

RFP No. 2017-02

Request for Proposals  
for  
Community Transportation Coordinator Designation  
under  
Florida's Transportation Disadvantaged Program  
in  
Bradford County, Florida

## EXHIBITS



North Central Florida Regional Planning Council  
2009 NW 67th Place  
Gainesville, FL 32653-1603  
<http://ncfrpc.org/>  
352.955.2000

November 2, 2017

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**EXHIBIT A**

**MODEL LETTER**

**TRANSMITTAL OF PROPOSAL  
TO REQUESTING AGENCY**

**MODEL LETTER OF TRANSMITTAL**

(Date)

Mr. Scott R. Koons, AICP, Executive Director  
North Central Florida Regional Planning Council  
2009 N.W. 67 Place  
Gainesville, Florida 32653-1603

RE: Proposal for Community Transportation Coordinator for Bradford County

Dear Mr. Koons:

Enclosed are five (5) copies of a completed and signed Proposal for (Proposer's Name) to be designated Community Transportation Coordinator for Bradford County. One of these copies is a clean, single side original that you can use to make additional copies. The (agency/firm) understands the responsibilities and requirements of Chapter 427, Florida Statutes, Rule 41-2 of the Florida Administrative Code and shall comply with all appropriate federal, state and local regulations in this matter.

We look forward to servicing the needs of transportation disadvantaged citizens of Bradford County. Thank you for your consideration of this proposal.

Sincerely,

(Officer submitting proposal)

**EXHIBIT B**

**PROPOSERS IDENTIFICATION  
AND QUALIFICATION INFORMATION**

**PROPOSERS IDENTIFICATION AND QUALIFICATION INFORMATION**

1. Identification of Respondent:

Name of Organization:

Business Address:

Telephone Number: ( )

Years in Business at this Location:

2. Name and Title of Individual to Contact for Further Information:

3. Legal Status of Organization: (check one)

For-Profit Corporation or Joint Venture Corporation

For-Profit Partnership or Sole Proprietorship

Non-Profit Corporation

Public Agency

Other (Explain):

4. State the Proposer's proposed method of transportation service provision:

Community Transportation Coordinator only - agency/firm acts as a total brokerage system that does not operate vehicles

Community Transportation Coordinator/Transportation Operator - agency/firm provides all or part of the needed transportation services by operating vehicles

5. Has Respondent or any Officer or Partner of Respondent failed to complete a contract?

(circle one) YES NO

If yes, explain.

6. Location of central office that will provide overall administration and management of the project:



7. Disadvantaged Business Enterprise Status.

"Disadvantaged" Business is defined as a business having at least 51 percent owned, operated and controlled by "disadvantaged" group members. Disadvantaged group members are defined as Blacks, Hispanics, Asian Americans, American Indians, Alaskan Natives or women regardless of race or nationality."

Is the individual respondent agency/firm a certified disadvantaged or minority business enterprise?

(circle one) YES NO

Attach current certification documents to substantiate claim.

8. Is any litigation pending against respondent or any officer or partner of respondent?

(circle one) YES NO

If yes, explain.

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**EXHIBIT C**  
**STANDARD ASSURANCES**

**STANDARD ASSURANCES**

Name of Proposer:

At this time, we understand all requirements and state that as a serious proposer we will comply with all the stipulations included in the proposal package.

The above-named Proposer affirms and declares:

1. That the Proposer is of lawful age and that no other person, agency, firm or corporation has any interest in this Proposal or in the Contract that may result from this Proposal; other than as described in Exhibit B.
2. That this Proposal is made without any understanding, agreement or connection with any other person, agency, firm or corporation making a Proposal for the same project and is in all respects fair and without collusion or fraud.
3. That the Proposer has carefully examined the site of the work and that from his/her investigations has been satisfied as to the nature and location of the work, the kind and extent of the equipment and other facilities needed for the performance of the work, the general and local conditions, all difficulties to be encountered and all other items which in any way affect the work or its performance.
4. That the Proposer is in full compliance with all federal, state and local laws and regulations and intends to fully comply with same during the entire term of the contract.

In witness whereof, this Proposal is hereby signed by the duly authorized representative of the Proposer and sealed as of the date indicated.

ATTEST:

PROPOSER:

\_\_\_\_\_  
Witness Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed Name and Title

Date  
  
\_\_\_\_\_

Date  
  
\_\_\_\_\_

(Seal)

**EXHIBIT D**

**CERTIFICATION OF PROPOSER REGARDING  
DEBARMENT, SUSPENSION AND OTHER  
RESPONSIBILITY MATTERS**

**CERTIFICATION OF PROPOSER**

**REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

The Proposer \_\_\_\_\_ certifies to the best of its knowledge and belief that it and its principals:

1. Are not generally debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal or state department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this application or proposal had one or more public transactions (federal, state or local) terminated for cause or default.

(If the Proposer for Coordinator is unable to certify to any of the statements in this certification, the agency/firm shall attach an explanation to this certification.)

THE PROPOSER, \_\_\_\_\_, CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISION OF 31 U.S.C. SECTIONS 3801 ET. SEQ. ARE APPLICABLE HERETO.

\_\_\_\_\_  
Signature and Title of Authorized Official

The undersigned chief legal counsel for the \_\_\_\_\_ (agency/firm) hereby certifies that the \_\_\_\_\_ (agency/firm) has authority under state and local law to comply with the subject assurances and that the certification above has been legally made.

\_\_\_\_\_  
Signature of Agency/Firm Attorney

\_\_\_\_\_  
Date

**EXHIBIT E**  
**SERVICE STANDARDS**

## Service Standards

The Community Transportation Coordinator and any transportation operator from whom service is purchased or arranged by the Community Transportation Coordinator shall adhere to Florida Commission for the Transportation Disadvantaged approved standards. These standards include:

a. Drug and Alcohol Policy

**Rule 41-2.006 (4) (a), F.A.C.:** Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post accident and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration.

Suwannee River Economic Council shall comply with this standard.

b. Transport of Escorts and Dependent Children

**Rule 41-2.006 (4) (b), F.A.C.:** An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the local Service Plan.

**Local Policy:** Children under age 16 will be required to be accompanied by an escort. Escorts must be provided by the passenger. Escorts must be able to provide the necessary assistance to the passenger. Escorts will be transported at the regular rate.

c. Use, Responsibility and Cost of Child Restraint Devices

**Rule 41-2.006 (4) (c), F.A.C.:** Use of child restraint devices shall be determined locally as to their responsibility, and cost of such device in the local Transportation Disadvantaged Service Plan.

**Local Policy:** All passengers under the age of 4 and/or under 50 pounds will be required to use a child restraint device. This device will be provided by the passenger.

d. Passenger Property

**Rule 41-2.006 (4) (d), F.A.C.:** Passenger property that can be carried by the passenger and/or driver in one trip and can be safely stowed 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. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.

**Local Policy:** Passengers shall be allowed to have two pieces of personal property which they can place in their lap or stow under the seat. Passengers must be able to independently carry all items brought onto the vehicle.



e. Vehicle Transfer Points

**Rule 41-2.006 (4) (e), F.A.C.:** Vehicle transfer points shall provide shelter, security and safety of passengers.

The Community Transportation Coordinator shall comply with this standard.

f. Local Toll Free Phone Number

**Rule 41-2.006 (4) (f), F.A.C.:** A local toll free phone number for complaints or grievances shall be posted inside the vehicle. The Transportation Disadvantaged Helpline phone number (1-800-983-2435) shall also be posted inside all vehicles of the coordinated system. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including, advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board. All rider information/materials (brochures, user's guides, etc.) Will include the Transportation Disadvantaged Helpline phone number.

The Community Transportation Coordinator shall comply with this standard.

g. Out-Of-Service Area Trips

**Rule 41-2.006 (4) (g), F.A.C.:** 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.

**Local Policy:** The Community Transportation Coordinator may require medical provider certification for any out of county trip.

h. Vehicle Cleanliness

**Rule 41-2.006 (4) (h), F.A.C.:** Interior of all vehicles shall be free of 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.

**Local Policy:** All vehicles shall be cleaned (interior and exterior) on a regular schedule (minimum once a week).

i. Billing Requirements

**Rule 41-2.006 (4) (I), F.A.C.:** Billing requirements of the Community Transportation Coordinator to subcontractors shall be determined locally by the local Coordinating Board and provided in the local Transportation Disadvantaged Service Plan. All bills shall be paid within seven (7) calendar days to subcontractors, after receipt of said payment by the Community Transportation Coordinator, in accordance with Section 287.0585, Florida Statutes.

**Local Policy:** If the Community Transportation Coordinator without reasonable cause fails to make payments to the subcontractors and suppliers within seven (7) working days after the receipt by the Community Transportation Coordinator of full or partial payment, the Community Transportation Coordinator shall pay to the subcontractors and suppliers a penalty in the amount of one-half of one percent of the amount due, per day, from the expiration of the period allowed herein for payment. (F.S. 2000/ Ch 287/Part I/287.0585 Late payments by contractors to subcontractors and suppliers; penalty.)

j. Passenger/Trip Database

**Rule 41-2.006 (4) (j), F.A.C.:** Passenger/trip data base must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system.

The Community Transportation Coordinator shall comply with this standard.

k. Adequate Seating

**Rule 41-2.006 (4) (k), F.A.C.:** Adequate seating for paratransit 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.

The Community Transportation Coordinator shall comply with this standard.

l. Driver Identification

**Rule 41-2.006 (4) (l), F.A.C.:** Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with specific passengers, 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.

**Local Policy:** The Community Transportation Coordinator shall comply with this standard.

m. Passenger Assistance

**Rule 41-2.006 (4) (m), F.A.C.:** The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or wheelchair securement devices, storage of mobility assistive devices and closing the vehicle door. In the door-through-door paratransit service category, the driver shall 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 wheelchairs up or down more than one step, unless it can be performed safely as determined by the passenger, guardian and driver.

**Local Policy:** The Community Transportation Coordinator shall comply with this standard.

n. Smoking, Eating, and Drinking

**Rule 41-2.006 (4) (n), F.A.C.:** Smoking is prohibited in any vehicle. Requirements for drinking and eating on board the vehicle will be addressed in the local Transportation Disadvantaged Service Plan.

**Local Policy:** Eating and drinking on board the vehicle will not be allowed. Stops may be made to accommodate the needs of the passengers at the discretion of the driver.

o. Passenger No-Shows

**Rule 41-2.006 (4) (o), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board 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 Transportation Disadvantaged Service Plan.

**Local Policy** - The Community Transportation Coordinator shall attempt to reduce the number of no-shows annually.

p. Two-Way Communications

**Rule 41-2.006 (4) (p), F.A.C.:** All vehicles providing service within the coordinated system shall be equipped with two-way communications in good working order and audible to the driver at all times to the base.

The Community Transportation Coordinator shall comply with this standard.

q. Air Conditioning/Heating

**Rule 41-2.006 (4) (q), F.A.C.:** All vehicles providing service within the coordinated system shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.

The Community Transportation Coordinator shall comply with this standard.

r. First Aid

**Rule 41-2.006 (4) (r), F.A.C.:** First Aid policy shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

**Local Policy:** All vehicles will be equipped with first aid kits and bio-hazard kits as required by state and federal regulations.

s. Cardiopulmonary Resuscitation

**Rule 41-2.006 (4) (s), F.A.C.:** Cardiopulmonary resuscitation policy shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

**Local Policy:** Drivers are not required to be trained in cardiopulmonary resuscitation.

t. Driver Criminal Background Screening

**Rule 41-2.006 (4) (t), F.A.C.:** Driver background screening shall be determined locally, dependent up on purchasing agencies' requirements and provided in the local Transportation Disadvantaged Service Plan.

**Local Policy:** All drivers in the coordinated system must have a criminal background check with local law enforcement and the Florida Department of Law Enforcement. All drivers must also have a driving records check.

u. Fixed Route Transit Utilization

**Rule 41-2.006 (4) (u), F.A.C.:** In areas where fixed route transportation is available, the Community Transportation Coordinator should jointly establish with the local Coordinating Board a percentage of total trips that will be placed on the fixed route system.

**Local Policy:** Not applicable.

v. Pick-Up Window

**Rule 41-2.006 (4) (v), F.A.C.:** The Community Transportation Coordinator should establish and address the passenger pick-up windows in the local Transportation Disadvantaged Service Plan. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.

**Local Policy:**

**Transportation Disadvantaged Program:** Thirty (30) minute pickup window based on the pick-up time given to the passenger at the time of scheduling their ride.

**Mobility Enhancement Program On-Demand Service City of Starke:** Passengers will be picked-up within 30 minutes from the time they schedule their trip.

**Mobility Enhancement Program On-Demand Bradford County:** Passengers will be picked up within 60 minutes from the time they schedule their trip.

w. On-Time Performance

**Rule 41-2.006 (4) (w), F.A.C.:** The Community Transportation Coordinator and local Coordinating Board 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. This measure should also be included as part of the Community Transportation Coordinato'r's evaluation of its contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** The Community Transportation Coordinator will have a 90 percent on-time performance rate for all completed trips. On-time performance will be measured by random sampling of trips.

x. Advance Reservation Requirement

**Rule 41-2.006 (4) (x), F.A.C.:** The Community Transportation Coordinator should establish and address in the local Transportation Disadvantaged Service Plan a minimum 24 hour advanced notification time to obtain services. This policy should be communicated to contracted operators, purchasing agencies and passengers.

**Local Policy:**

**Transportation Disadvantaged Program:** Trips must be scheduled twenty-four hours in advance for service needed Tuesday through Friday. Trips must be scheduled seventy-two hours in advance for service needed on Mondays.

**Mobility Enhancement Grant Program On-Demand City of Starke:** Trips must be scheduled at least 30 minutes in advance.

**Mobility Enhancement Grant Program On-Demand Bradford County:** Trips must be requested at least 60 minutes in advance.

y. Safety

**Rule 41-2.006 (4) (y), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board should jointly establish and address in the local service plan a performance measure to evaluate the safety of the coordinated system. This measure should be used in the Community Transportation Coordinator's evaluation of the contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** There shall be no more than 1 accident per 100,000 miles during the evaluation period.

z. Reliability

**Rule 41-2.006 (4) (z), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board should jointly establish and address in the local service plan a performance measure to evaluate the reliability of the vehicles utilized in the coordinated system. This measure should be used in the Community Transportation Coordinator's evaluation of the contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** There shall be no more than 5 roadcalls during the evaluation period.

aa. Call-Hold Time

**Rule 41-2.006 (4) (aa), F.A.C.:** This performance measure can be used to address the accessibility of the service. The Community Transportation Coordinator and the local Coordinating Board should jointly determine if a standard for a 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 local Coordinating Board's evaluation of the Community Transportation Coordinator.

This standard is not applicable to this service area.

bb. Quality of Service

**Rule 41-2.006 (4) (bb), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board should jointly establish and address in the local service plan a performance measure to evaluate the quality of service provided within the coordinated system. The measure should be used in the Community Transportation Coordinator's evaluation of contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** Collect and publicly post passenger satisfaction survey ratings. There shall be no more than one complaint per 1,000 trips during the evaluation period.

cc. Safety Belt Usage

**Chapter 316.614 (4), Florida Statutes:** It is unlawful for any person: (a) To operate a motor vehicle in this state unless each passenger and the operator of the vehicle under the age of 18 years are restrained by a safety belt or by a child restraint device pursuant to s. [316.613](#), if applicable; or (b) To operate a motor vehicle in this state unless the person is restrained by a safety belt. (5) It is unlawful for any person 18 years of age or older to be a passenger in the front seat of a motor vehicle unless such person is restrained by a safety belt when the vehicle is in motion. (6)(a) Neither a person who is certified by a physician as having a medical condition that causes the use of a safety belt to be inappropriate or dangerous nor an employee of a newspaper home delivery service while in the course of his or her employment delivering newspapers on home delivery routes is required to be restrained by a safety belt.

**Local Policy:** Passengers whose transportation is sponsored by Florida's Transportation Disadvantaged Program shall wear a safety belt while being transported unless they are certified by a physician as having a medical condition that causes the use of a safety belt to be inappropriate or dangerous.

**EXHIBIT F**

**CONTRACTING INSTRUCTIONS**

**MEMORANDUM OF AGREEMENT**

**2016/17 BRADFORD COUNTY TRANSPORTATION DISADVANTAGED SERVICE PLAN**



INSTRUCTION MANUAL  
FOR THE  
MEMORANDUM OF AGREEMENT  
AND  
THE TRANSPORTATION DISADVANTAGED SERVICE PLAN  
2007/2008

Issued By:

FLORIDA COMMISSION FOR THE TRANSPORTATION DISADVANTAGED  
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# INTRODUCTION

This manual contains information regarding the Memorandum of Agreement and the Transportation Disadvantaged Service Plan. This manual is intended to provide guidance to Community Transportation Coordinators, Planning Agencies, and Local Coordinating Boards when planning, implementing and evaluating services under the Coordinated Transportation Disadvantaged Program.

Pursuant to Chapter 427, Florida Statutes, the purpose of the Commission for the Transportation Disadvantaged (Commission) is to accomplish the arrangement for the provision of transportation services to the transportation disadvantaged. In accomplishing this, the Commission approves a Community Transportation Coordinator (Coordinator) for each service area of the state. The Coordinator is responsible for the accomplishment of certain requirements regarding the arrangement of cost-effective, efficient, unduplicated, and unfragmented transportation disadvantaged services within its respective service area. The contractual administration for transportation disadvantaged services by a Coordinator is accomplished through a Memorandum of Agreement between the Commission and the Coordinator. This Agreement is a contract through which the Commission delineates the statewide minimum service standards and requirements by which the Coordinator must operate.

Conditions set forth in the Memorandum of Agreement require the development and implementation of a Transportation Disadvantaged Service Plan. The Service Plan is developed by the Coordinator and the Planning Agency under the guidance and approval of the Local Coordinating Board. The plan is an annually updated tactical plan with components of development, service and, quality assurance. Through the Local Coordinating Board's involvement in the review and approval of the Service Plan, the Local Coordinating Board is able to guide and support the Coordinator in implementing coordination efforts and locally developed service standards that are consistent with the needs and resources of the community.

This manual is divided into two parts: Memorandum of Agreement, and Transportation Disadvantaged Service Plan. Each part contains information and guidance to assist in the completion of these program requirements. An appendix is provided that contains the Memorandum of Agreement Boilerplate, a sample Transportation Disadvantaged Service Plan format, Local Coordinating Board Membership Certification Format, Roll Call Voting Sheet Format, Rate for Services Summary Page Format, Sample Update or Amendment Submittal Letter, Update or Amendment Table and, Glossary of Terms.

## **PART I**

# **MEMORANDUM OF AGREEMENT**

This part of the manual contains requirements and instructions for the completion of the Memorandum of Agreement.

### **A. GENERAL INFORMATION**

Under Chapter 427, Florida Statutes, the Planning Agency is tasked with recommending to the Commission a single Community Transportation Coordinator. The Planning Agency must follow the competitive procurement process as outlined in Chapter 287, Florida Statutes, for a Coordinator designation. Once the process has been completed, the Planning Agency submits documentation to the Commission staff, verifying a competitive process was used. The Planning Agency then requests that the Commission approve the Planning Agency's recommendation of a single Community Transportation Coordinator for that specific service area. This process is followed every five years. The contractual administration for transportation disadvantaged services by a Coordinator is accomplished through a Memorandum of Agreement between the Commission and the Coordinator.

The Memorandum of Agreement is a "state contract" for passenger transportation services and is for a term of five years. The Agreement recognizes/establishes a vendor, the Community Transportation Coordinator, who is responsible for the arrangement of all transportation services in a particular service area which are funded through federal, state, and local government transportation disadvantaged funds. This agreement is between the Commission for the Transportation Disadvantaged and an approved Coordinator. The Agreement must be reviewed in its entirety and approved by the Local Coordinating Board prior to execution by the Commission. The agreement contains the Commission's minimum standard requirements and is the basis for uniform statewide passenger transportation services. The Memorandum of Agreement includes standard contract language approved by the Commission and adopted by administrative rule. The requirements of this agreement are not subject to change by the Coordinator.

### **B. INSTRUCTION FOR COMPLETION AND SUBMITTAL**

The Planning Agency is responsible for ensuring that the Memorandum of Agreement is signed by the proposed Community Transportation Coordinator and the Local Coordinating Board. The Commission-approved Memorandum of Agreement form must be used. The most current form may be found on the Commission for the Transportation Disadvantaged web site: <http://www.dot.state.fl.us/ctd/programinfo/programdevelopmentsection/programdevelopmenthome.htm>. The approved and signed Agreement should be submitted with the Planning Agency's recommendation of a Community Transportation Coordinator. Please use the following guidelines when completing a Memorandum of Agreement for submission to the Commission for execution:

### Instructions for PAGE 1 of the Memorandum of Agreement

- Do not fill in the contract number. This number will be assigned by the Commission upon execution.
- Do not fill in the effective dates. The Commission will fill in the dates upon execution.
- Insert the legal name of the governing body which is responsible as the Community Transportation Coordinator. Include the address to which this contract will be returned upon execution.
- Enter the name of the county(ies) for which the Coordinator is designated to serve in the appropriate space.

### Instructions for PAGE 8 of the Memorandum of Agreement.

- Enter the name and/or position of the representative who is responsible for the administration of the program under the Agreement.
- Do not fill in any dates on the Agreement, except the date the local coordinating board approved the document.
- All signatures must be originals. Do not use rubber stamps.
- Be sure authorized parties type or neatly print titles and names on all copies to ensure clarity.
- Signatures on the agreements must be attested to by one affirming official and sealed (corporate or notary seal).
- Be sure to include a resolution from the agency authorizing signing of the agreement by an individual or position. The resolution must have original signatures. The resolution is from the governing body of the Community Transportation Coordinator, not the Local Coordinating Board.
- Submit two signed copies for further processing to:

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

A copy of the Memorandum of Agreement will be furnished to the Community Transportation Coordinator and the Planning Agency after the agreement has been executed by the Commission.

## **PART II**

# **TRANSPORTATION DISADVANTAGED SERVICE PLAN**

This part of the manual contains requirements and instructions for the completion of the Transportation Disadvantaged Service Plan.

### **A. GENERAL INFORMATION**

The Transportation Disadvantaged Service Plan is an annually updated tactical plan jointly developed by the Planning Agency and the Coordinator which contains development, service, and quality assurance components. The Local Coordinating Board reviews and approves the Service Plan and it is submitted to the Commission for the Transportation Disadvantaged for final action.

The Federal Transit Administration modified several of its circulars for funding assistance in support of the federal Safe Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). Beginning in fiscal year 2007, projects selected for funding under the Elderly Individuals and individuals with Disabilities, JARC, and New Freedom program must be derived from a Coordinated Public Transit-Human Services Transportation Plan. These projects should be identified within the Needs Assessment and Goals, Objectives and Strategies sections of the Development Plan. The plan must be developed through a process that includes representatives of public, private, and nonprofit transportation and human services providers and participation by the public. Florida's Transportation Disadvantaged Service Plan is developed through the input of Local Coordinating Boards whose membership includes citizens, public transportation, and human service providers. In addition to being a statutory requirement of Chapter 427, the Transportation Disadvantaged Service Plan may also be used to satisfy this federal requirement.

Through the guidance and support of the Coordinating Board, both the development and service components should complement each other. The Local Coordinating Board plays an important role in the support, advisement, monitoring, and evaluation of the Coordinator based on the approved Transportation Disadvantaged Service Plan. Through the Local Coordinating Board's involvement in the review and approval of the plan, the Coordinating Board is able to guide and support the Coordinator in implementing coordination efforts and locally developed service standards that are consistent with the needs and resources of the community.

A Transportation Disadvantaged Service Plan must be developed and maintained for each service area as recognized by the Commission. An initial Transportation Disadvantaged Service Plan is due within 120 calendar days after the execution of the initial Memorandum of Agreement. The Service Plan will cover a five-year period, with annual updates for years two through five, due prior to July 1 of each subsequent year. The development and submission of the Service Plan and annual updates are the responsibility of the Coordinator, the Planning Agency, and the Local Coordinating Board. In order to prevent any loss of funding, it is critical

that the plan and updates are submitted timely. The minimum guidelines to be utilized when developing the Transportation Disadvantaged Service Plan are provided in this manual.

## B. INSTRUCTIONS FOR COMPLETION AND SUBMITTAL

The Planning Agency is responsible for ensuring that the Transportation Disadvantaged Service Plan is completed, approved and signed by the Local Coordinating Board. The Planning Agency must complete the Development component and the Quality Assurance component of the Service Plan. The Community Transportation Coordinator must complete the Service Element and submit it to the Planning Agency to be incorporated into the complete service plan to be presented to the Local Coordinating Board for approval. At a minimum, the Service Plan must address the mandatory elements as identified in the sample format. The approved and signed Service Plan should be submitted by the Planning Agency. Please use the following guidelines when completing a Transportation Disadvantaged Service Plan for submission to the Commission for execution:

- Provide a Cover Page identifying the service area, the time period of the service plan and the parties who are submitting the plan.
- Include a Table of Contents that, at a minimum, follows the format provided in this manual. All pages should be numbered.
- Include a completed Local Coordinating Board Membership Certification form, signed by the Planning Agency representative.
- Ensure that a roll call voting sheet identifying all Coordinating Board members, their affiliation, and whether they voted for or against the submittal of this document to the Commission is included and is signed by the Local Coordinating Board chairman. Also indicate those members who were absent from the meeting.
- All signatures must be originals. Do not use rubber stamps.
- Submit two signed copies for further processing to:

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

A copy of the Transportation Disadvantaged Service Plan will be furnished to the Community Transportation Coordinator and the Planning Agency after it has been executed by the Commission.

## C. SPECIFIC COMPONENT REQUIREMENTS

Each component of the Service Plan builds and supports the others. The Development section identifies the long term goals and objectives for the local program based on data presented within that component. The Development component should describe how you will get from where you are today, as identified in the Service Plan component, to where you plan to be illustrated through the analysis provided in the Development component. The Service component identifies the operational and administrative structure as it exists today. The Quality Assurance component describes the methods utilized to evaluate the services provided by the Coordinator. The following is specific criteria that, at a minimum, should be addressed within each section of the Service Plan. The Planning Agency, Community Transportation Coordinator or Local Coordinating Board may include additional information as needed.

### I. DEVELOPMENT PLAN

#### A. Introduction to the Service Area

##### 1. Background of the TD Program

This section should provide the reader with an account of the organization and development of the TD Program at the local level. It may also include a discussion of the evolution of the Program at the state level. However, this is not a requirement.

##### 2. Community Transportation Coordinator Designation Date/History

At a minimum, include information on when and how the organization was formed and selected as a Coordinator. Also identify the process used by the Planning Agency for selection.

##### 3. Organization Chart

This should identify all those involved in the provision of service, from the Commission for the Transportation Disadvantaged, through the local Coordinating Board, to the Community Transportation Coordinator and the Planning Agency, and to the consumers.

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

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

- a) Local Government Comprehensive Plans
- b) Regional Policy Plans
- c) Transit Development Plans
- d) Commission for the Transportation Disadvantaged 5Yr/20Yr Plan
- e) MPO Long Range Transportation Plans (where applicable)
- f) Transportation Improvement Programs (where applicable)

## 5. Public Participation

Identify the local process that allows representatives of public, private, and non-profit transportation and human services providers and members of the public to participate in the development and update of the Transportation Disadvantaged Service Plan. Stakeholders may include:

- ❖ Transportation Partners such as
  - area transportation planning agencies
  - public transportation providers (including ADA paratransit providers),
  - private transportation providers (including private transportation brokers, taxi operators, van pool providers and intercity bus operators),
  - non-profit transportation providers;
- ❖ Passengers and Advocates such as
  - existing and potential riders, including both general and targeted population passengers,
  - protection and advocacy organizations
  - representatives from independent living centers
  - advocacy organizations working on behalf of targeted populations
- ❖ Human Service Partners
  - agencies that administer health, employment or other support programs for targeted populations
  - job training and placement agencies
  - housing agencies
  - health care facilities
  - mental health providers
- ❖ Others
  - emergency and security management agencies
  - tribes and tribal representatives
  - economic development organizations
  - faith-based and community based organizations
  - representatives of the business community (employers)
  - appropriate local or state officials and elected officials
  - school districts

It is important that stakeholders be included in the development, implementation and updates of the local coordinated Transportation Disadvantaged Service Plan. This should include the annual public hearing as required of the Local Coordinating Board.



## B. Service Area Profile/Demographics

### 1. Service Area Description

Provide general descriptive information about the service area. This should be a short, one to two paragraph explanation.

### 2. Demographics

#### a) Land Use

Emphasize the relationship between land uses and transportation in the service area.

#### b) Population/Composition

Provide a description of the population of the service area. Include population information such as total population, population breakdown by age groups, population densities, income information, employment status and location of employment, housing classifications and patterns, educational profiles, automobile ownership and use, historical tradition, cultural descriptions, and government and institutional descriptions.

#### c) Employment

Address employment as it relates to the generation of trips for the service area.

#### d) Major Trip Generators/Attractors

Identify major locations where trips would be generated from or to. This can include major medical facilities, amusement parks, large employers,

#### e) Inventory of Available Transportation Services

Develop an inventory of all identifiable transportation services that are currently available in the service area. This would include public, private, non-profit and local commuter service providers.

## C. Service Analysis

### 1. Forecasts of Transportation Disadvantaged Population

You are encouraged to use the Methodology Guidelines for Forecasting TD Transportation Demand at the County Level, prepared for the Commission by the Center for Urban Transportation Research, May 1993. However, if you choose to develop and utilize your own methodology, please indicate that you have done so.

### 2. Needs Assessment

Assess the transportation needs and demand for individuals with disabilities, elderly, low income, and high risk and at-risk children. Identify any gaps in transportation services that are needed in the service area. Use service trends, populations by segments and rider expectations, and any community development plans as tools. This may be difficult for very rural counties to accomplish with a lot of certainty. Be specific as to what is needed. This

should include both service needs as well as capital purchase needs. Projects selected for funding under the Elderly Individuals and individuals with Disabilities, JARC, and New Freedom program may be derived from a the Transportation Disadvantaged Service Plan. The need for services that could be considered projects should be identified within this section of the Development Plan. The plan must be developed through a process that includes representatives of public, private, and nonprofit transportation and human services providers and participation by the public. Some examples could be expansion of service, additional routes, more vehicles, maintenance facilities, changes in routes, additional funding for particular service needs, etc.

### 3. Barriers to Coordination

Identify any federal, state, or local governmental policies, natural or operational environmental characteristics/constraints, or funding constraints, etc. that hinder or prevent the coordination of transportation services. Provide local efforts planned to address barriers and identify how the Commission for Transportation Disadvantaged can assist.

## D. Goals, Objectives, and Strategies

Develop goals, objectives and strategies for the local coordinated transportation program. Goals, objectives and strategies are critical to the implementation of the Transportation Disadvantaged Service Plan. They are important policy statements that have been carefully considered by the Coordinator and the Planning Agency with the direction and support of the Coordinating Board. They represent a statement of local policy that will be used to manage the future transportation disadvantaged program within the service area. The plan for advancing from where you are today to where you need to be should be presented in this section through long range goals, specific measurable objectives, and strategies. This section should be updated on an annual basis.

A goal is a statement of purpose intended to define an ultimate end or condition. It reflects a direction of action, and is a subjective value statement. Goals may include more than one objective. That is, there may be more than one milestone necessary to achieve a goal.

An objective is a specific, measurable action that can be taken toward achieving the goal. Objectives should be dated. Deficiencies and corresponding corrective actions, as well as any service improvements or expansions should be identified within this section as dated objectives.

Strategies are specific actions that will be taken to achieve the objectives. These represent priority actions that will be carried out as part of the planning or quality assurance activities. For accountability purposes, the annual evaluation of the Coordinator should assess both the progress on the strategies themselves and

how well the strategies that have been implemented advance the progress towards reaching or achieving the corresponding objectives.

#### E. Implementation Schedule

The Implementation Schedule should be derived from the goals, objectives, and strategies described in the section above. The schedule should be in chronological order and include the strategy, the responsible party(s) for accomplishment, the anticipated beginning and ending date and any known costs. This section should be updated on an annual basis.

## II. SERVICE PLAN

### A. Operations

The operations element is a profile of the Coordinator's current system which provides basic information about the Coordinator's daily operations. This element should be written in a manner which is intended to give someone with little or no knowledge of transportation operations an adequate level of understanding. All terminology must be consistent with the terms identified in the Glossary of Terms provided in this manual.

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

At a minimum, describe the various types of transportation services available, i.e., ambulatory, non-ambulatory, stretcher, paratransit, fixed-route, subscription or group services. Identify any special routes that are available and when these services are available. The services identified in this section should be those which are required to meet the identified needs of federal, state and local government purchasing agencies.

Coordinators should establish policies regarding any restrictions to whether services are provided door-to-door or curb-to-curb; utilization of friends/family first, mandatory use of fixed route (where available).

The Coordinator must provide for or arrange for after hours and weekend transportation as required by any Federal, State, or Local Government agency sponsoring such services. The provision of said services shall be furnished in accordance with the Coordinator's prior notification requirements. At the discretion of the Coordinator and the Local Coordinating Board, will call and same day services may be provided. However, these services should only be provided at a minimal level and may be provided for additional costs to the purchaser. Coordinator must provide a listing of any holidays that services will not be available.

Group trips may also be provided, but at a lower cost than the advance reservation or demand response. Provide the locally established definition of a group trip. Subscription trips may also be provided. Under no circumstances should a subscription rider have to continually call to arrange for their transportation. Provide the locally established definition of a subscription trip.

## 2. Accessing Services

At a minimum, this section must include detailed information regarding:

- a) The phone number and office hours in which services can be scheduled. Include alternative communications such as internet reservations and Relay Services.
- b) The method and advanced notification time required to obtain services.
- c) An explanation of the cancellation process and requirements.
- d) No show procedure (both Coordinator and rider), including any applicable penalties.
- e) Procedures for dispatching backup service or after-hours service.

Also, this section should address any policies the local coordinating board has established in regards to:

- a) Eligibility, as determined locally, for services funded by the Transportation Disadvantaged Trust Fund.
- b) Prioritization, as determined locally, for services funded by the Transportation Disadvantaged Trust Fund.
- c) Other Procedures

## 3. Transportation Operators and Coordination Contractors

The Coordinator must provide the process by which it analyzes and implements the provision of services through potential operator contracting entities. This must include: 1) the steps that must be taken by the Coordinator to contract with an operator, i.e. the locally approved procedure, whether it be competitive bid, RFP, RFQ, negotiation, etc.; and 2) the criteria on which the Coordinator makes decisions regarding the potential operator contracting entity.

Transportation services provided through negotiated arrangements with coordination contractors by the Coordinator must be justified through an analysis of the appropriate financial data, calculation methodology, and any other factors the Coordinating Board feels is relevant.

For each Operator and Coordination Contract currently in place, identify the name of the contractor and contact person, the type of service(s) they provide, the clients they serve (i.e., non-sponsored, Medicaid, ADA Complementary Paratransit (where applicable), etc.), and their hours of operation.

4. Public Transit Utilization (where applicable)  
Indicate the degree to which public transit is being utilized in the service area. If Public Transit is available but is not being utilized by the Coordinator, please identify any barriers which you may have encountered in your efforts. Please note that utilization of an existing public transit system is encouraged due to the cost effectiveness of this service.
5. School Bus Utilization  
Identify current services available through the use of school buses. Provide a detailed explanation of any additional cost for insurance, coordination surcharge, or other necessary costs, and provide the bottom line cost of utilizing school buses. In addition, for those Coordinators who currently have an agreement with a school board, provide information on anticipated services. If you do not have an agreement with the local school board in place, please identify any barriers which you may have encountered in your efforts.
6. Vehicle Inventory  
Provide a vehicle inventory report of the vehicles utilized within the coordinated system. The inventory should reflect the year, make, model, mileage, funding source and owner for each vehicle.
7. System Safety Program Plan Certification  
Each Coordinator and any transportation operators from whom service is purchased or funded by local government, state or federal transportation disadvantaged funds, shall ensure the purchasers that their operations and services are in compliance with the safety requirements as specified in Section 341.061, Florida Statutes, and Chapter 14-90, F.A.C. Provide a copy of the latest Department of Transportation System Safety Program Plan Certification.
8. Intercounty Services  
Coordinators are required to plan and work with Community Transportation Coordinators in adjacent and other areas of the state to coordinate the provision of community trips that might be handled at a lower overall cost to the community by another Coordinator. At a minimum, describe any cooperative agreements you may have with other Coordinators in the state. This section should also include information regarding any cooperative agreements or discussions currently in progress or planned for the period covered by the Service Plan. If applicable, identify any problems that may impede the use of cooperative agreements.
9. Emergency Preparedness and Response  
Discuss what plans are in place that will be activated in the event of an emergency, the anticipation of an event and after an emergency has been declared. Describe the relationship the Coordinator has with the Local Emergency Management Agency (Specifically ESF 1).

10. Educational Efforts/Marketing

Describe any current or planned activities that the Coordinator is undertaking to provide information about the transportation system. This could include educational efforts as well as marketing for services.

11. Acceptable Alternatives

Identify alternatives that have been approved based on Chapter 427.016(l)(a), Florida Statutes, and Rule 41-2.015(2-3), Florida Administrative Code, and the specific reasons for their categorization as an alternative. Include for each of these alternatives any plans to bring them through the system in the future. Indicate whether or not these alternatives were reviewed by the local coordinating board. It is not intended that you identify transportation that is currently being provided through the alternatives identified in Rule 41-2.015(2)(a)-(e), FAC.

12. Service Standards

Identify local service standards that have been jointly developed by the Local Coordinating Board, the Planning Agency, and the Coordinator, consistent with those of the Commission. Service standards are integral to the development and implementation of a quality transportation program to the transportation disadvantaged in a service area. Standards should be developed to address, at a minimum, the following:

- a) drug and alcohol policy
- b) escorts and children
- c) child restraints
- d) rider property
- e) vehicle transfer points
- f) local toll free phone number for consumer comment
- g) out of service area trips
- h) vehicle cleanliness
- i) billing requirements to contracted operators
- j) rider/trip data
- k) adequate seating
- l) driver identification
- m) passenger assistance
- n) smoking and eating on vehicles
- o) no-show policies
- p) communication equipment
- q) vehicle air conditioning and heating equipment
- r) first aid policy
- s) cardiopulmonary resuscitation
- t) pick-up windows
- u) on-time performance
- v) advance reservation requirements

- w) public transit ridership (if applicable)
- x) complaints
- y) accidents
- z) roadcalls
- aa) call-hold time

Service standards may also be developed to correct deficiencies identified in the annual evaluation of the Coordinator. The identified standards which do not currently exist or are not yet in application should be addressed in the Development Plan component of this plan through a dated objective.

### 13. Local Complaint and Grievance Procedure/Process

Provide the Coordinator's process for resolving complaints. This would include any steps that would be taken directly by the Coordinator.

Provide the process that the Local Coordinating Board uses to hear complaints and grievances regarding service. The grievance process should include the identification of the manner in which a user is made aware of the grievance process.

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

Identify the process the Coordinator has in place to monitor both transportation operators and coordination contractors. Community Transportation Coordinators are responsible for evaluating their operators and coordination contractors to ensure contractual compliance. This evaluation should be done on a periodic basis depending on the needs and requirements of the Coordinator. A comprehensive annual evaluation should be completed to ensure compliance, at a minimum, with the System Safety Program Plan, locally approved standards, Commission standards, reporting of annual operating data, and insurance requirements. This report should be provided to the Local Coordinating Board to be reviewed and included in the Coordinator's evaluation.

### 15. Coordination Contract Evaluation Criteria

Identify the criteria used to annually review coordination contractors, in cooperation with the Local Coordinating Board, and determine whether the issuance or continuation of a coordination contract would be the most cost-effective and efficient utilization of local, state, or federal dollars.

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

The Commission has established the Rate Calculation Model, a standard process for the development of rates for transportation services that are arranged or provided by the Coordinator. This model can be used by the Commission in

comparing and approving rates to be paid to and used by Coordinators and in determining cost-based rates to be charged to all purchasing agencies.

It is the intent that this model be used to develop a rate for all purchasing agencies, except fixed route bus passes. If there are any rates for services provided to other agency-sponsored customers that are different from the non-sponsored rates, provide an explanation as to why these rates were not developed in accordance with the rate model and what actions are being taken to include them in future years.

All rates for services will be included on a summary page following the format provided in this manual. This single location of information regarding rates for different types of services allows the Coordinating Board, the Commission and others the opportunity to do a comprehensive analysis of the rate structure. Coordinators should also include a copy of the Rate Calculation Model worksheets as backup documentation.

The Rate Calculation Model Worksheets and Rates for Services should be reviewed and updated annually. The Rate Calculation Model allows for annual changes to occur based on changes to the level of service, expenditures and revenues.

Any amendments that may occur after July 1, to rates which result in an increase, for any service provided, that is greater than 3% must come before the Commission for review and approval. The only exceptions to this is in instances where a recent procurement process has been conducted (i.e., request for proposals, request for bids, etc.) or an increase in rates for fixed schedule/fixed route systems, i.e., bus passes or tokens.



### III. QUALITY ASSURANCE

Provide information on the evaluation processes utilized at the local level to ensure quality of service is being obtained and that it is being provided in the most cost effective, efficient, unduplicated and unfragmented manner.

Identify the process used by the Local Coordinating Board and the planning agency in the evaluation of the Community Transportation Coordinator. The evaluation should be conducted utilizing the Commission for the Transportation Disadvantaged *QAPE/LCB CTC EVALUATION WORKBOOK*. This evaluation workbook was created to provide a formal process for evaluating the performance of the Coordinator (and its operators.) The workbook contains several worksheets that can be used by the Coordinating Board to conduct this evaluation. The Commission requires worksheets regarding Cost, Competition and Coordination be completed during this review.

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 Commission. Include a summary of the latest Coordinator Evaluation and Evaluation Procedure developed by the Coordinating Board.

Coordinators can only be evaluated against the established standards for service. It is the responsibility of the Local Coordinating Board to recommend and approve effective service standards against which the Coordinator can be evaluated, ensuring quality transportation for the transportation disadvantaged. Also included in this section should be the locally approved process through which these standards will be evaluated. The criteria used in the development of these standards should include, at a minimum:

- a) service effectiveness;
- b) cost efficiency and effectiveness;
- c) vehicle utilization;
- d) service availability;
- e) reliability; and
- f) safety and training.

Identify any local service standards which were developed based on deficiencies or problems within the system. The evaluation should provide a time table for compliance by the Coordinator. The Local Coordinating Board follow-up on the corrective actions should be incorporated in the evaluation in the following year, as well as any recommendations from the Commission through their triennial Quality Assurance reviews.

## D. UPDATES OR AMENDMENTS

It will be necessary to make amendments or updates to the Transportation Disadvantaged Service Plan. The Local Coordinating Board must approve any changes to the Plan. The Planning Agency will submit the changes to the Commission after it has been reviewed and approved by the Local Coordinating Board.

The Planning Agency should submit a letter to the Executive Director of the Commission for the Transportation Disadvantaged providing the necessary information concerning the update or amendment, a copy of the Update or Amendment Table indicating which area is being changed, and the actual pages reflecting the update or amendment. A sample format is included in this manual. Once the necessary documentation is submitted, the Commission staff will respond to the Planning Agency advising whether the change is accepted. Once the update or amendment has been accepted, they will become a part of the Transportation Disadvantaged Service Plan.

## I. UPDATES

The Transportation Disadvantaged Service Plan is an annually updated tactical plan. It must be reviewed and updated annually prior to July 1 of each year. The Local Coordinating Board must approve each annual update. The following sections of the Plan must be reviewed and updated annually.

### Section I – DEVELOPMENT PLAN

#### Needs Assessment

Ensure that new service or capital needs are identified to support future funding applications

#### Goals, Objectives, Strategies

Ensure that objectives indicate an implementation date/accomplishment date.  
Note deficiencies & corrective actions  
Note service improvements or expansions  
Section should be logical and mirror format from previous year

#### Implementation Plan

Identify progress, setbacks, adherence to schedules  
Revise implementation schedule as necessary

### Section III - COST/REVENUE ALLOCATION AND RATE STRUCTURE JUSTIFICATION

Review current and updated projected expenses, revenues and levels of service and make adjustments accordingly. A new Service Rates Summary page as well as Rate Model Worksheets must be submitted.

