other (Medicaid, dispatcher, scheduler, etc.):_____
_____

WHAT? _____ **Service** (ride time, schedules, timeliness, attitude/conduct, drivers skill)
_____ **Policy** (fares, co-payments, operation hours, prioritization, denied services)
_____ **Vehicle** (safety, equipment, cleanliness)

Date of Occurrence: _____ Time: _____ Location: _____

Statement of Reported Circumstances: _____
_____
_____
_____
_____
_____

Resolution: N o [ ] Yes [ ] (If yes, complete section on Back.)

Intake Signature: _____; Date: _____

Critical Issue? No [ ] Yes [ ] & REFER TO SUPERVISOR IMMEDIATELY
critical issues include: physical, verbal, or substance abuse; any life threatening situation (reckless driving, passenger abandonment, accidents/incidents.)

Has this person reported this same problem before? No [ ]. Yes [ ] When?
Log # _____
_____
Log # _____

SERVICE REPORT – PAGE 2 Log # _____, continued

Follow up Date: _____ Comments: _____
_____
_____

Signature: _____ Date: _____

Findings: (attach statements of all parties involved.) _____
_____
_____
_____
_____

Signature: _____ Date: _____

Resolution
Action Taken/Date: _____
_____
_____
_____
_____
_____
_____

Was Corrective action necessary? No [ ] Yes [ ] Explain: _____
_____

Is customer satisfied with resolution? Yes [ ] No [ ] Unknown [ ]

If **NO**, inform the customer of Local Coordinating Board's **Formal Grievance Procedures**.
[They may contact Julia B. Davis at (239) 338-2550. X 219]

Did customer file a formal grievance? Yes [ ] No [ ] Unknown [ ]

[ ] Provide the Customer with the Commission for the Transportation Disadvantaged's Ombudsman Hotline Phone Number which is: Phone: (800) 983-2435; TDD (800) 648-4084
Signature: _____ Date: _____

Carriers are to use these forms to record complaints. Please use one form per complaint, do not group complaints onto one form. Use the Log # when responding to inquiries about each complaint.

EXHIBIT F

RATE STRUCTURE

Worksheet for Multiple Service Rates

CTC: Good Wheels, ir Version 1.4
County: Lee

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

SECTION III: Escort Service

1. Do you want to charge all escorts a fee?..... ○ Yes ● No — Skip #2 - 4 and 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 ..... ● Pass. Trip ○ Pass. Mile — Leave Blank
   per passenger mile?.....
3. If you answered Yes to # 1 and completed # 2, for how many of the projected Passenger Trips / Passenger Miles will a passenger be accompanied by an escort? — Leave Blank
4. How much will you charge each escort?..... — Leave Blank

SECTION IV: Group Service Loading

1. If the message "You Must Complete This Section" appears to the right, what is the projected total number of Group Service Passenger Miles? (otherwise leave blank)..... — Do NOT Complete Section IV
   ..... And what is the projected total number of Group Vehicle Revenue Miles? — Loading Rate 0.00 to 1.00

SECTION V: Rate Calculations for Mulitple 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: 2016 - 2017

		Ambul	Wheel Chair	Stretcher	Group	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	490,000	168,800 +	70,000 +	1,200 +	Leave Blank 0	Does Not = Total Projected Passenger Miles, with adjmt. for contracted services
Rate per Passenger Mile =		$2.55	$4.37	$9.11	$0.00 per passenger	$0.00 per group
		Ambul	Wheel Chair	Stretcher	Group	
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	40,000	17,000 +	6,200 +	100 +	Leave Blank	Does Not = Total Projected Passenger Trips, with adjmt. for contracted services
Rate per Passenger Trip =		$26.71	$45.79	$95.41	$0.00 per passenger	$0.00 per group

2 If you answered # 1 above and want a COMBINED Rate per Trip PLUS a per Mile add-on for 1 or more services,...

Combination Trip and Mile Rate

	Ambul	Wheel Chair	Stretcher	Group	
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =				Leave Blank	$0.00
Rate per Passenger Mile for Balance =	$2.55	$4.37	$9.11	$0.00 per passenger	$0.00 per group

Rates If No Revenue Funds Were Identified As Subsidy Funds

	Ambul	Wheel Chair	Stretcher	Group	
Rate per Passenger Mile =	$4.74	$8.12	$16.92	$0.00 per passenger	$0.00 per group
Rate per Passenger Trip =	$49.63	$85.07	$177.23	$0.00 per passenger	$0.00 per group

Program These Rates Into Your Medicaid Encounter Data