#### Previous TDSP Review Letter

All items cited as deficient or inadequate and needing follow up

Others sections of the Plan may be updated during the same review period. These areas may include:

#### Section I. DEVELOPMENT PLAN

- Organization Chart updated as necessary
- LCB certification page (members, agencies, alternates and term) to include any changes as previously submitted in TDSP or updates
- Any significant changes to major trip generators/attractors that have significantly altered service delivery

#### Section II SERVICE PLAN

- Changes in types or hours of service
- Significant changes in system policies (priorities, eligibility criteria, etc.)
- New service innovations or cancellation of services
- Changes in operators/coordination contractors
- Changes in vehicle inventory
- SSPP certification if expired and renewed
- Include new acceptable alternatives
- Changes and narrative for adoption of new Service standards
- Any and all changes to the local Grievance Process and the Evaluation Process, including explanations for implementation of changes

#### Section III. QUALITY ASSURANCE

- Include any evaluation process changes and update to the Summary of the latest Coordinator Evaluation.

## II. AMENDMENTS

Amendments may occur in any one of the sections of the Plan. Amendments are changes that need to be made to the Plan that were not made during the annual update process. Any changes to the Plan after July 1 of each year will be considered an amendment.

Rates amendments which result in an increase, for any service provided, that is greater than 3% must come before the Commission for review and approval. The only exceptions to this is an increase in rates for fixed schedule/fixed route systems, i.e., bus passes or tokens.

## **PART III APPENDICES**

Contract # \_\_\_\_\_

Effective: \_\_\_\_\_ to \_\_\_\_\_

STATE OF FLORIDA  
COMMISSION FOR THE TRANSPORTATION DISADVANTAGED  
**MEMORANDUM OF AGREEMENT**

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

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

\_\_\_\_\_ county(ies), and hereafter referred to as the "Coordinator."

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

The Parties Agree:

I. The Coordinator Shall:

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

E. Accomplish this Project by:

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

F. Comply with Audit and Record Keeping Requirements by:

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

2. Assuming the responsibility of invoicing for any transportation services arranged, unless otherwise stipulated by a purchase of service contract or coordination contract.
  3. Maintaining and filing with the Commission, local Coordinating Board, and all purchasing agencies/entities such progress, fiscal, inventory, and other reports as those entities may require during the period of this Agreement.
  4. Providing copies of finance and compliance audits to the Commission and local Coordinating Board as requested by the Commission or local Coordinating Board.
  5. Reporting accidents involving a vehicle operated within the coordinated transportation system in the coordinator's designated service area. Accidents involving a fatality or fatalities must be reported to the Commission not more than 24 hours after the community transportation coordinator becomes aware of the fatal accident. Any other accident, those not involving a fatality or fatalities, with over \$1,000 in property damages, or personal injury that requires evacuation to a medical facility or a combination of both, must be reported to the Commission not more than 72 hours after the community transportation coordinator becomes aware of the accident. Copies of any accident report or reports prepared or received by the community transportation coordinator as a result of any accident must be sent to the Commission upon receipt or preparation of the report.
- G. Retain all financial records, supporting documents, statistical records, and any other documents pertinent to this Agreement for a period of five (5) years after termination of this Agreement. If an audit has been initiated and audit findings have not been resolved at the end of five (5) years, the records shall be retained until resolution of the audit findings. The Coordinator shall assure that these records shall be subject to inspection, review, or audit at all reasonable times by persons duly authorized by the Commission or this Agreement. They shall have full access to and the right to examine any of the said records and documents during the retention period.
- H. Comply with Safety Requirements by:
1. Complying with Section 341.061, F.S., and Rule 14-90, FAC, concerning System Safety; or complying with Chapter 234.051, F.S., regarding school bus safety requirements for those services provided through a school board; and
  2. Assuring compliance with local, state, and federal laws, and Commission policies relating to drug testing. Conduct drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration.
- I. Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of \$100,000 for any one person and \$200,000 per occurrence at all times during the existence of this Agreement for all transportation services purchased or provided for the transportation disadvantaged through the Community Transportation Coordinator. Upon the execution of this Agreement, the Coordinator shall add the Commission as an additional **named insured** to all insurance policies covering vehicles transporting the transportation disadvantaged. In the event of any cancellation or changes in

the limits of liability in the insurance policy, the insurance agent or broker shall notify the Commission. The Coordinator shall insure that contracting transportation operators and coordination contractors also maintain the same minimum liability insurance, or an equal governmental insurance program. Insurance coverage in excess of \$1 million per occurrence must be approved by the Commission and the local Coordinating Board before inclusion in the Transportation Disadvantaged Service Plan or in the justification of rates and fare structures. Such coverage may be provided by a self-insurance program established and operating under the laws of the State of Florida and written verification of insurance protection in accordance with Section 768.28, Florida Statutes, shall be provided to the Commission upon request.

- J. Safeguard information by not using or disclosing any information concerning a user of services under this Agreement for any purpose not in conformity with the local, state and federal regulations (45 CFR, Part 205.50), except upon order of a court, written consent of the recipient, or his/her responsible parent or guardian when authorized by law.
- K. Protect Civil Rights by:
1. Complying with state and federal laws including but not limited to laws regarding discrimination on the basis of sex, race, religion, age, disability, sexual orientation, or national origin. The Coordinator gives this assurance in consideration of and for the purpose of obtaining federal grants, loans, contracts (except contracts of insurance or guaranty), property, discounts, or other federal financial assistance to programs or activities receiving or benefiting from federal financial assistance and agreeing to complete a Civil Rights Compliance Questionnaire if so requested by the Commission.
  2. Agreeing that compliance with this assurance constitutes a condition of continued receipt of or benefit from federal financial assistance, and that it is binding upon the Coordinator, its successors, subcontractors, transferee, and assignees for the period during which such assistance is provided. Assure that all operators, subcontractors, subgrantee, or others with whom the Coordinator arranges to provide services or benefits to participants or employees in connection with any of its programs and activities are not discriminating against those participants or employees in violation of the above statutes, regulations, guidelines, and standards. In the event of failure to comply, the Coordinator agrees that the Commission may, at its discretion, seek a court order requiring compliance with the terms of this assurance or seek other appropriate judicial or administrative relief, to include assistance being terminated and further assistance being denied.
- L. To the extent allowed by Section 768.28, Florida Statutes, and only to the monetary and other limitations contained therein, indemnify and hold harmless the Commission and all of the Commission's members, officers, agents, and employees; purchasing agency/entity officers, agents, and employees; and the local, state, and federal governments from any claim, loss, damage, cost, charge or expense arising out of any act, action, neglect or omission by the Coordinator during the performance of this Agreement, whether direct or indirect, and whether to any person or property to which the Commission or said parties may be subject, except that neither the Coordinator nor any of its sub-contractors will be liable under this section for damages arising out of injury or damage to persons or property directly caused or resulting from the sole negligence of the Commission or any of its members, officers, agents or



employees; purchasing agency/entity, officers, agents, and employees; and local, state, or federal governments. Nothing herein is intended to serve as a waiver of sovereign immunity by any agency/entity or Coordinator to which sovereign immunity may be applicable. Nothing herein shall be construed as consent by a state agency/entity or political subdivision of the State of Florida or the federal government to be sued by third parties in any matter arising out of any Agreement or contract. Notwithstanding the foregoing, pursuant to Section 768.28, Florida Statutes, no agency or subdivision of the state shall be required to indemnify, insure, or assume any liability for the Commission's negligence.

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

4. All vehicles providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.

P. Comply with other requirements as follows:

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

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

II. The Commission Shall:

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

III. The Coordinator and the Commission Further Agree:

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

F. Notice and Contact:

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

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

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

This document has been reviewed in its entirety and approved by the local Coordinating Board at its official meeting held on \_\_\_\_\_.

\_\_\_\_\_  
Coordinating Board Chairperson

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

COMMUNITY TRANSPORTATION  
COORDINATOR:

STATE OF FLORIDA, COMMISSION FOR  
THE TRANSPORTATION DISADVANTAGED:

\_\_\_\_\_  
Agency Name

\_\_\_\_\_  
Typed Name of Authorized Individual

\_\_\_\_\_  
Typed Name of Authorized Individual

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

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

Title: Executive Director

Title: \_\_\_\_\_

Attest: \_\_\_\_\_ (SEAL)  
Notary Public

ATTEST: \_\_\_\_\_ (SEAL)  
Corporate Officer or Notary Public

# TRANSPORTATION DISADVANTAGED SERVICE PLAN FORMAT

COVER PAGE

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#### III. QUALITY ASSURANCE

COMMUNITY TRANSPORTATION COORDINATOR EVALUATION PROCESS

# COORDINATING BOARD MEMBERSHIP CERTIFICATION

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

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

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

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

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

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

REPRESENTATION	MEMBER	ALTERNATE	TERM
1. Chairperson			
2. Elderly			
3. Disabled			
4. Citizen Advocate			
5. Citizen Advocate/User			
6. Children at Risk			
7. Community Action			
8. Public Education			
9. Dept. of Transportation			
10. Dept. Of Children and Families			
11. Dept. Of Elder Affairs			
12. Dept. of Education			
13. Dept. of Health Care Adm.			
14. Regional Workforce Dev. Brd			
15. Veteran Services			
16. Local Mass Transit			
17. Transportation Industry			
18. Local Medical Community			

TRANSPORTATION DISADVANTAGED SERVICE PLAN  
 LOCAL COORDINATING BOARD  
 ROLL CALL VOTE

REPRESENTATION	MEMBER	VOTED FOR	VOTED AGAINST	ABSENT FROM VOTING
1. Chairperson				
2. Elderly				
3. Disabled				
4. Citizen Advocate				
5. Citizen Advocate/User				
6. Children at Risk				
7. Community Action				
8. Public Education				
9. Dept. of Transportation				
10. Dept. Of Children and Families				
11. Dept. Of Elder Affairs				
12. Dept. of Education				
13. Dept. of Health Care Adm.				
14. Regional Workforce Dev. Brd.				
15. Veteran Services				
16. Local Mass Transit				
17. Transportation Industry				
18. Local Medical Community				

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Coordinating Board Chairperson

Approved by the Commission for the Transportation Disadvantaged.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Executive Director





SAMPLE UPDATE OR AMENDMENT SUBMITTAL LETTER

(Designated Official Planning Agency Letterhead)

(DATE)

Ms. Lisa Bacot, Executive Director  
Commission for the Transportation Disadvantaged  
605 Suwannee Street, MS-49  
Tallahassee, FL 32399-0450

RE: \_\_\_\_\_ (MOA No)  
\_\_\_\_\_ (MOA Dates)

Dear Ms. Bacot:

By this letter, \_\_\_\_\_ (Name of Community Transportation Coordinator) is requesting an update or amendment to the above referenced Memorandum of Agreement/Transportation Disadvantaged Service Plan. This update or amendment has been reviewed and approved by the Local Coordinating Board at their \_\_\_\_\_ meeting. We request that the Commission accept this update/amendment effective \_\_\_\_\_.

(State what the update or amendment is and why it is being submitted)

If this request is accepted, please signify by signing below, and returning a copy of the signed letter to us. Upon receipt, we will then consider the update or amendment accepted. If this is not acceptable, or further information is needed before it can be accepted, please advise us in writing within ten days.

Thank you for your consideration of this request.

Sincerely,

(Designated Official Planning Agency)

The Commission for the Transportation Disadvantaged hereby agrees and accepts this update or amendment to the above referenced MOA/TDSP, effective \_\_\_\_\_(Date).

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Date

## TRANSPORTATION DISADVANTAGED SERVICE PLAN UPDATE OR AMENDMENT TABLE

Please indicate by placing an "X" by the area(s) that is being updated/amended.

_____AMENDMENT	_____UPDATE
LOCAL COORDINATING BOARD MEMBERSHIP CERTIFICATION	_____
ROLL CALL VOTING SHEET	_____
<b>I. DEVELOPMENT PLAN</b>	
INTRODUCTION OF SERVICE AREA	
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Consistency Review of Other Plans	_____
Public Participation	_____
SERVICE AREA PROFILE/DEMOGRAPHICS	
Land Use	_____
Population/Composition	_____
Employment	_____
Major Trip Generators/Attractors	_____
Inventory of Available Transportation Services	_____
SERVICE ANALYSIS	
Forecasts of Transportation Disadvantaged Population	_____
Needs Assessment	_____
Barriers to Coordinator	_____
GOALS, OBJECTIVES AND STRATEGIES	
_____	_____
IMPLEMENTATION SCHEDULE	
_____	_____
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Accessing Services	_____
Transportation Operators and Coordination Contractors	_____
Public Transit Utilization	_____
School Bus Utilization	_____
Vehicle Inventory	_____
System Safety Program Plan Certification	_____

Intercounty Services	_____
Emergency Preparedness and Response	_____
Education Efforts/Marketing	_____
Acceptable Alternatives	_____
Service Standards	_____
Local Complaint and Grievance Procedure/Process	_____
Community Transportation Coordinator Monitoring Procedures For Operators And Coordination Contractors	_____
Coordination Contract Evaluation Criteria	_____

COST/REVENUE ALLOCATION AND RATE STRUCTURE JUSTIFICATION

Service Rates Summary	_____
Rate Model Worksheets	_____

III. QUALITY ASSURANCE

COMMUNITY TRANSPORTATION COORDINATOR EVALUATION PROCESS	_____
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# Bradford County Transportation Disadvantaged Service Plan

July 1, 2017 - June 30, 2018

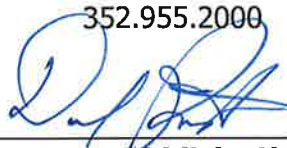
Bradford County Transportation Disadvantaged  
Coordinating Board



# 2017/18 Bradford County Transportation Disadvantaged Service Plan

Approved by the  
Bradford County  
Transportation Disadvantaged Coordinating Board

2009 NW 67th Place  
Gainesville, FL 32653-1603  
[www.ncfrpc.org/mtpo](http://www.ncfrpc.org/mtpo)  
352.955.2000



---

**Danny Riddick, Chair**

with Assistance from



North Central Florida Regional Planning Council  
2009 NW 67th Place  
Gainesville, FL 32653-1603  
[www.ncfrpc.org](http://www.ncfrpc.org)  
352.955.2200

and



Suwannee River Economic Council  
P.O. Box 70  
Live Oak, FL 32060  
386.362.4115

April 11, 2017

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# Chapter I: Development Plan

## A. Introduction to The Service Area

The purpose of this section is to provide information about the organization and development of Florida's Transportation Disadvantaged Program in Bradford County. This Plan shall serve as the Coordinated Public Transit-Human Services Transportation Plan under the federal Moving Ahead for Progress in the 21st Century Act (MAP-21).

### 1. Background of Florida's Transportation Disadvantaged Program

Florida's Transportation Disadvantaged Program began in 1979 with the adoption of Chapter 427, Florida Statutes. The Florida Legislature adopted this legislation to provide transportation disadvantaged services in a coordinated fashion.

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 handicapped or high-risk or at-risk as defined in s. 411.202, Florida Statutes."

In 1989, the Florida Legislature reviewed Chapter 427, Florida Statutes according to the State's Regulatory Sunset Act (Section 11.61, Florida Statutes). During this legislative review, the Legislature decided to reenact Chapter 427, Florida Statutes with several revisions.

In 1990, Rule 41-2 of the Florida Administrative Code was adopted to implement the provisions of Chapter 427, Florida Statutes. In addition, Rule 41-2 of the Florida Administrative Code assigns the Florida Commission for the Transportation Disadvantaged with the responsibility to accomplish the coordination of transportation services provided to the transportation disadvantaged.

The following sections discuss each of the major components of the Transportation Disadvantaged Program.

#### a. Florida Commission for the Transportation Disadvantaged

The Florida Commission for the Transportation Disadvantaged is independent and reports to the Governor and the Legislature. Chapter 427, Florida Statutes states that:

"the purpose of the Commission is to accomplish the coordination of transportation services to the transportation disadvantaged."

The Governor appoints seven members to the Florida Commission for the Transportation Disadvantaged. Five of the members must have significant experience in the operation of a business and two of the members must have a disability and use the transportation disadvantaged system. The Chair is appointed by the Governor and Vice-Chair is elected annually from the membership of the Florida Commission for the Transportation Disadvantaged.

## b. Designated Official Planning Agency

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. In the rural areas of the state, organizations which are eligible to be planning agencies are:

- county or city governments
- regional planning councils
- metropolitan planning organizations
- local planning organizations who are currently performing planning activities in the service area

The North Central Florida Regional Planning Council is the Designated Official Planning Agency for Bradford County. According to Rule 41-2 of the Florida Administrative Code, responsibilities of the Designated Official Planning Agency include:

- Appointment of members to the local coordinating boards.
- Provision of staff support to the local coordinating boards.
- Recommendation to the Florida Commission for the Transportation Disadvantaged regarding the initial selection or re-designation of the Community Transportation Coordinator.

## c. Local Coordinating Boards

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 concerning the coordination of transportation services.

According to Rule 41-2 of the Florida Administrative Code, the Designated Official Planning Agency appoints an elected official, to serve as the official chairperson for all local coordinating board meetings. The Board shall elect a Vice-Chair.

In addition to the Chair, the following agencies or other groups serve on the local coordinating boards as voting members:

- An elected official from Bradford County.
- A representative of the Florida Department of Transportation.
- A representative of the Florida Department of Children and Family Services.
- A representative of the Public Education Community.
- A representative of the Florida Department of Education.
- A person recommended by the local Veterans Service Office representing veterans of the county.

- A person who is recognized by the Florida Association for Community Action as representing the economically disadvantaged.
- A person over age sixty representing the elderly.
- A person with a disability representing the disabled.
- Two citizen advocate representatives in the county; one who must be a person who uses the transportation services of the system as their primary means of transportation.
- A local representative for children at risk.
- In areas where they exist, the Chairperson or designee of the local mass transit or public transit system's Board.
- A representative of the Florida Department of Elderly Affairs.
- An experienced representative of the local private for profit transportation industry.
- A representative of the Florida Agency for Health Care Administration.
- A representative of the Regional Workforce Development Board.
- A representative of the local medical community.

The following are some of the duties of the local coordinating board:

- Approving the Transportation Disadvantaged Service Plan.
- Annually evaluating the Community Transportation Coordinator's performance.
- Reviewing all applications for local, state and federal transportation disadvantaged funds.

#### **d. Community Transportation Coordinator**

The Community Transportation Coordinator is responsible for ensuring that coordinated transportation services are provided to serve the transportation disadvantaged. Suwannee River Economic Council is the designated Community Transportation Coordinator for Bradford County.

Suwannee River Economic Council may provide all or a portion of transportation service in a designated service area. Suwannee River Economic Council may subcontract or broker services if it is cost effective and efficient. The following are some responsibilities of Suwannee River Economic Council:

- In cooperation with the planning agency, develop and implement a Transportation Disadvantaged Service Plan.
- Execute contracts for service with transportation operators.
- Review all applications for federal, state and local funding (in conjunction with the local coordinating board).
- Prepare an annual operating report.

## 2. Designation Date/History

Suwannee River Economic Council is a private non-profit corporation, chartered by the State of Florida in 1966. In 1972, Suwannee River Economic Council began the Suwannee Valley Transit System in Columbia, Hamilton, Suwannee and Lafayette Counties. In 1974, Suwannee Valley Transit Authority was created to serve Columbia, Hamilton and Suwannee Counties. Suwannee River Economic Council continues to operate as the Community Transportation Coordinator for Lafayette County.

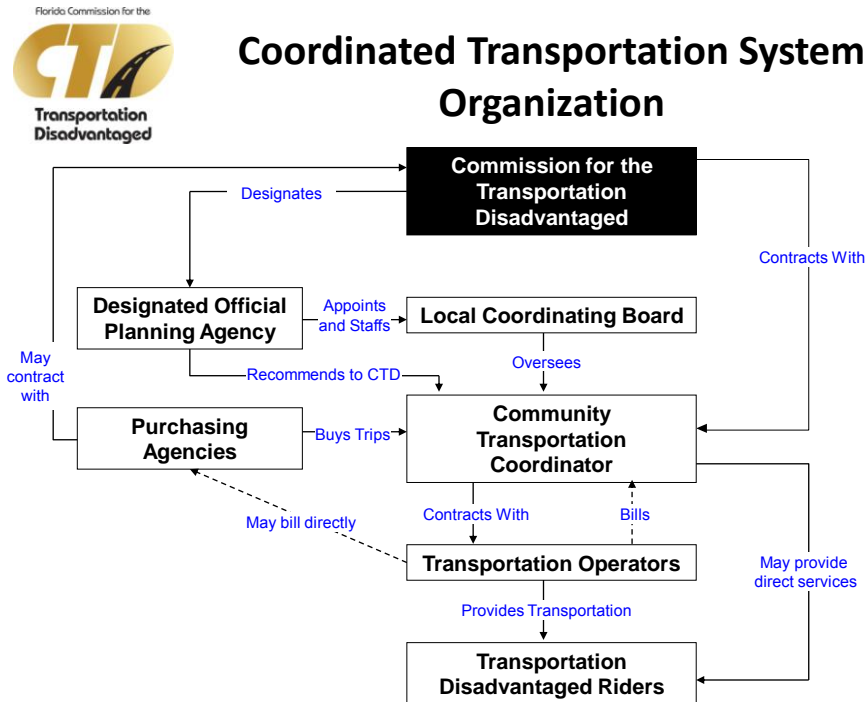
The North Central Florida Regional Planning Council recommended Suwannee River Economic Council as the designated Community Transportation Coordinator in 1991. The Florida Commission for the Transportation Disadvantaged approved Suwannee River Economic Council's designation as the Community Transportation Coordinator for Bradford County on January 9, 1992. Suwannee River Economic Council was selected as the Community Transportation Coordinator through a request for proposals process.

In 2016, the North Central Florida Regional Planning Council recommended that Suwannee River Economic Council be re-designated the Community Transportation Coordinator for Bradford County. The Florida Commission for the Transportation Disadvantaged designated Suwannee River Economic Council as the Bradford County Community Transportation Coordinator effective July 1, 2016.

The North Central Florida Regional Planning Council was designated the official planning agency for Bradford County in April 1990. The Council was selected through a non-competitive selection process.

## 3. Organization Chart

The following chart identifies the partners involved in Florida's Transportation Disadvantaged Program.



## 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;
4. the implementation of the Comprehensive Plan.

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Bradford County Comprehensive Plan.

### b. Regional Policy Plans

The North Central Florida Strategic Regional Policy Plan adopted in October 2011 by the North Central Florida Regional Planning Council is a long-range guide for the physical, economic and social development of a planning region which identifies regional goals and policies. The plan serves as a basis for the review of the resources and facilities found in local government comprehensive plans originating in the region. Public transit is addressed in Section V of the plan. Regional Goal 5.6. is to reduce the unmet general trip demand of the north central Florida transportation disadvantaged population.

The following policies are included in the Strategic Regional Policy Plan to reduce unmet trip demand:

- **Policy 5.6.1.** Improve mobility options for low-income, elderly and disabled citizens.
- **Policy 5.6.2.** Increase funding for coordinated transportation systems for the transportation disabled.
- **Policy 5.6.3.** The Council and/or the Metropolitan Transportation Organization for the Gainesville Urbanized Area should provide technical assistance to designated north central Florida local transportation coordinating boards and community transportation coordinators.

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Strategic Regional Policy Plan.

### c. Transit Development Plans

Not applicable.

d. Florida Commission for the Transportation Disadvantaged  
5-Year/20-Year Plan

The Florida Commission for the Transportation Disadvantaged 5-Year/20-Year Plan establishes goals, objectives and a plan of action for the Florida Commission for the Transportation Disadvantaged. The plan presents forecasts of demand for transportation disadvantaged services, the cost of meeting the forecasted demand, forecasts of future funding for transportation disadvantaged services and approaches to balancing the supply and demand for these services. The plan also provides forecasts of the transportation disadvantaged population, demand for trips, number of trips supplied, unmet demand for trips and operating expenses.

The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Florida Commission for the Transportation Disadvantaged 5-Year/20-Year Plan.

e. Metropolitan Planning Organization Long-Range Transportation Plans

Not applicable.

f. Transportation Improvement Program

Not applicable.

## **5. Public Participation**

The Bradford County Transportation Disadvantaged 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 Bradford County Transportation Disadvantaged Service Plan. The Transportation Disadvantaged Service Plan is developed through input of the Bradford County Transportation Disadvantaged Board whose membership includes citizens and human service providers.

## 6. Bradford County Transportation Disadvantaged Coordinating Board Membership Certification

### BRADFORD COUNTY TRANSPORTATION DISADVANTAGED COORDINATING BOARD MEMBERSHIP CERTIFICATION

Name: North Central Florida Regional Planning Council  
 Address: 2009 N.W. 67th Place  
Gainesville, Florida 32653-1603

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

1. The membership of the Local Coordinating Board, established pursuant to Rule 41-2.012(3), Florida Administrative Code, 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: \_\_\_\_\_  
 Rick Davis, Chair

REPRESENTATION	MEMBER	ALTERNATE	TERM ENDING
Local Elected Official/Chair	Daniel Riddick		No Term
Elderly	Vacant	Vacant	6/30/2017
Disabled	<u>Sherry Ruskowski</u>	Vacant	6/30/2018
Citizen Advocate	Vacant	Vacant	6/30/2018
Citizen Advocate/User	Vacant	Vacant	6/30/2018
Children at Risk	Vacant	Vacant	6/30/2019
Florida Association for Community Action	Vacant	Vacant	6/30/2017
Public Education	<u>Louette Smith</u>	Vacant	No Term
Florida Department of Transportation	<u>Sandra Collins</u>	Janell Damato	No Term
Florida Department of Children and Families	Rhiannon Griggs	Vacant	No Term
Florida Department of Elder Affairs	Vacant	Vacant	No Term
Florida Department of Education	Jeffrey Aboumrad	Vacant	No Term
Florida Agency for Health Care Administration	Dewece Ogden	Pamela Hagley	No Term
Regional Workforce Development Board	Linda Tatum	Vacant	No Term
Veteran Services	Barbara Fischer	Vacant	6/30/2017
Local Mass Transit	Not Applicable	Not Applicable	No Term
Private Transportation Industry	Steve Futch	Vacant	6/30/2019
Local Medical Community	Vacant	Vacant	6/30/2019



## 7. Bradford County Transportation Disadvantaged Coordinating Board Membership

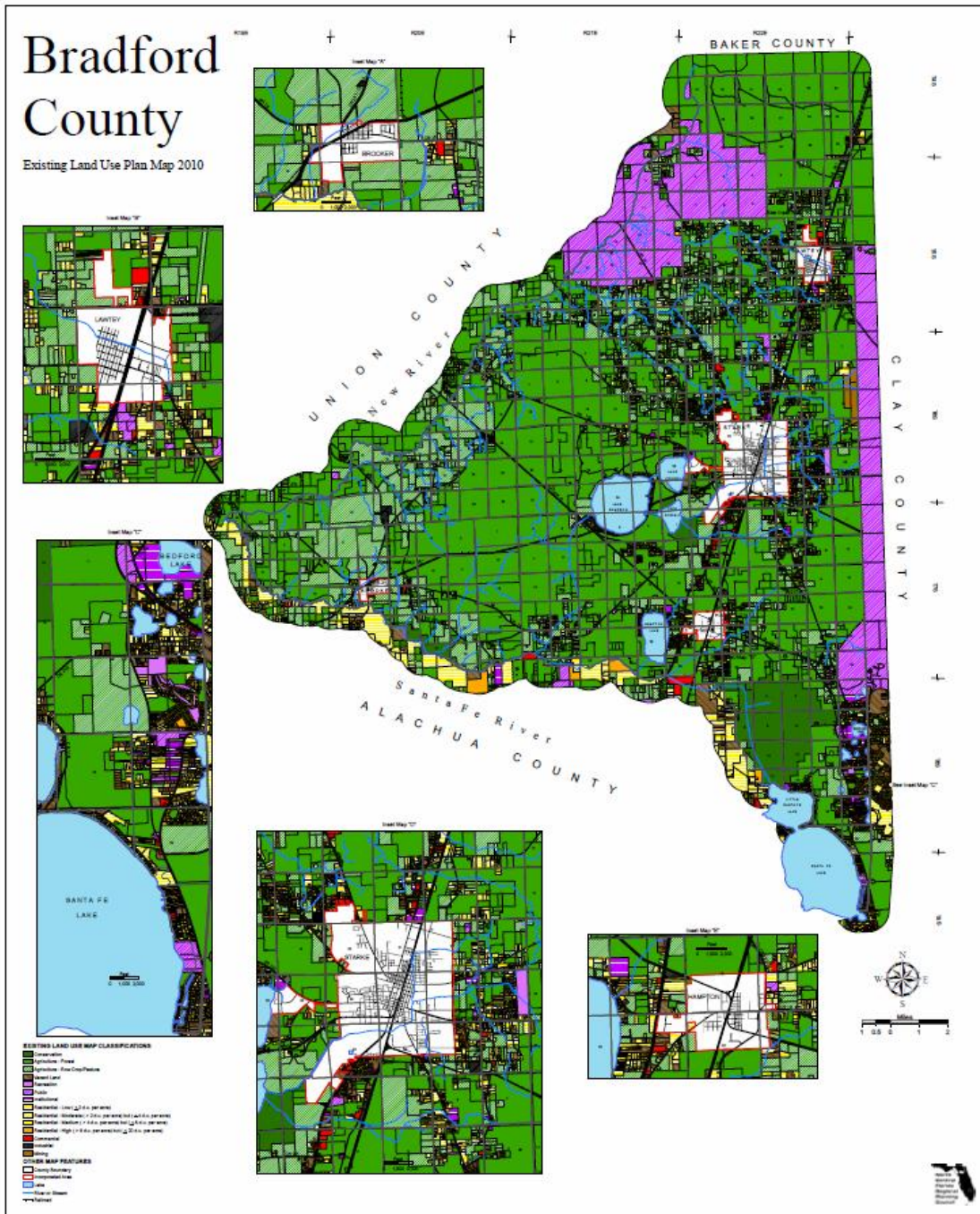
### BRADFORD COUNTY TRANSPORTATION DISADVANTAGED COORDINATING BOARD

MEMBER/REPRESENTING	ALTERNATE/REPRESENTING
Commissioner Danny Riddick Local Elected Official/Chair	Commissioner Tommy Chastain Local Elected Official
Sandra Collins Florida Department of Transportation Grievance Committee Member	Janell Damato Florida Department of Transportation
Rhiannon Griggs Florida Department of Children and Families Grievance Committee Member	Nakiesha Thompson Florida Department of Children and Families
Jeffrey Aboumrad Florida Department of Education Grievance Committee Member	Vacant Florida Department of Education
Vacant Florida Department of Elder Affairs	Vacant Florida Department of Elder Affairs
Dewece Ogden Florida Agency for Health Care Administration Grievance Committee Member	Pamela Hagley Florida Agency for Health Care Administration
Linda Tatum Regional Workforce Board	Vacant Regional Workforce Board
Vacant Florida Association for Community Action Term ending June 30, 2017	Vacant Florida Association for Community Action Term ending June 30, 2017
Louette Smith Public Education	Vacant Public Education
Barbara Fischer Veterans Grievance Committee Member Term ending June 30, 2017	Vacant Veterans Term ending June 30, 2017
Vacant Citizen Advocate Term ending June 30, 2018	Vacant Citizen Advocate Term ending June 30, 2018
Vacant Citizen Advocate - User Term ending June 30, 2018	Vacant Citizen Advocate - User Term ending June 30, 2018
Sherry Ruszkowski Persons with Disabilities Term ending June 30, 2018	Vacant Persons with Disabilities Term ending June 30, 2018
Vacant Elderly Term ending June 30, 2017	Vacant Elderly Term ending June 30, 2017
Vacant Medical Community Term ending June 30, 2019	Vacant Medical Community Term ending June 30, 2019
Vacant Children at Risk Term ending June 30, 2019	Vacant Children at Risk Term ending June 30, 2019
Steve Futch - Vice -Chair Private Transit Term ending June 30, 2019	Vacant Private Transit Term ending June 30, 2019

## B. Service Area Profile and Demographics

### 1. Bradford County Service Area Description

Bradford County has a land area of approximately 293 square miles. The County is located in the north central portion of the State of Florida and is bordered on the north by Baker County, on the east by Clay County, on the south by Alachua County and a small piece of Putnam County and on the west by Union County.





**b. Population/Composition**

According to the 2010 US Census Bureau, Bradford County's 2010 population was 27,310. The Bureau of Economic and Business Research estimated Bradford County's 2016 total population as 27,440. The Bureau of Economic Research also estimated the population of the City of Starke as 5,515, the Town of Brooker as 324, the City of Hampton as 485, the City of Lawtey as 718 and the unincorporated area as 20,398. As Table 1 shows, 74 percent of the County's population is located within the unincorporated areas.

**TABLE 1**

**Population Counts and Estimates  
Bradford County**

<b>AREA</b>	<b>POPULATION COUNT 2010 Census</b>	<b>POPULATION ESTIMATES 2016</b>
Bradford County	28,520	27,440
Town of Brooker	338	324
City of Hampton	500	485
City of Lawtey	730	718
City of Starke	5,449	5,515
Unincorporated Area	21,503	20,398

Sources: 2010 Bureau of the Census/Bureau of Economic and Business Research, University of Florida

It is important to note that, according to the Bureau of Economic and Business Research, 2,892 individuals in Bradford County are inmates and patients residing in federal and state government-operated institutions. They are considered nonresidents of the local area for revenue-sharing purposes. Institutionalized individuals are counted as part of the general population, so they are reflected in statistics on age. However, they are not included in the statistics for income or poverty levels for households.

**c. Population Densities**

With approximately 294 square miles of land area, the County population density in 2010 was approximately 97 persons per square mile.

Table 2 shows that the City of Starke is the most densely populated area in Bradford County, with 839 persons per square mile. The Brooker census division, which has the lowest population density within the County, has only 15 persons per square mile.

**TABLE 2**

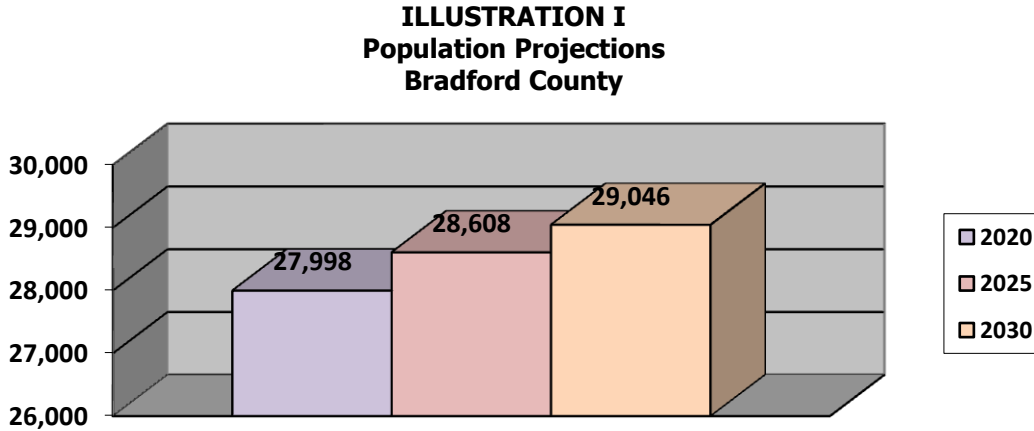
**Population Density  
Bradford County**

<b>2010 U.S. CENSUS POPULATION</b>	<b>SQUARE MILES</b>	<b>PERSONS PER SQUARE MILE</b>
28,520	294	97

Source: U.S. Census Bureau: 2010 State and County Quick Facts

**d. Population Projections**

According to the Bureau of Economic and Business Research, it is estimated that Bradford County will have a total population of 27,998 by the year 2020, and by 2025, the total County population will be 28,608. Illustration I shows population projections for 2020, 2025 and 2030.



Source: Bureau of Economic and Business Research, University of Florida

**e. Population Age Distribution**

Population age distribution is useful in determining mobility needs which transit might meet. The elderly typically are less likely to have access to a vehicle and thus are more dependent on the transit system for their travel needs. Table 3 shows estimates of the County's population by age group. The 25-44 year-old age group is the largest age group within the County. The 65 and over population is the smallest age group within the County, comprising 13 percent of the population.

**TABLE 3**  
**Population Estimates By Age Group**  
**Bradford County**  
**2015**

Age Group	Population
0-4	1,569
5-17	3,950
18-24	2,305
25-54	11,134
55-64	3,676
65-79	3,508
80+	1,168

Source: Bureau of Economic and Business Research, University of Florida

**f. Disability and Self Care Limitations**

According to the 2010 Bureau of the Census, 4,730 civilian residents who are 5 years of age and over who are not institutionalized, have disabilities.

**g. Employment**

The 2010 Bureau of the Census estimates that Bradford County's labor force (individuals who are able to work but may not be employed) in 2015 was 22,474 with 47 percent of people employed. The estimated unemployment rate for Bradford County was 12 percent.

**h. Income**

According to the 2010 Bureau of the Census, the per capita income for Bradford County in 2015 was \$19,739. The percent of persons below poverty level in 2015 was 21.3%. Table 4 shows per capita income and the percentage of persons below poverty level. Table 5 shows income levels that are currently used to define the federal poverty level. Low-income households often have no mobility choice other than public transportation and thus generally have high potential for transit use.

**TABLE 4  
Income and Poverty Status  
Bradford County**

<b>Per Capita Income In 2015</b>	<b>Percentage Of Persons Below Poverty Level 2015</b>
\$19,739	21.3%

Source: Bureau of the Census 2010, State and County Quick Facts

**TABLE 5  
2017 Poverty Guidelines For The 48 Contiguous States  
And The District of Columbia**

<b>Persons In Family/Household</b>	<b>2017 Poverty Guideline</b>
1	\$12,060
2	\$16,240
3	\$20,420
4	\$24,600
5	\$28,780
6	\$32,960
7	\$36,140
8	\$41,320

\* For families/households with more than 8 persons, add \$5,230 for each additional person.

Source: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation

According to the Bureau of Economic and Business Research, the total number of Medicaid recipients in 2013 was 6,591.

Table 6 shows individuals who received Supplemental Security Income.

**TABLE 6  
Supplemental Security Income  
Bradford County  
2015**

Type Of Assistance	Recipients
Aged Assistance	50
Aid to the Blind & Disabled	782

Source: Bureau of Economic and Business Research, University of Florida

### i. Housing

The 2010 Bureau of the Census estimates that in 2015, the total number of households in Bradford County was 8,770 and that the average household size was 2.72. Table 7 presents data on housing units below poverty level.

**TABLE 7  
Housing Units  
Bradford County  
2015**

Housing Units	Percent of Families Below the Poverty Level	Owner Occupied Housing Unit Rate	Median Value of Owner Occupied Housing Units
10,870	21.3%	73.9%	\$89,200

Source: 2010 Bureau of the Census Quick Facts

### j. Health

One hospital and two nursing homes are located in Bradford County. According to Bureau of Economic and Business Research, in 2015, there were 7 physicians of medicine and in 2014, there were 354 registered, practical and advanced nurses.

### k. Transportation

According to the 2010 Census 2011-2015 American Community Survey, an estimated 806 households in Bradford County had no vehicle available in 2015.

## I. Major Trip Generators/Attractors

Major trip generators/attractors include: Bradford-Union Vocational Technical Center, Shands Hospital at Starke, local government offices, Florida State Prison, Suwannee River Economic Council's Starke office, Sunshine Industries and Windsor Manor and Whispering Pines nursing homes.

Travel to Gainesville continues to be necessary for many County residents, particularly for employment and medical purposes. Approximately 15 percent of Bradford County's employed residents work in Alachua County.

## C. Service Analysis

### 1. General and Critical Need Transportation Disadvantaged Populations

The National Center for Transit Research Center for Urban Transportation Research developed a methodology for estimating the general and critical need Transportation Disadvantaged population based on the most current U.S. Census Bureau demographic and socio-economic data available. The general Transportation Disadvantaged population includes the estimates of all disabled, elderly, low income persons and children who are "high-risk" or "at-risk."

The critical need Transportation Disadvantaged population includes individuals who, due to severe physical limitations or low incomes, are unable to transport themselves or purchase transportation and are dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life sustaining activities.

The following tables show general and critical need Transportation Disadvantaged population estimates and forecasts for Bradford County.

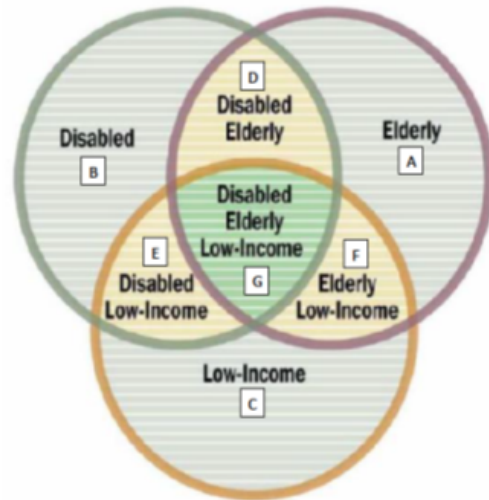


**TABLE 8**  
**General Transportation Disadvantaged Population**

<i>Bradford County</i>					Census Data from 2013			
County Pop. By Age	Total Pop by Age	% of Total Pop	Population Below Poverty Level by Age	% of Total Pop Below Poverty Level by Age	Total Population with a Disability by Age	% of Total Pop with a Disability by Age	Total Pop with Disability and Below Poverty Level by Age	% Total Pop with a Disability and Below Poverty Level by Age
< 5 Years of Age	1,565	6.5%	364	1.5%	0	0.0%	0	0.00%
5-17	3,789	15.8%	665	2.8%	144	0.6%	131	0.55%
18-34	4,683	19.5%	804	3.3%	335	1.4%	98	0.41%
35-64	9,609	40.0%	2,097	8.7%	1,897	7.9%	709	2.95%
<b>Total Non Elderly</b>	<b>19,646</b>	<b>81.8%</b>	<b>3,930</b>	<b>16.4%</b>	<b>2,376</b>	<b>9.9%</b>	<b>938</b>	<b>3.90%</b>
65-74	2,303	9.6%	76	0.3%	1,311	5.5%	322	1.34%
75+	2,078	8.6%	144	0.6%	2,078	8.6%	114	0.47%
<b>Total Elderly</b>	<b>4,381</b>	<b>18.2%</b>	<b>220</b>	<b>0.9%</b>	<b>3,389</b>	<b>14.1%</b>	<b>436</b>	<b>1.81%</b>
<b>Total</b>	<b>24,027</b>	<b>100%</b>	<b>4,150</b>	<b>17.3%</b>	<b>5,765</b>	<b>24.0%</b>	<b>1,374</b>	<b>5.72%</b>

Double Counts Calculations		
E - Estimate non-elderly/disabled/ low income	From Base Data (I11)	938
B - Estimate non-elderly/ disabled/not low income	Subtract I11 from G11	1,438
G - Estimate elderly/disabled/low income	From Base Data (I14)	436
D- Estimate elderly/ disabled/not low income	Subtract I14 from G14	2,953
F - Estimate elderly/non-disabled/low income	Subtract I14 from E14	(216)
A - Estimate elderly/non-disabled/not low income	Subtract sum of J17, J18 and J19 from C14	1,208
C - Estimate low income/not elderly/not disabled	Subtract I11 from E11	2,992
<b>Total - Non-Duplicated</b>		<b>9,749</b>

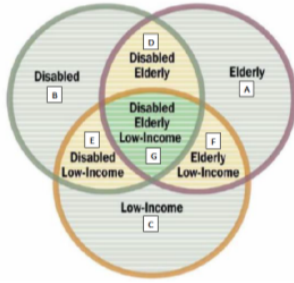
General TD Population	% of Total	
Non-Duplicated General TD Population Estimate	<b>9,749</b>	40.6%



**TABLE 10**  
**General and Critical Need**  
**Transportation Disadvantaged Populations**

Bradford County

General TD Population Forecast	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<i>Overlapping Circle Component</i>											
E - Estimate non-elderly/disabled/low income	938	943	947	952	957	962	967	972	976	981	986
B - Estimate non-elderly/disabled/not low income	1,438	1,445	1,453	1,460	1,467	1,475	1,482	1,489	1,497	1,505	1,512
G - Estimate elderly/disabled/low income	436	438	440	443	445	447	449	452	454	456	458
D - Estimate elderly/disabled/not low income	2,953	2,968	2,983	2,998	3,013	3,028	3,043	3,059	3,074	3,090	3,105
F - Estimate elderly/non-disabled/low income	-216	-217	-218	-219	-220	-221	-223	-224	-225	-226	-227
A - Estimate elderly/non-disabled/not low income	1,208	1,214	1,220	1,226	1,233	1,239	1,245	1,251	1,258	1,264	1,270
C - Estimate low income/not elderly/not disabled	2,992	3,007	3,022	3,037	3,053	3,068	3,084	3,099	3,115	3,130	3,146
<b>TOTAL GENERAL TD POPULATION</b>	<b>9,749</b>	<b>9,798</b>	<b>9,847</b>	<b>9,897</b>	<b>9,947</b>	<b>9,997</b>	<b>10,047</b>	<b>10,098</b>	<b>10,149</b>	<b>10,200</b>	<b>10,251</b>
<b>TOTAL POPULATION</b>	<b>24,027</b>	<b>24,148</b>	<b>24,270</b>	<b>24,392</b>	<b>24,515</b>	<b>24,638</b>	<b>24,763</b>	<b>24,887</b>	<b>25,013</b>	<b>25,139</b>	<b>25,265</b>



Bradford County

Critical Need TD Population Forecast	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total Critical TD Population</b>											
Disabled	1,613	1,621	1,629	1,637	1,645	1,654	1,662	1,670	1,679	1,687	1,696
Low Income Not Disabled No Auto/Transit	755	759	763	767	770	774	778	782	786	790	794
<b>Total Critical Need TD Population</b>	<b>2,368</b>	<b>2,380</b>	<b>2,392</b>	<b>2,404</b>	<b>2,416</b>	<b>2,428</b>	<b>2,440</b>	<b>2,452</b>	<b>2,465</b>	<b>2,477</b>	<b>2,490</b>
<b>Daily Trips - Critical Need TD Population</b>											
Severely Disabled	79	79	80	80	81	81	81	82	82	83	83
Low Income - Not Disabled - No Access	1,434	1,441	1,448	1,456	1,463	1,470	1,478	1,485	1,493	1,500	1,508
<b>Total Daily Trips Critical Need TD Population</b>	<b>1,513</b>	<b>1,538</b>	<b>1,564</b>	<b>1,531</b>	<b>1,618</b>	<b>1,646</b>	<b>1,676</b>	<b>1,705</b>	<b>1,735</b>	<b>1,766</b>	<b>1,794</b>
<b>Annual Trips</b>	<b>393,353</b>	<b>400,001</b>	<b>406,761</b>	<b>413,635</b>	<b>420,626</b>	<b>428,071</b>	<b>435,647</b>	<b>443,358</b>	<b>451,206</b>	<b>459,192</b>	<b>466,401</b>

## 2. Paratransit Service Demand Estimation

The National Center for Transit Research Center for Urban Transportation Research developed a paratransit service demand estimation tool based on the most current U.S. Census Bureau demographic and socio-economic data available. The following table shows trip demand for the critical Transportation Disadvantaged population.

**TABLE 9**  
**Critical Need Transportation Disadvantaged Population**

Bradford 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	0	4.20%	-	-		
5-17	144	4.20%	6	0.16%		
18-34	335	6.30%	21	0.45%		
35-64	1,897	13.84%	263	2.73%		
<b>Total Non Elderly</b>	<b>2,376</b>		<b>290</b>	<b>1.47%</b>	<b>28.60%</b>	<b>83</b>
65-74	1,311	27.12%	356	15.44%		
75+	2,078	46.55%	967	46.55%		
<b>Total Elderly</b>	<b>3,389</b>		<b>1,323</b>	<b>30.20%</b>	<b>11.70%</b>	<b>155</b>
<b>Total</b>	<b>5,765</b>		<b>1,613</b>	<b>6.71%</b>		<b>238</b>

Critical Need - Severely Disabled TD Population			
	Not Low Income	Low Income	Totals
<i>Non-Elderly</i>	207	83	290
<i>Elderly</i>	1,168	155	1,323
<b>TOTAL</b>	<b>1,375</b>	<b>238</b>	<b>1,613</b>

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

Calculation of Daily Trips FOR THE CRITICAL NEED TD POPULATION			
<b>Low Income &amp; Not Disabled = C + F</b>			
<i>Assumes</i>	2,776		
27.2%	xx % without auto access		
	755		
100.0%	xx % without transit access		
	755		
<b>Calculation of Daily Trips</b>			
		Daily Trip Rates	Total
<b>Total Actual Critical TD Population</b>		<b>Per Person</b>	<b>Daily Trips</b>
<i>Severely Disabled</i>	1,613	0.049	79
<i>Low Income ND</i>	755	1.899	1,434
<b>Totals</b>	<b>2,368</b>		<b>1,513</b>

### 3. Barriers to Coordination

Medicaid non-emergency transportation services are no longer coordinated through Florida’s Coordinated Transportation System in Bradford County. In May 2014, the Florida Agency for Health Care Administration implemented Florida’s Managed Medical Care Program. The Managed Medical Care Program requires Managed Medical Assistance Plans to provide transportation to their enrollees who have no other means of transportation available.

The Managed Medical Assistance Plans provide transportation services directly through their own network of transportation providers. According Chapter 2 of the Florida Agency for Health Care Administration Transportation Coverage, Limitations and Reimbursement Handbook, July 1997, “Medicaid is required by Chapter 427, Florida Statutes to purchase transportation services through the designated Community Transportation Coordinator, unless those services are not cost effective or the Community Transportation Coordinator does not coordinate Medicaid transportation services.”

### 4. Needs Assessment

#### United States Code Section 5311 Grant Program

PROJECT	PROJECT YEAR	LOCATION	ESTIMATED COST	FUNDING SOURCE
Provide transportation services for the transportation disadvantaged.	2017/18	Bradford County	\$193,393	United States Code Section 5311
			\$193,393	Suwannee River Economic Council

#### United States Code Section 5339 Grant Program

PROJECT	PROJECT YEAR	LOCATION	ESTIMATED COST	FUNDING SOURCE
Purchase one replacement vehicle	2017/18	Bradford County	\$59,176.80	United States Code Section 5339
			\$14,794.20	Florida Department of Transportation

#### Rural Area Capital Assistance Program

PROJECT	PROJECT YEAR	LOCATION	ESTIMATED COST	FUNDING SOURCE
Purchase scheduling software upgrade and mobile data terminals .	2014/15	Bradford, Dixie, Gilchrist and Lafayette Counties	\$31,500	Rural Area Capital Assistance Program Grant
			\$3,500	Suwannee River Economic Council

**Transportation Disadvantaged Program - Trip & Equipment Grant**

<b>PROJECT</b>	<b>PROJECT YEAR</b>	<b>LOCATION</b>	<b>ESTIMATED COST</b>	<b>FUNDING SOURCE</b>
Provide trips to transportation disadvantaged individuals.	2015/16	Bradford County	\$119,844  \$13,316	Transportation Disadvantaged Trust Fund Suwannee River Economic Council

**Transportation Disadvantaged Program - Mobility Enhancement Grant**

<b>PROJECT</b>	<b>PROJECT YEAR</b>	<b>LOCATION</b>	<b>ESTIMATED COST</b>	<b>FUNDING SOURCE</b>
Provide on-demand service for local medical, pharmacy and shopping purposes.	2016/17	Bradford County - City of Starke	\$92,491.20  \$10,276.80	Transportation Disadvantaged Trust Fund Suwannee River Economic Council

## 5. Goals, Objectives and Strategies

**GOAL I:** **Coordinate transportation disadvantaged services funded with local, state and/or federal government funds.**

**OBJECTIVE:** Identify agencies that receive local, state and/or federal government public transportation funds that are not coordinated through the Community Transportation Coordinator.

**Strategy a:** Identify agencies in Bradford County that receive local, state and/or federal funds to transport clients or purchase vehicles.

**Strategy b:** Contact agencies to obtain information about coordination opportunities.

**Strategy c:** Determine whether a purchase of service contract, coordination contract or subcontract should be executed with the identified agencies to coordinate the transportation services that are being provided.

**GOAL II:** **Identify unmet transportation needs in Bradford County.**

**OBJECTIVE:** Identify unmet transportation needs and discuss ways to meet these needs at each local Coordinating Board meeting.

**Strategy:** The Community Transportation Coordinator shall report quarterly the number and types of transportation services that are requested which it is unable to provide.

**GOAL III:           The Community Transportation Coordinator shall provide transportation services that are consumer oriented and effectively coordinate trips.**

**OBJECTIVE:**       Provide transportation services that maximize the use of all vehicles to eliminate duplication of service without unduly inconveniencing the rider.

**Strategy a:**        The Community Transportation Coordinator shall report on a quarterly basis the number of single passenger trips provided.

**Strategy b:**        The Community Transportation Coordinator shall work with purchasing agencies and service providers (doctors' offices, hospitals, etc.) to arrange appointments to group trips.

**Strategy c:**        The Community Transportation Coordinator shall document the reduction of single passenger trips.

**Strategy d:**        The local Coordinating Board shall measure the total passenger trips per vehicles quarterly.

**GOAL IV:           The Community Transportation Coordinator shall develop creative ways to provide additional trips.**

**OBJECTIVE:**        Identify additional funding opportunities to provide transportation.

**Strategy:**         Using information concerning unmet needs, the Community Transportation Coordinator shall determine the level of demand and cost of providing additional service.

**GOAL V:            The Community Transportation Coordinator shall ensure that the demand responsive transportation services offered to individuals with disabilities is equivalent to the level and quality of transportation services offered to individuals without disabilities.**

**OBJECTIVE:**        The Community Transportation Coordinator shall comply with the requirements of the *Americans with Disabilities Act (ADA)* regarding the access to and provision of transportation services.

**Strategy a:**        The Community Transportation Coordinator shall eliminate physical barriers preventing the use of transportation services by persons who are elderly and/or disabled.

**Strategy b):**        The Community Transportation Coordinator shall train its staff members regarding the utilization of special equipment for persons with disabilities as well as the abilities of persons with disabilities.

**GOAL VI:           The local Coordinating Board shall annually evaluate the Community Transportation Coordinator's performance based on specific criteria.**

**OBJECTIVE:**        The local Coordinating Board shall annually evaluate the Community Transportation Coordinator's performance in general and relative to Commission standards as referenced in *Rule 41-2.006 of the Florida Administrative Code*.

**GOAL VII:**           **The Community Transportation Coordinator shall utilize the Transportation Disadvantaged Trust Fund allocation in the most cost efficient manner.**

**OBJECTIVE:**       The Community Transportation Coordinator shall adhere to a strict budget of Transportation Disadvantaged Trust Funds to ensure that these funds are spent in the most efficient manner.

**Strategy a:**       The Community Transportation Coordinator and Local Coordinating Board shall determine the most efficient manner to expend the Transportation Disadvantaged Trust Funds.

**Strategy b:**       The Community Transportation Coordinator shall inform the Local Coordinating Board of any difficulties experienced concerning the under expenditure or over expenditure of the Transportation Disadvantaged Trust Funds.

**GOAL VIII:**       **The Community Transportation Coordinator shall comply with all reporting requirements of the Florida Commission for the Transportation Disadvantaged and the Local Coordinating Board.**

**OBJECTIVE:**       The Community Transportation Coordinator shall complete all reports which require Local Coordinating Board review and/or approval.

**Strategy:**        The Community Transportation Coordinator shall complete and submit all final reports to the planning agency staff prior to the meeting date to be reviewed and included in the Local Coordinating Board's meeting packet.

**GOAL IX:**         **The Community Transportation Coordinator shall maintain the quality of service.**

**OBJECTIVE:**       The local Coordinating Board shall monitor the quality of service provided by the Community Transportation Coordinator.

**Strategy:**        The Community Transportation Coordinator shall report complaints to the Local Coordinating Board.

**OBJECTIVE:**       **The Community Transportation Coordinator shall provide courteous and professional service.**

**Strategy:**        Reservationists and other office staff shall receive sensitivity and courtesy training annually.

**GOAL X:**         **The Community Transportation Coordinator shall promote cost and service efficiency through efficient routing, scheduling and operation procedures.**

**OBJECTIVE:**       The local Coordinating Board shall encourage the Community Transportation Coordinator to provide the greatest number of trips using the most cost effective methods possible.

**Strategy:**        The Community Transportation Coordinator shall maintain a database with pertinent information relative to clients' needs and limitations.

**GOAL XI:                   The Community Transportation Coordinator shall insure the provision of safe transportation services.**

**OBJECTIVE:**           The Community Transportation Coordinator shall insure the safety and well being of passengers through inspection and maintenance of all vehicles in the coordinated system and driver training.

**Strategy:**              The System Safety Program Plan shall meet all established requirements and adhere to *Chapter 341 Florida Statutes* and *Rule and 14-90, Florida Administrative Code*.

## 6. Implementation Plan

STRATEGIES	IMPLEMENTATION DATE
(1) Identify agencies located in Bradford County receiving local, state and/or federal funds to transport clients or purchase vehicles. (2) Contact the identified agencies to obtain information about the funding they receive. (3) Determine type of contract to execute to coordinate transportation services.	(1) Ongoing (2) Ongoing (3) Ongoing
(1) Discuss transportation needs at local Coordinating Board meetings. (2) Report unmet trip requests.	(1) Quarterly (2) Quarterly
(1) Maximize the use of vehicles without unduly inconveniencing the rider. (2) Work with purchasing agencies and service providers to arrange appointments to group trips. (3) Document the reduction of single passenger trips. (4) Measure total passenger trips per vehicle.	(1) Ongoing (2) Ongoing (3) 2017 (4) 2017
(1) Identify additional funding opportunities to provide trips. (2) Report the types of funding opportunities that may be available for additional trips.	(1) Ongoing (2) Ongoing (3) Ongoing
(1) Ensure that the demand responsive transportation services offered to individuals with disabilities is equivalent to the level and quality of services offered to individuals without disabilities. (2) Provide alternative methods for accessing transportation services for individuals with disabilities. (3) Train staff members regarding the utilization of special equipment for persons with disabilities.	(1) Ongoing (2) Ongoing (3) Ongoing
Evaluate the performance of the Community Transportation Coordinator in general and relative to Florida Commission for the Transportation Disadvantaged standards, completion of service plan elements and Florida Commission for the Transportation Disadvantaged workbook modules.	2017



<p>(1) Adhere to a strict budget of Transportation Disadvantaged Trust Funds to insure that the Trust Funds are spent in the most efficient manner.</p> <p>(2) Determine the most efficient manner to expend the Transportation Disadvantaged Trust Funds.</p> <p>(3) Inform the local Coordinating Board of any difficulties experienced concerning the expenditure of the Transportation Disadvantaged Trust Funds.</p>	<p>(1) Ongoing (2) Annually (3) Quarterly</p>
<p>(1) Complete all reports for review and/or approval.</p> <p>(2) Final reports shall be completed and submitted to planning agency staff a minimum of two weeks prior to next local Coordinating Board meeting.</p>	<p>(1) Ongoing (2) Ongoing</p>
<p>(1) Monitor the quality of service.</p> <p>(2) Make recommendations to improve the quality of service.</p> <p>(3) Provide courteous and professional service.</p> <p>(4) Provide sensitivity and courtesy training annually.</p> <p>(5) Collect on-time performance data.</p>	<p>(1) Ongoing (2) Ongoing (3) Ongoing (4) Ongoing (5) Annually</p>
<p>(1) Maintain a data base with pertinent information relative to clients needs and limitations.</p>	<p>(1) Ongoing</p>
<p>The System Safety Program Plan shall meet all established requirements and adhere to Chapter 341, Florida Statutes and Rule 14-90, Florida Administrative Code.</p>	<p>Annually</p>

# Chapter II: Service Plan

## A. Operations

The operations element is a profile of the Bradford County coordinated transportation system. This element is intended to provide basic information about the daily operations of Suwannee River Economic Council and its contracted transportation operators.

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

Provider	Ambulatory	Wheelchair	Stretcher	Advance Reservation	Subscription	On Demand	Door to Door
Suwannee River Economic Council	✓	✓	✓	✓	✓	✓	✓
Bradford ARC	✓	✓		✓	✓		✓

#### a. Bariatric Transportation

Suwannee River Economic Council will transport all "common wheelchairs. A common wheelchair is defined as a device which does not exceed 30 inches in width and 48 inches in length measured two inches above the ground and does not weigh more than 600 pounds when occupied. Wheelchairs that exceed these dimensions and weight may not to be transported.

#### b. Hours and Days of Service

Transportation Disadvantaged Program sponsored service is provided Monday through Friday, 6:00 a.m. to 6:00 p.m. excluding holidays (see below).

#### c. Holidays

Transportation Disadvantaged Program sponsored service will not be provided on the following observed holidays.

- Veteran's Day
- Thanksgiving Day
- Christmas Day
- New Year's Day
- Martin Luther King, Jr.'s Birthday
- Memorial Day
- Independence Day
- Labor Day

## **2. Accessing Services**

### **a. Office Hours**

Suwannee River Economic Council's office hours are Monday through Friday, 8:00 a.m. to 4:30 p.m.

### **b. Phone Numbers**

386.496.0624  
1.844.496.0624

### **c. Advance Notification Time**

Trips must be canceled a minimum of two hours before the scheduled pick-up time. Twenty-four hours advance notification must be given for trips provided Tuesday through Friday. Seventy-two hours advance notification must be given for trips provided on Mondays.

### **d. No-Show Policy**

Trips must be canceled a minimum of two hours before the scheduled pick-up time. If trips are not cancelled at least two hours in advance, the passenger will be considered a no-show. Cancellations at the door will be considered no-shows. If an individual is charged with frequent no-shows, they may be temporarily suspended from service. A no-show will not be credited to a rider if the cancellation is received before the vehicle is dispatched.

On the first "no-show," the driver will leave a "no-show" notice on the client's door. On the second "no-show" occurrence, a letter of warning will be sent from the Community Transportation Coordinator. If a third infraction occurs within 60 days, the Community Transportation Coordinator will send a letter notifying the client that they have been suspended from service for a 30 day period. When the client is again reinstated to the program, and if three (3) infractions occur within 60 days, the suspension will be 45 days. When the client is again reinstated to the program and if three (3) infractions occur within 60 days, the suspension will be 60 days.

### **e. After Hours Service**

After hours service is not provided through the Transportation Disadvantaged Program.

### **f. Passenger Fares**

Suwannee River Economic Council will not charge fares to passengers sponsored by Florida's Transportation Disadvantaged Program.

**g. Transportation Disadvantaged Program Eligibility**

Individuals must apply for Transportation Disadvantaged Program eligibility certification for their transportation to be sponsored by Florida’s Transportation Disadvantaged Program. Recertification will be conducted every three years. The Transportation Disadvantaged Program Eligibility Certification Application is shown as Exhibit A.

Suwannee River Economic Council will use the following criteria to determine eligibility:

1. Determine if the applicant is unable to transport themselves because they do not have an operational vehicle or the ability to operate a vehicle.
2. Determine if the applicant is sponsored by any agency for transportation services; is unable to purchase transportation; is unable to find transportation from other sources.
3. Applicants must also satisfy at least one of the following:
  - a. Be mentally or physically disabled as defined in the Americans with Disabilities Act of 1990.
  - b. Be 60 years of age or older.
  - c. Household income meets a maximum of 125% of the current U.S. Department of Health and Human Services Poverty Guidelines as indicated below.

**2017 Poverty Guidelines For The 48 Contiguous States  
And The District of Columbia**

<b>Persons In Family/Household</b>	<b>Poverty Guideline</b>	<b>Maximum Household Income 125% 2017 Poverty Guideline</b>
1	\$12,060	\$15,075
2	\$16,240	\$20,300
3	\$20,420	\$25,525
4	\$24,600	\$30,750
5	\$28,780	\$35,975
6	\$32,960	\$41,200
7	\$36,140	\$45,175
8	\$41,320	\$51,650

\* For families/households with more than 8 persons, add \$5,230 for each additional person.

Source: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation

Individuals who are not travelling to a Medicaid Managed Medical Assistance Program compensable service may be eligible for Transportation Disadvantaged Program sponsored service.

Suwannee River Economic Council will provide Transportation Disadvantaged Program applicants with written notification of eligibility approval or denial within 15 working days after receipt of application. Applicants determined to be ineligible for Transportation Disadvantaged Program sponsored services may file appeals with Suwannee River Economic Council.

**EXHIBIT A  
TRANSPORTATION DISADVANTAGED PROGRAM  
ELIGIBILITY CERTIFICATION APPLICATION**

Last Name \_\_\_\_\_ First Name \_\_\_\_\_  
Middle Initial \_\_\_\_\_  
Street Address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_  
Zip Code \_\_\_\_\_ County \_\_\_\_\_  
Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Male \_\_\_\_ Female  
Telephone Number (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
Emergency Contact Name \_\_\_\_\_  
Relationship \_\_\_\_\_  
Telephone Number (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

1. How many people reside in your household Including parents, caregivers, relatives or others involved in your living functions?  
\_\_\_\_\_

2. Does your household have an operational vehicle(s)?  
 Yes Are you or another household member able to operate the vehicle(s)?  Yes  No  
 No

3. Are you enrolled in any assistance programs:  
 Managed Medical Care Program (Medicaid)  
 Aging Program  
 Other

4. What other means of transportation are available for you to use?  
\_\_\_\_\_

1. Do you have a physical or mental disability as outlined in the Americans With Disabilities Act of 1990?  
 Yes  
 No

2. Please check or list any special needs, services or modes of transportation you require:

<input type="checkbox"/> Powered Wheelchair	<input type="checkbox"/> Manual Wheelchair	<input type="checkbox"/> Powered Scooter/Cart
<input type="checkbox"/> Stretcher	<input type="checkbox"/> Walker	<input type="checkbox"/> Leg Braces
<input type="checkbox"/> Cane	<input type="checkbox"/> Respirator	<input type="checkbox"/> Oxygen CO2
<input type="checkbox"/> Personal Care Attendant/Escort	<input type="checkbox"/> Service Animal	
Other: _____		

Including all wages, disability payments, Social Security payments, pensions, dividends, investments, etc., what is your total gross annual household income?

\$ \_\_\_\_\_

The following represents 125 percent of the 2017 U.S. Department of Health and Human Services Poverty Guidelines. In order to qualify for services under Florida's Transportation Disadvantaged Program, your household income may not exceed these guidelines.

Persons In Family/Household	2017 Poverty Guideline	Maximum Household Income 125% 2017 Poverty Guideline
1	\$12,060	\$15,075
2	\$16,240	\$20,300
3	\$20,420	\$25,525
4	\$24,600	\$30,750
5	\$28,780	\$35,975
6	\$32,960	\$41,200
7	\$36,140	\$45,175
8	\$41,320	\$51,650

\* For families/households with more than 8 persons, add \$5,230 for each additional person. Maximum household income is revised annually based on the U.S. Department of Health and Human Services Poverty Guidelines.

**CERTIFICATION AND ACKNOWLEDGEMENT**

I understand and affirm that the information provided in this application will be used to determine if I am eligible for non-emergency transportation services sponsored by Florida's Transportation Disadvantaged Program. I understand that the information about my disability contained in this application is confidential and will be shared only with professionals involved in evaluating and determining eligibility for transportation services provided under Florida's Transportation Disadvantaged Program. I certify that, to the best of my knowledge, the information in this application is true, correct, complete and made in good faith and any material omissions, falsifications, misstatements or misrepresentations in the above information could disqualify me from receiving services under Florida's Transportation Disadvantaged Program.

**APPLICANT SIGNATURE** \_\_\_\_\_

**DATE** \_\_\_\_\_

**Suwannee River Economic Council will notify you whether your application has been approved or denied within 15 business days. If your application is denied, you may file an appeal with Suwannee River Economic Council within 15 working days.**

**APPLICATION PROCESSED BY:** \_\_\_\_\_

**SIGNATURE** \_\_\_\_\_

**DATE** \_\_\_\_\_



## h. Transportation Disadvantaged Program Trip Priorities

Suwannee River Economic Council in cooperation with the local Coordinating Board has established the following Transportation Disadvantaged Program trip priorities:

- Life Sustaining Medical Trips
- General Medical Trips
- Employment Trips
- Essential Business Trips
- Education/Training Trips
- Nutrition/Mealsite Trips
- Recreational/Social Trips

## **3. Transportation Operators And Coordination Contractors**

Suwannee River Economic Council's coordination contract with the Bradford ARC is shown as Appendix C.

## **4. Public Transit Utilization**

Not applicable. There is no fixed route, public transit system operating in Bradford County.

## **5. School Bus Utilization**

Currently, there is no need to use school buses at this time. If Suwannee River Economic Council determines a need to use school buses in the future, the Bradford County School Board will be contacted for assistance.

## **6. Vehicle Inventory**

Suwannee River Economic Council's vehicle inventory is shown as Appendix D.

## **7. System Safety Program Plan Certification**

Suwannee River Economic Council's System Safety Program Plan Certification is shown as Exhibit E.

## **8. Inter-County Services**

Suwannee River Economic Council does not have any inter-county agreements with other Community Transportation Coordinators at this time.



## 9. Natural Disaster/Emergency Preparedness

The Bradford County Emergency Management Department does not have a formal agreement with Suwannee River Economic Council to provide transportation during natural disasters.

## 10. Marketing

Currently, there are no efforts to market the availability of transportation services sponsored by Transportation Disadvantaged Trust Funds due to the limited availability of these funds.

## 11. Acceptable Alternatives

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

## 12. Service Standards

The Community Transportation Coordinator and any transportation operator from whom service is purchased or arranged by the Community Transportation Coordinator shall adhere to Florida Commission for the Transportation Disadvantaged approved standards. These standards include:

### a. Drug and Alcohol Policy

**Rule 41-2.006 (4) (a), F.A.C.:** Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post accident and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration.

Suwannee River Economic Council shall comply with this standard.

### b. Transport of Escorts and Dependent Children

**Rule 41-2.006 (4) (b), F.A.C.:** An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the local Service Plan.

**Local Policy:** Children under age 16 will be required to be accompanied by an escort. Escorts must be provided by the passenger. Escorts must be able to provide the necessary assistance to the passenger. Escorts will be transported at the regular rate.

### c. Use, Responsibility and Cost of Child Restraint Devices

**Rule 41-2.006 (4) (c), F.A.C.:** Use of child restraint devices shall be determined locally as to their responsibility, and cost of such device in the local Transportation Disadvantaged Service Plan.

**Local Policy:** All passengers under the age of 4 and/or under 50 pounds will be required to use a child restraint device. This device will be provided by the passenger.

d. Passenger Property

**Rule 41-2.006 (4) (d), F.A.C.:** Passenger property that can be carried by the passenger and/or driver in one trip and can be safely stowed 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. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.

**Local Policy:** Passengers shall be allowed to have two pieces of personal property which they can place in their lap or stow under the seat. Passengers must be able to independently carry all items brought onto the vehicle.

e. Vehicle Transfer Points

**Rule 41-2.006 (4) (e), F.A.C.:** Vehicle transfer points shall provide shelter, security and safety of passengers.

The Community Transportation Coordinator shall comply with this standard.

f. Local Toll Free Phone Number

**Rule 41-2.006 (4) (f), F.A.C.:** A local toll free phone number for complaints or grievances shall be posted inside the vehicle. The Transportation Disadvantaged Helpline phone number (1-800-983-2435) shall also be posted inside all vehicles of the coordinated system. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including, advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board. All rider information/materials (brochures, user's guides, etc.) Will include the Transportation Disadvantaged Helpline phone number.

The Community Transportation Coordinator shall comply with this standard.

g. Out-Of-Service Area Trips

**Rule 41-2.006 (4) (g), F.A.C.:** 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.

**Local Policy:** The Community Transportation Coordinator may require medical provider certification for any out of county trip.

h. Vehicle Cleanliness

**Rule 41-2.006 (4) (h), F.A.C.:** Interior of all vehicles shall be free of 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.

**Local Policy:** All vehicles shall be cleaned (interior and exterior) on a regular schedule (minimum once a week).

i. **Billing Requirements**

**Rule 41-2.006 (4) (I), F.A.C.** Billing requirements of the Community Transportation Coordinator to subcontractors shall be determined locally by the local Coordinating Board and provided in the local Transportation Disadvantaged Service Plan. All bills shall be paid within seven (7) calendar days to subcontractors, after receipt of said payment by the Community Transportation Coordinator, in accordance with Section 287.0585, Florida Statutes.

**Local Policy:** If the Community Transportation Coordinator without reasonable cause fails to make payments to the subcontractors and suppliers within seven (7) working days after the receipt by the Community Transportation Coordinator of full or partial payment, the Community Transportation Coordinator shall pay to the subcontractors and suppliers a penalty in the amount of one-half of one percent of the amount due, per day, from the expiration of the period allowed herein for payment. (F.S. 2000/ Ch 287/Part I/287.0585 Late payments by contractors to subcontractors and suppliers; penalty.)

j. **Passenger/Trip Database**

**Rule 41-2.006 (4) (j), F.A.C.:** Passenger/trip data base must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system.

The Community Transportation Coordinator shall comply with this standard.

k. **Adequate Seating**

**Rule 41-2.006 (4) (k), F.A.C.:** Adequate seating for paratransit 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.

The Community Transportation Coordinator shall comply with this standard.

l. **Driver Identification**

**Rule 41-2.006 (4) (I), F.A.C.:** Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with specific passengers, 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.

**Local Policy:** The Community Transportation Coordinator shall comply with this standard.

m. Passenger Assistance

**Rule 41-2.006 (4) (m), F.A.C.:** The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or wheelchair securement devices, storage of mobility assistive devices and closing the vehicle door. In the door-through-door paratransit service category, the driver shall 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 wheelchairs up or down more than one step, unless it can be performed safely as determined by the passenger, guardian and driver.

**Local Policy:** The Community Transportation Coordinator shall comply with this standard.

n. Smoking, Eating, and Drinking

**Rule 41-2.006 (4) (n), F.A.C.:** Smoking is prohibited in any vehicle. Requirements for drinking and eating on board the vehicle will be addressed in the local Transportation Disadvantaged Service Plan.

**Local Policy:** Eating and drinking on board the vehicle will not be allowed. Stops may be made to accommodate the needs of the passengers at the discretion of the driver.

o. Passenger No-Shows

**Rule 41-2.006 (4) (o), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board 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 Transportation Disadvantaged Service Plan.

**Local Policy** - The Community Transportation Coordinator shall attempt to reduce the number of no-shows annually.

p. Two-Way Communications

**Rule 41-2.006 (4) (p), F.A.C.:** All vehicles providing service within the coordinated system shall be equipped with two-way communications in good working order and audible to the driver at all times to the base.

The Community Transportation Coordinator shall comply with this standard.

q. Air Conditioning/Heating

**Rule 41-2.006 (4) (q), F.A.C.:** All vehicles providing service within the coordinated system shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.

The Community Transportation Coordinator shall comply with this standard.

r. First Aid

**Rule 41-2.006 (4) (r), F.A.C.:** First Aid policy shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

**Local Policy:** All vehicles will be equipped with first aid kits and bio-hazard kits as required by state and federal regulations.

s. Cardiopulmonary Resuscitation

**Rule 41-2.006 (4) (s), F.A.C.:** Cardiopulmonary resuscitation policy shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

**Local Policy:** Drivers are not required to be trained in cardiopulmonary resuscitation.

t. Driver Criminal Background Screening

**Rule 41-2.006 (4) (t), F.A.C.:** Driver background screening shall be determined locally, dependent up on purchasing agencies' requirements and provided in the local Transportation Disadvantaged Service Plan.

**Local Policy:** All drivers in the coordinated system must have a criminal background check with local law enforcement and the Florida Department of Law Enforcement. All drivers must also have a driving records check.

u. Fixed Route Transit Utilization

**Rule 41-2.006 (4) (u), F.A.C.:** In areas where fixed route transportation is available, the Community Transportation Coordinator should jointly establish with the local Coordinating Board a percentage of total trips that will be placed on the fixed route system.

**Local Policy:** Not applicable.

v. Pick-Up Window

**Rule 41-2.006 (4) (v), F.A.C.:** The Community Transportation Coordinator should establish and address the passenger pick-up windows in the local Transportation Disadvantaged Service Plan. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.

**Local Policy:** There is a thirty (30) minute pickup window in place for all intra-county trips based on the arrival/departure time of the passenger. The passenger is given a pick-up time at the time of scheduling the ride.

w. On-Time Performance

**Rule 41-2.006 (4) (w), F.A.C.:** The Community Transportation Coordinator and local Coordinating Board 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. This measure should also be included as part of the Community Transportation Coordinator's evaluation of its contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** The Community Transportation Coordinator will have a 90 percent on-time performance rate for all completed trips. On-time performance will be measured by random sampling of trips.

x. Advance Reservation Requirement

**Rule 41-2.006 (4) (x), F.A.C.:** The Community Transportation Coordinator should establish and address in the local Transportation Disadvantaged Service Plan a minimum 24 hour advanced notification time to obtain services. This policy should be communicated to contracted operators, purchasing agencies and passengers.

**Local Policy:** Twenty-four hours advanced notice is required for all trips scheduled within the coordinated system. Monday service requires 72 hours advance notice.

y. Safety

**Rule 41-2.006 (4) (y), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board should jointly establish and address in the local service plan a performance measure to evaluate the safety of the coordinated system. This measure should be used in the Community Transportation Coordinator's evaluation of the contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** There shall be no more than 1 accident per 100,000 miles during the evaluation period.

z. Reliability

**Rule 41-2.006 (4) (z), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board should jointly establish and address in the local service plan a performance measure to evaluate the reliability of the vehicles utilized in the coordinated system. This measure should be used in the Community Transportation Coordinator's evaluation of the contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** There shall be no more than 5 roadcalls during the evaluation period.

## aa. Call-Hold Time

**Rule 41-2.006 (4) (aa), F.A.C.:** This performance measure can be used to address the accessibility of the service. The Community Transportation Coordinator and the local Coordinating Board should jointly determine if a standard for a 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 local Coordinating Board's evaluation of the Community Transportation Coordinator.

This standard is not applicable to this service area.

## bb. Quality of Service

**Rule 41-2.006 (4) (bb), F.A.C.:** The Community Transportation Coordinator and the local Coordinating Board should jointly establish and address in the local service plan a performance measure to evaluate the quality of service provided within the coordinated system. The measure should be used in the Community Transportation Coordinator's evaluation of contracted operators and the local Coordinating Board's evaluation of the Community Transportation Coordinator.

**Local Policy:** Collect and publicly post passenger satisfaction survey ratings. There shall be no more than one complaint per 1,000 trips during the evaluation period.

## cc. Safety Belt Usage

**Chapter 316.614 (4), Florida Statutes:** It is unlawful for any person: (a) To operate a motor vehicle in this state unless each passenger and the operator of the vehicle under the age of 18 years are restrained by a safety belt or by a child restraint device pursuant to s. 316.613, if applicable; or (b) To operate a motor vehicle in this state unless the person is restrained by a safety belt. (5) It is unlawful for any person 18 years of age or older to be a passenger in the front seat of a motor vehicle unless such person is restrained by a safety belt when the vehicle is in motion. (6)(a) Neither a person who is certified by a physician as having a medical condition that causes the use of a safety belt to be inappropriate or dangerous nor an employee of a newspaper home delivery service while in the course of his or her employment delivering newspapers on home delivery routes is required to be restrained by a safety belt.

**Local Policy:** Passengers whose transportation is sponsored by Florida's Transportation Disadvantaged Program shall wear a safety belt while being transported unless they are certified by a physician as having a medical condition that causes the use of a safety belt to be inappropriate or dangerous.

## 13. Local Grievance Procedure/Process

The Transportation Disadvantaged Program Grievance Procedures are shown in Appendix A.

## 14. Passenger Code of Conduct

For everyone's safety, drivers and riders of the system are expected to act in an appropriate manner at all times and abide by the policies of Suwannee River Economic Council.

- Riders shall be ready to board the vehicle within 5 minutes of its arrival.
- Riders shall be prepared to share their ride with other passengers.
- No person may eat, drink or smoke on board any vehicle.
- No passenger may operate or tamper with any equipment on board any vehicle.
- Riders may not have radios, cassette tape players, CD players or other sound generating devices in operation while on board a vehicle, UNLESS it is connected to a headset.
- Disruptive behavior, which results in a distraction to the driver is deemed a safety hazard. Such behavior will not be tolerated and shall be grounds for suspension of transportation privileges.

**a. Verbal Abuse**

Verbal abuse by a rider against staff, drivers or other clients will not be tolerated. Verbal abuse includes but is not limited to use of profanity, obscene gestures, yelling or screaming. Riders who verbally abuse staff, drivers or other clients may be suspended from service.

**b. Physical Abuse**

Physical abuse of either a rider to another rider or rider to a driver will not be tolerated. Physical abuse includes but is not limited to grabbing, hitting or touching. Such abuse shall be deemed as assault. In such cases, the local police shall be notified, and the rider shall be issued a notice of suspension from service.

**c. Substance Abuse**

No passenger who is under the influence of alcohol or illegal drugs will be transported. If a passenger is scheduled to be returned home and they are under the influence, they will be required to find alternative means of transportation. If a pattern of such behavior exists, a suspension of transportation privileges shall be invoked.

**d. Penalties**

The following penalties shall apply to service sponsored by Florida's Transportation Disadvantaged Program. Service suspension for Medicaid NET sponsored passengers must follow the Medicaid Program guidelines.

**Verbal Abuse**

- First offense – written warning
- Second offense – one week suspension of services
- Third offense – 30 day suspension of services
- Fourth offense – 90 day suspension of services
- Fifth offense – permanently removed from service

**Physical Abuse**



First offense - Suwannee River Economic Council will issue a written notice of suspension for 90 days by certified mail. The notice will advise the rider that Suwannee River Economic Council intends to suspend his or her riding privileges and the reason for such action.

Second offense – 180 day suspension of services

Third offense - permanently removed from service

### **e. Appeals**

A rider has ten (10) calendar days from the date of issuance of suspension notice to request a reconsideration hearing on the suspension. If a reconsideration hearing is requested, the hearing will be held by the Bradford County Transportation Disadvantaged Coordinating Board Grievance Committee if the suspension involves transportation provided under Florida’s Transportation Disadvantaged Program. All requests for reconsideration must be in writing and delivered to:

Suwannee River Economic Council  
P.O. Box 70  
Live Oak, FL 32060

and

Transportation Disadvantaged Program  
Coordinating Board Grievance Committee  
2009 N.W. 67 Place, Suite A  
Gainesville, Florida 32653-1603

The written request must include the name and address of the person who is requesting the hearing and a statement as to why his or her riding privileges should not be suspended. If the request is not received within ten (10) calendar days from the issue date of the suspension, then the suspension becomes effective ten (10) calendar days from the date of issue. Upon receipt of letter requesting the reconsideration hearing, a hearing shall be held within 10 working days. The North Central Florida Regional Planning Council will advise the person requesting the reconsideration hearing by return correspondence of the date, time and location of the hearing.

The person will be given the opportunity to present the reasons why they believe the suspension should not take place. The Bradford County Transportation Disadvantaged Coordinating Board Grievance Committee will make a recommendation whether or not to uphold the suspension. A written statement of the recommendation shall be forwarded to the person requesting the hearing within two (2) working days after the hearing by the Grievance Committee. A written statement of the decision whether or not to uphold the suspension shall be forwarded by certified mail within two (2) working days by Suwannee River Economic Council to the person requesting the hearing.

## **15. Evaluation Process**

Suwannee River Economic Council in cooperation with the local Coordinating Board 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**

See Appendix B.

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## **Chapter III: Quality Assurance**

This section contains the steps the local Coordinating Board will take to monitor and evaluate the services provided by or coordinated through the Community Transportation Coordinator, based on the Florida Commission for the Transportation Disadvantaged standards and the locally established service standards.

### **A. Community Transportation Coordinator Evaluation Process**

The local Coordinating Board will evaluate the Community Transportation Coordinator's performance on an annual basis using the Commission for the Transportation Disadvantaged Quality Assurance Program Evaluation/Local Coordinating Board, Community Transportation Coordinator Evaluation Workbook. This evaluation workbook was created to provide a formal process for evaluating the performance of the Coordinator (and its operators). The Commission requires worksheets regarding Cost, Competition and Coordination be completed during this review.

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# **Appendix A: Bradford County Transportation Disadvantaged Coordinating Board Grievance Procedures**

# Transportation Disadvantaged Grievance Procedures

July 12, 2016

Bradford County  
Transportation Disadvantaged Coordinating Board



# Transportation Disadvantaged Grievance Procedures

Approved by the  
Bradford County  
Transportation Disadvantaged Coordinating Board

2009 NW 67th Place  
Gainesville, FL 32653-1603  
[www.ncfrpc.org/mtpo](http://www.ncfrpc.org/mtpo)  
352.955.2000

---

**Danny Riddick, Chair**

with Assistance from



North Central Florida Regional Planning Council  
2009 NW 67th Place  
Gainesville, FL 32653-1603  
[www.ncfrpc.org](http://www.ncfrpc.org)  
352.955.2200

July 12, 2016



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## **Chapter I: Bradford County Transportation Disadvantaged Coordinating Board Grievance Procedures**

### **A. Preamble**

The following sets forth the procedures for the Bradford County Transportation Disadvantaged Coordinating Board to address grievances from agencies, users, potential users, sub-contractors, and other interested parties concerning Florida's Coordinated Transportation System.

### **B. Agency Description**

The Bradford County Transportation Disadvantaged Coordinating Board, herein after referred to as the Board, is a public body appointed by the North Central Florida Regional Planning Council serving as the Designated Official Planning Agency as authorized by Section 427.015, Florida Statutes.

### **C. Definitions**

Transportation disadvantaged means those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk as defined in Section 411.202, Florida Statutes.

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 transportation service-providing agency.

Community Transportation Coordinator means a transportation entity recommended by a metropolitan planning organization, or by the appropriate designated official planning agency as provided for in Section 427.011, Florida Statutes in an area outside the purview of a metropolitan planning organization, to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.

Coordinating Board means an advisory entity in each designated service area composed of representatives appointed by the metropolitan planning organization or designated official planning agency, to provide assistance to the community transportation coordinator relative to the coordination of transportation services.

Coordination means the arrangement for the provision of transportation services to the transportation disadvantaged in a manner that is cost-effective, efficient and reduces fragmentation and duplication of services.

**Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Procedures**

Designated Official Planning Agency means the official body or agency designated by the Commission 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.

Designated Service Area means a geographical area recommended by a designated official planning agency, subject to approval by the Florida Commission for the Transportation Disadvantaged, which defines the community where coordinated transportation services will be provided to the transportation disadvantaged.

Florida's Coordinated Transportation System means a transportation system responsible for coordination and service provisions for the transportation disadvantaged as outlined in Chapter 427, Florida Statutes.

Grievance means a written complaint to document any concerns regarding the operation or administration of services provided by Florida's Coordinated Transportation System by the Community Transportation Coordinator, subcontracted transportation operators, the Designated Official Planning Agency, or the Board. A grievance may also be a service complaint that has been left unresolved for more than 45 days.

Memorandum of Agreement is the state contract for transportation disadvantaged services purchased with federal, state or local government transportation disadvantaged funds. This agreement is between the Florida Commission for the Transportation Disadvantaged 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.

Service complaint means 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. All service complaints shall be recorded and a summary of complaints should be provided by the Community Transportation Coordinator on a quarterly basis, to the Board.

Transportation Disadvantaged Service Plan means an annually updated plan jointly developed by the Designated Official Planning Agency and the Community Transportation Coordinator which contains a development plan, service plan and quality assurance components. The plan shall be approved and used by the local Coordinating Board to evaluate the Community Transportation Coordinator.

## **D. Purpose**

- (1) The 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 Board for the improvement of service.
- (2) The Board shall establish procedures to provide regular opportunities for issues to be brought before the Grievance Committee and to address them in a timely manner. Members appointed to the Grievance Committee shall be voting members of the Board.

**Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Procedures**

- (3) The Grievance Committee and the Board shall have the authority to hear and advise on grievances. 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.

## **E. Membership**

- (1) The Bradford County Transportation Disadvantaged Coordinating Board Chair shall appoint five (5) voting members to a Grievance Committee. The membership of the Grievance Committee shall include broad geographic representation from members of the local Coordinating Board representing the counties in the service area.
- (2) Term limits on the Grievance Committee may coincide with term limits on the Board.

## **F. Officers**

- (1) The Grievance Committee shall elect a Chair and Vice-Chair.

## **G. Meetings**

- (1) The Grievance Committee may meet as often as necessary to fulfill their responsibilities. Meetings may be called, rescheduled, postponed or cancelled for any appropriate purpose by the Chair. The Grievance Committee may meet following Board meetings to hear complaints and grievances. All meetings will function under the "Government in the Sunshine Law." All meetings will provide opportunity for public comments on the agenda.
- (2) Notice of Meetings. Notices and tentative agendas shall be provided to the Florida Commission for the Transportation, Committee members and other interested parties at least two weeks prior to the meeting. Meeting notices shall include the date, time, location, general nature/subject of the meeting, a contact person and phone number to call for additional information and to request accessible formats.
- (3) Quorum. At all meetings of the Grievance Committee, the presence in person of a majority of the voting members shall be necessary and sufficient to constitute a quorum for the transaction of business. In the absence of a quorum, those present may, without notice other than by announcement at the meeting, recess the meeting from time to time, until a quorum shall be present. At any such recessed meeting, any business may be transacted which might have been transacted at the meeting as originally called.
- (4) Voting. A majority vote is required for actions by the Grievance Committee. As required by Section 286.012, Florida Statutes, all Grievance Committee members, including the Chair, must vote on all official actions taken by the Grievance Committee except when there appears to be a possible conflict of interest with a member or members of the Grievance Committee.

**Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Procedures**

- (5) **Conflict of Interest.** In accordance with Chapter 112 (Part III), Florida Statutes, "No county, municipal, or other public office shall vote in an official capacity upon any measure which would inure to his or her special private gain or loss, or which the officer know would inure to the special private gain or loss of a principal by whom he or she is retained, of the parent organization or subsidiary of a corporate principal which he or she is retained, of a relative or of a business associate. The officer must publicly announce the nature of his or her interest before the vote and must file a memorandum of voting conflict on Ethics Commission Form 8B with the meeting's recording officer within 15 days after the vote occurs disclosing the nature of his or her interest in the matter."

In cases where a grievance involves the private or personal interests of a member of the Grievance Committee, such member shall be disqualified from hearing such grievance. If a Grievant claims a conflict between the Grievant and a Grievance Committee member, the Grievance Committee member identified as having a conflict shall recuses themselves from hearing the grievance. No member of the Grievance Committee shall appear before the Grievance Committee as an agent or attorney for any person.

- (6) **Proxy Voting.** Proxy voting is not permitted.
- (7) **Parliamentary Procedures.** The Grievance Committee will conduct business using parliamentary procedures according to Robert's Rules of Order, except when in conflict with these Grievance Procedures.

## **H. Administration**

- (1) **Staff Support.** The North Central Florida Regional Planning Council shall provide the Grievance Committee with sufficient staff support and resources to enable the Grievance Committee to fulfill their responsibilities.
- (2) **Minutes.** The North Central Florida Regional Planning Council is responsible for maintaining an official set of minutes for each Grievance Committee meeting.

## **I. Duties**

The Grievance Committee shall make recommendations to the Board, the Community Transportation Coordinator, and/or to the Florida Commission for the Transportation Disadvantaged for improvement of service.

## **J. Procedures**

- (1) The grievance procedures shall be open to addressing concerns by any person or agency including but not limited to: purchasing agencies, users, potential users, private-for-profit operators, private-nonprofit operators, Community Transportation Coordinators, Designated Official Planning Agencies, elected officials, and drivers. The grievant, in their formal complaint, should demonstrate or establish their concerns as clearly as possible.

**Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Procedures**

- (2) The Board must make a written copy of the grievance procedures available to anyone, upon request. All documents pertaining to the grievance process will be made available, upon request, in accessible format. The following procedures are established to provide regular opportunities for grievances to be brought before the Grievance Committee.
- (3) Should an interested party wish to file a grievance with the Board, that grievance must be filed in writing within ninety (90) days after the occurrence of the event giving rise to the grievance. The grievance shall be sent to:  
  
Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Committee  
2009 N.W. 67th Place  
Gainesville, FL 32653-1603
- (4) If requested, the North Central Florida Regional Planning Council staff will provide assistance to individuals in preparing written grievances.
- (5) 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 North Central Florida Regional Planning Council staff.
- (6) The grievance shall include:
  - a. the name, address and telephone number of the Complainant;
  - b. a statement of the grounds for the grievance and be supplemented by supporting documentation, made in a clear and concise manner; and
  - c. an explanation by the Complainant of the improvements needed to address the complaint.
- (7) If the Board receives a grievance pertaining to the operation of services by the Community Transportation Coordinator, that grievance shall be forwarded to the Community Transportation Coordinator for a written response. The Community Transportation Coordinator's written response shall be provided to the Grievance Committee at least one week prior to the Grievance Committee meeting to hear such grievance.
- (8) If the Complainant does not want to be contacted by the Community Transportation Coordinator concerning the grievance before the grievance is heard, the Community Transportation Coordinator is prohibited from contacting the Complainant.
- (9) Within fifteen (15) working days following the date of receipt of the formal grievance, North Central Florida Regional Planning Council staff shall advise the Grievance Committee of the grievance to schedule a hearing on the grievance and inform the Complainant of the hearing date.
- (10) The Grievance Committee shall meet to hear the grievance within forty-five (45) calendar days from the date of receipt of the grievance.
- (11) North Central Florida Regional Planning Council staff shall send notice of the Grievance Committee's scheduled hearing in writing to the local newspaper of greatest circulation, the Complainant and other interested parties.

**Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Procedures**

- (12) 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. The Community Transportation Coordinator shall provide transportation to and from Grievance Committee meetings at no charge to complainants who cannot transport themselves to the meetings.
- (13) A written report and any recommendations of the Grievance Committee shall be provided to the Board. A copy of this report shall be provided to the concerned parties within ten (10) working days after the hearing on the grievance and no more than sixty (60) calendar days from the date of receipt of the formal grievance. The Grievance Committee's recommendation will stand unless the recommendation is changed by the Board.
- (14) A written report shall also be provided to the Community Transportation Coordinator's Governing Board.

## **K. Appeals**

- (1) Appeals of recommendations by the Grievance Committee to the Board shall be made within twenty (20) working days from the date when the Grievance Committee makes a recommendation regarding a grievance. The appeal shall be mailed to:

Bradford County Transportation Disadvantaged Coordinating Board  
2009 N.W. 67th Place  
Gainesville, FL 32653-1603

- (2) The Complainant will be notified in writing of the date, time and place of the Board meeting where the appeal will be heard. This written notice will be mailed at least ten (10) calendar days in advance of the meeting.
- (3) The Board will meet to hear the appeal and render its recommendation within thirty (30) calendar days of the date the appeal was filed. A written copy of the recommendation will be mailed to all parties involved within ten (10) calendar days of the date of the recommendation.
- (4) Should a Complainant remain dissatisfied with the Board's decision, he or she may contact the Florida Commission for the Transportation Disadvantaged at the following address:

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

- (5) The Florida Commission for the Transportation Disadvantaged also has an Ombudsman Program to assist individuals with complaints. The toll-free Ombudsman Hotline is 1-800-983-2435. Chapter 427, Florida Statutes does not expressly confer the power or authority for the Florida Commission for the Transportation Disadvantaged to "hear and determine" a grievance between two (2) third parties. The Florida 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."

**Bradford County Transportation Disadvantaged Coordinating Board  
Grievance Procedures**

- (6) If the grievance showed that one (1) of the parties with whom the Florida Commission for the Transportation Disadvantaged contracts was acting so aberrantly as to not be in compliance with its contract, the Florida Commission for the Transportation Disadvantaged could exercise whatever contractual rights it has to correct the problem.
- (7) The Florida 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.

## **L. Suspension Reconsideration**

- (1) If a rider has been issued a notice of suspension of service by the Community Transportation Coordinator, they have ten (10) calendar days from the date of issuance of suspension notice to request a reconsideration hearing on the suspension. If a reconsideration hearing is requested, the hearing will be held by the Grievance Committee if the suspension involves transportation provided under Florida's Transportation Disadvantaged Program.
- (2) The written request must include the name, address and telephone number of the person who is requesting the hearing and a statement as to why his or her riding privileges should not be suspended. If the request is not received within ten (10) calendar days from the issue date of the suspension, then the suspension becomes effective ten (10) calendar days from the date of issue.
- (3) Upon receipt of letter requesting the reconsideration hearing, a hearing shall be held within ten (10) working days. The North Central Florida Regional Planning Council will advise the person requesting the reconsideration hearing by return correspondence of the date, time and location of the hearing.
- (4) The suspended rider will be given the opportunity to present the reasons why they believe the suspension should not take place. The Grievance Committee will make a recommendation whether or not to uphold the suspension. A written statement of the decision whether or not to uphold the suspension shall be forwarded by certified mail within two (2) working days by the Community Transportation Coordinator to the suspended rider requesting the reconsideration.

## **M. Prohibition Against Retaliation**

The Community Transportation Coordinator shall not take any punitive action against an individual who files a grievance. No individual shall be denied Transportation Disadvantaged Program services because such individual has filed a grievance related to Florida's Transportation Disadvantaged Program or has testified or is about to testify in any such proceeding or investigation related to Florida's Transportation Disadvantaged Program.

## **N. Alternative Recourse**

Apart from these grievance processes, aggrieved parties with proper standing, may also have recourse through Chapter 120, Florida Statutes, administrative hearings process or the judicial court system.



## **O. Certification**

The undersigned hereby certifies that he/she is the Chair of the Bradford County Transportation Disadvantaged Coordinating Board and that the foregoing is a full, true and correct copy of the Grievance Procedures of this Board as adopted by the Bradford County Transportation Disadvantaged Coordinating Board the 12th day of July 2016.

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Danny Riddick, Chair  
Bradford County Transportation Disadvantaged Coordinating Board

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## Preliminary Information Worksheet

Version 1.4

**CTC Name:** Suwannee River Economic Council, Inc.  
**County (Service Area):** Bradford County  
**Contact Person:** Matt Pearson  
**Phone #:** 386/362-4115 ext. 223

Check Applicable Characteristic:

**ORGANIZATIONAL TYPE:**

- Governmental
- Private Non-Profit
- Private For Profit

**NETWORK TYPE:**

- Fully Brokered
- Partially Brokered
- Sole Source

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

**Comprehensive Budget Worksheet**

Version 1.4

CTC: Suwannee River Economic Council, Inc.  
County: Bradford County

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

	Prior Year's <b>ACTUALS</b> from July 1st of 2014 to June 30th of 2016	Current Year's <b>APPROVED Budget, as amended</b> from July 1st of 2015 to June 30th of 2016	Upcoming Year's <b>PROPOSED Budget</b> from July 1st of 2016 to June 30th of 2017	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

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

**Local Non-Govt**

Farebox						Change in excess rollover no longer required due to Medicaid changes.
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other	\$ 15,150	\$ 30,149	\$ 19,318	99.8%	-35.9%	
<b>Bus Pass Program Revenue</b>						

**Local Government**

District School Board						
Compl. ADA Services						
County Cash						
County In-Kind, Contributed Services						
City Cash						
City In-Kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
<b>Bus Pass Program Revenue</b>						

**CTD**

Non-Spons. Trip Program	\$ 119,848	\$ 119,844	\$ 118,844	0.0%	0.0%	
Non-Spons. Capital Equipment						
Rural Capital Equipment	\$ 9,282			-100.0%		
Other TD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

**USDOT & FDOT**

49 USC 5307		\$ 58,000	\$ 60,000		3.4%	
49 USC 5310						
49 USC 5311 (Operating)	\$ 133,042	\$ 112,000	\$ 115,000	-15.8%	2.7%	
49 USC 5311 (Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

**AHCA**

Medicaid						
Other AHCA (specify in explanation)	\$ 82,544	\$ 93,373	\$ 93,466	13.1%	0.1%	
<b>Bus Pass Program Revenue</b>						

**DCF**

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

**DOH**

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

**DOE (state)**

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

**AWI**

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

**DOEA**

Elder Americans Act	\$ 16,881	\$ 12,000	\$ 18,000	-28.9%	50.0%	Increase in budget from previous year.
Community Care for Elderly						
Other DOEA (specify in explanation)						
<b>Bus Pass Program Revenue</b>						

**DCA**

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

**Comprehensive Budget Worksheet**

Version 1.4

CTC: Suwannee River Economic Council, Inc.  
County: Bradford County

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

	Prior Year's ACTUALS from July 1st of 2014 to June 30th of 2015	Current Year's APPROVED Budget, as amended from July 1st of 2015 to June 30th of 2016	Upcoming Year's PROPOSED Budget from July 1st of 2016 to June 30th of 2017	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

**APD**

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

**DJJ**

(specify in explanation)						
Bus Pass Program Revenue						

**Other Fed or State**

XXXX						
XXXX						
XXXX						
Bus Pass Program Revenue						

**Other Revenues**

Interest Earnings						
XXXX						
XXXX						
Bus Pass Program Revenue						

**Balancing Revenue to Prevent Deficit**

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

Balancing Revenue is Short By =		None	None		
Total Revenues =	\$373,777	\$425,366	\$426,626	13.8%	0.1%

**EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors!)**

	2015	2016	2017	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	
<b>Operating Expenditures</b>						
Labor	\$ 153,856	\$ 149,000	\$ 154,250	-3.2%	3.5%	Fringe Benefits: Anticipated increase in budgeted employee benefits from previous budget year. Services: Anticipated decrease in budgeted audit expenses. Metems and Supplies: Anticipated decrease in budgeted expense due to decrease in gas prices.
Fringe Benefits	\$ 63,973	\$ 67,500	\$ 64,000	-10.1%	11.3%	
Services	\$ 21,180	\$ 28,250	\$ 21,200	23.9%	-19.2%	
Materials and Supplies	\$ 40,716	\$ 67,200	\$ 50,560	15.1%	-11.6%	
Utilities	\$ 15,660	\$ 15,500	\$ 15,000	-0.4%	1.9%	
Casualty and Liability	\$ 21,020	\$ 22,400	\$ 21,750	6.5%	-2.9%	
Taxes	\$ 157		\$ 220	-100.0%		
<b>Purchased Transportation:</b>						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services		\$ 2,000	\$ 2,000		0.0%	
Other						
Miscellaneous	\$ 1,464	\$ 1,200	\$ 1,250	-18.0%	4.2%	
Operating Debt Service - Principal & Interest						
Leases and Rentals	\$ 14,684	\$ 16,000	\$ 15,300	9.0%	-4.4%	
Contrib. to Capital Equip. Replacement Fund						
In-Kind, Contributed Services	\$ -	\$ -	\$ -			
Allocated Indirect	\$ 14,014	\$ 13,316	\$ 13,316	-5.0%	0.0%	
<b>Capital Expenditures</b>						
Equip. Purchases with Grant Funds	\$ 6,075	\$ 65,000	\$ 68,000	845.5%	1.5%	
Equip. Purchases with Local Revenue						
Equip. Purchases with Rate Generated Rev.						
Capital Debt Service - Principal & Interest						
<b>ACTUAL YEAR GAIN</b>	\$11,229					
Total Expenditures =	\$362,548	\$425,366	\$425,626	17.3%	0.1%	

See NOTES Below.

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

ACTUAL year GAIN (program revenue) MUST be reinvested as a trip or system subsidy. Adjustments must be identified and explained in a following year, or applied as a Rate Base Adjustment to proposed year's rates on the next sheet.

Budgeted Rate Base Worksheet		Version 1.4	CTC: Suwannee River Economic Council, Inc.	
		County: <b>Bradford County</b>		
1. Complete applicable <b>GREEN</b> cells in column 3. <b>YELLOW</b> and <b>BLUE</b> cells are automatically completed in column 3. 2. Complete applicable <b>GOLD</b> cells in column and 5.				
	Upcoming Year's BUDGETED Revenues from July 1st of 2016 to June 30th of 2017	What amount of the Budgeted Revenues in col. 2 will be generated at the 1000 per unit determined by this spreadsheet. OR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue Excluded from the Rate Base	What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment. OR will be used as match for the purchase of equipment?
1	2	3	4	5
<b>REVENUES (CTC/Operators ONLY)</b>				
<b>Local Non-Govt</b>				
Farebox	\$ --	\$ --	\$ --	
Medicaid Co-Pay Received	\$ --	\$ --	\$ --	
Donations/Contributions	\$ --	\$ --	\$ --	
In-Kind, Contributed Services	\$ --	\$ --	\$ --	
Other	\$ 19,316	\$ 19,316	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>Local Government</b>				
District School Board	\$ --	\$ --	\$ --	
Comp. ADA Services	\$ --	\$ --	\$ --	
County Cash	\$ --	\$ --	\$ --	
County In-Kind, Contributed Services	\$ --	\$ --	\$ --	
City Cash	\$ --	\$ --	\$ --	
City In-Kind, Contributed Services	\$ --	\$ --	\$ --	
Other Cash	\$ --	\$ --	\$ --	
Other In-Kind, Contributed Services	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>CTD</b>				
Non-Sports Trip Program	\$ 119,844	\$ 119,844	\$ --	
Non-Sports Capital Equipment	\$ --	\$ --	\$ --	
Bus Capital Equipment	\$ --	\$ --	\$ --	
Other TD	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>USDOT &amp; FDOT</b>				
49 USC 5307	\$ --	\$ --	\$ --	
49 USC 5310	\$ 80,000	\$ 80,000	\$ 80,000	
49 USC 5311 (Operating)	\$ 115,000	\$ 115,000	\$ 115,000	
49 USC 5311(Capital)	\$ --	\$ --	\$ --	
State Grant	\$ --	\$ --	\$ --	
Service Development	\$ --	\$ --	\$ --	
Contractor Assistance	\$ --	\$ --	\$ --	
Other FDOT	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>AHCA</b>				
Medicaid	\$ --	\$ --	\$ --	
Other AHCA	\$ 93,469	\$ 93,469	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>DCP</b>				
Alcohol, Drug & Mental Health	\$ --	\$ --	\$ --	
Family Safety & Preservation	\$ --	\$ --	\$ --	
Comm. Care Dis. Aging & Adol. Serv.	\$ --	\$ --	\$ --	
Other DCP	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>DOH</b>				
Children Medical Services	\$ --	\$ --	\$ --	
County Public Health	\$ --	\$ --	\$ --	
Other DOH	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>DOE (state)</b>				
Carl Perkins	\$ --	\$ --	\$ --	
Div. of Blind Services	\$ --	\$ --	\$ --	
Vocational Rehabilitation	\$ --	\$ --	\$ --	
Day Care Programs	\$ --	\$ --	\$ --	
Other DOE	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>AWI</b>				
WAGES/Workforce Board	\$ --	\$ --	\$ --	
AWI	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>DOEA</b>				
State Activities All	\$ 10,000	\$ 10,000	\$ --	
Community Care for Elderly	\$ --	\$ --	\$ --	
Other DOEA	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	
<b>DCA</b>				
Community Services	\$ --	\$ --	\$ --	
Other DCA	\$ --	\$ --	\$ --	
<b>Bus Pass Program Revenue</b>	<b>\$ --</b>	<b>\$ --</b>	<b>\$ --</b>	

**YELLOW cells are NEVER Generated by Applying Authorized Rates**

**BLUE cells Should be funds generated by rates in this spreadsheet**

**GREEN cells MAY BE Revenue Generated by Applying Authorized Rate per Mile/Trip Charges**

Fill in that portion of budgeted revenue in Column 2 that will be **GENERATED** through the application of authorized per mile, per trip, or combination per trip plus per mile rates. Also, include the amount of funds that are Earmarked as local match for Transportation Services and **NDT** Capital Equipment purchases.

If the Farebox Revenues are used as a source of Local Match Dollars, then identify the appropriate amount of Farebox Revenue that represents the portion of Local Match required on any state or federal grants. This does not mean that Farebox is the only source for Local Match.

Please review all Grant Applications and Agreements containing State and/or Federal funds for the proper Match Requirement levels and allowed sources.

**GOLD cells**

Fill in that portion of Budgeted Rate Subsidy Revenue in Column 4 that will come from Funds Earmarked by the Funding Source for Purchasing Capital Equipment. Also include the portion of Local Funds earmarked as Match related to the **Purchase of Capital Equipment** if a match amount is required by the Funding Source.

**Budgeted Rate Base Worksheet** Version 1.4 CTC: **Suwannee River Economic Council, Inc.**  
County: **Bradford County**

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

	Upcoming Year's BUDGETED Revenues from July 1st of 2015 to June 30th of 2017	What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, CR used as local match for these type revenues?	Budgeted Rate Subsidy Revenue Excluded from the Rate Base	What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, CR will be used as match for the purchase of equipment?
	1	2	3	4
<b>APD</b>				
Office of Disability Determination	\$ -		\$ -	
Developmental Services	\$ -		\$ -	
Other APD	\$ -		\$ -	
Bus Pass Program Revenue	\$ -		\$ -	
<b>DJJ</b>				
DJJ	\$ -		\$ -	
Bus Pass Program Revenue	\$ -		\$ -	
<b>Other Fed or State</b>				
xxx	\$ -		\$ -	
xxx	\$ -		\$ -	
xxx	\$ -		\$ -	
Bus Pass Program Revenue	\$ -		\$ -	
<b>Other Revenues</b>				
Interest Earnings	\$ -		\$ -	
xxxx	\$ -		\$ -	
xxxx	\$ -		\$ -	
Bus Pass Program Revenue	\$ -		\$ -	
<b>Balancing Revenue to Prevent Deficit</b>				
Actual or Planned Use of Cash Reserve	\$ -		\$ -	
<b>Total Revenues =</b>	<b>\$ 435,626</b>		<b>\$ 250,626</b>	<b>\$ 175,000</b>
			<b>\$ 115,000</b>	<b>\$ 60,600</b>

EXPENDITURES (CTC/Operators ONLY)	Amount of Budgeted Operating Rate Subsidy Revenue
<b>Operating Expenditures</b>	
Labor	\$ 154,250
Fringe Benefits	\$ 64,000
Services	\$ 21,200
Materials and Supplies	\$ 50,540
Utilities	\$ 18,600
Casualty and Liability	\$ 21,750
Taxes	\$ 220
<b>Purchased Transportation</b>	
Paratransit Bus Pass Expenses	\$ -
School Bus Utilization Expenses	\$ -
Contracted Transportation Services	\$ 2,000
Other	\$ -
Miss/Renewals	\$ 1,250
Operating Debt Service - Principal & Interest	\$ -
Leases and Rentals	\$ 15,320
Contrib. to Capital Equip. Replacement Fund	\$ -
In-Kind, Contributed Services	\$ -
Allocated Indirect	\$ 13,318
<b>Capital Expenditures</b>	
Equip. Purchases with Grant Funds	\$ 60,000
Equip. Purchases with Local Revenues	\$ -
Equip. Purchases with Rate Connected Rev.	\$ -
Capital Debt Service - Principal & Interest	\$ -
	\$ -
<b>Total Expenditures =</b>	<b>\$ 426,626</b>
minus EXCLUDED Subsidy Revenue =	<b>\$ 175,000</b>
<b>Budgeted Total Expenditures INCLUDED in Rate Base =</b>	<b>\$ 250,626</b>
Rate Base Adjustment <sup>1</sup> =	\$ -
<b>Adjusted Expenditures Included in Rate Base =</b>	<b>\$ 250,626</b>

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

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

<sup>1</sup> The Difference between Expenses and Revenues for Fiscal Year: 2014 - 2015

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

### Worksheet for Program-wide Rates

CTC: Suwannee River Et Version 1.4  
County: Bradford County

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

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

<div style="border: 1px solid gray; background-color: #e0e0e0; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center; margin: 0;"><b>PROGRAM-WIDE RATES</b></p> <p>Total <u>Projected</u> Passenger Miles = <span style="border: 1px solid green; padding: 2px;">128,200</span></p> <p style="background-color: #333; color: white; padding: 2px; text-align: center;"><b>Rate Per Passenger Mile = \$ 1.95</b></p> <p>Total <u>Projected</u> Passenger Trips = <span style="border: 1px solid green; padding: 2px;">10,050</span></p> <p style="background-color: #333; color: white; padding: 2px; text-align: center;"><b>Rate Per Passenger Trip = \$ 24.94</b></p> </div> <div style="border: 1px solid gray; background-color: #e0e0e0; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center; margin: 0;"><b>Rates If No Revenue Funds Were Identified As Subsidy Funds</b></p> <p style="background-color: #333; color: white; padding: 2px; text-align: center;"><b>Rate Per Passenger Mile = \$ 3.32</b></p> <p style="background-color: #333; color: white; padding: 2px; text-align: center;"><b>Rate Per Passenger Trip = \$ 42.35</b></p> </div>	<p>Fiscal Year</p> <p style="text-align: center;">2016 - 2017</p> <div style="border: 1px solid gray; background-color: #e0e0e0; padding: 5px; margin-top: 20px;"> <p style="background-color: #333; color: white; padding: 2px; text-align: center;"><b>Avg. Passenger Trip Length = 12.8 Miles</b></p> </div>
--	---

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

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

**Vehicle Revenue Miles (VRM)**  
The miles that vehicles are scheduled to or actually travel while in revenue service. Vehicle revenue miles exclude:

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

**Passenger Miles (PM)**  
The cumulative sum of the distances ridden by each passenger.



**Worksheet for Multiple Service Rates**

CTC: Southern River Version 1.4  
County: Bradford County

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

**SECTION I: Services Provided**

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

<b>Amputatory</b> Go to Section I for Amputatory Service	<b>Wheelchair</b> Go to Section I for Wheelchair Service	<b>Stretcher</b> Go to Section II for Stretcher Service	<b>Group</b> STOP! Do NOT Complete Section II for Group Service
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

**SECTION II: Contracted Services**

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

<b>Amputatory</b> Skip # 2, 3, 4 and Go to Section II for Amputatory Service	<b>Wheelchair</b> Skip # 2, 3, 4 and Go to Section II for Wheelchair Service	<b>Stretcher</b> Answer # 2 for Stretcher Service	<b>Group</b> Do NOT Complete Section II for Group Service
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

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

<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
--	--	--	--

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

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

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

**Combination Trip and Mile Rate**

<b>Amputatory</b> Leave Blank and Go to Section II for Amputatory Service	<b>Wheelchair</b> Leave Blank and Go to Section II for Wheelchair Service	<b>Stretcher</b> Leave Blank and Go to Section II for Stretcher Service	<b>Group</b> Do NOT Complete Section II for Group Service
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

**Worksheet for Multiple Service Rates**

CTC: Suwannee River Water 14  
County: Bradford County

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

2. If you answered "Yes" to #1, do you want to charge the fee per passenger trip OR per passenger mile?  
 Per Trip  
 Per 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)  
 Loading Rate: 0.00 to 1.00

And what is the projected total number of Group Vehicle Revenue Miles?  
 Loading Rate: 0.00 to 1.00

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

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

Projected Passenger Miles (excluding locally contracted services addressed in Section II) = 128,200  
 Rate per Passenger Mile = \$1.81

Projected Passenger Trips (excluding locally contracted services addressed in Section II) = 10,050  
 Rate per Passenger Trip = \$17.29

2. If you answered #1 above and want a COMBINED Rate per Trip PLUS a per Mile add-on for 1 or more services, INPUT the Desired Rate per Trip (but must be 18% than per trip rate above) =  
 Rate per Passenger Mile for Balance = \$1.81

**RATES FOR FY: 2016 - 2017**

Service	Rate	Group
Ambul	\$1.81	\$0.00
Wheel Chair	\$5.10	\$6.45
Stretcher	\$14.00	\$20.00
Leave Blank		0
Ambul	\$1.40	\$1.00
Wheel Chair	\$37.58	\$71.29
Stretcher	\$10.00	\$0.00
Leave Blank		
Ambul	\$1.81	\$3.10
Wheel Chair	\$6.45	\$6.45
Stretcher	\$0.00	\$0.00
Leave Blank		

**Rates if No Revenue Funds Were Identified As Subsidy Funds**

Service	Rate	Group
Ambul	\$3.07	\$0.00
Wheel Chair	\$5.25	\$10.95
Stretcher	\$0.00	\$0.00
Ambul	\$37.23	\$53.82
Wheel Chair	\$132.86	\$6.00
Stretcher	\$6.00	\$0.00

Program / Input Rates into Your Multiple Escorted Data

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## **Appendix C: Service Provider Contract**

Effective: 01/23/2012 to 01/22/2013

STATE OF FLORIDA  
COMMISSION FOR THE TRANSPORTATION DISADVANTAGED  
STANDARD COORDINATION/OPERATOR CONTRACT

REC'D JAN 9 12

**THIS CONTRACT** is entered into between the COMMUNITY TRANSPORTATION COORDINATOR, Suwannee River Economic Council, Inc., designated pursuant to Chapter 427, F.S., to serve the transportation disadvantaged for the community that includes the entire area of Bradford county, and hereinafter referred to as the "Coordinator" and Sunshine Industries, hereinafter referred to as the "Agency/Operator". The terms and conditions of this Contract are effective January 23, 2012 and will continue through January 22, 2013.

WHEREAS, the Coordinator is required, under Rule 41-2, F.A.C., Contractual Arrangements, to provide and/or enter into where cost effective and efficient; to enter into subcontract(s) or to broker transportation services to transportation operators; and

WHEREAS, transportation disadvantaged funds includes any local government, state or federal funds that are for the transportation of transportation disadvantaged; and

WHEREAS, the Coordinator desires to contract with the Agency/Operator for the provision of transportation services for the transportation disadvantaged; and

WHEREAS, the Coordinator believes it to be in the public interest to provide such transportation services through the Agency/Operator for the residents of the service area who are clients of the Agency/Operator; and

WHEREAS, the Agency/Operator will provide the Coordinator the opportunity to develop a proposal for any new transportation services needed; and

WHEREAS, the Agency/Operator, in an effort to coordinate available resources, will make available transportation services to the Coordinator.

WHEREAS, this Contract allows for the provisions of transportation services to be provided by the Agency/Operator, in accordance with Chapter 427, F.S., Rule 41-2, F.A.C., and the most current Community Transportation Coordinator policies.

Standard Coordination/Operator Contract  
Form

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NOW, THEREFORE, in consideration of the mutual covenants, promises and representations herein, the parties agree as follows:

THE AGENCY/OPERATOR SHALL:

- A. Provide services and vehicles according to the conditions specified in Attachment I.
- B. Coordinate available resources and make available transportation services to the Coordinator. Such services shall be provided in accordance with Attachment I.
- C. Every three (3) months, submit to the Coordinator a Quarterly Year to Date Operating Report (from the Annual Operating Report) detailing demographic, operational and financial data regarding coordination activities in the designated service area. The report shall be prepared on forms provided by the Commission for the Transportation Disadvantaged, hereinafter Commission, and according to the instructions for the forms.
- D. Comply with audit and record keeping requirements by:
  - 1. Utilizing the Commission recognized Chart of Accounts defined in the Transportation Accounting Consortium Model Uniform Accounting System for Rural and Specialized Transportation Providers (uniform accounting system) for all transportation disadvantaged accounting and reporting purposes. Agencies/Operators with existing and equivalent accounting systems are not required to adopt the Chart of Accounts in lieu of their existing Chart of Accounts but shall prepare all reports, invoices, and fiscal documents relating to the transportation disadvantaged functions and activities using the chart of accounts and accounting definitions as outlined in the above referenced manual.
  - 2. Maintaining and filing with the Coordinator such progress, fiscal, inventory and other reports as the Coordinator may require during the period of this contract.
  - 3. By reserving to the Coordinator, the right to conduct finance and compliance audits at any time. Such audits conducted by the Coordinator will be at the expense of the Coordinator.
- E. Retain all financial records, supporting documents, statistical records, and any other documents pertinent to this Agreement for a period of five (5) years after termination of this Agreement. If an audit has been initiated and audit findings have not been resolved at the end of the five (5) years, the records shall be retained until resolution of the audit findings. The Agency/Operator shall assure that these records shall be subject to inspection, review, or audit at all reasonable times by persons duly

authorized by the Coordinator or Commission or this Agreement. The Commission and the Coordinator shall have full access to and the right to examine any of the records and documents during the retention period.

- F. Comply with Safety Requirements by:
1. Complying with Section 341.061, F.S., and Rule 14-90, F.A.C., concerning System Safety or complying with Chapter 234.051, F.S., regarding school bus safety requirements for those services provided through a school board;
  2. Assuring compliance with local, state, and federal laws, and Commission policies relating to drug testing, and;
  3. Complying with Coordinator's System Safety Program Plan (SSPP) for designated service area.
- G. Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of \$100,000 for any one person and \$300,000 per occurrence, general liability insurance rate of \$100,000 each accident and disease, and a \$1,000,000 policy limit in effect at all times during the existence of this Contract. Upon the execution of this Contract, the Agency/Operator shall add the Coordinator as an additional named insured to all insurance policies covering vehicles transporting the transportation disadvantaged. In the event of any cancellation or changes in the limits of liability in the insurance policy, the insurance agent or broker shall notify the Coordinator. The Agency/Operator shall furnish the Coordinator written verification of the existence of such insurance coverage prior to the execution of this Contract. School board vehicle insurance coverage shall be in accordance with Section 234.03, F.S. and 234.211, F.S. Insurance coverage in excess of \$1 million per occurrence must be approved by the Coordinator and/or the local Coordinating Board before inclusion in this contract or in the justification of rates and fare structures, s. 41-2.006(1), FAC.
- H. Safeguard information by not using or disclosing any information concerning a user of services under this Agreement for any purpose not in conformity with the local, state and federal regulations, including but not limited to 45 CFR, Part 205.50, except upon order of a court of competent jurisdiction, written consent of the recipient, or his/her responsible parent or guardian when authorized by law.
- I. Protect Civil Rights by:
1. Complying with Title VI of the Civil Rights Act of 1964 and Section 504 of the Rehabilitation Act of 1973, as amended. The Agency/Operator gives this

assurance in consideration of and for the purpose of obtaining federal grants, loans, contracts (except contracts of insurance or guaranty), property, discounts, or other federal financial assistance to programs or activities receiving or benefiting from federal financial assistance and agreeing to complete a Civil Rights Compliance Questionnaire if so required by the Coordinator. Agency/Operator shall also assure compliance with:

- a. Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. 2000d et seq., which prohibits discrimination on the basis of race, color, or national origin in programs and activities receiving or benefiting from federal financial assistance.
  - b. Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 794, which prohibits discrimination on the basis of disability in programs and activities receiving or benefiting from federal financial assistance.
  - c. Title IX of the Education Amendments of 1972, as amended, 20 U.S.C. 1681 et seq., which prohibits discrimination on the basis of sex in education programs and activities receiving or benefiting from federal financial assistance.
  - d. The Age Discrimination Act of 1975, as amended, 42 U.S.C. 6101 et seq., which prohibits discrimination on the basis of age in programs or activities receiving or benefiting from federal financial assistance.
  - e. The Omnibus Budget Reconciliation Act of 1981, P.L. 97-35, which prohibits discrimination on the basis of sex and religion in programs and activities receiving or benefiting from federal financial assistance.
  - f. All regulations, guidelines, and standards lawfully adopted under the above statutes.
  - g. The Americans with Disabilities Act of 1990, as it may be amended from time to time.
2. Agreeing that compliance with this assurance constitutes a condition of continued receipt of or benefit from federal financial assistance, and that it is binding upon the Agency/Operator, its successors, subcontractors, transferees, and assignees for the period during which such assistance is provided. Assuring that operators, subcontractors, sub grantees, or others with whom the Coordinator arranges to provide services or benefits to participants or employees in connection with any of its programs and activities are not discriminating



against those participants or employees in violation of the above statutes, regulations, guidelines, and standards. In the event of failure to comply, the Agency/Operator agrees that the Coordinator may, at its discretion, seek a court order requiring compliance with the terms of this assurance or seek other appropriate judicial or administrative relief, to include assistance being terminated and further assistance being denied.

- J. Agency/Operator's obligation to indemnify, defend, and pay for the defense or at the Coordinator's option, to participate and associate with the Coordinator in the defense and trail of any claim and any related settlement negotiations, shall be triggered by the Coordinator's notice of claim for indemnification to the Agency/Operator. Agency/Operator's inability to evaluate liability or its evaluation of liability shall not excuse the Agency/Operator's duty to defend and indemnify within seven days after such notice by the Coordinator is given by registered mail. Only an adjudication or judgment after the highest appeal is exhausted specifically finding the Coordinator solely negligent shall excuse performance of this provision by the Agency/Operator. Agency/Operator shall pay all costs and fees related to this obligation and its enforcement by the Coordinator. The Coordinator's failure to notify Agency/Operator of a claim shall not release Agency/Operator of the above duty to defend.
- K. Comply with all standards and performance requirements of the:
1. The Commission for the Transportation Disadvantaged (Attachment II);
  2. The local Coordinating Board approved Transportation Disadvantaged Service Plan and;
  3. Any entities that purchase service.

Failure to meet the requirements or obligations set forth in this Contract, and performance requirements established and monitored by the Coordinating Board in the approved Transportation Disadvantaged Service Plan shall be due cause for non-payment of reimbursement invoices until such deficiencies have been addressed or corrected to the satisfaction of the Coordinator.

- L. Provide Corrective Action. A corrective action notice is a written notice to the Agency/Operator that the Agency/Operator is in breach of certain provisions of this Contract and that correction is required. Any corrective action notice will specify a reasonable time for corrective action to be completed. The Agency/Operator agrees to implement the Corrective Action specified in the notice and provide written documentation to substantiate the implementation of the Corrective Action.

- M. All contracts, subcontracts, coordination contracts will be reviewed annually by the Coordinator and local Coordinating Board for conformance with the requirements of this Contract.
- N. Return to the Coordinator any overpayments due to unearned funds or funds disallowed pursuant to the terms of this Contract that were disbursed to the Agency/Operator by the Coordinator. The Agency/Operator shall return any overpayment within thirty (30) calendar days after either discovery by the Agency/Operator, or notification of the Agency/Operator by the Coordinator or entity purchasing transportation, whichever is earlier. In the event that the Coordinator first discovers an overpayment has been made, the Coordinator will notify the Agency/Operator by letter of such a finding. Should repayment not be made in a timely manner, the Coordinator or purchasing entity will charge interest after thirty (30) calendar days after the date of notification or discovery, or the Coordinator will deduct said amount from future invoices.
- O. In performing this Contract, the Agency/Operator shall not discriminate against any employee or applicant for employment because of race, age, disability, creed, color, sex or national origin. Such action shall include, but not be limited to, the following: employment upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Agency/Operator shall insert the foregoing provision modified only to show the particular contractual relationship in all its contracts in connection with the development of operation of the Contract, except contracts for the standard commercial supplies or raw materials, and shall require all such contractors to insert a similar provision in subcontracts relating to the performance of this Contract, except subcontracts for standard commercial supplies or raw materials. The Agency/Operator shall post, in conspicuous places available to employees and applicants for employment for Project work, notices setting forth the provisions of the nondiscrimination clause.
- P. By execution of this Contract, the Agency/Operator represents that it has not paid and, also, agrees not to pay, any bonus or commission for the purpose of obtaining an approval of its application for the financing hereunder. Funds disbursed to the Agency/Operator under this Contract shall not be expended for the purpose of lobbying the Legislature, the judicial branch, or a state agency.

THE COORDINATOR SHALL:

- A. Recognize the Agency/Operator as described in Chapter 427, F.S., and Rule 41-2,

Standard Coordination/Operator Contract  
Form

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F.A.C.

- B. Insure that entities with transportation disadvantaged funds will purchase transportation disadvantaged services through the coordinated system.
- C. At a minimum, annually monitor the Agency/Operator for insurance, safety and reporting requirements, pursuant to Chapter 427, F.S., and Rule 41-2, F.A.C. The information contained in the Annual Operating Report must be collected, at a minimum, quarterly from the Agency/Operator.

THE OPERATOR AND COORDINATOR FURTHER AGREE:

- A. Nothing in the Contract shall require the Coordinator to observe or enforce compliance with any provision thereof, perform any other act or do any other thing in contravention of any applicable state law. If any provision of the Contract is found by a court of law to violate any applicable state law, the purchasing entity will at once notify the Coordinator in writing in order that appropriate changes and modification may be made by the Coordinator and the Agency/Operator to the end that the Agency/Operator may proceed as soon as possible with the provision of transportation services.
- B. If any part or provision of this Contract is held invalid, the remainder of this Contract shall be binding on the parties hereto.
- C. Termination Conditions:
  - 1. Termination at Will - This Contract may be terminated by either party upon no less than thirty (30) days notice, without cause. Said notice shall be delivered by certified mail, return receipt required, or in person with proof of delivery.
  - 2. Termination due to Lack of Designation - In the event that the Coordinator so designated by the local Coordinating Board and approved by the Commission, loses its designation, this contract is terminated immediately upon notification to the Agency/Operator. Notice shall be delivered by certified mail, return receipt requested, or in person, with proof of delivery. Notice shall be effective upon receipt.
  - 3. Termination due to Disapproval of Memorandum of Agreement - In the event that the Commission does not accept and approve any contracted transportation rates listed within the Memorandum of Agreement, this Contract is terminated immediately upon notification to the Agency/Operator. Notice shall be delivered by certified mail, return receipt requested, or in person, with proof of

delivery. Notice shall be effective upon receipt.

4. Termination due to Lack of Funds - In the event funds to finance this contract become unavailable, the Coordinator may terminate the contract with no less than twenty-four (24) hours written notice to the Agency/Operator. Notice shall be delivered by certified mail, return receipt requested, or in person, with proof of delivery. Notice shall be effective upon receipt. The Coordinator shall be the final authority as to the availability of funds.
  5. Termination for Breach - Unless the Agency/Operator's breach is waived by the Coordinator in writing, the Coordinator may, by written notice to the Agency/Operator, terminate this Contract upon no less than twenty-four (24) hours notice. Notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery. Waiver by the Coordinator of breach of any provision of this Contract shall not be deemed to be a waiver of any other breach and shall not be construed to be a modification of the terms of this Contract, and shall not act as a waiver or estoppel to enforcement of any provision of this Contract. The provisions herein do not limit the Coordinator's right to remedies at law or to damages.
  6. Upon receipt of a notice of termination of this Contract for any reason, the Agency/Operator shall cease service and prepare all final reports and documents required by the terms of this Contract. A final invoice shall be sent to the Coordinator within thirty (30) days after the termination of this Contract.
- D. Renegotiations or Modifications of this Contract shall only be valid when they have been reduced to writing, duly approved by the Coordinator, and signed by both parties hereto.
- E. Agency/Operator shall assign no portion of this Contract without the prior written consent of the Coordinator.
- F. This Contract is the entire agreement between the parties.
- G. Attachments I and II are an integral part of the Contract and are hereby incorporated by reference into this Contract. All subsequent attachments are of an optional nature.

ATTACHMENT I  
AGENCY/OPERATOR CONTRACT

SERVICE DESCRIPTION

1. The Agency/Operator will be able to provide:  
Type of Service – ambulatory, wheelchair
  
2. The Agency/Operator will be available to provide transportation  
6:00 AM through 6:00 PM, Monday through Friday  
  
Days Agency/Operator will not be able to provide services:  
Holidays and Sundays
  
3. Vehicles Agency/Operator will use to transport all passengers  
Attach Inventory
  
4. Vehicle/Equipment Standards (if any)  
Functioning air conditions/heating, grab rails, stanchions, first aid kits, fire extinguishers, adequate communication equipment are standard.
  
5. Driver Requirements  
Current valid license, DOT Physical, working knowledge of Coordinators SSPP, pre hire and random drug test.
  
6. Training  
Annual Driver training is required.
  
7. Agency/Operator' fare structure

H. Notice and Contact:

The name and address of the contract manager for the Coordinator for this Contract is:

Frances Terry, Executive Director  
P.O. Box 70  
Live Oak, FL 32064

The representative/position of the Agency/Operator responsible for administration of the program under this contract is:

Sherry Ruskowski, Executive Director  
P.O. Box 509  
Starke, FL 32091

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

This contract and its attachments contain all the terms and conditions agreed upon by the parties hereto.

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

AGENCY/OPERATOR:

COMMUNITY TRANSPORTATION  
COORDINATOR

Bradford ARC

Suwannee River Economic Council, Inc.

Sherry Ruskowski

Frances Terry

Typed Name of Authorized Individual

Typed Name of Authorized Individual

Signature: Sherry Ruskowski

Signature: Frances Terry

Title: EXECUTIVE DIRECTOR

Title: Executive Director

Date: 1/5/12

Date: 1-9-12

Standard Coordination/Operator Contract  
Form

9 of \_\_\_\_\_

\$1.50 per mile when providing services for Coordinator

8. Billing/Invoicing and Reimbursement procedure for Agency/Operator.

Submit invoice (if any) and reports monthly

9. Reporting Requirements

Total miles, revenue miles, trips, total drivers, total vehicles, accidents, driver hours, total transportation revenues, total expenses.

ATTACHMENT II

The Commission for the Transportation Disadvantaged  
Standards and Performance Requirements

Pursuant to Rule 41-2.006, Florida Administrative Code, the Community Transportation Coordinator and any Transportation Operator/Agency from whom service is purchased or arranged by the Community Transportation Coordinator shall adhere to Commission approved standards. These standards shall include:

- (a) Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration;
- (b) An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the local Transportation Disadvantaged Service Plan;
- (c) Child restraint devices shall be determined locally as to their use, responsibility, and cost of such device in the local Transportation Disadvantaged Service Plan;
- (d) Passenger property that can be carried by the passenger and/or driver in one trip and can be safely be stowed 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. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices;
- (e) Vehicle transfer points shall provide shelter, security, and safety of passengers;
- (f) 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 Transportation Disadvantaged Service Plan including, advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board;
- (g) 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;
- (h) 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;
- (l) Billing requirements of the Community Transportation Coordinator to subcontractors shall be determined locally by the local Coordinating Board and provided in the local Transportation Disadvantaged Service Plan. All bills shall be paid within 15 calendar days to subcontractors, after receipt of said payment by the Community Transportation Coordinator, except in instances where the Community Transportation Coordinator is a non-governmental entity;
  - (j) Passenger/trip data base must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system;
  - (k) Adequate seating for paratransit 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;
  - (l) Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders, or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle;
  - (m) The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or utilization of wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. In certain paratransit service categories, the driver may also be required to open and close doors to buildings, except in situations in which assistance in opening/closing building doors would not be safe for passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian, and driver;
  - (n) All vehicles ordered or put into service after 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. All vehicles that are not equipped with two-way communications shall have two years to be in compliance after the adoption date of this section of the Rule;

- (o) 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. All vehicles that are not equipped with an air conditioner and/or heater shall have two years to be in compliance after the adoption date of this section of the Rule;
- (r) First Aid shall be determined locally and provided in the local Transportation Disadvantaged Service Plan; and
- (s) Cardiopulmonary Resuscitation shall be determined locally and provided in the local Transportation Disadvantaged Service Plan.

LIST OF OPTIONAL ADDITIONAL ATTACHMENTS

Coordinator's Memorandum of Agreement, including Transportation Disadvantaged Service Plan (Attachment III)

Coordinator's and Local Coordinating Board's Grievance Procedures (Attachment IV)

Coordinator's Safety System Plan (Attachment V)

Annual Operating Report Instructions/Forms (Attachment VI)

Any Entities Purchasing Transportation's Standards (Attachment VII)

Any Reporting Forms (Quarterly Reports to Local Coordinating Board or Coordinator) (Attachment VIII)

Any Billing/Invoicing Forms (Attachment IX)

Current Coordinator Policies (Attachment X)

Contract Extension

Between Agency and Provider

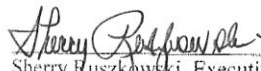
Hereby extends the Standard Coordination Contract between Suwannee River Economic Council, Inc., P.O. Box 70, Live Oak, Florida 32064 and

Coordinator Name Sunshine Industries  
~~P.O. Box 509~~ 1351 SOUTH WATER STREET  
Starke, Florida 32091


Until 02/22/14. All conditions remain the same as in original contract.

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Extension approval

  
Sherry Ruskowski, Executive Director  
Bradford ARC

2/5/13  
Date

  
Frances Terry, Executive Director  
Suwannee River Economic Council, Inc.

2/7/13  
Date

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# Appendix D: Vehicle Inventory

## 1.1. FORM C-4: CURRENT VEHICLE AND TRANSPORTATION EQUIPMENT INVENTORY (A)

Name of Applicant: Suwannee River Economic Council, Inc. Date of Inventory: 11/28/16

Model Yr. (b)	Make/size /type (C)	FDOT control # or VIN (d)	Ramp or lift (specify)	Seats & W/C positions (i.e. 12+2)	Avg. miles/Yr.	Current Mileage	Vehicle Status (Active/Spare/ Other)	Expected retirement date	Other equipment (e)	Funding source (f)
2009	Ford Cutaway	1FDPE45S79D A88334	Lift	12+2	11,378	68,273	Active	2014		FDOT 5311 STIM
2010	Ford Van	1FTNE2ELXA DA75692		ST+2	8,258	49,547	Active	2015		FDOT 5310
2009	Chevy Cutaway	1GBJG31K781 231943	Lift	8+1	17,144	102,865	Active	2014		TD-RC
2010*	Chevy Cutaway	1GBJG31K791 172605	Lift	8+1	12,639	75,834	Active	2015		FDOT 5310
2012	Chevy Cutaway	1GB3G2BG4B 1172032	Lift	8+2	25,205	100,818	Active	2017		FDOT 5310
2011	Chevy Cutaway	1GB3G2BG4B 1171589	Lift	8+2	11,458	57,291	Active	2016		TD-RC
2013	Chevy Cutaway	1GB3G2BG0D 1175402	Lift	8+2	28,694	86,083	Active	2018		FDOT 5310
2015	Chevy Cutaway	1GB3G2BG0E 1198468	Lift	8+2	32,855	65,710	Active	2020		FDOT 5310
2015	Ford Cutaway	1FDPE4FS0FD A35288	Lift	12+2	4,279	8,558	Active	2020		FDOT 5339

- (a) Applicants must use this form.
- (b) Identify vehicles to be replaced with this or other grant by placing an asterisk (\*) next to the model year. In Exhibit B of the application, provide the name of the lessee or contractor, if applicable.
- (c) For example, Ford 22' bus; Dodge converted van.
- (d) Show FDOT control number OR VIN if bought with grant through FDOT. If bought through other funding, list the complete VIN.
- (e) Include computer hardware and software, copiers, printers, mobile radios, communication systems, etc.
- (f) Identify the grant or other funding source used for purchasing the vehicle/equipment

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# Appendix E: Safety Compliance Self Certification





**Bus Transit System Annual Safety and Security Certification**

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

Certification Date (Current): 2016

Certification Year: (Previous): 2015

Name and Address of Bus Transit System: Suwannee River Economic Council, Inc.  
POB 70  
Live Oak FL 32064

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

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

Blue Ink Signature: *Matt* Date: 1/6/16  
(Individual Responsible for Assurance of Compliance)

Name: Matt Pearson Title: Executive Director

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

Name: See Attachment

Name of Qualified Mechanic who Performed Annual Inspections: See Attachment

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

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# North Central Florida Regional Planning Council

*Transportation Disadvantaged Service Plan Team*

Scott R. Koons, AICP, Executive Director

\* Lynn Franson-Godfrey, AICP, Senior Planner

\* Primary Responsibility  
\*\* Secondary Responsibility



Use the QR Reader App  
on your smart phone to  
visit our website!

# Bradford County Transportation Disadvantaged Coordinating Board

2009 NW 67th Place, Gainesville, FL 32653-1603

[www.ncfrpc.org/td](http://www.ncfrpc.org/td)

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**EXHIBIT G**

**GUIDELINES FOR THE PROBATIONARY AND ANNUAL REVIEW  
OF A COMMUNITY TRANSPORTATION COORDINATOR**

II. GUIDELINES FOR THE PROBATIONARY PERIOD OF  
A COMMUNITY TRANSPORTATION COORDINATOR

All initial CTC approvals of the TDC will be for a six month probationary period and will require the submission of a six month evaluation of CTC performance by the local CB. The six-month evaluation shall be performed six months from the date the TDC approved the designation of the CTC. A report shall be submitted to the TDC by the Planning Agency within 45 days of the evaluation, summarizing the results of the evaluation, the conclusion of the CB, and a recommendation by the Planning Agency whether or not to proceed with the current CTC.

The annual evaluation is customarily completed 2 to 3 months prior to the expiration of the MOA contract period and prior to the efforts to develop the new MOA and Service Plan. A report shall be submitted to the TDC by the local CB within 45 days of the evaluation and prior to the execution of a new MOA, summarizing the results of the evaluation, the conclusion of the local CB, and a recommendation by the Planning Agency whether or not to proceed with the current CTC.

The following guidelines are to be used as criteria for evaluating the CTC's performance:

1. The local CB is provided the flexibility to evaluate their respective CTC based on the progress made since the time of the CTC's appointment. The CB should also evaluate the CTC based on performance standards or expectations identified in the approved service plan. In addition, the CB may evaluate the level of successful compliance with any of the requirements in the (MOA), including the service plan, if they so desire.
2. Any recommended course of action by a local CB or Planning Agency which is of the nature to replace the existing CTC should be properly supported with detailed documentation explaining the recommendation.
3. The procedure for monitoring this process shall be for TDC staff to monitor the submission of these reviews and schedule only the unfavorable reviews for TDC action. Favorable reviews shall be deemed as an automatic approval by the TDC for the continuation of the existing CTC, until further TDC monitoring or review reveals the need for corrective action.

**EXHIBIT H**

**ANNUAL OPERATING REPORT INSTRUCTIONS**

Florida Commission for the



# **Transportation Disadvantaged**

## **Instructions for Completion of the Annual Operating Report (AOR)**

Prepared by:

The Commission for the Transportation Disadvantaged

605 Suwannee Street, MS-49

Tallahassee, FL 32399

(850) 410-5700



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## Introduction

Pursuant to Chapter 427, Florida Statutes, each Community Transportation Coordinator (CTC) must submit an Annual Operating Report (AOR). The Commission for the Transportation Disadvantaged (CTD) has updated the instructions for the web page reporting forms for the AOR. This report is due to the CTD by September 15<sup>th</sup> of each year. CTCs must submit electronic extension requests to the CTD Area Manager no later than September 14<sup>th</sup>.

The CTD uses these forms to gather information needed to accurately reflect each CTC's operating data, provide a statewide operational profile of the Florida Coordinated Transportation System, and evaluate certain performance aspects of the coordinated systems individually and as a whole. The CTD also uses data collected in this report to substantiate the need to seek additional funds. All information submitted is subject to confirmation by the CTD. The CTC must be able to support all information submitted in this report with documentation, which substantiates the data's compliance with the requirements of these instructions.

### **NOTE:**

- **Each CTC must maintain written documentation of source information and procedures used to complete the report. This documentation should be updated annually, available for reference when completing the next year's report, and available when the report is subject to auditing.**
- **For record keeping purposes, each CTC should print the AOR before submitting the data to the CTD. If changes are required, the AOR should be printed again to ensure the most recent figures are captured.**
- **The information submitted within the Annual Operating Report is subject to auditing. This includes information from the CTC, it's operators, and coordination agencies.**

- **Planners have read-only and print access. Planners should schedule Local Coordinating Board review of the AOR at the first available quarterly meeting. This may take place before or after submission to the CTD.**
- **After submission of the Annual Operating Report, an option to “View Annual Report” will appear at the bottom of the home screen. Only current and previous year’s data will be populated on this report.**

## General Information

The operating data submitted in this report should only be that data which meets the definitions and descriptions as identified in these instructions.

1. Use the accrual method of accounting<sup>1</sup>.
2. Round all financial data to whole numbers.
3. If you are a CTC with a multi-county service area, it is required that a separate AOR be submitted for each county. When entering/editing data within the online forms, please use the “log off” link at the top right or bottom right of the page, and then log in for the respective county.
4. This report shall only include information that pertains to transportation disadvantaged passenger services that are provided or arranged via:
  - The CTC.
  - A Transportation Provider Contract between the CTC and their transportation providers, pursuant to the requirements of Rule 41-2, FAC, and the MOA.
  - A Coordination Contract pursuant to the requirements of Rule 41-2, FAC, and the MOA. Written contract between the community transportation coordinator and an agency who receives transportation disadvantaged funds and performs some, if

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### <sup>1</sup> **Accrual Method of Accounting**

The accrual basis of accounting is used in the AOR. Using the accrual basis, expenditures will be recorded as soon as they result in liabilities for benefits received, regardless of whether or not payment of the expenditure is made in the same accounting period. Similarly, revenues are recorded when earned, regardless of whether or not receipt of revenue takes place in the same reporting period. An element of accrual accounting is that the reporter needs support that events have actually occurred that will result in the accrual of revenues or expenses. When an organization receives a contribution, grant, appropriation, or contract, whose use is limited to a specified purpose, it has not earned revenue until the funds have been spent for that purpose.

Those CTC's agencies that use cash-basis or encumbrance-basis accounting, in whole or in part must make work sheet adjustments to record the data on the accrual basis.

not all of, its own services, as well as services to others. The CTC must verify all information it receives from a coordination contractor and must be able to provide documentation of the verification during an audit.

- A written school bus utilization agreement between the CTC and a District School Board.
5. Each CTC must maintain written documentation of source information and procedures used to complete the report. This documentation should be updated annually, available for reference when completing the next year's report, and available when the report is subject to auditing.
6. This report must not include information which pertains to:
- Fixed route/fixed schedule (including fixed guide way) services, such as provided by 49 USC 5307 public transit entities **unless** the related trips were purchased through the CTC by a sponsoring social service program, agency, or entity and are not for general public services.
  - Trips delivering meals, commodities, or services are not considered passenger trips and this report shall not contain any costs, revenues, or performance information regarding such activities.

## How to Use the Forms

1. First access the site at the following link: <https://www.flctd.com/aor>.
2. Select your county name, the fiscal year of the report, enter your password and select the “Log In” button.
3. Choose a section to fill out from the navigation buttons at the top of the screen.
4. To save your work, be sure to submit your entries by clicking the save information buttons at the top and bottom of each page. Remember, if you use the navigational buttons at the top of the page without clicking the save information button, the information will be lost.
5. When clicking the buttons, make sure you wait for one button’s command to be executed before you click another one. This helps ensure smooth flow of the system processes.
6. Users may also select the Instructions button. When clicked, a new window will open with the current Annual Operations Report Instructions. Each screen will open the Instructions page to the section pertaining to that page.
7. Clicking the save information button will check the data for any errors and save the changes to the database.
8. All sections will calculate totals at the time that the numbers are entered.
9. You will receive an ISSUE message if you attempt to leave any number box blank or input data that requires a percentage change justification. You can choose justifications from the drop down box. If you select the “other” justification, you must type a clear explanation using 15 words or less.
10. If the AOR is missing information, you will receive validation alerts. Before submitting the AOR to the CTD for final review, you will need to enter information in the highlighted areas to remove the validations alerts. After you have entered the corrected information, save the data and then submit the AOR to the CTD. The validation alerts should go away. You are finished if you do not receive a validation message.

## SECTION I: Face Sheet Instructions

The FACE SHEET is a record of basic information about your agency's system. Some of this data may be completed for you based on last year's report. Please make any necessary corrections. On this page, please use appropriate capitalization rules as the data will be directly imported into a statewide report. (I.e., use Florida, not FLORIDA or florida.)

**Report Date:** Enter the current date.

**Period Covered:** Include the twelve (12) month period from July 1 to June 30 during the year for which information in this report is being submitted. If your system has not been operating under an executed Memorandum of Agreement (MOA) for the entire twelve (12) months during this reporting period, report only the time period under which an MOA was in effect.

**Coordinator's Name:** Enter the legal name of the CTC as it is listed on the MOA currently in effect or enter "New CTC Information."

**Address:** Enter the mailing address, including City and Zip Code.

**Service Area:** Enter the county in which the CTC's MOA identifies as the service area, or for multi-county CTC's, enter the county in which the data in this report applies.

**Contact Person:** Enter the name of the individual to contact with questions concerning data provided in this report.

**Title:** Enter the title of the Contact Person.

**Phone:** Enter the area code and telephone number of the Contact Person.

**Fax:** Enter the area code and fax number of the CTC.

**E-Mail:** Enter the e-mail address of the Contact Person.

**Network Type:** Enter the network type that is most appropriate for your system. Choose one of the following:

1. **Complete Brokerage:** System in which the CTC does not provide any of the on-street transportation services itself, but contracts with transportation providers (including coordination contractors) to provide all on-street transportation disadvantaged services.
2. **Partial Brokerage:** System in which the CTC provides some of the on-street transportation services and contracts with one or more other transportation providers (including coordination contractors) to provide the other portion of the on-street transportation disadvantaged services.
3. **Sole Source:** System in which the CTC provides all the coordinated on-street transportation disadvantaged services, and has no providers or coordination contractors.

**Organization Type:** Enter the most appropriate type of organization that applies to the CTC. Choose one of the following:

1. Private Non-Profit
2. Private For-Profit
3. County Government
4. Metropolitan Planning Organization
5. Public Transit Authority
6. City Government

**CTC and LCB Certification:** The CTC Representative's signature is required for electronic submission. After electronic submission, print the FACE Sheet and send it to the CTD with signatures from both the CTC Representative and LCB Chair. CTD Staff will verify LCB review in minutes submitted by the Planning Agency.

The CTC may submit the certification after the September 15<sup>th</sup> deadline, as long as it is submitted electronically in the AOR online database by that date.



## SECTION II: General Information

- 1. Provider Listing.** Record the number of total providers utilized in the coordinated system, including coordination contractors that are under written contract to provide transportation services and have submitted the required AOR information. Record the number of private non-profit and private for-profit providers. Also record the number of public, governmental agencies that are under contract with the CTC. **The CTC should be included if the coordinator provides any on-street transportation service.** This entry must have corresponding employee, trip, and expense entries.
- 2. Coordination Contractors.** Record the number of providers that are listed in Section 1 that are coordination contractors. A coordination contractor is 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. This entry must have corresponding employee, trip, and expense entries.

## SECTION III: Passenger Trip Information

A one-way passenger trip is defined as a unit of service provided each time a passenger enters the vehicle, is transported, then exits the vehicle [i.e. If a passenger travels from home to the doctor, then to a store, then home, the total number of one-way passenger trips would be three (3)]. This number should not include personal care attendants or escorts. **All information provided in these sections should be mutually exclusive in each category and therefore should not be counted twice.** ADA paratransit trips should only be included in this report when the CTC coordinates or provides trips to both ADA and TD riders on the same vehicle.

### 1. One-Way Passenger Trips by Type of Service

- a. Record the number of trips by each type of service and differentiate the trips by recording whether or not the trip was provided within or outside of the service area. If the trip originates or ends outside of the service area listed on the Face Page, the trip is considered outside the service area.
  - Fixed Route/Fixed Schedule: This is service in which the vehicles repeatedly follow a consistent time schedule and stopping points over the same route, and whereby such schedule, route or service is not at the user's request (i.e., conventional city bus, fixed guide way). This category is split into three separate sub-categories. The sub-categories titled Daily, Weekly, and Monthly passes are only for transportation systems that receive Section 49 USC 5307 funding and the person was sponsored by a funding agency. **This entry must have a corresponding Purchased Transportation Expense (bus pass) entry.**

For agencies distributing bus passes, enter the actual number of trips per pass if an automated accounting system is in place or use the following methodology:

Single Ride or Daily Pass: Counted as one (1) one-way passenger trip per pass (or token).

Weekly Pass: Counted as three (3) one-way passenger trips per pass.

30-Day or Monthly Pass: Counted as twelve (12) one-way passenger trips per pass.

If the above method for calculating one-way passenger trips is not used, the CTC shall obtain prior approval of the CTD Area Manager. The methodology used and data reported is subject to auditing and must be maintained on file with source documentation for completing the AOR.

- **Deviated Fixed Route Service.** Record the number of one-way passenger trips that are provided using a deviated fixed route system (passengers may call for a pick up at specific locations near the scheduled route), or a service route (the user may board and exit at will at pre-determined destinations).
  
- **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. For the purpose of this report, paratransit services are further delineated as Ambulatory, Non-Ambulatory, and Stretcher service.
  - **Ambulatory Service.** A paratransit trip taken by an individual who at the time of pick-up was capable of walking.
  
  - **Non-Ambulatory Service.** A paratransit trip taken by an individual who at the time of pick-up was not capable of walking without the assistance of some form of device, but did not need to be transported utilizing stretcher services. This includes wheelchairs and scooters.
  
  - **Stretcher Service.** A special form of non-emergency paratransit whereby the rider is transported on a stretcher, litter, gurney or other device.

- **Other Services.** This includes school board trips that are provided with a district school board operated bus and under the arrangements of a written school bus utilization agreement. For reporting purposes, one-way passenger trips, unduplicated passenger head count, vehicle mileage, and the associated revenues/expenses is the ONLY data that is reported. If the CTC does not arrange and/or provide Headstart Program trips, the trips cannot be counted unless a written agreement exists between the CTC and the agency.

- b. Enter the total number of trips included in Box 1a that were provided by Transportation Providers.
- c. Enter the total number of trips included in Box 1a that were provided by Coordination Contractors.

## **2. One-Way Passenger Trips – by Funding Source**

This portion of the report further identifies the number of trips purchased by each Funding Source. Record the number of trips each funding source purchased in the box by the name.

- Agency for Health Care Administration – This should include all Medicaid trips provided for HMO Brokers, if provided within the CTC’s coordinated system. Do not include Med-Waiver trips in this category.
- Agency for Persons with Disabilities – Med-Waiver and ARC trips are counted in this funding source.
- Commission for the Transportation Disadvantaged
- Department of Children and Families
- Department of Community Affairs (now known as Department of Economic Opportunity)
- Department of Education
- Department of Elder Affairs
- Department of Health
- Department of Juvenile Justice
- Florida Department of Transportation

- Local Government – ADA trips are counted in this funding source. ADA paratransit trips should only be included in this report when the CTC coordinates or provides trips to both ADA and TD riders on the same vehicle.
- Local Non-Government
- Other Federal or State Programs

**Note:** If a trip is sponsored by more than one funding source, the funding source paying for a majority of the trip should be credited with the trip.

### 3. One-Way Passenger Trips - by Type

This portion of the report further identifies each trip by the type of passenger that took the trip<sup>2</sup>.

- a. Elderly: Anyone who is sixty (60) years of age and over.
- b. Children: Anyone under fifteen (15) years of age.
- c. Other: Anyone who is neither elderly nor a child.

Each of the major categories above is then broken down into four sub-categories below:

- **Low Income:** Anyone with an income at or below the published National Poverty Level. (Current Poverty Thresholds available from the U. S. Census Bureau) <http://aspe.hhs.gov/poverty/index.cfm>
- **Disabled:** 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).

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<sup>2</sup> It is understood that in some cases this information cannot be reasonably acquired on a continuous basis. Therefore, this information may be obtained through a documented sampling process which is designed to provide a reasonable estimate of the type passenger taking the trip. If this information is obtained through a sampling process rather than actual figures, please note "yes" in the box provided on the AOR form.

- **Low Income and Disabled:** Anyone who has both a physical or mental impairment and is at or below the published National Poverty Level.
- **Other:** Anyone who is neither disabled nor low income.

#### 4. **One-Way Passenger Trips - by Purpose**

This section is to classify one-way passenger trips according to the destination of the passenger. Each listed trip is mutually exclusive and is reported in actual numbers.

- **Medical.** Anyone the CTC transported for medical reasons. Medical reasons include trips to the doctor, dentist, chiropractor, hospital or to purchase prescriptions.
- **Employment.** Anyone the CTC transported to or from a job interview, current job, or a job-related duty that is related to receiving payment for employment, including sheltered workshops, where the riders receive minimal payment.
- **Education/Training/Day Care.** Anyone who is transported to or from school, college, Vo-tech, or any other facility whose purpose it is to train, teach, or educate people, including day care for children or WAGES/Regional Workforce Boards. Sheltered workshops where payment for employment is not provided would be in this category.
- **Nutritional.** Anyone transported for reasons of receiving a meal, nutritional benefits or grocery shopping. Meals on wheels should not be included in this report.
- **Life-Sustaining/Other.** Anyone transported for the purpose of conducting personal business (e.g. Banks, social service offices, visiting spouse/parent in nursing home); and shopping, excluding grocery shopping. Or anyone transported for reasons other than the above. This could include after school programs, transporting persons against their will (e.g. Baker Act, juvenile detention), social, or recreational reasons. Volunteer workers and support groups would also be included in this category.

#### 5. **Unduplicated Passenger Head Count.**

This is the actual number of individual persons who took a trip during the reporting period, regardless of how many trips the person took. If a passenger rode in all categories (5a and 5b below), count the person in the type of service that they used most often.

- a. Include a count of all passengers who traveled on paratransit service, a deviated fixed route service, or a district school board trip and were provided transportation through the CTC, transportation providers or coordination contractors.
- b. Include all unduplicated passengers who traveled on fixed route service and were sponsored by an agency (required if fixed route trips are listed). If this information is not readily available, a sampling process may be used. This does not include the general public.

#### **6. Number of Unmet Trip Requests.**

Enter the number of one-way passenger trips which were unable to be provided or arranged through the coordinated system, for any reason, **including lack of capacity, vehicle availability, or lack of funding to sponsor the trip.** This data is used to substantiate the need for increased TD funding at the state and local level, and will not penalize the CTC.

**Unmet Trip Requests by Type of Trip.** Enter, by category, the number of each unmet trip request. Categorize by: medical, employment, education/training/daycare, nutritional, or life-sustaining/other types of trips that could not be provided.

**Reason Trip was Denied.** Enter, by category, the number of each reason a trip request could not be made. Categorize by: lack of funding, lack of vehicle availability, lack of driver availability or other.

#### **7. Number of Passenger No-shows.**

A no-show is when the passenger was scheduled to be transported but was not and did not cancel the trip within the locally established time frame. (Record a passenger who did not cancel a round trip as 1 passenger no-show.)

- **Passenger No-Shows by Funding Source.** Enter, by category, the number of

passenger no-shows by the funding agency that was to have paid for the trip. Please categorize by Agency for Health Care Administration, Agency for Persons with Disabilities, Agency for Workforce Innovation, and Commission for the Transportation Disadvantaged.

**8. Complaints.** Include any documented customer concern involving timeliness, vehicle condition, quality of service, personnel behavior and other operational policies. The number reported should be for all providers in the coordinated system and be inclusive of complaints referred by the Transportation Disadvantaged Helpline. The information reported should be categorized as service, policy, vehicles, or other.

**9. Commendations.** Commendations consist of any documented compliment of any aspect of the coordinated system, including personnel, vehicles, service, etc. The number reported should be for all providers in the coordinated system and be inclusive of commendations referred by the Transportation Disadvantaged Helpline. The commendation should be categorized as CTC, Transportation Providers, and Coordination Contractors.



## SECTION IV: Vehicle Information

### 1. Mileage Information.

Mileage information must be shown in the two major categories (Vehicle and Revenue Miles) and four sub-categories (CTC, Transportation Providers, Coordination Contractors, and School Bus Utilization Agreement). Only include mileage associated with passenger transport. Meal delivery should not be included.

**Vehicle Miles:** The total number of paratransit miles driven by the CTC and all transportation providers under contract with the CTC, while involved in the transport of Transportation Disadvantaged passengers. This includes deadhead, maintenance, and non-revenue miles. Do not include Section 49 USC 5307 fixed route/fixed schedule vehicle miles.

**Revenue Miles:** The total number of paratransit service miles driven while Transportation Disadvantaged passengers are actually riding on the vehicles. This figure should be from the first passenger pick-up until the last passenger drop-off. Do not include Section 49 USC 5307 fixed route/fixed schedule revenue miles.

**Note: The Vehicle Miles and Revenue Miles should NOT be the same. Vehicle Miles are always larger than Revenue Miles.**

### 2. Total Roadcalls

A count of paratransit "in-service" roadcalls for "mechanical" or "other" reasons during this reporting period whether the rider is transferred or not.

"In-service" is defined as the time a vehicle has begun its route to provide transportation service to the time it has completed its route. Do not include Section 49 USC 5307 fixed route/fixed schedule or deviated fixed route roadcalls.

**Roadcalls For Mechanical Failure:** A revenue service interruption caused by failure of some mechanical element of the revenue vehicle. Mechanical failures include breakdowns of air equipment, brakes, body parts, doors, cooling system, heating system,

electrical units, fuel system, engine, steering and front axle, rear axle and suspension, and torque converters.

**Roadcalls for Other Reasons:** A revenue service interruption caused by tire failure, fare box failure, wheel chair lift failure, air conditioning system, out of fuel-coolant-lubricant, and other causes not included as mechanical failures. Roadcalls exclude accidents.

### 3. Number of Accidents

The number of paratransit accidents under the appropriate category outlined below which occurred during this reporting period. Do not include Section 49 USC 5307 fixed route/fixed schedule accidents. Each category is mutually exclusive and should be broken out into chargeable (a ticket was received or the cause of the accident was the fault of the provider) or non-chargeable (a ticket was given to the other party involved in the accident or was not the fault of the provider).

**Person Only.** Total number of in-service accidents related to vehicle activity involving injury to persons only (this is not a count of injured persons). Injury to persons includes those situations where the person(s) requires transportation to a medical facility for some sort of medical attention as a result of the accident. This includes injuries sustained while entering and exiting vehicles, and may include injuries sustained from falling down a step if services are door thru door.

**Vehicle Only.** Total number of in-service accidents with damage to either vehicle or property involved in the accidents. The threshold for reporting purposes is when the damage to either vehicle or property meets or exceeds \$1,000.00.

**Person and Vehicle.** Total number of in-service accidents with both vehicle or property damage and injury to persons involved in the accidents. The definitions and thresholds for "person" and "vehicle" are the same as in the preceding two paragraphs, and for reporting purposes, accidents reported in this category only have to meet the threshold criteria for one area (i.e. person or vehicle).

#### **4. Total Number of Vehicles**

Add the number of vehicles for each transportation provider counted in Section II: 1. Provider Listing to calculate the total number of vehicles. Do not include Carrier/Alternative Provider vehicles unless they have an operator or coordination contract with the CTC.

- a. Number of wheelchair accessible vehicles. The total number of wheelchair lift/ramp equipped vehicles that operate in the coordinated system (The percentage is calculated automatically).
- b. Number of stretcher equipped vehicles: The total number of vehicles that are equipped to accommodate stretchers (The percentage is calculated automatically).  
NOTE: If you have reported one or more stretcher trips, you must include one or more stretcher equipped vehicles or a validation alert will appear.

## SECTION V: Employee Information

This section is intended to reflect an employee profile for the CTC and all transportation providers, as it pertains to the paratransit data in this report. Coordination Contractor information should be reported in item 2. In the first column record the number of employees; in the second column record the number of hours worked, if applicable.

### 1. CTC and Transportation Provider Employee Information

This section records the number of persons that the CTC and the Transportation Provider employ, and the number of driver and volunteer hours recorded. With the exception of drivers and management, if an employee serves in two different capacities list that person in either the position they were hired for, or the position they spend more time doing. Drivers and management should be noted as drivers or management employees regardless of other responsibilities. Do not include Carrier/Alternative Provider employees unless they have an operator or coordination contract with the CTC.

Add the total number of hours each driver worked for the appropriate time period. If this information is not available, calculate the number of hours worked by multiplying the total full-time drivers by 2,080 hours (assuming the driver is working 40 hours a week, 52 weeks a year. If one employee works part-time as a mechanic and a part-time driver, mark one [1] employee in the part-time driver column **only**, with 1,040 hours [20 hours a week x 52 weeks = 1,040 hours] of work in the driver hour column). Record the number of hours worked appropriately. Include any School Board employees and taxi-cab employees that are involved with providing TD services. **Do not include Section 49 USC 5307 fixed route/fixed schedule employees.**

- **Full-Time Drivers.** Enter the total number of full-time drivers the CTC or transportation provider is presently employing.
  
- **Part-Time Drivers.** Enter the total number of part-time drivers the CTC or transportation provider is presently employing.

- **Volunteer Drivers.** Enter the number of persons who drive without compensation, but may receive mileage reimbursement.
- **Maintenance Employees.** Enter the number of persons who are employed by the CTC or a transportation provider and provide maintenance services.
- **Dispatchers.** Enter the number of persons whose primary responsibility is to provide dispatch services.
- **Schedulers.** Enter the number of persons whose primary responsibility is to provide scheduling services.
- **Call Intake/Reservationist/Customer Service.** Enter the number of persons whose primary responsibility are to intake calls, set the reservations or provide customer service.
- **Other Operations Employees.** Enter the number of persons who work in some capacity, but are not listed in any other category.
- **Other Volunteers.** Enter the number of persons who assist in the aspects of service delivery, and do not drive, without compensation.
- **Administrative Support.** Enter the number of persons involved in the administrative support of the system, including bookkeeper, custodial, security, planning, marketing and program development.
- **Management Employees.** Enter the number of persons involved in the management of the system, including transit director, route supervisor, operations manager or planning manager.

## 2. Coordination Contractor Employee Information

Use the preceding category definitions to complete the coordination contractor employee information.

## Financial Data

The revenue and expense reports shall reflect fully allocated cost figures for administrative and operating costs. During the twelve month reporting period, this information corresponds to the passenger trip and vehicle mile operating data for your total coordinated system.

Remember, when the AOR is submitted to the CTD, it represents figures for the entire system. Transportation Providers and Coordination Contractors' detailed financial expense and revenue information should be provided not only for reporting purposes, but for justification purposes in the annual review of those contracts.

Each CTC must maintain written documentation of source information and procedures used to complete the report. This documentation should be updated annually, available for reference when completing the next year's report, and available when the report is subject to auditing.

### **1. Detailed Revenue and Trips Provided By Funding Source**

Enter the dollar amount under the appropriate line item of each revenue source. Separate by CTC/Transportation Providers and by Coordination Contractors.

### **2. Expenses Categories**

This table is a breakdown of expenses. The object codes next to the expense categories will assist you in categorizing the expenses. Separate the expenses of the CTC, the Transportation Providers and the Coordination Contractors.

## **SECTION VI: Revenue Sources**

### **Chart of Accounts**

Revenue sources with multiple “other” fields should be reported consistently year over year in the same “other” field. Moving the field where revenues are reported will cause validation alerts. Example, under “Other Federal and State Programs” there are three “other” fields. If last year a grant was reported in the second “other” field, use the second “other” field to report that same grant in this year’s report. If there is a line item for a designated funding source, use the line item rather than the “other” field.

### **Agency for Health Care Administration**

- Medicaid Non-Emergency - Revenue received for the provision of non-emergency transportation through a contract with an HMO Broker. This does not include Med-Waiver revenues.

### **Agency for Persons with Disabilities**

- Developmental Services (Residential, Independent Living, Client Services) - Revenues received for the provision of services for the Development Services program. This includes Med-Waiver and ARC revenues.

### **Commission for the Transportation Disadvantaged**

- Non-Sponsored Trip Program - Revenues received from the CTD for the purpose of providing Non-Sponsored trips and included in the funding allocation of the reporting year.
- Non-Sponsored Capital Equipment Program - Revenues received from the CTD Trip and Equipment Grant for the purpose of purchasing capital equipment to administer and provide transportation for the Non-Sponsored program.
- Rural Capital Assistance Grant (i.e. Shirley Conroy Grant) - Revenues received from the CTD for the purpose of purchasing capital equipment to administer and provide transportation for the TD program.
- TD Other - Revenues received from the CTD for the purpose of providing Non-

Sponsored trips, but not included in the funding allocation of the reporting year. For the 2016-17 reporting year, this will include the Mobility Enhancement Grant.

### **Department of Children and Families**

- Alcohol, Drug Abuse and Mental Health - Revenues received for the provision of services for the Alcohol, Drug Abuse and Mental Health program.
- Family Safety and Preservation - Revenues received for the provision of services for the Family Safety and Preservation program.
- Aging and Adult Service - Revenues received for the provision of services for the Aging and Adult Service program.
- Other DCF - Revenues received for the provision of services for any other Department of Children and Families program.

### **Department of Community Affairs (now known as Department of Economic Opportunity)**

- Community Service Block Grants - Community Service Block Grants, Hospice, and Community Action programs.
- Other DCA Revenues - Revenues received for the provision of services for a Department of Community Affairs program.

### **Department of Education**

- Carl Perkins Vocational Educational Act - Revenues received for the provision of services for the Carl Perkins Vocational Education Act.
- Division of Blind Services - Revenues received for the provision of services for the DBS.
- Vocational Rehabilitation - Revenues received for the provision of services for the Vocational Rehabilitation.
- Day Care Programs - Revenues received for the provision of services for Day Care programs administered through the Department of Education.
- Other - Revenues received for the provision of services for any other Department of Education program.(i.e., Pre-K programs and adult literacy)

### **Department of Elder Affairs**



- Older Americans Act - Revenues received for the provision of services provided under the OAA or Title IIIB.
- Community Care for the Elderly - Revenues received for provision of services for the Community Care for the Elderly program.
- Other - Revenues received for the provision of services for any other Department of Elder Affairs program.

### **Department of Health**

- Children's Medical Services - Revenues received for the provision of services for the Children's Medical Services program.
- County Public Health Units - Revenues received for service through the County Public Health Units.
- Division of Disability Determination Program - Revenues received for the provision of providing services for the Disability Determination Program.

### **Department of Juvenile Justice**

- Juvenile Justice - Revenues received for the provision of services for the Department of Juvenile Justice.

### **Department of Transportation**

- Section 5307 Grants to urbanized areas and states for transit-related purposes.
- Section 5310 Funds are used to provide transportation services to meet the special needs of the elderly and persons with disabilities. **Note: The match for these funds should be reported under local non-government if a private CTC or local government if a governmental CTC.**
- Section 5311 Eligible Recipients are State and local governments, non-profit organizations (including Indian tribes and groups), and public transit providers for non-urbanized area service. Funds may be used for capital, operating, and administrative purposes.
- Section 5316 Job Access-Reverse Commute (JARC) funds are for projects that assist welfare recipients and eligible low-income individuals in accessing jobs and other employment-related activities, as well as reverse commute projects

transporting those in urban areas to suburban employment opportunities.

- Section 5317 New Freedom funds are for new public transportation services and service alternatives beyond those required by the American with Disabilities Act (ADA), assisting individuals with disabilities, including transportation to and from employment.
- Block Grant- Revenue received through a Block Grant program for the purpose of operating within the coordinated system.
- Service Development - Revenue received through the Service Development program for the purpose of operating within the coordinated system.
- Community Assistance Program - Revenue received through a community assistance program funded through FDOT for the purpose of operating services within the coordinated system.
- Other (DOT) - Other revenue received through DOT for the purpose of providing services within the coordinated system, such as the ridesharing program.

### **Local Government**

- District School Board Service - Revenues received for the provision of services for the local district school board.
- Complementary ADA Service - Local governmental funds received for ADA complementary paratransit service. ADA paratransit revenues should only be included in this report when the CTC coordinates or provides trips to both ADA and TD riders on the same vehicle.
- County Cash - Revenues received for the provision of services from the local county government.
- County In-Kind - Revenues received from a county in the form of a contribution or donation.
- City Cash - Revenue received for the provision of services from the city or municipality.
- City In-Kind - Revenues received from a city or municipality in the form of a contribution or donation.
- Other Cash - Revenues received for the provision of services from other local government sources.
- Other In-Kind - Revenues received from other local governmental organizations,

not properly classified as city, county or school board, in the form of contribution or donation from local governmental agencies.

- **Note: A governmental CTC should report the 5310 match under Local Government.**

### **Local Non-Government**

- Fare box - Amount required as payment by the rider
- Donations, Contributions - Any funds received through donations for the purpose of operating the coordinated system.
- In-Kind / Contributed Services - Any services that were donated for the purpose of operating the coordinated system (i.e. - volunteer employees that donated their service to the operations of the CTC, parking lots, and buildings from non-governmental sources).
- Other Non-Government - Any revenue received from local non-government entities for the purpose of operating the coordinated system. Revenues received from the following are examples of other non-government revenue: hospitals and clinics, schools and universities, United Way, YMCA, maintenance repairs, local match, interest income, advertising, charter services, and sale of equipment.
- **A non-governmental CTC should report the 5310 match under Local Non-Government.**

### **Other Federal or State Programs**

- Revenues received for the provision of services for any other Federal or State programs not classified in another category.

## SECTION VII: Expense Sources

For additional clarification of categories below, please refer to the “Rural Transportation Accounting” document located at:

<http://www.dot.state.fl.us/ctd/docs/DoingBusinessDocs/Chart%20of%20Accounts-Rural%20Transportation%20Accounting%20Consortium-1986%20Complete%20Report.pdf>.

### Labor (501)

- Operator/Driver Salaries and Wages - the labor of employees of the coordinated system who are classified as revenue vehicle operators/drivers or crew workers.
- Training Salaries and Wages - the labor of employees of the coordinated system who are being trained.
- Dispatcher Salaries and Wages - the labor of employees of the coordinated system who are classified as vehicle dispatchers.
- Administrative Salaries and Wages - the labor of employees of the coordinated system who are classified as administrative (e.g. bookkeeper, support staff).
- Management Salaries and Wages - the labor of employees of the coordinated system who are classified as management (e.g. manager, supervisor, executive director).
- Scheduler Salaries and Wages - the labor of employees of the coordinated system who are classified as schedulers.
- Call Intake, Customer Service Salaries and Wages - the labor of employees of the coordinated system who are classified as call intake or customer service.
- Vehicle Maintenance Salaries and Wages - the labor of employees of the coordinated system who are classified as vehicle maintenance.
- Other Salaries and Wages - the labor of employees of the coordinated system that are not properly categorized into one of the labor categories provided.

## **Fringe Benefits (502)**

- Providers - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as revenue vehicle operators or crew workers.
- Training - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as being trained.
- Dispatcher - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as vehicle dispatchers.
- Administrative - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as administrative (e.g. support staff or bookkeeper).
- Management - payments or accruals, in addition to wages and salaries, paid directly to or on behalf of employees of the coordinated system who are classified as management (e.g. managers, supervisors, executive director).
- Scheduler - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as schedulers.
- Call Intake and Customer Service - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as call intake or customer service.
- Vehicle Maintenance - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system who are classified as vehicle maintenance.
- Other - payments or accruals, in addition to wages or salaries, paid directly to or on behalf of employees of the coordinated system that are not properly categorized into one of the labor categories provided. (i.e., unemployment insurance, uniform allowance)

## **Services (503)**

- Management Service Fees - the labor and services provided by a Management Service Company (MSC) engaged to provide operating management to the

coordinated system. This category covers both the continuing labor and services of MSC personnel devoted full time to the coordinated system and the occasional consulting and special purpose studies provided by MSC.

- Advertising Services Fees - the labor and materials provided by an advertising agency in the development and production of advertising campaigns. (Advertising media fees, regardless of whether they are paid to the advertising agency or directly to the media, are included in object class miscellaneous (509).
- Professional and Technical Services - The labor and services provided by attorneys, accountants and auditors, investment bankers, computer service companies, engineering firms, management consultants, transit industry consultants, etc. These services generally require specialized technical knowledge and are usually performed under the supervision of the outside organization, rather than transit system personnel.
- Other Services - All costs for services provided that are not categorized above. These charges may include, but are not limited to, the following; bank service charges, lawn maintenance service, uniform cleaning service, maintenance services, and custodial services.

#### **Materials and Supplies Consumed (504)**

- Fuel and Lubricants Consumed - costs of gasoline, diesel fuel, propane, lubricating oil, transmission fluid, grease, etc., for use in all vehicles operated within the coordinated system.
- Tires and Tubes Consumed - cost of tires and tubes for replacement of tires and tubes on vehicles operated within the coordinated system. Lease payments for tires and tubes rented on a time period or mileage basis.
- Inventory Purchases - items purchased for immediate consumption such as vehicle maintenance parts, cleaning supplies and office forms.
- Other Materials and Supplies Consumed - cost of materials and supplies not specifically identified in above categories and purchased for immediate consumption, or to establish bench stock e.g., vehicle maintenance parts, cleaning supplies, office forms, etc.

**Utilities (505)**

- Telephone - telephone service purchased from the telephone company, including long distance and leased lines. Cellular telephone service purchased from cellular telephone provider. Does not include yellow pages advertising.
- Others - the electrical power purchased from an outside utility company and used for all purposes, except telephone.

**Casualty and Liability (506)**

- Premium for Physical Damage Insurance - premiums applicable to an accounting period to insure the coordinated system from losses through damage to its own property caused by collision, fire, theft, flood, hurricane, etc.
- Premium for Public Liability & Property Damage - premiums applicable to an accounting period to insure the coordinated system against loss from liability for its acts which cause damage to the person or property of others.
- Other - all costs for insurance not properly classified in the above categories.

**Taxes (507)**

- Property Tax - the tax levied by the state and/or local government against the coordinated system based on a valuation of the property owned by the coordinated system.
- Vehicle Licensing and Registration Fees - the fees assessed by federal, state, and local governments for granting authority to operate a motor vehicle.
- Other Taxes - taxes levied by federal, state, and local governments against the coordinated system and not properly classifiable in the above categories.

## **Purchased Transportation Services (508)**

### **Purchased Bus Pass Expenses:**

- Expenses accrued through the purchase of bus passes/tickets.
- Reported as “Fixed Route/Fixed Schedule,” “Daily Trip Tickets, Weekly Passes, or Monthly Passes” “Within and Outside” the Service Area. NOTE: If you have reported bus pass trips, you must report bus pass expense.
- Deviated Fixed Route Service should NOT be reported in this section.
- Within the coordinated system and for transportation disadvantaged persons only.

### **School Bus Expenses:**

- Expenses accrued through the utilization of school buses within the coordinated system.

### **Other:**

- Expenses accrued by purchasing transportation from Common Carriers/Alternative Providers such as, Greyhound, stretcher services, and/or emergency back-up taxi service. This would include the use of Transportation Network Companies (TNCs).
- Providers should report all expenses on this line.
- May include provider expense for those providers that were unable or unwilling to split out expenses as requested.

## **Miscellaneous (509)**

- Dues and Subscriptions - fees for membership in industry organizations and subscriptions to periodical publications.
- Travel and Meetings - fares and allowances for transportation of coordinated system employees and related officials on airplanes, trains, etc. This includes expenses for food and lodging, charges for participation in transportation conferences and other related business meeting expenses.
- Advertising/Promotion Media - advertising media fees and expenses, regardless of whether they are paid to an advertising agency or direct to the media. The labor and materials provided by an advertising agency in the development and production of



advertising campaigns is included in object class Services (503) advertising services.

- Uncollected Medicaid Co-payments - expenses accrued by the coordinated system due to the non-payment of the Medicaid co-payment.
- Other - other expenses incurred such as fines, penalties, and bad debt expense.

### **Interest (511)**

- Interest on Long-Term Debt Obligations - charges for the use of borrowed capital on a long-term basis (the liability for which is usually represented by debt instruments such as equipment obligations, bonds, etc..) employed in the operation of the coordinated system. Interest charges pertaining to construction debt which are capitalized will not be reflected as interest expense. This is an obligation that lasts longer than one year.
- Interest on Short-Term Debt Obligations - charges for the use of borrowed capital on a short-term basis used in the operation of the coordinated system. This is an obligation that is for less than one year and is federally allowable.

### **Leases and Rentals (512)**

- Passenger Revenue Vehicles - leases and rentals of rolling stock used exclusively or predominately for providing passenger transit services within the coordinated system.
- Service Vehicles - leases and rentals of rolling stock used for purposes other than providing passenger transit services within the coordinated system.
- Office equipment - lease and rentals of equipment used in the coordinated system.
- Other - leases and rentals of the physical facilities or other items (e.g. land, office space, building, equipment other than office equipment, furnishings, and storage space) that are used for performing the general administrative functions of the coordinated system.

### **Annual Depreciation (513)**

- Passenger Revenue Vehicles - depreciation of rolling stock used exclusively or predominately for providing passenger transit services within the coordinated system. When calculating depreciation for revenue vehicle purchased through a grant and match program, you are allowed to report in the entire year's depreciation in the AOR. For example: a \$50,000 vehicle depreciated over 5 years would result in \$10,000 worth of depreciation. Therefore, you would report \$10,000 for depreciation.

- Service Vehicles - depreciation of rolling stock used for purposes other than providing passenger transit services within the coordinated system.
- Vehicle Storage and Dispatch Center - depreciation of the physical facilities (e.g. buildings/ structures, office equipment, equipment, equipment other than office equipment, and furnishings) that are used for storing revenue vehicles and for dispatching vehicles for revenue service.
- Maintenance Equipment and Facilities - depreciation of the physical facilities (e.g. buildings/structures, office equipment, equipment other than office equipment, and furnishings) that are used for maintenance facilities for revenue vehicles.
- Data Processing Equipment - depreciation of the physical facilities (e.g. buildings, if devoted exclusively to data processing services, office equipment, other equipment, particularly main frame and auxiliary computer equipment, furnishings) that are used for performing data processing services.
- Other - depreciation of the physical facilities or other items (e.g. buildings, office equipment, amortization of intangibles, other equipment and furnishings) used for performing the general administrative functions of the transit system.

### **Contributed Services (530)**

- The value of services provided at no cost to the Community Transportation Coordinator where the value of the service can be claimed as an allowable source of revenue. This expense item should be equal to the revenue account titled contributed services. This category covers the receipt of services (not cash) from another entity where such services benefit the coordinated system operations and the coordinated system provider is under no obligation to pay for the services.

### **Allocated Indirect Expenses (if applicable)**

- Expenses directly related as an expense to the coordinated system but indirectly accrued through another source (e.g. when a Community Transportation Coordinator occupies part of a county or private building and therefore owes a portion of the overall building).

**EXHIBIT I**

**2017/18 TRIP AND EQUIPMENT GRANT APPLICATION**

Florida Commission for the



**Transportation  
Disadvantaged**

FISCAL YEAR 2017-18  
PROGRAM MANUAL AND APPLICATION  
FOR THE  
TRIP & EQUIPMENT GRANT

Issued By:

FLORIDA COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

605 Suwannee Street, Mail Station 49

Tallahassee, Florida 32399-0450

850-410-5700

[www.fdot.gov/ctd](http://www.fdot.gov/ctd)

# **INTRODUCTION**

The Transportation Disadvantaged Trust Fund is administered by the Florida Commission for the Transportation Disadvantaged (Commission), pursuant to Section 427.0159, Florida Statutes. The purpose of the Transportation Disadvantaged Trust Fund is to provide a dedicated funding source for the operational and planning expenses of the Commission in carrying out its legislative responsibilities. The trust fund is appropriated by the Legislature annually from revenues collected from vehicle registrations and voluntary contributions. The Trip & Equipment Grant program was established to provide opportunities for non-sponsored transportation disadvantaged citizens to obtain access to transportation for daily living needs when they are not sponsored for that need by any other available federal, state or local funding source. This is a reimbursement grant. Grantees must provide service or procure capital equipment before seeking reimbursement.

This manual contains information regarding the Transportation Disadvantaged Non-Sponsored Trip & Equipment Grant Program administered by the Commission. Its purpose is to provide program guidance to Community Transportation Coordinators (CTCs) when planning and implementing non-sponsored transportation disadvantaged services and purchasing equipment under this program.

This manual is divided into two parts: Program Requirements and the Grant Application Instructions and Forms.

# PART I

## TRIP & EQUIPMENT GRANT PROGRAM REQUIREMENTS

This part of the manual contains requirements of the Trip & Equipment Grant.

### 1. ELIGIBILITY INFORMATION

#### A. Eligible Recipients

For this grant cycle, an eligible recipient is any current Commission approved CTC who has an executed Memorandum of Agreement (MOA) and Transportation Disadvantaged Service Plan (TDSP). The recipient of these funds will be referred to as the Grantee.

#### B. Allowable Expenditures

The grant funds allocated from the Transportation Disadvantaged Trust Fund are for the specific purpose of reimbursing the CTC for a portion of the cost of each passenger trip provided to eligible non-sponsored transportation disadvantaged individuals, or for equipment to be utilized in the designated service area. The Trip & Equipment Grant funds are to be expended and utilized in accordance with Chapter 427, Florida Statutes; Rule 41-2, Florida Administrative Code; Commission policies; the grant agreement; and this grant manual.

The Grantee shall not use grant funds to supplant or replace funding of transportation disadvantaged services that are currently funded by any federal, state, or local governmental agency. The grant funds shall not be used as a system subsidy to cover other operating costs or deficits.

The following is a detailed description of the two areas for which these grant funds may be utilized.

**(1) Non-sponsored trips:** A non-sponsored trip is a one-way trip for an eligible individual who meets the definition of transportation disadvantaged and is not sponsored by any other federal, state, or local government program. These trips are coordinated by the Grantee and can be provided by any conveyance, either publicly or privately owned. These trips originate and/or end in the Grantee's service area for the purpose of health care, shopping, education, employment, recreation, or other life sustaining activities. There shall be an approved eligibility application for each rider who receives a non-sponsored service (trip or bus pass). This documentation shall be made available upon request by CTD Staff or a designee.

Personal care attendants (PCAs), escorts, and companions of eligible individuals are not an eligible reimbursement expense. However, they are recognized as a cost of doing business and should be accounted for when determining a rate structure.

**(2) Capital Equipment:** Capital equipment is any equipment used to maintain or provide improved or expanded transportation services to the transportation disadvantaged and is utilized within the Grantee's coordinated system.

Eligible capital equipment may include, but is not limited to:

- a. Paratransit vehicles, including small buses, vans, or sedans;
- b. Wheelchair lifts, ramps, restraints, or other safety equipment;
- c. Two-way radios and communications equipment (TDD -Telecommunications Device for the Deaf), cell phones, excluding annual service contracts;
- d. Computer hardware/software;
- e. Support equipment, other than items specifically identified in this section, above \$500 per piece;
- f. Vehicle procurement, testing, acceptance inspection, and vehicle rehabilitation when the rehabilitation extends the life of the vehicle one year beyond the original expectancy; or
- g. Initial installation or set-up costs of any of the above items.

Capital equipment does not include the acquisition, construction, or improvement of facilities. In addition, funding cannot be used for extended warranties or maintenance or service agreements beyond those included with the initial purchase of the capital equipment.

## **2. GRANT FUNDING**

Each year, the Commission will calculate each service area's allocation in accordance with 41-2, FAC. Each service area's anticipated eligible allocation is subject to change based on annual appropriations approved by the Legislature.

A maximum of twenty-five percent (25%) of the total Trip & Equipment Grant project budget can be used for the purchase of capital expenditures. Voluntary dollar contributions can only be used to purchase non-sponsored trips and cannot be used to fund capital equipment.

### **LOCAL MATCH REQUIREMENT**

All match funding must be documented, reasonable, necessary, and related to this project.

- (1) Trip & Equipment Match - This grant program provides ninety-percent (90%) funding and requires a ten-percent (10%) local cash match generated from local sources. No state or federal government revenues are acceptable as local match.

Examples of cash generated from local sources include local appropriations, dedicated tax revenues, private donations, net income generated from advertising and concessions, contract revenues, and farebox revenues.

- (2) Voluntary Dollar Contribution Match - A ten-percent (10%) local cash or in-kind match for the voluntary dollar contributions is required. All in-kind match used as a funding mechanism must be equivalent to a cash value and be documented, reasonable, necessary, and related to this project.

Examples of in-kind match that are acceptable to the Commission include non-cash donations, volunteered services, or salaries and fringe benefits. Any service provided with State or Federal government revenues is not accepted as in-kind match.

**FUNDING PARTICIPATION FORMULA**

	Allocation for Non-Sponsored Trip & Equipment Grant	Voluntary dollar contribution for Non-sponsored Trips
State	90%	90%
Local cash match	10%	
Local cash or in-kind match		10%
TOTAL	100%	100%

**3. GRANT APPROVAL**

All grants are subject to approval by the Commission or its designee. Once documentation of capital equipment needs, rate model calculation spreadsheets, fixed route service rates, and other information is confirmed, a grant agreement will be forwarded to the recipient for execution.

Costs incurred prior to grant agreement execution cannot be charged to the project, nor will the Commission give retroactive grant agreement execution. Costs incurred by a recipient to prepare and file this agreement are not eligible project costs.

**4. INVOICING**

Invoices for Transportation Disadvantaged Trust Funds will not be honored until the grant agreement has been executed by both the Commission and the Grantee, and is on file at the Commission office. Funds will be expended at the fare structure contained in the approved Transportation Disadvantaged Service Plan and Exhibit B of the grant for the particular type or mode of service. Invoices related to this grant agreement shall be completed in accordance with the Commission’s most current Invoicing Procedures for the Provision of Transportation and Capital Equipment.

**5. CAPITAL EQUIPMENT ADDITIONAL INFORMATION**

All capital equipment purchases made with funds from the Transportation Disadvantaged Trust Fund shall be reviewed by the Local Coordinating Board (LCB) and approved by the Commission prior to grant execution. Equipment purchased shall meet or exceed any applicable Commission accepted minimum specifications. The Commission accepts any specifications by any local, state, or federal government department.



If the Grantee decides to purchase vehicles or other equipment after the date of the Agreement, the Grantee must request the Commission amend the grant to include such equipment. An amended Trip & Equipment Grant Application Form reflecting the capital equipment, reviewed and signed by the LCB, shall be provided to the Commission prior to execution of the amendment. Such amendments must be requested and approved no later than March 31<sup>st</sup>.

All vehicles purchased with Transportation Disadvantaged Funds shall be titled to the Grantee, with a lien to the Florida Commission for the Transportation Disadvantaged.

Grantees who intend to utilize project vehicles for demand response services should ensure that such services offered to individuals with disabilities, including individuals who use wheelchairs, are equivalent to the level and quality of service offered to individuals without disabilities.

The Grantee may only purchase vehicles with Transportation Disadvantaged Trust Funds that the Grantee actually uses to transport eligible transportation disadvantaged passengers in the coordinated system. The Grantee shall notify the Commission in writing of any lease or assignment of operational responsibility of project vehicles and equipment to third-parties.

The Commission shall retain a majority of the interest in all capital equipment until the useful life of such equipment, as defined by the Commission's Capital Equipment Policy, has been expended. At that time, the grantee may dispose of such equipment with the written permission of the Commission in accordance with the Commission's Capital Equipment Procedures.

Grantees are required to insure vehicles in accordance with requirements of Chapter 427, F.S. Each vehicle or other capital equipment purchase must have insurance coverage for liability, collision, or other property loss. The Commission must be made an additional insured for liability policies and the loss payee for collision or property insurance coverage.

The Commission may, after consultation with the Grantee and LCB, transfer any equipment purchased under this grant at such time that it deems the equipment to be underutilized or that it is not being operated for its intended purpose.

Prescribed inspection schedules, published by the equipment manufacturer(s), shall be adhered to and appropriately documented to protect the equipment warranties. Preventative maintenance inspection checklists, work (or repair) order which adequately record labor actions, parts replaced, consumables added and any sub-contracted repairs are considered essential records for documentation. The eligible recipient will be responsible for maintenance of software.

# **PART II**

## **TRIP & EQUIPMENT GRANT**

### **APPLICATION INSTRUCTIONS AND FORMS**

#### **GENERAL INSTRUCTIONS**

Presented in this part are specific instructions on the preparation of the grant application forms. Although specific instructions on the preparation of the grant application are provided, additional assistance may be obtained by contacting the Commission at (850) 410-5700.

- A. A complete application package shall be submitted to the Commission and consist of the following forms: Trip & Equipment Grant Application, the Service Rates, Authorizing Resolution, and the Standard Assurances. The application package can be submitted to the assigned CTD project manager via email, with signed originals to follow via mailed to the Commission for the Transportation Disadvantaged, 605 Suwannee Street, MS-49, Tallahassee, FL 32399.
- B. Local Coordinating Board review is not required for this application unless a request for capital equipment is included as part of the total project budget. The LCB Chair must sign the grant application indicating that it has been reviewed by the LCB. The LCB review may be obtained after the grant application is submitted, but must be received by the Commission prior to the final execution of the grant.
- C. The grant agreement must contain the rates that will be charged for the services provided to those who are transportation disadvantaged. Except for rates from fixed route providers, an updated Rate Model Calculation Spreadsheet must be provided to support the rates listed on the Service Rates Form for the non-sponsored services. The rate model worksheets are required to be reviewed by the LCB and incorporated into the Transportation Disadvantaged Service Plan. The Trip & Equipment Grant agreement will not be prepared without an LCB approved rate.

#### **TIMETABLE**

**JULY 1** Earliest date that grant agreements can be effective for these grant funds. The Commission's fiscal year begins on July 1<sup>st</sup> each year. Contracts not executed prior to July 1 will begin on the date of execution.

**MARCH 31** Last day to request Capital Equipment grant amendments.

**JUNE 30** All Grant Agreements will terminate on June 30<sup>th</sup> the following year.

**AUGUST 15** Deadline for final invoices.

## **TRANSPORTATION DISADVANTAGED TRIP & EQUIPMENT GRANT APPLICATION INSTRUCTIONS AND FORMS**

Except for the following notes, the grant application forms are essentially self-explanatory. If questions arise, please contact the Commission.

### **TRIP & EQUIPMENT GRANT APPLICATION**

LEGAL NAME: The full legal name of the applicant's organization, not an individual. Name must match the Federal ID number and the information that is registered with MyFloridaMarketPlace.

FEDERAL EMPLOYER IDENTIFICATION NUMBER: The number used by all employers within the United States to identify their payroll and federal income tax. Name must match Federal ID number and the information that is registered with MyFloridaMarketPlace.

REGISTERED ADDRESS: This should be the grant applicant's mailing address as registered in MyFloridaMarketPlace and will be the address on the grant agreement. This address shall also be consistent with the address associated with your Federal Employer Identification (FEI) Number.

CONTACT PERSON, PHONE NUMBER, AND E-MAIL ADDRESS: Provide the name of the person who will be the point of contact, their phone number and email address.

PROJECT LOCATION: This is the service area [county(ies)] that the applicant operates in, as identified in the Memorandum of Agreement and the Transportation Disadvantaged Service Plan. CTCs who serve several different service areas should complete a separate application form for each service area.

PROPOSED PROJECT START DATE: The start date shall be July 1<sup>st</sup> each state fiscal cycle or date of grant agreement execution if later than July 1st.

BUDGET ALLOCATION: Using the Commission approved Trip & Equipment Grant Allocations chart, complete each funding category as appropriate. Once each line item is complete, right click on the space provided for the "Total Project Amount." Select "update field" from the drop down box. This will automatically calculate the total project amount.

CAPITAL EQUIPMENT REQUEST: Provide a detailed description and estimated total cost of equipment to be purchased with grant funds. Ensure funds requested do not exceed 25% of total project costs.

LOCAL COORDINATING BOARD (LCB) REVIEW: The LCB is only required to review the application if the CTC is using project funds for capital equipment. If applicable, the LCB Chairman must certify, by signing the application, that the LCB has reviewed the grant application.

## **SERVICE RATES FORM**

Complete the Service Rates Form listing the selected passenger mile or passenger trip rates from the approved Rate Model and as listed in the Transportation Disadvantaged Service Plan. Include Fixed Route Bus Pass (Daily, Weekly, Monthly, etc.) costs if grants funds will be used to purchase these types of transportation services. The passes purchased with this grant must be used for Transportation Disadvantaged eligible riders who have been approved for TD services. There shall be an approved eligibility application for each rider who receives a non-sponsored trip or bus pass. This documentation shall be made available upon request by CTD staff or a designee.

## **SAMPLE AUTHORIZING RESOLUTION**

A resolution authorizing an individual and/or position to sign the grant agreement, amendments, assurances, etc., must be completed by the recipient's governing body. A sample resolution is provided for convenience. It is not required that this sample resolution be used as long as the same basic information is included. The resolution must include signatures. Remember that the resolution can be good for an extended period or for multiple contracts if worded accordingly. The signed resolution may be submitted after the submission of the application but prior to the grant agreement execution.

## **STANDARD ASSURANCES**

The Standard Assurance form should be signed and dated by the person or position identified in the authorizing resolution.

# TRIP & EQUIPMENT GRANT APPLICATION DOCUMENTS

- Application Form
- Service Rates Forms
- Standard Assurances
- Sample Authorizing Resolution

\*Actual forms are "Fill-In" documents and are provided separately.\*



## Transportation Disadvantaged Trip & Equipment Grant Application Form



<b>Legal Name</b>			
<b>Federal Employer Identification Number</b>			
<b>Registered Address</b>			
<b>City and State</b>		<b>Zip Code</b>	
<b>Contact Person for this Grant</b>		<b>Phone Number</b> <i>Format 111-111-1111</i>	
<b>E-Mail Address (Required)</b>			
<b>Project Location (County(ies))</b>		<b>Proposed Project Start Date</b>	
<b>Budget Allocation</b>			
	Planning Funds Transferred from Planning Agency		
	Grant Amount – State Allocation (90%)		
	Grant Amount – Local Match (10%)		
	Grant Amount – Proviso (90%)		
	Grant Amount – Proviso Match (10%)		
	Voluntary Dollar Amount		
	Local Match for Voluntary Dollars [In Kind]		
	<b>Total Project Amount</b>		<b>\$ 0.00</b>

Capital Equipment Request	
Description of Capital Equipment	\$ Amount

*Local Coordinating Board Review IS Required if Requesting Capital Equipment*

*If the purchase of capital equipment is included in this Application Form, the application has been reviewed by the \_\_\_\_\_ Local Coordinating Board.*

\_\_\_\_\_  
*Signature of Local Coordinating Board Chairperson*

\_\_\_\_\_  
*Date*

I, the authorized Grant Recipient Representative, hereby certify that the information contained in this form is true and accurate and is submitted in accordance with the 2017-18 Program Manual and Application for the Trip & Equipment Grant.

\_\_\_\_\_  
*Signature of Grant Recipient Representative*

\_\_\_\_\_  
*Date*

TripandEquipmentGrantApplicationForms20170519 5-19-17  
Form Revised 5/19/17





## TRANSPORTATION DISADVANTAGED TRIP & EQUIPMENT GRANT STANDARD ASSURANCES

The Grantee hereby assures and certifies that:

1. The Grantee has the requisite fiscal, managerial, and legal capacity to carry out the Transportation Disadvantaged Program and to receive and disburse State funds.
2. The Grantee is aware that the Trip & Equipment Grant is a reimbursement grant. Reimbursement of funds will be approved for payment upon receipt of a properly completed invoice with supporting documentation.
3. Trip & Equipment Grant funds will not be used to supplant or replace existing federal, state, or local government funds.
4. The Grantee understands that an approved written eligibility application is required and is to be maintained for each rider who receives a non-sponsored trip or bus pass and such documentation shall be made available upon request by CTD staff or its designee.
5. The Grantee is aware that if capital equipment is purchased with these grant funds, equipment must be received by the recipient no later than June 30, 2018.
6. The Grantee recipient is aware that the approved project must be complete by June 30, 2018, which means services must be provided by that date or reimbursement will not be approved.
7. Capital equipment purchased through this grant shall comply with the recipient's competitive procurement requirements or Chapter 287 or Chapter 427, Florida Statutes.

This certification is valid for the agreement period for which the grant application is filed.

Signature: \_\_\_\_\_ Date:   
Name:   
Title:   
Agency:   
Service Area:

StandardAssuranceForm20170519  
Form Revised 5/19/2017



## Transportation Disadvantaged Trip & Equipment Grant Sample Authorizing Resolution

A RESOLUTION of the (Grantee), hereinafter BOARD, hereby authorizes the filing and execution of a Transportation Disadvantaged Trip & Equipment Grant Agreement with the Florida Commission for the Transportation Disadvantaged.

WHEREAS, this BOARD is eligible to receive a Transportation Disadvantaged Trip & Equipment Grant and to undertake a transportation disadvantaged service project as authorized by Section 427.0159, Florida Statutes, and Rule 41-2, Florida Administrative Code.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD THAT:

1. The BOARD has the authority to enter into this grant agreement.
2. The BOARD authorizes (Person or position) to execute the grant agreement, amendments, warranties, certifications and any other documents which may be required in connection with the agreement with the Florida Commission for the Transportation Disadvantaged on behalf of the \_\_\_\_\_.
3. The BOARD'S Registered Agent in Florida is \_\_\_\_\_.  
The Registered Agents address is: \_\_\_\_\_.

DULY PASSED AND ADOPTED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2017.

BOARD OF \_\_\_\_\_

\_\_\_\_\_  
(Signature of Chairperson)

\_\_\_\_\_  
(Typed name of Chairperson)

ATTEST:

Signature \_\_\_\_\_

Sample Resolution 20160519  
Forms Revised 5/19/17

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**EXHIBIT J**

**CHAPTER 427, FLORIDA STATUTES**

Select Year: 2017 Go

## The 2017 Florida Statutes

Title XXX  
SOCIAL WELFARE

Chapter 427  
SPECIAL TRANSPORTATION AND COMMUNICATIONS SERVICES  
CHAPTER 427  
SPECIAL TRANSPORTATION AND COMMUNICATIONS SERVICES

[View Entire Chapter](#)

PART I  
TRANSPORTATION SERVICES  
(ss. 427.011-427.017)

PART II  
TELECOMMUNICATIONS ACCESS SYSTEM  
(ss. 427.701-427.708)

PART III  
ASSISTIVE TECHNOLOGY DEVICE WARRANTY ACT  
(ss. 427.801-427.806)

PART I  
TRANSPORTATION SERVICES

427.011 Definitions.

427.012 The Commission for the Transportation Disadvantaged.

427.013 The Commission for the Transportation Disadvantaged; purpose and responsibilities.

427.0135 Purchasing agencies; duties and responsibilities.

427.015 Function of the metropolitan planning organization or designated official planning agency in coordinating transportation for the transportation disadvantaged.

427.0155 Community transportation coordinators; powers and duties.

427.0157 Coordinating boards; powers and duties.

427.0158 School bus and public transportation.

427.0159 Transportation Disadvantaged Trust Fund.

427.016 Expenditure of local government, state, and federal funds for the transportation disadvantaged.

427.017 Conflicts with federal laws or regulations.

**427.011 Definitions.**—For the purposes of ss. 427.011-427.017:

(1) "Transportation disadvantaged" means those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk or at-risk as defined in s. 411.202.

(2) "Metropolitan planning organization" means the organization responsible for carrying out 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).

(3) "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 transportation service-providing agency.

(4) "Transportation improvement program" means a staged multiyear program of transportation improvements, including an annual element, which is developed by a metropolitan planning organization or designated official planning agency.

(5) "Community transportation coordinator" means a transportation entity recommended by a metropolitan planning organization, or by the appropriate designated official planning agency as provided for in ss. 427.011-427.017 in an area outside the purview of a metropolitan planning organization, to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.

(6) "Transportation operator" means one or more public, private for-profit, or private nonprofit entities engaged by the community transportation coordinator to provide service to transportation disadvantaged persons pursuant to a coordinated system service plan.

(7) "Coordinating board" means an advisory entity in each designated service area composed of representatives appointed by the metropolitan planning organization or designated official planning agency, to provide assistance to the community transportation coordinator relative to the coordination of transportation services.

(8) "Purchasing agency" means a department or agency whose head is an ex officio, nonvoting adviser to the commission, or an agency that purchases transportation services for the transportation disadvantaged.

(9) "Paratransit" means those elements of public transit which provide service between specific origins and destinations selected by the individual user with such service being provided at a time that is agreed upon by the user and provider of the service. Paratransit service is provided by taxis, limousines, "dial-a-ride," buses, and other demand-responsive operations that are characterized by their nonscheduled, **nonfixed route nature**.

(10) "Transportation disadvantaged funds" means 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, administration, operation, procurement, and maintenance of vehicles or equipment and capital investments. Transportation disadvantaged funds do not include funds for the transportation of children to public schools.

(11) "Coordination" means the arrangement for the provision of transportation services to the transportation disadvantaged in a manner that is cost-effective, efficient, and reduces fragmentation and duplication of services.

(12) "Nonsponsored transportation disadvantaged services" means transportation disadvantaged services that are not sponsored or subsidized by any funding source other than the Transportation Disadvantaged Trust Fund.

History—ss. 1, 9, ch. 79-180; s. 4, ch. 80-414; ss. 1, 3, ch. 84-56; ss. 1, 14, ch. 89-376; s. 57, ch. 90-306; s. 5, ch. 91-429; s. 82, ch. 92-152; s. 63, ch. 94-237; s. 2, ch. 2008-203.

**427.012 The Commission for the Transportation Disadvantaged.**—There is created the Commission for the Transportation Disadvantaged in the Department of Transportation.

(1) The commission shall consist of seven members, all of whom shall be appointed by the Governor, in accordance with the requirements of s. 20.052.

(a) Five 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 select 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.

(b) Two of the members must have a disability and use the transportation disadvantaged system.

(c) 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.

(d) Each member shall be appointed to a term of 4 years. A member may be reappointed for one additional 4-year term.

(e) Each member must be a resident of the state and a registered voter.

(f) At any given time, at least one member must be at least 65 years of age.

(g) The Secretary of Transportation, the Secretary of Children and Families, the executive director of the Department of Economic Opportunity, the executive director of the Department of Veterans' Affairs, the Secretary of Elderly Affairs, the Secretary of Health Care Administration, the director of the Agency for Persons with Disabilities, and a county manager or administrator who is appointed by the Governor, or a senior management level representative of each, shall serve as ex officio, nonvoting advisors to the commission.

(h) A member may not, within the 5 years immediately before his or her appointment, or during his or her term on the commission, have or have had a financial relationship with, or represent or have represented as a lobbyist as defined in s. 11.045, the following:

1. A transportation operator;
2. A community transportation coordinator;
3. A metropolitan planning organization;
4. A designated official planning agency;
5. A purchaser agency;
6. A local coordinating board;
7. A broker of transportation; or

8. A provider of transportation services.
- (2) 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.
- (3) Members of the commission shall serve without compensation but shall be allowed per diem and travel expenses, as provided in s. 112.061.
- (4) The commission shall meet at least quarterly, or more frequently at the call of the chairperson. Four members of the commission constitute a quorum, and a majority vote of the members present is necessary for any action taken by the commission.
- (5) The Governor may remove any member of the commission for cause.
- (6) Each candidate for appointment to the commission must, before accepting the appointment, undergo background screening under s. 435.04 by filing with the Department of Transportation a complete set of fingerprints taken by an authorized law enforcement agency. The fingerprints must be submitted to the Department of Law Enforcement for state processing, and that department shall submit the fingerprints to the Federal Bureau of Investigation for federal processing. The Department of Transportation shall screen the background results and inform the commission of any candidate who does not meet level 2 screening standards. A candidate who has not met level 2 screening standards may not be appointed to the commission. The cost of the background screening may be borne by the Department of Transportation or the candidate.
- (7) The commission shall appoint an executive director who shall serve under the direction, supervision, and control of the commission. The executive director, with the consent of the commission, shall employ such personnel as may be necessary to perform adequately the functions of the commission within budgetary limitations. Employees of the commission are exempt from the Career Service System.
- (8) The commission shall appoint a technical working group that includes representatives of private paratransit providers. The technical working group shall advise the commission on issues of importance to the state, including information, advice, and direction regarding the coordination of services for the transportation disadvantaged. The commission may appoint other technical working groups whose members may include representatives of community transportation coordinators; metropolitan planning organizations; regional planning councils; experts in insurance, marketing, economic development, or financial planning; and persons who use transportation for the transportation disadvantaged, or their relatives, parents, guardians, or service professionals who tend to their needs.
- (9) The commission is assigned to the office of the secretary of the Department of Transportation for administrative and fiscal accountability purposes, but it shall otherwise function independently of the control, supervision, and direction of the department.
- (10) The commission shall develop a budget pursuant to chapter 216. The budget is not subject to change by the department staff after it has been approved by the commission, but it shall be transmitted to the Governor, as head of the department, along with the budget of the department.
- History.—ss. 2, 8, 9, ch. 79-180; s. 5, ch. 80-414; s. 73, ch. 81-167; s. 76, ch. 83-55; ss. 2, 3, ch. 84-56; ss. 2, 14, ch. 89-376; s. 29, ch. 91-282; s. 5, ch. 91-429; s. 83, ch. 92-152; s. 64, ch. 94-237; s. 10, ch. 96-387; s. 204, ch. 99-8; s. 118, ch. 99-385; s. 9, ch. 2005-255; s. 1, ch. 2006-61; s. 3, ch. 2008-203; s. 342, ch. 2011-142; s. 59, ch. 2012-5; s. 242, ch. 2014-19.

**427.013 The Commission for the Transportation Disadvantaged; purpose and responsibilities.**—The purpose of the commission is to accomplish the coordination of transportation services provided to the transportation disadvantaged. The goal of this coordination is to assure the cost-effective provision of transportation by qualified community transportation coordinators or transportation operators for the transportation disadvantaged without any bias or presumption in favor of multioperator systems or not-for-profit transportation operators over single operator systems or for-profit transportation operators. In carrying out this purpose, the commission shall:

- (1) Compile all available information on the transportation operations for and needs of the transportation disadvantaged in the state.
- (2) Establish statewide objectives for providing transportation services for the transportation disadvantaged.
- (3) Develop policies and procedures for the coordination of local government, federal, and state funding for the transportation disadvantaged.
- (4) Identify barriers prohibiting the coordination and accessibility of transportation services to the transportation disadvantaged and aggressively pursue the elimination of these barriers.
- (5) Serve as a clearinghouse for information about transportation disadvantaged services, training, funding sources, innovations, and coordination efforts.
- (6) Assist communities in developing transportation systems designed to serve the transportation disadvantaged.
- (7) Unless otherwise provided by state or federal law, ensure that all procedures, guidelines, and directives issued by purchasing agencies are conducive to the coordination of transportation services.
- (8)(a) Ensure that purchasing agencies purchase all trips within the coordinated system, unless they have fulfilled the requirements of s. 427.0135(3) and use a more cost-effective alternative provider that meets comparable quality and standards.
- (b) Unless the purchasing agency has negotiated with the commission pursuant to the requirements of s. 427.0135(3), provide, by rule, criteria and procedures for purchasing agencies to use if they wish to use an alternative provider. Agencies must demonstrate that the proposed alternative provider can provide a trip of comparable quality and standards for the clients at a lower cost than that provided within the coordinated system, or that the coordinated system cannot accommodate the agency's clients.
- (9) Unless the purchasing agency has negotiated with the commission pursuant to the requirements of s. 427.0135(3), develop by rule standards for community transportation coordinators and any transportation operator or coordination contractor from whom service is purchased or arranged by the community transportation coordinator covering coordination, operation, safety, insurance, eligibility for service, costs, and utilization of transportation disadvantaged services. These standards and rules must include, but are not limited to:
  - (a) Minimum performance standards for the delivery of services. These standards must be included in coordinator contracts and transportation operator contracts with clear penalties for repeated or continuing violations.
  - (b) Minimum liability insurance requirements for all transportation services purchased, provided, or coordinated for the transportation disadvantaged through the community transportation coordinator.
- (10) Adopt rules pursuant to ss. 120.536(1) and 120.54 to implement the provisions of ss. 427.011-427.017.
- (11) Approve the appointment of all community transportation coordinators.
- (12) Have the authority to apply for and accept funds, grants, gifts, and services from the Federal Government, state government, local governments, or private funding sources. Applications by the commission for local government funds shall be coordinated through the appropriate coordinating board. Funds acquired or accepted under this subsection shall be administered by the commission and shall be used to carry out the commission's responsibilities.
- (13) Make an annual report to the Governor, the President of the Senate, and the Speaker of the House of Representatives by January 1 of each year.
- (14) Consolidate, for each state agency, the amounts of each agency's actual expenditures, together with the actual expenditures of each local government and directly federally funded agency and the amounts collected by each official planning agency.
- (15) Prepare a statewide 5-year transportation disadvantaged plan which addresses the transportation problems and needs of the transportation disadvantaged, which is fully coordinated with local transit plans, compatible with local government comprehensive plans, and which ensures that the most cost-effective and efficient method of providing transportation to the disadvantaged is programmed for development.
- (16) Review and approve memorandums of agreement for the provision of coordinated transportation services.
- (17) Review, monitor, and coordinate all transportation disadvantaged local government, state, and federal fund requests and plans for conformance with commission policy, without delaying the application process. Such funds shall be available only to those entities participating in an approved coordinated transportation system or entities which have received a commission-approved waiver to obtain all or part of their transportation through another means. This process shall identify procedures for coordinating with the state's intergovernmental coordination and review procedures and s. 216.212(1) and any other appropriate grant review process.
- (18) Develop an interagency uniform contracting and billing and accounting system that shall be used by all community transportation coordinators and their transportation operators.
- (19) Develop and maintain a transportation disadvantaged manual.
- (20) Design and develop transportation disadvantaged training programs.
- (21) Coordinate all transportation disadvantaged programs with appropriate state, local, and federal agencies and public transit agencies to ensure compatibility with existing transportation systems.
- (22) Designate the official planning agency in areas outside of the purview of a metropolitan planning organization.
- (23) Develop need-based criteria that must be used by all community transportation coordinators to prioritize the delivery of nonsponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust Fund moneys.
- (24) Establish a review procedure to compare the rates proposed by alternate transportation operators with the rates charged by a community transportation coordinator to determine which rate is more cost-effective.
- (25) Conduct a cost-comparison study of single-coordinator, multicoordinator, and brokered community transportation coordinator networks to ensure that the most cost-effective and efficient method of providing transportation to the transportation disadvantaged is programmed for development.
- (26) Develop a quality assurance and management review program to monitor, based upon approved commission standards, services contracted for by an agency, and those provided by a community transportation operator pursuant to s. 427.0155.
- (27) Ensure that local community transportation coordinators work cooperatively with local workforce development boards established in chapter 445 to provide assistance in the development of innovative transportation services for participants in the welfare transition program.
- (28) In consultation with the Agency for Health Care Administration and the Department of Transportation, develop an allocation methodology that equitably distributes all transportation funds under the control of the commission to compensate counties, community transportation coordinators, and other entities providing transportation disadvantaged services. The methodology shall separately account for Medicaid beneficiaries. The methodology shall consider such factors as the actual costs of each transportation disadvantaged trip based on prior-year information, efficiencies that a provider might adopt to reduce costs, results of the rate and cost comparisons conducted under subsections (24) and (25), as well as cost efficiencies of trips when compared to the local cost of transporting the general public. This subsection does not supersede the authority of the Agency for Health Care Administration to distribute Medicaid funds.
- (29) Incur expenses for the purchase of advertisements, marketing services, and promotional items.
- (30) For the 2017-2018 fiscal year and notwithstanding any other provision of this section:
  - (a) Allocate, from funds provided in the General Appropriations Act, to community transportation coordinators who do not receive Urbanized Area Formula funds pursuant to 49 U.S.C. s. 5307 to provide transportation services for persons with disabilities, older adults, and low-income persons so they may access health care, employment, education, and other life-sustaining activities. Funds allocated for this purpose shall be distributed among community transportation coordinators based upon the Transportation Disadvantaged Trip and Equipment allocation methodology established by the commission.
  - (b) Award, from funds provided in the General Appropriations Act, competitive grants to community transportation coordinators to support transportation projects to:
    1. Enhance access to health care, shopping, education, employment, public services, and recreation;
    2. Assist in the development, improvement, and use of transportation systems in nonurbanized areas;
    3. Promote the efficient coordination of services;
    4. Support inner-city bus transportation; and

5. Encourage private transportation providers to participate.

(c) This subsection expires July 1, 2018.

History—ss. 3, 9, ch. 79-180; s. 6, ch. 80-414; s. 274, ch. 81-259; ss. 1, 3, ch. 84-56; ss. 3, 14, ch. 89-376; s. 5, ch. 91-429; s. 84, ch. 92-152; s. 65, ch. 94-237; s. 17, ch. 98-57; s. 113, ch. 98-200; s. 119, ch. 99-385; s. 102, ch. 2000-165; s. 25, ch. 2000-266; s. 2, ch. 2006-61; s. 4, ch. 2008-203; s. 105, ch. 2016-62; s. 21, ch. 2016-216; s. 47, ch. 2017-71.

<sup>1</sup>Note.—Section 47, ch. 2017-71, amended subsection (30) "[i]n order to implement Specific Appropriation 1868 of the 2017-2018 General Appropriations Act."

**427.0135 Purchasing agencies; duties and responsibilities.**—Each purchasing agency, in carrying out the policies and procedures of the commission, shall:

- (1) Use the coordinated transportation system for provision of services to its clients, unless each department or purchasing agency meets the criteria outlined in rule or statute to use an alternative provider.
- (2) Pay the rates established in the service plan or negotiated statewide contract, unless the purchasing agency has completed the procedure for using an alternative provider and demonstrated that a proposed alternative provider can provide a more cost-effective transportation service of comparable quality and standards or unless the agency has satisfied the requirements of subsection (3).
- (3) Not procure transportation disadvantaged services without initially negotiating with the commission, as provided in s. 287.057(3)(e)12., or unless otherwise authorized by statute. If the purchasing agency, after consultation with the commission, determines that it cannot reach mutually acceptable contract terms with the commission, the purchasing agency may contract for the same transportation services provided in a more cost-effective manner and of comparable or higher quality and standards. The Medicaid agency shall implement this subsection in a manner consistent with s. 409.908(18) and as otherwise limited or directed by the General Appropriations Act.
- (4) Identify in the legislative budget request provided to the Governor each year for the General Appropriations Act the specific amount of money the purchasing agency will allocate to provide transportation disadvantaged services.
- (5) Provide the commission, by September 15 of each year, an accounting of all funds spent as well as how many trips were purchased with agency funds.
- (6) Assist communities in developing coordinated transportation systems designed to serve the transportation disadvantaged. However, a purchasing agency may not serve as the community transportation coordinator in any designated service area.
- (7) Ensure that its rules, procedures, guidelines, and directives are conducive to the coordination of transportation funds and services for the transportation disadvantaged.
- (8) Provide technical assistance, as needed, to community transportation coordinators or transportation operators or participating agencies.

History—ss. 4, 14, ch. 89-376; s. 5, ch. 91-429; s. 66, ch. 94-237; s. 4, ch. 95-394; s. 10, ch. 96-417; s. 26, ch. 2000-266; s. 5, ch. 2008-203; s. 34, ch. 2010-151; s. 16, ch. 2013-154; s. 32, ch. 2016-65; s. 26, ch. 2017-129.

**427.015 Function of the metropolitan planning organization or designated official planning agency in coordinating transportation for the transportation disadvantaged.**—

- (1) In developing the transportation improvement program, each metropolitan planning organization or designated official planning agency in this state shall include a realistic estimate of the cost and revenue that will be derived from transportation disadvantaged services in its area. The transportation improvement program shall also identify transportation improvements that will be advanced with such funds during the program period. Funds required by this subsection to be included in the transportation improvement program shall only be included after consultation with all affected agencies and shall only be expended if such funds are included in the transportation improvement program.
- (2) Each metropolitan planning organization or designated official planning agency shall recommend to the commission a single community transportation coordinator. However, a purchasing agency may not serve as the community transportation coordinator in any designated service area. The coordinator may provide all or a portion of needed transportation services for the transportation disadvantaged but shall be responsible for the provision of those coordinated services. Based on approved commission evaluation criteria, the coordinator shall subcontract or broker those services that are more cost-effectively and efficiently provided by subcontracting or brokering. The performance of the coordinator shall be evaluated based on the commission's approved evaluation criteria by the coordinating board at least annually. A copy of the evaluation shall be submitted to the metropolitan planning organization or the designated official planning agency, and the commission. The recommendation or termination of any community transportation coordinator shall be subject to approval by the commission.
- (3) Each metropolitan planning organization or designated official planning agency shall request each local government in its jurisdiction to provide the actual expenditures of all local and direct federal funds to be expended for transportation for the disadvantaged. The metropolitan planning organization or designated official planning agency shall consolidate this information into a single report and forward it, by September 15, to the commission.

History—ss. 6, 9, ch. 79-180; ss. 1, 3, ch. 84-56; ss. 5, 14, ch. 89-376; s. 5, ch. 91-429; s. 67, ch. 94-237; s. 27, ch. 2000-266; s. 6, ch. 2008-203.

**427.0155 Community transportation coordinators; powers and duties.**—Community transportation coordinators shall have the following powers and duties:

- (1) Execute uniform contracts for service using a standard contract, which includes performance standards for operators.
- (2) Collect annual operating data for submittal to the commission.
- (3) Review all transportation operator contracts annually.
- (4) Approve and coordinate the utilization of school bus and public transportation services in accordance with the transportation disadvantaged service plan.
- (5) In cooperation with a functioning coordinating board, review all applications for local government, federal, and state transportation disadvantaged funds, and develop cost-effective coordination strategies.
- (6) In cooperation with, and approved by, the coordinating board, develop, negotiate, implement, and monitor a memorandum of agreement including a service plan, for submittal to the commission.
- (7) In cooperation with the coordinating board and pursuant to criteria developed by the Commission for the Transportation Disadvantaged, establish eligibility guidelines and priorities with regard to the recipients of nonsponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust Fund moneys.
- (8) Have full responsibility for the delivery of transportation services for the transportation disadvantaged as outlined in s. 427.015(2).
- (9) Work cooperatively with local workforce development boards established in chapter 445 to provide assistance in the development of innovative transportation services for participants in the welfare transition program.

History—ss. 6, 14, ch. 89-376; s. 5, ch. 91-429; s. 85, ch. 92-152; s. 68, ch. 94-237; s. 18, ch. 98-57; s. 103, ch. 2000-165; s. 7, ch. 2008-203; s. 22, ch. 2016-216.

**427.0157 Coordinating boards; powers and duties.**—The purpose of each coordinating board is to develop local service needs and to provide information, advice, and direction to the community transportation coordinators on the coordination of services to be provided to the transportation disadvantaged. The commission shall, by rule, establish the membership of coordinating boards. The members of each board shall be appointed by the metropolitan planning organization or designated official planning agency. The appointing authority shall provide each board with sufficient staff support and resources to enable the board to fulfill its responsibilities under this section. Each board shall meet at least quarterly and shall:

- (1) Review and approve the coordinated community transportation disadvantaged service plan, including the memorandum of agreement, prior to submittal to the commission;
- (2) Evaluate services provided in meeting the approved plan;
- (3) In cooperation with the community transportation coordinator, review and provide recommendations to the commission on funding applications affecting the transportation disadvantaged;
- (4) Assist the community transportation coordinator in establishing eligibility guidelines and priorities with regard to the recipients of nonsponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust Fund moneys.
- (5) Review the coordination strategies of service provision to the transportation disadvantaged in the designated service area; and
- (6) Evaluate multicounty or regional transportation opportunities.
- (7) Work cooperatively with local workforce development boards established in chapter 445 to provide assistance in the development of innovative transportation services for participants in the welfare transition program.

History—ss. 7, 14, ch. 89-376; s. 5, ch. 91-429; s. 86, ch. 92-152; s. 19, ch. 98-57; s. 104, ch. 2000-165; s. 8, ch. 2008-203; s. 23, ch. 2016-216.

**427.0158 School bus and public transportation.**—

- (1) The community transportation coordinator shall maximize the use of public school transportation and public fixed route or fixed schedule transit service for the transportation of the transportation disadvantaged.
- (2) The school boards shall cooperate in the utilization of their vehicles to enhance coordinated transportation disadvantaged services by providing information as requested by the community transportation coordinator and by allowing the use of their vehicles at actual cost upon request when those vehicles are available for such use and are not transporting students.
- (3) The public transit fixed route or fixed schedule system shall cooperate in the utilization of its regular service to enhance coordinated transportation disadvantaged services by providing the information as requested by the community transportation coordinator. The community transportation coordinator may request, without limitation, the following information:
  - (a) A copy of all current schedules, route maps, system map, and fare structure;
  - (b) A copy of the current charter policy;
  - (c) A copy of the current charter rates and hour requirements; and
  - (d) Required notification time to arrange for a charter.

History—ss. 8, 14, ch. 89-376; s. 5, ch. 91-429; s. 9, ch. 2008-203.

**427.0159 Transportation Disadvantaged Trust Fund.**—

- (1) There is established in the State Treasury the Transportation Disadvantaged Trust Fund to be administered by the Commission for the Transportation Disadvantaged. All fees collected for the transportation disadvantaged program under s. 320.03(9) shall be deposited in the trust fund.
- (2) Funds deposited in the trust fund shall be appropriated by the Legislature to the commission and shall be used to carry out the responsibilities of the commission and to fund the administrative expenses of the commission.
- (3) Funds deposited in the trust fund may be used by the commission to subsidize a portion of a transportation disadvantaged person's transportation costs which is not sponsored by an agency, only if a cash or in-kind match is required. Funds for nonsponsored transportation disadvantaged services shall be distributed based upon the need of the recipient and according to criteria developed by the Commission for the Transportation Disadvantaged.
- (4) A purchasing agency may deposit funds into the Transportation Disadvantaged Trust Fund for the commission to implement, manage, and administer the purchasing agency's transportation disadvantaged funds, as defined in s. 427.011(10).

History—ss. 9, 14, ch. 89-376; s. 5, ch. 91-429; s. 87, ch. 92-152; s. 69, ch. 94-237; s. 21, ch. 2000-257; s. 61, ch. 2001-62; s. 10, ch. 2008-203.

<sup>1</sup>Note.—Section 22, ch. 2000-257, provides that "[n]otwithstanding any other law to the contrary the requirements of sections 206.46(3) and 206.606(2), Florida Statutes, shall not apply to any funding, programs, or other provisions contained in this act."

**427.016 Expenditure of local government, state, and federal funds for the transportation disadvantaged.—**

(1)(a) All transportation disadvantaged funds expended within the state shall be expended to purchase transportation services from community transportation coordinators or public, private, or private nonprofit transportation operators within the coordinated transportation system, except when the rates charged by proposed alternate operators are proven, pursuant to rules generated by the Commission for the Transportation Disadvantaged, to be more cost-effective and are not a risk to the public health, safety, or welfare. However, in areas where transportation suited to the unique needs of a transportation disadvantaged person cannot be purchased through the coordinated system, or where the agency has met the rule criteria for using an alternative provider, the service may be contracted for directly by the appropriate agency.

(b) This subsection does not preclude a purchasing agency from establishing maximum fee schedules, individualized reimbursement policies by provider type, negotiated fees, or any other mechanism, including contracting after initial negotiation with the commission, which the agency considers more cost-effective and of comparable or higher quality and standards than those of the commission for the purchase of services on behalf of its clients if it has fulfilled the requirements of s. 427.0135(3) or the procedure for using an alternative provider. State and local agencies shall not contract for any transportation disadvantaged services, including Medicaid reimbursable transportation services, with any community transportation coordinator or transportation operator that has been determined by the Agency for Health Care Administration, the Department of Legal Affairs Medicaid Fraud Control Unit, or any state or federal agency to have engaged in any abusive or fraudulent billing activities.

(2) Each year, each agency, whether or not it is an ex officio, nonvoting adviser to the Commission for the Transportation Disadvantaged, shall identify in the legislative budget request provided to the Governor for the General Appropriations Act the specific amount of any money the agency will allocate for the provision of transportation disadvantaged services. Additionally, each state agency shall, by September 15 of each year, provide the commission with an accounting of the actual amount of funds expended and the total number of trips purchased.

(3) Each metropolitan planning organization or designated official planning agency shall annually compile a report accounting for all local government and direct federal funds for transportation for the disadvantaged expended in its jurisdiction and forward this report by September 15 to the commission.

History.—ss. 5, 9, ch. 79-180; ss. 1, 3, ch. 84-56; ss. 10, 14, ch. 89-376; s. 5, ch. 91-429; s. 88, ch. 92-152; s. 70, ch. 94-237; s. 5, ch. 95-394; s. 11, ch. 2008-203.

**427.017 Conflicts with federal laws or regulations.—**Upon notification by an agency of the Federal Government that any provision of this act conflicts with federal laws or regulations, the state or local agencies involved may take any reasonable steps necessary to assure continued federal funding. Further, it is the legislative intent that the conflict shall not affect other provisions or applications of this act that can effectively be implemented without implementation of the provision in question, and to this end, the provisions of this act are declared severable.

History.—ss. 7, 9, ch. 79-180; ss. 1, 3, ch. 84-56; s. 14, ch. 89-376; s. 5, ch. 91-429.

**PART II  
TELECOMMUNICATIONS  
ACCESS SYSTEM**

427.701 Title.

427.702 Findings, purpose, and legislative intent.

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427.705 Administration of the telecommunications access system.

427.706 Advisory committee.

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427.708 Certain public safety and health care providers required to purchase and operate TDD's.

**427.701 Title.—**This part may be cited as the "Telecommunications Access System Act of 1991."

History.—s. 1, ch. 91-111.

**427.702 Findings, purpose, and legislative intent.—**

(1) The Legislature finds and declares that:

(a) Telecommunications services provide a rapid and essential communications link among the general public and with essential offices and organizations such as police, fire, and medical facilities.

(b) All persons should have basic telecommunications services available to them at reasonable and affordable costs.

(c) A significant portion of Florida's hearing impaired and speech impaired populations has profound disabilities, including dual sensory impairments, which render normal telephone equipment useless without additional specialized telecommunications devices, many of which cost several hundred dollars.

(d) The telecommunications system is intended to provide access to a basic communications network between all persons, and that many persons who have a hearing impairment or speech impairment currently have no access to the basic telecommunications system.

(e) Persons who do not have a hearing impairment or speech impairment are generally excluded from access to the basic telecommunications system to communicate with persons who have a hearing impairment or speech impairment without the use of specialized telecommunications devices.

(f) There exists a need for a telecommunications relay system whereby the cost for access to basic telecommunications services for persons who have a hearing impairment or speech impairment is no greater than the amount paid by other telecommunications customers.

(g) The Federal Government, in order to carry out the purposes established by Title II of the Communications Act of 1934, as amended, by the enactment of the Americans with Disabilities Act, endeavored to ensure that interstate and intrastate telecommunications relay services are available, to the extent possible and in the most efficient manner, to hearing impaired and speech impaired persons in the United States.

(h) Title IV of the Americans with Disabilities Act mandates that the telecommunications companies providing telephone services within the state shall provide telecommunications relay services on or before July 25, 1993, to persons who are hearing impaired or speech impaired within their certificated territories in a manner that meets or exceeds the requirements of regulations to be prescribed by the Federal Communications Commission.

(2) It is the declared purpose of this part to establish a system whereby the citizens of Florida who are hearing impaired, speech impaired, or dual sensory impaired have access to basic telecommunications services at a cost no greater than that paid by other telecommunications services customers, and whereby the cost of specialized telecommunications equipment necessary to ensure that citizens who are hearing impaired, speech impaired, or dual sensory impaired have access to basic telecommunications services and the provision of telecommunications relay service is borne by all the telecommunications customers of the state.

(3) It is the intent of the Legislature:

(a) That a telecommunications access system be established to provide equitable basic access to the telecommunications network for persons who are hearing impaired, speech impaired, or dual sensory impaired.

(b) That the telecommunications access system includes a telecommunications relay service system that meets or exceeds the certification requirements of the Federal Communications Commission.

(c) That the telecommunications access system includes the distribution of telecommunications devices for the deaf that are compatible with the telecommunications relay service system and has the capability of incorporating new technologies as they develop.

(d) That the telecommunications access system includes the distribution of specialized telecommunications devices necessary for hearing impaired, speech impaired, or dual sensory impaired persons to access basic telecommunications services.

(e) That the telecommunications access system ensures that users of the telecommunications relay service system pay rates no greater than the rates paid for functionally equivalent voice communications services.

(f) That the telecommunications access system be as cost-efficient as possible without diminishing the effectiveness or the quality of the system.

(g) That the telecommunications access system uses state-of-the-art technology for specialized telecommunications devices and the telecommunications relay service and encourages the incorporation of new developments in technology, to the extent that it has demonstrated benefits consistent with the intent of this act and is in the best interest of the citizens of this state.

(h) That the value of the involvement of persons who have hearing or speech impairments, and organizations representing or serving those persons, be recognized and such persons and organizations be involved throughout the development, establishment, and implementation of the telecommunications access system through participation on the advisory committee as provided in s. 427.706.

(i) That the total cost of providing telecommunications relay services and distributing specialized telecommunications devices be spread equitably among and collected from customers of all local exchange telecommunications companies.

History.—s. 1, ch. 91-111.

**427.703 Definitions.—**As used in this part:

(1) "Administrator" means a corporation not for profit incorporated pursuant to the provisions of chapter 617 and designated by the Florida Public Service Commission to administer the telecommunications relay service system and the distribution of specialized telecommunications devices pursuant to the provisions of this act and rules and regulations established by the commission.

(2) "Commission" means the Florida Public Service Commission.

(3) "Deaf" means having a permanent hearing impairment and being unable to discriminate speech sounds in verbal communication, with or without the assistance of amplification devices.

(4) "Dual sensory impaired" means having both a permanent hearing impairment and a permanent visual impairment and includes deaf/blindness.

(5) "Hard of hearing" means having a permanent hearing impairment which is severe enough to necessitate the use of amplification devices to discriminate speech sounds in verbal communication.

(6) "Hearing impaired" or "having a hearing impairment" means deaf or hard of hearing and, for purposes of this part, includes being dual sensory impaired.

(7) "Local exchange telecommunications company" means a telecommunications company certificated by the commission to provide telecommunications services within a specific geographic area.

(8) "Operating fund" means the fund established, invested, managed, and maintained by the administrator for the exclusive purpose of implementing and administering the provisions of this act pursuant to commission rules and regulations.

(9) "Ring signaling device" means a mechanism, such as a flashing light, which visually indicates that a communication is being received through a telephone line. This term also means a mechanism such as an adjustable volume ringer and buzzer which audibly and loudly indicates an incoming telephone communication.

(10) "Speech impaired" or "having a speech impairment" means having a permanent loss of verbal communication ability which prohibits normal usage of a standard telephone handset.

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**EXHIBIT K**

**RULE 41-2, FLORIDA ADMINISTRATIVE CODE**

**CHAPTER 41-2**  
**COMMISSION FOR THE TRANSPORTATION DISADVANTAGED**

41-2.001	Purpose (Repealed)
41-2.002	Definitions
41-2.003	Commission Organization and Personnel (Repealed)
41-2.005	Member Department Responsibilities (Repealed)
41-2.006	Insurance, Safety Requirements and Standards
41-2.007	Reporting Requirements
41-2.008	Contractual Arrangements
41-2.009	Designated Official Planning Agency
41-2.010	Selection of Community Transportation Coordinator
41-2.011	Community Transportation Coordinator Powers and Duties
41-2.012	Coordinating Board Structure and Duties
41-2.013	Transportation Disadvantaged Trust Fund
41-2.014	Grants Program
41-2.015	Expenditure of Local Government, State, and Federal Funds for the Transportation Disadvantaged
41-2.016	Accessibility (Repealed)
41-2.0161	Program Monitoring of Performance (Repealed)
41-2.0162	Chronological Listing of Report Dates
41-2.018	Public Comment

**41-2.001 Purpose.**

*Rulemaking Authority 427.013(9) FS. Law Implemented 120.53(1), 427.011-427.017 FS. History--New 5-2-90, Amended 6-17-92, 7-11-95, Repealed 7-15-12.*

**41-2.002 Definitions.**

For purposes of this rule chapter, the following definitions will apply:

(1) "Americans with Disabilities Act" is a federal law, P.L. 101-336, signed by the President of the United States on July 26, 1990.

(2) "Coordination Contract" means a written contract between the Community Transportation Coordinator and an agency who receives transportation disadvantaged funds and performs some, if not all, of its own transportation services, as well as transportation services to others, when shown to be more effective and more efficient from a total system perspective. The 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 community transportation coordinator.

(3) "Designated Official Planning Agency" means the official body or agency designated by the Commission 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.

(4) "Designated Service Area" means a geographical area recommended by a designated official planning agency, subject to approval by the Commission, which defines the community where coordinated transportation services will be provided to the transportation disadvantaged.

(5) "Emergency" means 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 transportation services to a designated service area for the transportation disadvantaged population.

(6) "Emergency Fund" means 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.

(7) "Florida Coordinated Transportation System" (FCTS) means a transportation system responsible for coordination and service provisions for the transportation disadvantaged as outlined in Chapter 427, F.S.

(8) “Local Government” means an elected and/or appointed public body existing to coordinate, govern, plan, fund and administer public services within a designated, limited geographic area within the state.

(9) “Local Government Comprehensive Plan” means a plan that meets the requirements of Sections 163.3177 and 163.3178, F.S.

(10) “Memorandum of Agreement” is the state contract for transportation disadvantaged services purchased with 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.

(11) “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 governmentally or privately owned. Public transit specifically includes those forms of transportation commonly known as “paratransit”.

(12) “Regional Planning Council (RPC)” means the organization created under the provisions of Section 186.504, F.S.

(13) “Reserve Fund” means 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.

(14) “State Fiscal Year” means the period from July 1 through June 30 of the following year.

(15) “Transportation Disadvantaged Service Plan” means an annually updated plan jointly developed by the designated official planning agency and the Community Transportation Coordinator which contains a development plan, service plan, and quality assurance components. The plan shall be approved and used by the local Coordinating Board to evaluate the Community Transportation Coordinator.

(16) “Transportation Operator” means one or more public, private for profit or private nonprofit entities engaged by the community transportation coordinator to provide service to transportation disadvantaged persons pursuant to a coordinated transportation development plan.

(17) “Transportation Operator Contract” means a written contract between the Community Transportation Coordinator and the Transportation Operators, as approved by the Commission, that outlines the terms and conditions for any services to be performed.

(18) “Trust Fund” means the Transportation Disadvantaged Trust Fund authorized in Section 427.0159, F.S., and administered by the Commission.

*Rulemaking Authority 427.013(10) FS. Law Implemented 427.011-427.017 FS. History—New 5-2-90, Amended 6-17-92, 1-4-94, 7-11-95, 5-1-96, 10-1-96, 3-10-98, 8-10-09.*

#### **41-2.003 Commission Organization and Personnel.**

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.012 FS. History—New 5-2-90, Amended 6-17-92, 3-10-98, Repealed 7-15-12.*

#### **41-2.005 Member Department Responsibilities.**

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.0135 FS. History—New 5-2-90, Amended 6-17-92, 6-15-93, 7-11-95, 3-10-98, Repealed 1-7-16.*

#### **41-2.006 Insurance, Safety Requirements and Standards.**

(1) The Community Transportation Coordinator, shall ensure compliance with the minimum liability insurance requirement of \$100,000 per person and \$200,000 per incident, which are comparable to Section 768.28(5), F.S., limits, for all transportation services purchased or provided for the transportation disadvantaged through the Community Transportation Coordinator. The Community Transportation Coordinator will indemnify and hold harmless the Local, State, and Federal governments and their entities, departments, and the Commission from any liabilities arising out of or due to an accident or negligence on the part of the Community Transportation Coordinator and all Transportation Operators under contract to them.

(2) Each Community Transportation Coordinator, and any Transportation Operators from whom transportation service is purchased with local government, state or federal transportation disadvantaged funds, 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 Chapter 14-90, F.A.C.

(3) Each Community Transportation Coordinator, and any Transportation Operators from whom service is purchased or funded by local government, state or federal transportation disadvantaged funds shall assure the purchaser of their continuing compliance

with the applicable state or federal laws relating to drug testing (specifically, Section 112.0455, F.S.; Rule 14-17.012 and Chapters 59A-24 and 60L-19, F.A.C.; and 41 U.S.C. 701; 49 C.F.R., Parts 29 and 382; and 46 C.F.R., Parts 4, 5, 14 and 16).

(4) The Community Transportation Coordinator and any Transportation Operator from whom service is purchased or arranged by the Community Transportation Coordinator shall adhere to Commission approved standards. These standards include:

(a) Drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration;

(b) An escort of a passenger and dependent children are to be transported as locally negotiated and identified in the local Transportation Disadvantaged Service Plan;

(c) Use of child restraint devices shall be determined locally as to their responsibility, and cost of such device in the local Transportation Disadvantaged Service Plan;

(d) Passenger property that can be carried by the passenger and/or driver in one trip and can safely be stowed 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. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices;

(e) Vehicle transfer points shall provide shelter, security, and safety of passengers;

(f) A local toll free phone number for complaints or grievances shall be posted inside the vehicle. The TD Helpline phone number 1(800) 983-2435 shall also be posted inside all vehicles of the coordinated system. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including, advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board. All rider information/materials (brochures, user's guides, etc.) will include the TD Helpline phone number;

(g) 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;

(h) 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;

(i) Billing requirements of the Community Transportation Coordinator to subcontractors shall be determined locally by the local Coordinating Board and provided in the local Transportation Disadvantaged Service Plan. All bills shall be paid within 7 working days to subcontractors, after receipt of said payment by the Community Transportation Coordinator, in accordance with Section 287.0585, F.S.;

(j) Passenger/trip data base must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system;

(k) Adequate seating for paratransit 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;

(l) Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders, or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle;

(m) The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or utilization of wheel chair securement devices, storage of mobility assistive devices, and closing the vehicle door. In the door-through-door paratransit service category, the driver shall 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;

(n) Smoking is prohibited in any vehicle. Requirements for drinking and eating on board the vehicle will be addressed in the local Transportation Disadvantaged Service Plan;

(o) The Community Transportation Coordinator and the local Coordinating Board 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 Transportation Disadvantaged Service Plan;

(p) All vehicles providing service within the coordinated system, shall be equipped with two-way communications in good working order and audible to the driver at all times to the base;

(q) All vehicles providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible;

(r) First Aid policy shall be determined locally and provided in the local Transportation Disadvantaged Service Plan;

(s) Cardiopulmonary Resuscitation policy shall be determined locally and provided in the local Transportation Disadvantaged Service Plan;

(t) Driver background screening shall be determined locally, dependent upon purchasing agencies' requirements, and provided in the local Transportation Disadvantaged Service Plan;

(u) In areas where fixed route transportation is available, the Community Transportation Coordinator should jointly establish with the Local Coordinating Board (LCB) a percentage of total trips that will be placed on the fixed route system;

(v) The Community Transportation Coordinator should establish and address the passenger pick-up windows in the local Transportation Disadvantaged Service Plan. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers;

(w) The Community Transportation Coordinator 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. This measure should also be included as a part of the Community Transportation Coordinator's evaluation of its contracted operators, and the LCB's evaluation of the Community Transportation Coordinator;

(x) The Community Transportation Coordinator should establish and address in the local Transportation Disadvantaged Service Plan a minimum 24 hour advanced notification time to obtain services. This policy should be communicated to contracted operators, purchasing agencies and passengers;

(y) The Community Transportation Coordinator 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 Community Transportation Coordinator's evaluation of the contracted operators, and the LCB's evaluation of the Community Transportation Coordinator;

(z) The Community Transportation Coordinator and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the reliability of the vehicles utilized in the coordinated system. This measure should be used in the Community Transportation Coordinator's evaluation of the contracted operators, and the LCB's evaluation of the Community Transportation Coordinator;

(aa) This performance measure can be used to address the accessibility of the service. The Community Transportation Coordinator and the LCB should jointly determine if a standard for a 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 Community Transportation Coordinator;

(bb) The Community Transportation Coordinator 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. The measure should be used in the Community Transportation Coordinator's evaluation of the contracted operators, and the LCB's evaluation of the Community Transportation Coordinator.

*Rulemaking Authority 427.013(9) FS. Law Implemented 287.0585, 427.011(11), 427.013, 427.0155, 427.0157, 768.28 FS. History—New 5-2-90, Amended 6-17-92, 5-1-96, 10-1-96, 3-10-98, 6-3-01, 7-3-03.*

#### **41-2.007 Reporting Requirements.**

(1) Each state agency shall, by September 15 of each year, provide the Commission with an accounting of the actual amount of

funds expended and the total number of trips purchased during the previous fiscal year.

(2) Each Designated Official Planning Agency shall provide to the Commission prior to each state fiscal year, an estimate of all transportation disadvantaged funds anticipated to be available for the upcoming state fiscal year budget. The estimate shall include the following information:

(a) Each local government agency within jurisdiction of the Official Planning Agency shall report an estimate of the direct federal funds and local government transportation disadvantaged funds anticipated to be available through the coordinated system for the upcoming state fiscal year to the Official Planning Agency, and

(b) The Official Planning Agency shall request from each federal government agency within its jurisdiction, an estimate of the direct federal transportation disadvantaged funds anticipated to be available through the coordinated system for the upcoming state fiscal year.

(3) The estimate mentioned in subsection (2) above shall include the following information identified by county:

(a) A brief description of the project or program;

(b) The dollar amount of transportation disadvantaged funds reported by categories of Coordinated, Non-Coordinated, Transportation Alternatives, or Other if applicable; and

(c) The estimated number of one-way passenger trips to be provided reported by categories of Coordinated, Non-Coordinated, Transportation Alternatives, or Other if applicable.

(4) Each Metropolitan Planning Organization or designated official planning agency shall annually compile a report accounting for all local government and direct federal funds for transportation for the disadvantaged expended in its jurisdiction, and forward this report by September 15 to the Commission.

(5) Upon receipt of the state agency and Official Planning Agency combined annual budget estimates, the Commission shall develop and distribute a statewide report outlining the expected expenditures for all transportation disadvantaged services through the coordinated system for the state fiscal year.

(6) Each Community Transportation Coordinator shall by September 15 of each year report required operating statistics to the Commission. The operational statistics will be compiled into a report by the Commission and utilized as a part of the analysis of the Community Transportation Coordinator's performance evaluation and the trip and equipment grant distribution. The Community Transportation Coordinator's report shall be reviewed by the Coordinating Board with a copy provided to the Metropolitan Planning Organization or Designated Official Planning Agency.

(7) Each Community Transportation Coordinator shall utilize the Chart of Accounts defined in the American Association of State Highway and Transportation Officials, Inc., Comprehensive Financial Management Guidelines For Rural and Small Urban Public Transportation Providers, dated September 1992, incorporated herein by reference, for its financial management. A copy of this document may be obtained from the Commission office located at 2740 Centerview Drive, Suite 1A, Tallahassee, Florida 32301. A copy of the document may also be viewed at Comprehensive Financial Management Guidelines on the Commission's website at [www.dot.state.fl.us/ctd/](http://www.dot.state.fl.us/ctd/). Community Transportation Coordinators with existing and equivalent accounting systems will not be required to adopt this Chart of Accounts but will be required to prepare all reports, invoices, and fiscal documents relating to the transportation disadvantaged functions and activities using the chart of accounts and accounting definitions as outlined in the above referenced manual.

(8) The Commission shall make an annual report to the Governor, the President of the Senate, and the Speaker of the House of Representatives by January 1 of each year. The report will contain a summary of the Commission's accomplishments for the preceding state fiscal year, the most current operational statistics for transportation disadvantaged services, identified unmet needs and a financial status of the Transportation Disadvantaged Trust Fund. Copies of the report will also be made available to member departments, Metropolitan Planning Organizations, Designated Official Planning Agencies and Community Transportation Coordinators, and others upon request.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.012(8), 427.013(3), (7), (8), (9), (12), (13), (16), 427.0135(1), 427.015(1) FS. History—New 5-2-90, Amended 6-17-92, 11-17-92, 1-4-94, 7-11-95, 5-1-96, 3-10-98, 12-6-09, 3-5-13.*

#### **41-2.008 Contractual Arrangements.**

The following contractual arrangements will be required of the Community Transportation Coordinator:

(1) A Memorandum of Agreement will be required and shall be a binding contract between the Commission and a Community Transportation Coordinator. It shall be utilized as the contract recognizing the Community Transportation Coordinator as a State

contract vendor for a designated service area. The format of the Memorandum of Agreement will contain the Commission's minimum requirements and shall be utilized by the Community Transportation Coordinator. The Coordinating Board shall approve the Memorandum of Agreement prior to submittal to the Commission.

(2) Transportation Operator Contract. The Community Transportation Coordinator shall enter into a standard contract, as approved by the Commission, with each Transportation Operator as to specific terms and conditions that apply to each Transportation Operator for services to be performed. The contract shall include the minimum requirements contained in the Memorandum of Agreement and other local requirements for local service delivery. The Community Transportation Coordinator will be responsible for monitoring the terms of the contract.

(3) Coordination Contract. The Community Transportation Coordinator shall enter into a Coordination Contract to show the specific terms and conditions, as outlined in the Memorandum of Agreement with those agencies who receive transportation disadvantaged funds and who, from a total system approach, can perform more effectively and more efficiently their own transportation under those conditions not covered in Rule 41-2.015, F.A.C., herein. The contract shall include the requirements of reporting, insurance, safety, and other terms that apply equally to any transportation operator. The contract also shall include any relative information regarding joint utilization and cost arrangements for the provision of transportation services to and from the coordinator. The Community Transportation Coordinator will be responsible for monitoring the terms of the contract. The contract shall be approved by the Coordinating Board and shall be reviewed annually to determine whether the continuation of said contract arrangement is the most cost effective and efficient utilization that is possible.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013(10), (15), 427.015(2), 427.0155(7), 427.0157(1) FS. History—New 5-2-90, Amended 6-17-92, 7-11-95, 10-1-96, 3-10-98.*

#### **41-2.009 Designated Official Planning Agency.**

(1) Metropolitan Planning Organizations shall serve as the designated official planning agency in urbanized areas. In areas not covered by a Metropolitan Planning Organization, agencies eligible for selection as Designated Official Planning Agencies include County or City governments, Regional Planning Councils, Metropolitan Planning Organizations from other areas, or Local Planning Organizations who are currently performing planning activities in designated service areas. Eligibility for continued designation by the Commission will be conditioned on the agency's resources, capabilities and actual performance in implementing the responsibilities and requirements of Chapter 427, F.S.

(2) Metropolitan Planning Organizations and Designated Official Planning Agencies shall include a Transportation Disadvantaged element in their Transportation Improvement Program (TIP). Such element shall include a project and program description, the planned costs and anticipated revenues for the services, identification of the year the project or services are to be undertaken and implemented, and assurances that there has been coordination with local public transit and local government comprehensive planning bodies, including input into the mass transit or other elements of local and regional comprehensive planning activities. Areas not required to develop a federally-required TIP shall report equivalent information in the Transportation Disadvantaged Service Plan.

(3) Each Designated Official Planning Agency shall provide each Coordinating Board with sufficient staff support and resources to enable the Coordinating Board to fulfill its responsibilities. In areas where a Metropolitan Planning Organization or Designated Official Planning Agency serves as the Community Transportation Coordinator and desires to utilize the same staff for the Coordinating Board, such agency shall abstain from any official actions that represent a conflict of interest, specifically in the evaluation process of the Community Transportation Coordinator.

(4) In consultation with the Community Transportation Coordinator and Coordinating Board, each Metropolitan Planning Organization or Designated Official Planning Agency shall develop and annually update, a Transportation Disadvantaged Service Plan. The Transportation Disadvantaged Service Plan shall be developed in a manner which assures that local planning agencies, responsible for preparing comprehensive plans, have the opportunity to review and comment on it, and shall not be inconsistent with applicable local government comprehensive plans, MPO long range comprehensive plans, transit development plans, and other local, regional, and state transportation plans. The Transportation Disadvantaged Service Plan shall be reviewed for final disposition by the Coordinating Board and the Commission.

(5) Consolidate the annual budget estimates of local and directly funded federal government transportation disadvantaged funds and forward to the Commission no later than the beginning of each state fiscal year.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013(21), 427.015 FS. History—New 5-2-90, Amended 6-17-92, 1-4-94, 3-10-98.*

**41-2.010 Selection of Community Transportation Coordinator.**

(1) Designation, selection, or revocation of designation of any Community Transportation Coordinator shall be subject to the approval of the Commission.

(2) Selection of agencies as Community Transportation Coordinators or Transportation Operators may be negotiated without competitive acquisition, upon the recommendation of the Metropolitan Planning Organization or Designated Official Planning Agency that it is in the best interest of the transportation disadvantaged. This includes circumstances such as emergencies, or insufficient competition availability.

(3) Selection of the Community Transportation Coordinator will be accomplished through public competitive bidding or proposals in accordance with applicable laws and rules.

(4) In cases where selection is accomplished by a request for proposal (RFP), the RFP shall, at a minimum, identify the following information:

(a) The scope and nature of the services and coordination required, and a request for the proposer's plan to provide same.

(b) A request that the proposer identify the resources, and accounting system techniques to be used in their audit trail for all services.

(c) A request that the proposer identify their organizational structure and key personnel, their financial capacity, equipment resources, and experience and qualifications, including the most recent financial audit by a certified public accountant in accordance with Section 216.349, F.S.

(d) A request that the proposer demonstrate the ability to coordinate a multitude of funding and service provisions, in addition to serving the needs of the general public or other transportation disadvantaged.

(e) A request that the proposer identify specific means by which it plans to comply with the provisions of the Americans with Disabilities Act, P.L. 101-336, Chapter 760, F.S., and any applicable local regulations governing disabled accessibility requirements, access to transportation, and discrimination.

(f) A demonstration by the proposer of plans for the provision of the most economically cost effective, quality services to the transportation disadvantaged, and plans which demonstrate coordination with the public school system, local public transit systems, private sector operators and other governmental agencies that provide services to the transportation disadvantaged within the designated service area.

(g) A demonstration by the proposer of plans to comply with safety requirements as specified in Section 341.061, F.S.

(h) An indication by the proposer of plans to comply with any state, federal, or local laws relating to drug testing.

(i) A sample Memorandum of Agreement for review by the respondent.

(j) A statement advising proposers of any local resources that exist or are planned that should be recognized in the bidders proposal.

(5) The announcement of the request for proposal shall be published in at least the largest general circulation newspaper in the designated service area and in the Florida Administrative Register. The advertised announcement shall include the time, date and place of a public meeting to provide information and answer questions about the request for proposal.

(6) Upon evaluation of the proposals, each Metropolitan Planning Organization or Designated Official Planning Agency, upon consultation with the Coordinating Board, shall recommend to the Commission a Community Transportation Coordinator.

(7) Upon resignation or termination of any Community Transportation Coordinator, the Metropolitan Planning Organization or Designated Official Planning Agency shall complete the recommendation process for a new Community Transportation Coordinator within 90 days after termination date for non-bid Community Transportation Coordinators and within 150 days after termination date for bid/RFP Community Transportation Coordinators. In the absence of these circumstances, the requirements of subsection 41-2.010(8), F.A.C., below shall apply.

(8) In cases of termination of the Community Transportation Coordinator, or in unforeseen emergencies, the Commission shall work with the Metropolitan Planning Organization or Designated Official Planning Agency and the Coordinating Board in an expeditious manner to provide for the continuation of services to the transportation disadvantaged in the designated service area, by providing or arranging the necessary technical assistance.

(9) The utilization of firms defined as minority business enterprises shall be encouraged to the extent possible utilizing the most recent certified minority business listing published by the Florida Department of Management Services.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013(10), (15), 427.015(2), 427.0155(7), 427.0157 FS. History—New 5-2-90, Amended 6-17-92, 7-11-95, 10-1-96, 3-10-98, 4-8-01.*



**41-2.011 Community Transportation Coordinator Powers and Duties.**

(1) Each Community Transportation Coordinator shall be 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. Local management personnel with day-to-day decision making authority must be physically located in each designated service area, unless otherwise authorized by the Commission.

(2) Where cost effective and efficient, the Community Transportation Coordinator shall subcontract or broker transportation services to Transportation Operators. The Coordinating Board is authorized to recommend approval or disapproval of such contracts to the Community Transportation Coordinator, providing the basis for its recommendation. Within 30 days of its receipt of the Coordinating Board's recommendation, the Community Transportation Coordinator shall accept or reject the recommendation, providing written reasons for its rejection. All Transportation Operator 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 previously approved. Each Community Transportation Coordinator will ensure the terms set forth for monitoring said Transportation Operators and Coordination Contractors are in compliance with standards pursuant to Rule 41-2.006, F.A.C.

(3) Pursuant to the conditions set forth in the Memorandum of Agreement, the Community Transportation Coordinator shall develop, implement, and monitor an approved Transportation Disadvantaged Service Plan. This plan shall be approved by the Coordinating Board and forwarded to the Commission for review and final disposition.

(4) Each Community Transportation Coordinator shall submit a report on operational statistics by September 15, each year to the Commission. A copy should also be provided to the Metropolitan Planning Organization or Designated Official Planning Agency.

(5) The Community Transportation Coordinator shall maximize the utilization of school bus and public transit services in accordance with Section 427.0158, F.S. Any utilization data shall be included in operational statistics provided to the coordinated system.

(6) In cooperation with the local Coordinating Board, the Community Transportation Coordinator shall review all applications for local government, federal and state transportation disadvantaged funds submitted from or planned for use in their designated service area. If funds are recommended for approval, the Community Transportation Coordinator, in cooperation with the Coordinating Board, will develop and implement cost-effective coordination strategies for their use and integration into the coordinated system.

(7) Funding to support the Community Transportation Coordinator's functions associated with documented coordination activities may be obtained from a coordination fee as part of each trip arranged, from subsidies received or both and upon approval by the Coordinating Board.

(8) Each Community Transportation Coordinator shall be aware of all of the transportation disadvantaged resources available or planned in their designated service area in order to plan, coordinate, and implement the most cost effective transportation disadvantaged transportation system possible under the conditions that exist in the designated service area.

(9) Contractual administration of Community Transportation Coordinators shall be accomplished through a Memorandum of Agreement between the Commission and the Community Transportation Coordinator in accordance with the procedures of the Commission. Transportation services purchased from or arranged by the Community Transportation Coordinator will be billed to purchasing agencies by the Community Transportation Coordinator at the rates identified in the approved Transportation Disadvantaged Service Plan or Coordination Contract and recognize any special conditions as specified by the purchasing agency. Payment for services will be made directly to the Community Transportation Coordinator unless otherwise agreed upon, in writing, by the purchaser and the Community Transportation Coordinator. Other contractual arrangements shall be followed as specified in this rule chapter.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.0155 FS. History—New 5-2-90, Amended 6-17-92, 6-15-93, 7-11-95, 5-1-96, 10-1-96, 3-10-98.*

**41-2.012 Coordinating Board Structure and Duties.**

The purpose of the Coordinating Board is to identify local service needs and to provide information, advice, and direction to the Community Transportation Coordinator on the coordination of services to be provided to the transportation disadvantaged through the Florida Coordinated Transportation System (FCTS). Each Coordinating Board is recognized as an advisory body to the

Commission in its service area. The members of the Coordinating Board shall be appointed by the Metropolitan Planning Organization or the Designated Official Planning Agency. A Coordinating Board shall be appointed in each county. However, when agreed upon in writing, by all Boards of County Commissions in each county to be covered in the service area, multi-county Coordinating Boards may be appointed. The structure and duties of the Coordinating Board shall be as follows:

(1) The Metropolitan Planning Organization or Designated Official Planning Agency shall appoint one elected official to serve as the official chairperson for all Coordinating Board meetings. The appointed chairperson shall be an elected official from the county that the Coordinating Board serves. For a multi-county Coordinating Board, the elected official appointed to serve as Chairperson shall be from one of the counties involved.

(2) The Coordinating Board shall hold an organizational meeting each year for the purpose of electing a Vice-Chairperson. The Vice-Chairperson shall be elected by a majority vote of a quorum of the members of the Coordinating Board present and voting at the organizational meeting. The Vice-Chairperson shall serve a term of one year starting with the next meeting. In the event of the Chairperson's absence, the Vice-Chairperson shall assume the duties of the Chairperson and conduct the meeting.

(3) In addition to the Chairperson, except for multi-county Coordinating Boards which shall have as a representative an elected official from each county, including the Chairperson, one of whom shall be elected Vice-Chairperson, the following agencies or groups shall be represented on the Coordinating Board, in every county as voting members:

- (a) A local representative of the Florida Department of Transportation;
- (b) A local representative of the Florida Department of Children and Family Services;
- (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;
- (d) In areas where they exist, a local representative of the Florida Division of Vocational Rehabilitation or the Division of Blind Services, representing the Department of Education;
- (e) A person recommended by the local Veterans Service Office representing the veterans of the county;
- (f) A person who is recognized by the Florida Association for Community Action (President), representing the economically disadvantaged in the county;
- (g) A person over sixty representing the elderly in the county;
- (h) A person with a disability representing the disabled in the county;
- (i) Two citizen advocate representatives in the county; one who must be a person who uses the transportation service(s) of the system as their primary means of transportation;
- (j) A local representative for children at risk;
- (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;
- (l) A local representative of the Florida Department of Elderly Affairs;
- (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;
- (n) A local representative of the Florida Agency for Health Care Administration;
- (o) A representative of the Regional Workforce Development Board established in Chapter 445, F.S.; and
- (p) A representative of the local medical community, which may include, but not be limited to, kidney dialysis centers, long term care facilities, assisted living facilities, hospitals, local health department or other home and community based services, etc.

(4) Except for the Chairperson, the non-agency members of the Board shall be appointed for three year staggered terms with initial membership being appointed equally for one, two, and three years. The Chairperson shall serve until elected term of office has expired or otherwise replaced by the Designated Official Planning Agency. No employee of a community transportation coordinator shall serve as a voting member of the coordinating board in an area where the community transportation coordinator serves. However, community transportation coordinators and their employees are not prohibited from serving on a coordinating board in an area where they are not the coordinator. However, an elected official serving as Chairperson of the coordinating board, or other governmental employees that are not employed for the purpose of making provisions for transportation and are not directly supervised by the community transportation coordinator shall not be precluded from serving as voting members of the coordinating board.

(5) The Board shall meet at least quarterly and shall perform the following duties in addition to those duties specifically listed in

Section 427.0157, F.S.:

(a) Maintain official meeting minutes, including an attendance roster, reflecting official actions and provide a copy of same to the Commission and the Chairperson of the designated official planning agency.

(b) Annually, provide the Metropolitan Planning Organization or Designated Official Planning Agency with an evaluation of the Community Transportation Coordinator's performance in general and relative to Commission and local standards as referenced in Rule 41-2.006, F.A.C., and the performance results of the most recent Transportation Disadvantaged Service Plan. 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. The Commission shall provide evaluation criteria for the local Coordinating Board to use relative to the performance of the Community Transportation Coordinator. This evaluation will be submitted to the Commission upon approval by the local coordinating board.

(c) Appoint a Grievance Committee to process and investigate complaints, from agencies, users, transportation operators, potential users of the system and the Community Transportation Coordinator in the designated service area, and make recommendations to the Coordinating Board or to the Commission, when local resolution cannot be found, for improvement of service. The Coordinating Board shall establish a process and procedures to provide regular opportunities for issues to be brought before such committee and to address them in a timely manner. Rider brochures or other documents provided to users or potential users of the system shall provide information about the complaint and grievance process including the publishing of the Commission's TD Helpline service when local resolution has not occurred. All materials shall be made available in accessible format, upon request by the citizen. Members appointed to the committee shall be voting members of the Coordinating Board.

(d) All coordinating board members should be trained on and comply with the requirements of Section 112.3143, F.S., concerning voting conflicts of interest.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.0157 FS. History—New 5-2-90, Amended 6-17-92, 11-16-93, 1-4-94, 7-11-95, 5-1-96, 10-1-96, 3-10-98, 4-8-01, 12-17-02, 7-3-03.*

#### **41-2.013 Transportation Disadvantaged Trust Fund.**

The Commission shall annually evaluate and determine each year's distribution of the Transportation Disadvantaged Trust Fund. Funds available through the Transportation Disadvantaged Trust Fund for non-sponsored transportation services and planning activities shall be applied only after all other potential funding sources have been used and eliminated. Grant funds shall not be used to supplant or replace funding of transportation disadvantaged services which are currently funded to a recipient by any federal, state, or local governmental agency. Monitoring of this mandate will be accomplished as needed by the Commission and all agencies funding transportation disadvantaged services. The use of minority-owned businesses is encouraged, utilizing the most recent certified companies published by the Department of Management Services. Funds deposited and appropriated into the Trust Fund will be utilized for:

(1) Commission administrative and operating expenses, including financial assistance, through a grant agreement, to designated official planning agencies to assist the Commission in implementing the program in each local area.

(2) A Grants Program to provide for the funding of non-sponsored trips, including the purchase of capital equipment.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013, 427.0159, 427.016 FS. History—New 5-2-90, Amended 6-17-92, 1-5-93, 6-26-94, 7-11-95, 3-10-98, 2-20-13.*

#### **41-2.014 Grants Program.**

(1) Eligible Applicants. Grant funds will be allocated annually to the following entities:

(a) Community Transportation Coordinators who have an executed Memorandum of Agreement.

(b) Metropolitan Planning Organizations or Designated Official Planning Agencies approved by the Commission.

(2) Types of Grants.

(a) Trip and Equipment Related. Trip and equipment related grant funds may be used for the provision of non-sponsored transportation disadvantaged services and for the purchase of capital equipment to be used for services provided to the transportation disadvantaged. Capital equipment expenditures will be limited to no more than 25% of the Commission participation and the required match.

(b) Planning Related. Planning related grant funds may be used by an eligible Metropolitan Planning Organization or

Designated Official Planning Agency to assist the Commission in their responsibilities at the local level as identified in Chapter 427, F.S., including support to the local Coordinating Board.

(3) Match Requirement. Eligible grant recipients for the trip and equipment grants only, must provide at least 10% of the total project cost as a local match. The match must be cash generated from local sources. Voluntary dollar collections do not require a match.

(4) Distribution of Grant Funds. On or about December 15 of each year, the Commission shall allocate a portion identified as the Grants Program of the Transportation Disadvantaged Trust Fund in the following manner:

(a) An annual amount of \$1,372,060 of the Grants Program shall be designated for planning grants to assist the Commission with implementation and maintenance of the program at the local level. Beginning with the 2002/2003 grant cycle, the annual cap will be adjusted by the same percentage increase equivalent to state employees as set by the Legislature.

(b) The voluntary dollar collections will be returned to the county where said funds were collected. The voluntary dollar collections shall be designated for additional trips at the local level.

(c) The remaining portion of funds, except as specified in paragraph 41-2.014(4)(b), F.A.C., will be appropriated for the Grants Program and designated for trip and equipment related grants, subject to limitations of paragraphs 41-2.014(1)(a) and (2)(a), F.A.C.

(5) Distribution of Trip and Equipment Related Grant Funds. Each eligible applicant's allocation will be determined for the county or counties within the designated service area for which the applicant provides coordinated transportation disadvantaged services.

(a) In order to maintain system and service stability, the Commission's Fiscal Year 99/00 Allocation of Trip and Equipment Grant Funds, dated 02/99, incorporated herein by reference, shall be the base allocation for each subsequent year's distribution for trip and equipment related grant funds. No county shall receive less than the base allocation unless the Commission's five year cash-flow forecast falls below the Fiscal Year 99/00 levels allocated to the trip and equipment grant related program.

(b) If the level of funding available for distribution to the trip and equipment grant program falls below the base as stated in paragraph 41-2.014(5)(a), F.A.C., a proportionate adjustment to the base allocation will be made. Such adjustment will be based on the five year cash-flow forecast of the Commission, and each county's share of the Fiscal Year 99/00 trip and equipment related grant allocation.

(c) Allocation of additional trip and equipment grant funds above the amount used in the base allocation will be allocated to eligible applicants based on a comparative ranking of all eligible applicants in each of the following four categories:

1. The applicant's total county area in square miles as a percentage of the total square miles of all eligible applicants.
2. Total system passenger trips provided as a percentage of all eligible applicant trips reported.
3. Total system vehicle miles traveled as a percentage of all eligible applicants vehicle miles traveled and reported.
4. Total county population as a percentage of the total population of all eligible applicants.

(d) Each category will represent one fourth of the trip related grant funds.

(e) The latest required operational statistics report which is submitted by September 15 of each year will be used for obtaining the applicant's coordinated vehicle miles and coordinated passenger trips data. For purpose of this section, coordinated vehicle miles or passenger trips shall not include those services provided through an approved transportation alternative.

(6) Distribution of Planning Related Grants. Planning related grant funds will be apportioned for distribution to the planning agencies as follows:

(a) 25% of the planning allocation shall be divided into shares equal to the percentage of population each county has relative to the total state population, with each planning agency receiving a share for each county within its jurisdiction;

(b) 75% of the planning allocation shall be divided into shares equal to the number of counties throughout the state, with each planning agency receiving no more than one share for each county within its jurisdiction. Eligible applicants not requiring the total amount of funding available may recommend to the Coordinating Board that any excess funds be allocated to the Community Transportation Coordinator for additional non-sponsored trip needs. The Commission shall reallocate any eligible excess funds to that particular county or service area's normal allocation. A local cash match of at least 10% shall be required to obtain this additional allocation.

(7) All grant applicants will provide their request for funds to the Commission no later than October 1 each year, unless otherwise approved by the Commission.

(8) Prioritization of Non-sponsored Transportation Services. The Community Transportation Coordinator, with approval of the Coordinating Board, shall have the authority to prioritize trips for non-sponsored transportation disadvantaged services which are

purchased with Transportation Disadvantaged Trust Funds. Any prioritization of trips or eligibility criteria which is developed shall consider all of the following criteria:

- (a) Cost Effectiveness and Efficiency.
- (b) Purpose of Trip.
- (c) Unmet Needs.
- (d) Available Resources.

*Rulemaking Authority 427.013(9), 427.013(10) FS. Law Implemented 427.013, 427.0159, 427.016 FS. History—New 5-2-90, Amended 6-17-92, 7-21-93, 6-26-94, 10-1-96, 3-10-98, 1-13-04.*

#### **41-2.015 Expenditure of Local Government, State, and Federal Funds for the Transportation Disadvantaged.**

(1) Any agency purchasing transportation services or providing transportation funding for the transportation disadvantaged with transportation disadvantaged funds shall expend all transportation disadvantaged funds through a contractual arrangement with the community transportation coordinator or an approved coordination provider except as provided in subsections (2) and (3) below.

(2) When it is better suited to the unique and diverse needs of a transportation disadvantaged person, the sponsoring agency may purchase or provide transportation by utilizing the following alternatives:

- (a) Privately owned vehicle of an agency volunteer or employee;
- (b) State owned vehicles;
- (c) Privately owned vehicle of a family member or custodian;
- (d) Common carriers, such as commercial airlines or bus; and
- (e) Emergency medical vehicles.

(3) The sponsoring agency may utilize other modes of transportation when the community transportation coordinator determines it is unable to provide or arrange the required service. Information pertaining to these denials for service shall be reported by the community transportation coordinator on a quarterly basis or more frequently as specified by the local coordinating board.

(4) All agency applications for transportation disadvantaged operating and capital assistance funds beyond those identified in the normal state legislative budget process shall be made available to the Coordinating Board for such review.

(5) The Commission shall request all funding requests containing a transportation disadvantaged fund component from the Florida State Clearinghouse. Said funding request shall be reviewed by the Commission. The Commission will respond when there are funding requests that conflict with the intent and provisions of Chapter 427, F.S., and the rules thereof.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013(16), 427.016 FS. History—New 5-2-90, Amended 6-17-92, 7-11-95, 3-10-98.*

#### **41-2.016 Accessibility.**

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013(4) FS. History—New 5-2-90, Amended 6-17-92, Repealed 7-15-12.*

#### **41-2.0161 Program Monitoring of Performance.**

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013 FS. History—New 6-17-92, Amended 5-1-96, Repealed 1-7-16.*

#### **41-2.0162 Chronological Listing of Report Dates.**

The following reports are listed in chronological order by due date and the recipient of the report:

- (1) January 1 – Commission Annual Report due to Governor and Legislature.
- (2) September 15 – Annual Operating Report of Community Transportation Coordinator due to Commission.
- (3) September 15 – Transportation Improvement Programs in urbanized areas due to Commission.
- (4) September 15 – Annual report of the actual amount of funds expended and trips purchased due from each state agency.
- (5) September 15 – Annual report accounting for all local government and direct federal funds for transportation for the disadvantaged expended in its jurisdiction due from each designated official planning agency or metropolitan planning organization.

*Rulemaking Authority 427.013(9) FS. Law Implemented 427.013, 427.0135, 427.015, 427.0155, 427.016 FS. History—New 6-17-92, Amended 6-15-93, 1-4-94, 7-11-95, 5-1-96, 3-10-98, 8-10-09.*

**41-2.018 Public Comment.**

The Commission for the Transportation Disadvantaged invites and encourages all members of the public to provide comment on matters or propositions before the Commission or a committee of the Commission. The opportunity to provide comment shall be subject to the following:

(1) Members of the public will be given an opportunity to provide comment on subject matters before the Commission after an agenda item is introduced at a properly noticed Commission meeting.

(2) Members of the public shall be limited to five (5) minutes to provide comment. This time shall not include time spent by the presenter responding to questions posed by Commission members, staff or Commission counsel. The chair of the Commission may extend the time to provide comment if time permits.

(3) Members of the public shall notify Commission staff in writing of his or her interest to be heard on a proposition or matter before the Commission. The notification shall identify the person or entity, indicate its support, opposition, or neutrality, and identify who will speak on behalf of a group or faction of persons.

*Rulemaking Authority 286.0114 FS. Law Implemented 286.0114 FS. History--New 2-13-14.*

**EXHIBIT L**

**CHAPTER 341.061, FLORIDA STATUTES**

Select Year: 2017 [Go](#)

The 2017 Florida Statutes

Title XXVI  
PUBLIC TRANSPORTATION

Chapter 341  
PUBLIC TRANSIT  
CHAPTER 341  
PUBLIC TRANSIT

[View Entire Chapter](#)

- 341.011 Florida Public Transit Act; short title.
- 341.031 Definitions relating to Florida Public Transit Act.
- 341.041 Transit responsibilities of the department.
- 341.051 Administration and financing of public transit and intercity bus service programs and projects.
- 341.052 Public transit block grant program; administration; eligible projects; limitation.
- 341.0521 Public records exemption.
- 341.053 Intermodal Development Program; administration; eligible projects; limitations.
- 341.061 Transit safety standards; inspections and system safety reviews.
- 341.071 Transit productivity and performance measures; reports.
- 341.101 State purchase of mass transit vehicles and facilities.
- 341.102 Regulation of nonpublic sector buses.
- 341.103 Disposal of personal property found on a public transportation system.
- 341.301 Definitions; ss. 341.302-341.303.
- 341.302 Rail program; duties and responsibilities of the department.
- 341.3025 Multicounty public rail system fares and enforcement.
- 341.303 Funding authorization and appropriations; eligibility and participation.
- 341.501 High-technology transportation systems; joint project agreement or assistance.
- 341.8201 Short title.
- 341.8203 Definitions.
- 341.822 Powers and duties.
- 341.8225 Department of Transportation sole governmental entity to acquire, construct, or operate high-speed rail projects; exception.
- 341.825 Communication facilities.
- 341.836 Associated development.
- 341.838 Fares, rates, rents, fees, and charges.
- 341.839 Alternate means.
- 341.840 Tax exemption.
- 341.842 Liberal construction.

341.011 Florida Public Transit Act; short title.—Sections 341.011-341.061 shall be known and may be cited as the “Florida Public Transit Act.”  
History.—s. 1, ch. 78-283; s. 1, ch. 84-340.

341.031 Definitions relating to Florida Public Transit Act.—As used in ss. 341.011-341.061, the term:

- (1) “Public transit provider” or “provider” means a public agency providing public transit service, including rail authorities created in chapter 343.
- (2) “Fixed-guideway transportation system” means a public transit system for the transporting of people by a conveyance, or a series of interconnected conveyances, which conveyance or series of conveyances is specifically designed for travel on a stationary rail or other guideway, whether located on, above, or under the ground.
- (3) “Eligible transit operating costs” means the total administrative, management, and operation costs directly incident to the provision of public transit services, excluding any depreciation or amortization of capital assets.
- (4) “Local revenue sources” means the sum of funds received from a local government entity to assist in paying transit operation costs, including tax funds, and revenue earned from fare box receipts, charter service, contract service, express service, and nontransportation activities.
- (5) “Paratransit” means those elements of public transit which provide service between specific origins and destinations selected by the individual user with such service being provided at a time that is agreed upon by the user and the provider of the service. Paratransit service is provided by taxis, limousines, “dial-a-ride” buses, and other demand-responsive operations that are characterized by their nonscheduled, nonfixed route nature.
- (6) “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 either governmentally owned or privately owned. Public transit specifically includes those forms of transportation commonly known as “paratransit.”
- (7) “Public transit capital project” means a project undertaken by a public agency to provide public transit to its constituency, and is limited to acquisition, design, construction, reconstruction, or improvement of a governmentally owned or operated transit system.
- (8) “Public transit service development project” means a project undertaken by a public agency to determine whether a new or innovative technique or measure can be utilized to improve or expand public transit services to its constituency. The duration of the project shall be limited according to the type of the project in conformance with the provisions of s. 341.051(5)(e), but in no case shall exceed a period of 3 years. Public transit service development projects specifically include projects involving the utilization of new technologies, services, routes, or vehicle frequencies; the purchase of special transportation services; and other such techniques for increasing service to the riding public as are applicable to specific localities and transit user groups.
- (9) “Commuter assistance program” means financial and technical assistance by the department to promote alternatives to the use of automobiles by a single commuter. The term includes the following program areas:
  - (a) “Ridesharing,” which means an arrangement between persons with a common destination, or destinations, within the same proximity, to share the use of a motor vehicle on a recurring basis for round-trip transportation to and from their place of employment or other common destination. For purposes of ridesharing, employment shall be deemed to commence when an employee arrives at the employer’s place of employment to report for work and shall be deemed to terminate when the employee leaves the employer’s place of employment, excluding areas not under the control of the employer. However, an employee shall be deemed to be within the course of employment when the employee is engaged in the performance of duties assigned or directed by the employer, or acting in the furtherance of the business of the employer, irrespective of location.
  - (b) “Transportation demand management,” which means techniques that can be used to increase the efficiency of existing transportation systems by influencing demand on the systems and by reducing the number of automobile trips during peak hours of highway use.
  - (c) “Transportation management association,” which means an organization which helps solve transportation problems by encouraging businesses and governments to implement ridesharing and demand management strategies.
- (10) “Transit corridor project” means a project that is undertaken by a public agency and designed to relieve congestion and improve capacity within an identified transportation corridor by increasing people-carrying capacity of the system through the use and facilitated movement of high-occupancy conveyances. Each transit corridor project must meet the requirements established in s. 341.051(5)(d). Initial project duration shall not exceed a period of 2 years unless the project is reauthorized by the Legislature. Such reauthorization shall be based upon a determination that the project is meeting or exceeding the criteria, developed pursuant to s. 341.051(5)(d), by which the success of the project is being judged and by inclusion of the project in a departmental appropriation request.
- (11) “Intercity bus service” means regularly scheduled bus service for the general public which operates with limited stops over fixed routes connecting two or more urban areas not in close proximity; has the capacity for transporting baggage carried by passengers; makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available; maintains scheduled information in the National Official Bus Guide; and provides package express service incidental to passenger transportation.
- (12) “Eligible bus carrier” or “carrier” means a private company that has operated defined intercity bus service in the state, with formal authority in accordance with the rules and regulations of the Federal Motor Carrier Safety Administration and the Surface Transportation Board of the Federal Department of Transportation, for a minimum of 2 years.
- (13) “Eligible intercity bus costs” means the total costs directly incident to the provision of intercity bus service, including any depreciation or amortization of capital assets purchased without public financial assistance.
- (14) “Intercity bus capital project” means a capital project undertaken by an intercity bus carrier to provide intercity bus service, and is limited to acquisition, design, construction, reconstruction, or improvement of a privately operated intercity bus service. Projects may include that portion of a governmentally owned or operated transit system designed to support privately operated intercity bus service.  
History.—s. 1, ch. 78-283; s. 2, ch. 82-95; s. 3, ch. 84-340; s. 20, ch. 85-81; s. 80, ch. 90-136; s. 65, ch. 92-152; ss. 35, 62, ch. 93-164; s. 85, ch. 2002-20; s. 1, ch. 2003-291.

341.041 Transit responsibilities of the department.—The department shall, within the resources provided pursuant to chapter 216:

- (1) Develop a statewide plan that provides for public transit and intercity bus service needs at least 5 years in advance. The plan shall be developed in a manner that will assure maximum use of existing facilities, and optimum integration and coordination of the various modes of transportation, including both governmentally owned and privately owned resources, in the most cost-effective manner possible. The



plan shall also incorporate plans adopted by local and regional planning agencies which are consistent, to the maximum extent feasible, with adopted strategic policy plans and approved local government comprehensive plans for the region and units of local government covered by the plan and shall, insofar as practical, conform to federal planning requirements. The plan shall be consistent with the goals of the Florida Transportation Plan developed pursuant to s. 339.155.

- (2) Formulate a specific program of projects and project financing to respond to identified transit and intercity bus service needs as part of the work program.
- (3) Develop, publish, and administer state measures concerning system management, performance, productivity, cost distribution, and safety of governmentally owned public transit systems and privately owned or operated systems financed wholly or in part by state funding. Such measures shall be developed jointly with representatives of affected publicly owned transit systems and in coordination with affected privately owned systems, with full consideration given to nationwide industry norms.
- (4) Provide technical and financial assistance to units of local government and intercity bus carriers, based on an analysis of public transit and intercity bus service problems and needs, to assist in establishing and implementing effective transit systems and related support programs. In providing such assistance, the department may assist public agencies that provide public transit and intercity bus carriers that provide intercity bus services by making department-owned transit vehicles and appurtenances available for lease to such agencies for special needs of limited duration.
- (5) Coordinate activities between the public entities and private entities on matters relating to public transit and intercity bus services.
- (6) Assist in the development and implementation of marketing and passenger information programs for public transit and intercity bus services.
- (7) Provide transit service through contracts with existing publicly or privately owned transit systems, where such service represents the transit element of a corridor project designed to relieve urban traffic congestion.
- (8) Provide intercity bus service, as defined in s. 341.031, to support projects that serve to maintain and enhance statewide intercity bus service. The department shall use and dedicate federal funds apportioned to intercity bus service according to federal requirements to support a statewide intercity bus network.
- (9) Provide new transit service and equipment where a public need has been determined to exist pursuant to the transportation planning process and where all of the following conditions occur:
  - (a) No other governmental entity of appropriate jurisdiction exists.
  - (b) The service cannot be reasonably provided by a governmentally owned or privately owned public transit provider.
  - (c) The cost of providing the service does not exceed the sum of revenues resulting from user fares, special transit services such as charter operations, local fund participation, and specific legislative appropriation for this purpose.

The department may buy, sell, own, lease, and otherwise encumber facilities, transit vehicles, and appurtenances thereto, as necessary to provide such service; or the department may provide service by contracts with governmentally owned or privately owned service providers.

- (10) Provide public transportation service where emergency service is required, provided that no other private or public transportation operation is available to provide needed service and that such service is clearly in the best interests of the people or communities being served. Such service shall be provided by contractual services, actual operation of state-owned transit equipment and facilities, or any other means deemed appropriate by the department and shall be limited to a period not to exceed 2 years.
- (11) Administer federal and state commuter assistance programs and related federal-aid funds apportioned to the department, which promote the use of ridesharing arrangements and transportation demand management strategies, and the creation of transportation management associations. Public agencies, and private organizations established pursuant to chapter 617 and approved by the local government and the department as being consistent with local, regional, and state transportation plans, are eligible to receive funds under this program. The department shall establish adequate insurance requirements based on passenger capacity for each vehicle used in ridesharing.
- (12) Assist local governmental entities and other transit operators in the planning and development of transit programs and procedures and in the identification of alternatives for achieving the most effective use of available transportation resources and increasing revenue sources as needed so that Florida's transit systems can move toward becoming fiscally self-sufficient. The department may also advance, on a matching basis, state funds for capital improvements to transit properties in accordance with the following:
  - (a) Candidate programs may include, but are not limited to, the development of terminal facilities for lease by interfacing modes, the acquisition and development of adjacent land for lease or sale to public and private entities, and the acquisition and development of air rights.
  - (b) The criteria to be utilized in determining whether or not to advance such funds shall be adopted by rule and shall include the demonstrated need of the transit system, administrative capability, and a system financial plan as approved by the department.
  - (13) Assist local governmental entities in achieving a condition wherein transit systems are operated at a service level that is responsive to identified transit needs and in such a manner as to promote maximum transit usage and achieve the highest possible operating recovery ratio commensurate with the local government's transit role and requirements.
  - (14) Assist local governmental entities and other transit operators in the planning, development, and coordination of transit services for Temporary Cash Assistance Program participants as defined in s. 414.0252.
  - (15) Create and maintain a common self-retention insurance fund to support fixed-guideway projects throughout the state when there is a contractual obligation to have the fund in existence in order to provide fixed-guideway services. The maximum limit of the fund is as required by any contractual obligation.

History.—s. 1, ch. 78-283; s. 253, ch. 84-309; s. 4, ch. 84-340; s. 16, ch. 89-301; s. 81, ch. 90-136; s. 66, ch. 92-152; s. 3, ch. 95-149; s. 56, ch. 95-257; s. 11, ch. 98-57; s. 34, ch. 99-385; s. 2, ch. 2003-291; s. 6, ch. 2010-209.

#### 341.051 Administration and financing of public transit and intercity bus service programs and projects.—

- (1) FEDERAL AID.—
  - (a) The department is authorized to receive federal grants or apportionments for public transit and intercity bus service projects in this state.
  - (b) Local governmental entities are authorized to receive federal grants or apportionments for public transit and commuter assistance projects. In addition, the provisions of s. 337.403 notwithstanding, if the relocation of utility facilities is necessitated by the construction of a fixed-guideway public transit project and the utilities relocation is approved as a part of the project by a participating federal agency (if eligible for federal matching reimbursement), then any county chartered under s. 6(e), Art. VIII of the State Constitution shall pay at least 50 percent of the nonfederal share of the cost attributable to such relocation after deducting therefrom any increase in the value of the new facility and any salvage value derived from the old facility. The balance of the nonfederal share shall be paid by the utility.
- (2) PUBLIC TRANSIT PLAN.—
  - (a) The department shall prepare a public transit plan which shall be included in the tentative work program of the department prepared pursuant to s. 339.135(4). The provisions of s. 339.135 apply to public transit projects in the same manner that they apply to other transportation facility construction projects. Any planned department participation shall be in accordance with subsection (5).
  - (b) The public transit plan shall be consistent with the local plans developed in accordance with the comprehensive transportation planning process. Projects that involve funds administered by the department, and that will be undertaken and implemented by another public agency, shall be included in the public transit plan upon the request of that public agency, providing such project is eligible under the requirements established herein and subject to estimated availability of funds. Projects so included in the plan shall not be altered or removed from priority status without notice to the public agency or local governmental entities involved.
- (3) APPROPRIATION REQUESTS.—
  - (a) Public transit funds shall be requested on the basis of the funding required for the public transit plan. Appropriation requests shall identify each public transit project calling for a state expenditure of \$500,000 or more.
  - (b) Public transit service development projects and transit corridor projects shall be individually identified in the appropriation request by the department. Such request shall show a breakdown of funds showing capital and operating expense.
  - (c) Unless otherwise authorized by the Legislature, the department is prohibited from entering into any agreement or contract for a public transit project which would result in the ultimate expenditure or commitment of state funds in excess of \$5 million.
- (4) PROJECT ELIGIBILITY.—
  - (a) Any project that is necessary to meet the program objectives enumerated in s. 341.041, that conforms to the provisions of this section, and that is contained in the local transportation improvement program and the adopted work program of the department is eligible for the expenditure of state funds for transit purposes.
    1. The project shall be a project for service or transportation facilities provided by the department under the provisions of this act, a public transit capital project, a commuter assistance project, a public transit service development project, an intercity bus service capital project, an intercity bus service project, or a transit corridor project.
    2. The project must be approved by the department as being consistent with the criteria established pursuant to the provisions of this act.
  - (b) Such expenditures shall be in accordance with the fund participation rates and the criteria established in this section for project development and implementation, and are subject to approval by the department as being consistent with the Florida Transportation Plan and regional transportation goals and objectives.
    - (c) Unless otherwise authorized by the Legislature, the department is prohibited from entering into any agreement or contract for a public transit project which would result in the ultimate expenditure or commitment of state funds in excess of \$5 million.
- (5) FUND PARTICIPATION; CAPITAL ASSISTANCE.—
  - (a) The department may fund up to 50 percent of the nonfederal share of the costs, not to exceed the local share, of any eligible public transit capital project or commuter assistance project that is local in scope; except, however, that departmental participation in the final design, right-of-way acquisition, and construction phases of an individual fixed-guideway project which is not approved for federal funding shall not exceed an amount equal to 12.5 percent of the total cost of each phase.
  - (b) The department is authorized to fund up to 100 percent of the cost of any eligible transit capital project, intercity bus service project, or commuter assistance project that is statewide in scope or involves more than one county where no other governmental entity or appropriate jurisdiction exists.
  - (c) The department is authorized to advance up to 80 percent of the capital cost of any eligible project that will assist Florida's transit systems and intercity bus services in becoming fiscally self-sufficient. Such advances shall be reimbursed to the department on an appropriate schedule not to exceed 5 years after the date of provision of the advances.
  - (d) The department is authorized to fund up to 100 percent of the capital and net operating costs of statewide transit service development projects or transit corridor projects. All transit service development projects shall be specifically identified by way of a departmental appropriation request, and transit corridor projects shall be identified as part of the planned improvements on each transportation corridor designated by the department. The project objectives, the assigned operational and financial responsibilities, the timeframe required to develop the required service, and the criteria by which the success of the project will be judged shall be documented by the department for each such transit service development project or transit corridor project.
  - (e) The department is authorized to fund up to 50 percent of the capital and net operating costs of transit service development projects that are local in scope and that will improve system efficiencies, ridership, or revenues. All such projects shall be identified in the appropriation request of the department through a specific program of projects, as provided for in s. 341.041, that is selectively applied in the

following functional areas and is subject to the specified times of duration:

1. Improving system operations, including, but not limited to, realigning route structures, increasing system average speed, decreasing deadhead mileage, expanding area coverage, and improving schedule adherence, for a period of up to 3 years;
2. Improving system maintenance procedures, including, but not limited to, effective preventive maintenance programs, improved mechanics training programs, decreasing service repair calls, decreasing parts inventory requirements, and decreasing equipment downtime, for a period of up to 3 years;
3. Improving marketing and consumer information programs, including, but not limited to, automated information services, organized advertising and promotion programs, and signing of designated stops, for a period of up to 2 years; and
4. Improving technology involved in overall operations, including, but not limited to, transit equipment, fare collection techniques, electronic data processing applications, and bus locators, for a period of up to 2 years.

(f) The department may fund up to 100 percent of the federal-aid apportionment for intercity bus service.

(6) ANNUAL APPROPRIATION.—Funds paid into the State Transportation Trust Fund pursuant to s. 201.15 for the New Starts Transit Program are hereby annually appropriated for expenditure to support the New Starts Transit Program.

(7) INTEROPERABLE FARE COLLECTION SYSTEMS.—

(a) The Legislature recognizes the importance of encouraging the seamless use of local and regional public transportation systems by residents of and visitors to the state wherever possible. The paramount concern is to encourage the implementation of fare collection systems that are interoperable and compatible with multiple public transportation systems throughout the state.

(b) Notwithstanding any other provision of law to the contrary, in order to facilitate the ease of transfer from one public transportation system to another, any public transit system which connects directly with a new public rail system put into service after December 1, 2010, and which is adding a new fare media system or is upgrading its existing fare media system shall use a universally accepted contactless fare media that is compatible with the American Public Transportation Association's Contactless Fare Media System Standard or the applicable bankcard contactless media standards and allows users to purchase fares at a single point of sale with coin, cash, or credit card. This paragraph does not require the use of a universally accepted contactless fare media for the paratransit element of any transit system or by any public transit system that does not share one or more points of origin or destination with a public rail system.

For purposes of this section, the term "net operating costs" means all operating costs of a project less any federal funds, fares, or other sources of income to the project.

History.—s. 1, ch. 78-283; s. 63, ch. 83-3; ss. 9, 13, ch. 83-138; s. 254, ch. 84-309; s. 5, ch. 84-340; s. 18, ch. 87-225; s. 20, ch. 88-286; s. 17, ch. 89-301; s. 82, ch. 90-136; s. 67, ch. 92-152; s. 21, ch. 92-173; s. 36, ch. 93-164; s. 57, ch. 95-257; s. 136, ch. 99-13; s. 106, ch. 99-385; s. 86, ch. 2002-20; s. 3, ch. 2003-291; s. 34, ch. 2005-290; s. 9, ch. 2008-114; s. 25, ch. 2010-225; s. 86, ch. 2015-229.

**341.052 Public transit block grant program; administration; eligible projects; limitation.—**

(1) There is created a public transit block grant program which shall be administered by the department. Block grant funds shall only be provided to "Section 9" providers and "Section 18" providers designated by the United States Department of Transportation and community transportation coordinators as defined in chapter 427. Eligible providers must establish public transportation development plans consistent, to the maximum extent feasible, with approved local government comprehensive plans of the units of local government in which the provider is located. In developing public transportation development plans, eligible providers must solicit comments from local workforce development boards established under chapter 445. The development plans must address how the public transit provider will work with the appropriate local workforce development board to provide services to participants in the welfare transition program. Eligible providers must provide information to the local workforce development board serving the county in which the provider is located regarding the availability of transportation services to assist program participants.

(2) Costs for which public transit block grant program funds may be expended include:

- (a) Costs of public bus transit and local public fixed guideway capital projects.
- (b) Costs of public bus transit service development and transit corridor projects. Whenever block grant funds are used for a service development project or a transit corridor project, the use of such funds is governed by s. 341.051. Local transit service development projects and transit corridor projects currently operating under contract with the department shall continue to receive state funds according to the contract until such time as the contract expires. Transit corridor projects, wholly within one county, meeting or exceeding performance criteria as described in the contract shall be continued by the transit provider at the same or a higher level of service until such time as the department, the M.P.O., and the service provider, agree to discontinue the service. The provider may not increase fares for services in transit corridor projects wholly within one county without the consent of the department.
- (c) Costs of public bus transit operations.

All projects must be consistent, to the maximum extent feasible, with the approved local government comprehensive plans of the units of local government in which the project is located.

(3) The following limitations shall apply to the use of public transit block grant program funds:

- (a) State participation in eligible capital projects shall be limited to 50 percent of the nonfederal share of such project costs.
- (b) State participation in eligible public transit operating costs may not exceed 50 percent of such costs or an amount equal to the total revenue, excluding farebox, charter, and advertising revenue and federal funds, received by the provider for operating costs, whichever amount is less.
- (c) No eligible public transit provider shall use public transit block grant funds to supplant local tax revenues made available to such provider for operations in the previous year; however, the Secretary of Transportation may waive this provision for public transit providers located in a county recovering from a state of emergency declared pursuant to part I of chapter 252.
- (d) The state may not give any county more than 39 percent of the funds available for distribution under this section or more than the amount that local revenue sources provide to that transit system.
- (4) To remain eligible to receive funding under the public transit block grant program, eligible public transit providers must comply with the requirements of s. 341.071(1) and the requirements of s. 341.071(2) and must comply with the provisions of paragraph (2)(b) relating to existing transit corridor projects.
- (5) The department shall distribute 15 percent of the funds designated for the public transit block grant program into the Transportation Disadvantaged Trust Fund for distribution to community transportation coordinators as provided by the rules of the Commission for the Transportation Disadvantaged.
- (6) The department shall distribute 85 percent of the public transit block grant funds to "Section 9" and "Section 18" providers designated by the United States Department of Transportation. The funds shall be distributed to "Section 9" providers, and to "Section 18" providers that are not designated as community transportation coordinators pursuant to chapter 427, according to the following formula, except that at least \$20,000 shall be distributed to each eligible provider if application of the formula provides less than that amount for any such provider:
  - (a) One-third shall be distributed according to the percentage that an eligible provider's county population in the most recent year for which those population figures are available from the state census repository is of the total population of all counties served by eligible providers.
  - (b) One-third shall be distributed according to the percentage that the total revenue miles provided by an eligible provider, as verified by the most recent "Section 15" report to the Federal Transit Administration or a similar audited report submitted to the department, is of the total revenue miles provided by eligible providers in the state in that year.
  - (c) One-third shall be distributed according to the percentage that the total passengers carried by an eligible provider, as verified by the most recent "Section 15" report submitted to the Federal Transit Administration or a similar audited report submitted to the department, is of the total number of passengers carried by eligible providers in the state in that year.
- (7)(a) Any funds distributed to an eligible provider pursuant to subsection (6) which cannot be expended within the limitations of the block grant program shall be returned to the department for redistribution to other eligible providers pursuant to that subsection.
  - (b) The department may consult with an eligible provider, before distributing funds to that provider pursuant to subsection (6), to determine whether the provider can expend its total block grant within the limitations of the block grant program. If the department and the provider agree that the total block grant cannot be expended, the provider may agree to accept a block grant of less than the total amount, in which case the funds that exceed such lesser agreed-upon amount shall be redistributed to other eligible providers pursuant to subsection (6).
  - (c) If an audit reveals that an eligible provider expended block grant funds on unauthorized uses, the provider must repay to the department an amount equal to the funds expended for unauthorized uses. The department shall redistribute such repayments to other eligible providers pursuant to subsection (6).
- (8) Notwithstanding the provisions of subsections (5), (6), and (7), the department may supplement an eligible provider's block grant allocation if funds are available; if requested by the M.P.O. or, if there is no M.P.O., by the county with jurisdiction; and if the department concurs in the request. Any supplement of a transit provider's block grant shall be specifically identified in the tentative work program submitted by the department to the Legislature. The provisions of subsections (2) and (3) shall apply to total block grants as supplemented by allocations made under this subsection.

History.—s. 83, ch. 90-136; s. 68, ch. 92-152; s. 34, ch. 93-164; s. 22, ch. 94-237; s. 15, ch. 97-100; s. 12, ch. 98-57; s. 86, ch. 2000-165; s. 11, ch. 2016-216.

**341.0521 Public records exemption.—**Personal identifying information held by a public transit provider for the purpose of facilitating the prepayment of transit fares or the acquisition of a prepaid transit fare card or similar device is exempt from s. 119.07(1) and s. 24(a), Art. I of the State Constitution.

History.—s. 1, ch. 2010-196; s. 1, ch. 2015-160.

**341.053 Intermodal Development Program; administration; eligible projects; limitations.—**

- (1) There is created within the Department of Transportation an Intermodal Development Program to provide for major capital investments in fixed-guideway transportation systems, access to seaports, airports and other transportation terminals, providing for the construction of intermodal or multimodal terminals; and to otherwise facilitate the intermodal or multimodal movement of people and goods.
- (2) In recognition of the department's role in the economic development of this state, the department shall develop a proposed intermodal development plan to connect Florida's airports, deepwater seaports, rail systems serving both passenger and freight, and major intermodal connectors to the Strategic Intermodal System highway corridors as the primary system for the movement of people and freight. In this state in order to make the intermodal development plan a fully integrated and interconnected system. The intermodal development plan must:
  - (a) Define and assess the state's freight intermodal network, including airports, seaports, rail lines and terminals, intercity bus lines and terminals, and connecting highways.
  - (b) Prioritize statewide infrastructure investments, including the acceleration of current projects, which are found by the Freight Stakeholders Task Force to be priority projects for the efficient movement of people and freight.
  - (c) Be developed in a manner that will assure maximum use of existing facilities and optimum integration and coordination of the various modes of transportation, including both government-owned and privately owned resources, in the most cost-effective manner possible.
- (3) The Intermodal Development Program shall be administered by the department.
- (4) The department shall review funding requests from a rail authority created pursuant to chapter 343. The department may include projects of the authorities, including planning and design, in the tentative work program.
- (5) No single transportation authority operating a fixed-guideway transportation system, or single fixed-guideway transportation system not administered by a transportation authority, receiving funds under the

Intermodal Development Program shall receive more than 33 1/3 percent of the total Intermodal development funds appropriated between July 1, 1990, and June 30, 2015. In determining the distribution of funds under the Intermodal Development Program in any fiscal year, the department shall assume that future appropriation levels will be equal to the current appropriation level.

(6) The department is authorized to fund projects within the Intermodal Development Program, which are consistent, to the maximum extent feasible, with approved local government comprehensive plans of the units of local government in which the project is located. Projects that are eligible for funding under this program include major capital investments in public rail and fixed-guideway transportation facilities and systems which provide intermodal access; road, rail, intercity bus service, or fixed-guideway access to, from, or between seaports, airports, and other transportation terminals; construction of intermodal or multimodal terminals; development and construction of dedicated bus lanes; and projects which otherwise facilitate the intermodal or multimodal movement of people and goods.

History.—s. 84, ch. 90-136; s. 69, ch. 92-152; s. 66, ch. 93-164; s. 47, ch. 99-385; s. 87, ch. 2002-20; s. 4, ch. 2003-291; s. 91, ch. 2012-174.

#### 341.061 Transit safety standards; inspections and system safety reviews.—

(1)(a) The department shall adopt by rule minimum safety standards for governmentally owned fixed-guideway transportation systems and privately owned or operated fixed-guideway transportation systems operating in this state which are financed wholly or partly by state funds. Standards must be site-specific for fixed-guideway transportation systems and shall be developed jointly by the department and representatives of the affected systems, giving full consideration to nationwide industry safety norms relating to the development and operation of fixed-guideway transportation systems.

(b) Each fixed-guideway transportation system shall develop a safety program plan that complies with established standards and shall certify to the department that the plan complies with the standards.

Following certification to the department, the fixed-guideway transportation system shall implement and comply with the plan during the development and operation of the system. Each fixed-guideway transportation system shall verify annually in writing to the department that it has complied with its adopted safety program plan.

(c) Before beginning passenger service operations, a fixed-guideway transportation system must certify in writing to the department that the system is safe for passenger service. Further, before a fixed-guideway transportation system the operations of which have been suspended as a result of noncompliance with established standards returns to service, the system must certify in writing to the department that the system is safe for passenger service.

(d) If a fixed-guideway transportation system does not comply with paragraph (b) or paragraph (c) or if, upon certification by a fixed-guideway transportation system, the department has good cause to believe that the system is not complying with its adopted safety program plan or is not safe for passenger service, the department may conduct a review of the system for safety compliance. Upon completion of its review, the department shall provide a copy of the review report to the affected system. Any adverse findings and any corrective actions required and the time allowed for such actions must be stated in the report. If at any time continued operation of the system, or a portion thereof, poses an immediate danger to public safety, the system operator shall suspend affected system service until corrective action is taken. If the system operator fails to take corrective action or fails to suspend service when immediate danger to the public exists, the department may require the affected system service to be suspended.

(2)(a) The department shall adopt by rule minimum equipment and operational safety standards for all governmentally owned bus transit systems and privately owned or operated bus transit systems operating in this state that are financed wholly or partly by state funds, all bus transit systems created pursuant to chapter 427, and all privately owned or operated bus transit systems under contract with any of the foregoing systems. Standards for bus transit systems shall be developed jointly by the department and representatives of the transit systems. Each such bus transit system shall develop a transit safety program plan that complies with established standards and shall certify to the department that the plan complies with the standards. Following certification to the department, the bus transit system shall implement and comply with the plan during the operation of the transit system.

(b) Each bus transit system shall, as part of the safety program plan, require that all transit buses operated by the system be inspected at least annually in accordance with established standards. Qualified personnel of the bus transit system or public or private entities qualified by the bus transit system shall perform safety inspections. Each bus transit system shall certify annually in writing to the department that it has complied with its adopted safety program plan and, as part of that plan, that safety inspections have been performed by a qualified entity at least once that year on all transit buses operated by such system.

(c) If a bus transit system does not comply with paragraph (a) or paragraph (b) or if, upon certification by a bus transit system, the department has good cause to believe that the system is not complying with its adopted safety program plan or is not safe for passenger service, the department may conduct a review of the system for safety compliance. Upon completion of its review, the department shall provide a copy of the review report to the affected system. Any adverse findings and any corrective actions required and the time allowed for such actions must be stated in the report. If at any time continued operation of the system, or a portion thereof, poses an immediate danger to public safety, the system operator shall suspend affected system service until corrective action is taken. If the system operator fails to take corrective action or fails to suspend service when immediate danger to the public exists, the department may require the affected system service to be suspended.

History.—s. 6, ch. 84-340; s. 37, ch. 86-243.

#### 341.071 Transit productivity and performance measures; reports.—

(1) Where there is an approved local government comprehensive plan in the political subdivision or political subdivisions in which the public transportation system is located, each public transit provider shall establish public transportation development plans consistent with approved local government comprehensive plans.

(2) Each public transit provider shall establish productivity and performance measures, which must be approved by the department and which must be selected from measures developed pursuant to s.

341.041(3). Each provider shall, by January 31 of each year, report to the department relative to these measures. In approving these measures, the department shall give consideration to the goals and objectives of each system, the needs of the local area, and the role for public transit in the local area. The report shall also specifically address potential enhancements to productivity and performance which would have the effect of increasing farebox recovery ratio.

(3) Each public transit provider shall publish in the local newspaper of its area the productivity and performance measures established for the year and a report which provides quantitative data relative to the attainment of established productivity and performance measures.

History.—s. 85, ch. 90-136; s. 46, ch. 2007-196.

#### 341.101 State purchase of mass transit vehicles and facilities.—

(1) The Division of Bond Finance of the State Board of Administration is authorized to acquire, finance, lease, or sell, and the department is authorized to lease or purchase, mass transit vehicles and facilities pursuant to ss. 288.23-288.30 and ss. 215.57-215.83.

(2) As used in s. 166.021, a "municipal purpose" also includes any and all means for the transportation of people and goods from place to place, which means of transportation are developed, operated, or maintained in whole or in part from public funds.

History.—s. 2, 3, ch. 70-239; s. 255, ch. 84-309; s. 7, ch. 84-340; s. 284, ch. 92-279; s. 55, ch. 92-326.

Note.—Former s. 334.023.

341.102 Regulation of nonpublic sector buses.—Except for contract agreements awarded pursuant to chapter 427, a county, as defined in s. 125.011(1), or a local governmental entity located within such a county, may not unduly restrict or impose any economic regulation upon any private sector contract transportation agreement. A private sector contract transportation agreement is a prearranged written contract between a bus owner and a public sector or private sector entity for the prearranged transportation of specific passengers, not including street hails, by a nonpublic sector bus over public roads that do not overlap public transportation corridors by more than 70 percent; provided, such passengers are employees, patients, or clients of the public sector or private sector entity, and such entity has a legitimate business or governmental purpose in transporting such employees, patients, or clients; and such entity's primary business is not transportation of passengers by motor vehicle, as defined in s. 320.01. For the purpose of this subsection, a nonpublic sector bus is defined as a vehicle designed for carrying more than 10 passengers. A public transportation corridor consists of those public roads within one-quarter mile of, and including, existing public transportation routes. Nothing contained in this subsection shall restrict local governmental entities from enacting necessary safety, insurance, and traffic ordinances.

History.—s. 5, ch. 81-209; s. 256, ch. 84-309; s. 8, ch. 84-340; s. 123, ch. 90-136; s. 1, ch. 90-230; s. 70, ch. 92-152; s. 6, ch. 2012-6.

#### 341.103 Disposal of personal property found on a public transportation system.—

(1) If personal property is found on a public transportation system, the director of the system or the director's designee shall take charge of the property and make a record of the date such property was found. If, within 90 calendar days after such property is found, or for a longer period of time as may be deemed appropriate by the director or the director's designee under the circumstances, the property is not claimed by the owner, the director or the director's designee may:

(a) Retain any or all of the property for use by the public transportation system or for use by the state or the unit of local government owning or operating the public transportation system;

(b) Trade or donate such property to another unit of local government or a state agency;

(c) Donate the property to a charitable organization;

(d) Sell the property; or

(e) Dispose of the property through an appropriate refuse removal company or a company that provides salvage services for the type of personal property found or located on the public transportation system.

(2) The public transportation system shall notify the owner, if known, that the property has been found and of its intent to dispose of such property.

(3) If the public transportation system elects to sell the property, it shall be sold at a public auction on the Internet or at a specified physical location. Notice of the time and place of sale must be given at least 10 calendar days before the date of sale in a publication of general circulation within the county where the public transportation system is located and after written notice, via certified mail, return receipt requested, is provided to the owner, if his or her identity and address are known. Such notice is sufficient if it refers to the public transportation system's intention to sell all then-accumulated found property.

There is no requirement that the notice identify each item to be sold. The rightful owner of such property may reclaim the property at any time before sale by presenting acceptable evidence of ownership to the public transportation system director or the director's designee. All proceeds from the sale of the property shall be retained by the public transportation system for use by the public transportation system in any lawfully authorized manner.

(4) A purchaser or recipient of personal property sold or obtained in good faith under this section shall take possession of the property free of the rights of the persons previously holding any legal or equitable interest therein, whether or not recorded.

History.—s. 10, ch. 2014-169.

#### 341.301 Definitions; ss. 341.302-341.303.—As used in ss. 341.302-341.303, the term:

(1) "Ancillary development" includes any lessee or licensee of the department, including other governmental entities, vendors, retailers, restaurateurs, or contract service providers, within a department-owned rail corridor, except for providers of commuter rail service, intercity rail passenger service, or freight rail service. The term includes air and subsurface rights, services that provide a local area network for devices for transmitting data over wireless networks, and advertising.

(2) "Branch line continuance project" means a project that involves branch line rehabilitation, new connecting track, rail banking, and other similar types of projects, including those specifically identified in the federal Railroad Revitalization and Regulatory Reform Act of 1976, and subsequent amendments to that act.

(3) "Commuter rail passenger" or "passengers" means all persons, ticketed or unticketed, using the commuter rail service on a department-owned rail corridor:

(a) On board trains, locomotives, rail cars, or rail equipment employed in commuter rail service or entraining thereon and detaining therefrom;

- (b) On or about the rail corridor for any purpose related to the commuter rail service, including parking, inquiring about commuter rail service, or purchasing tickets therefor, and coming to, waiting for, leaving from, or observing trains, locomotives, rail cars, or rail equipment; or
- (c) Meeting, assisting, or in the company of any person described in paragraph (a) or paragraph (b).
- (4) "Commuter rail service" means the transportation of commuter rail passengers and other passengers by rail pursuant to a rail program provided by the department or any other governmental entity.
- (5) "Governmental entity" or "entities" has the same meaning as provided in s. 11.45, including a "public agency" as defined in s. 163.01.
- (6) "Intercity rail transportation system" means the network of railroad facilities used or available for interstate and intrastate passenger and freight operations by railroads, whether or not on a schedule or whether or not restricted.
- (7) "Limited covered accident" means:
- (a) A collision directly between the trains, locomotives, rail cars, or rail equipment of the department and the freight rail operator only, where the collision is caused by or arising from the willful misconduct of the freight rail operator or its subsidiaries, agents, licensees, employees, officers, or directors or where punitive damages or exemplary damages are awarded due to the conduct of the freight rail operator or its subsidiaries, agents, licensees, employees, officers, or directors; or
- (b) A collision directly between the trains, locomotives, rail cars, or rail equipment of the department and National Railroad Passenger Corporation only, where the collision is caused by or arising from the willful misconduct of National Railroad Passenger Corporation or its subsidiaries, agents, licensees, employees, officers, or directors or where punitive damages or exemplary damages are awarded due to the conduct of National Railroad Passenger Corporation or its subsidiaries, agents, licensees, employees, officers, or directors.
- (8) "Rail corridor" means a linear contiguous strip of real property that is used for rail service. The term includes the corridor and structures essential to railroad operations, including the land, structures, improvements, rights-of-way, easements, rail lines, rail beds, guideway structures, switches, yards, parking facilities, power relays, switching houses, rail stations, any ancillary development, and any other facilities or equipment used for the purposes of construction, operation, or maintenance of a railroad that provides rail service.
- (9) "Rail corridor invitee" means all persons who are on or about a department-owned rail corridor:
- (a) For any purpose related to any ancillary development thereon; or
- (b) Meeting, assisting, or in the company of any person described in paragraph (a).
- (10) "Rail programs" means those programs administered by the state or other governmental entities which involve projects affecting the movement of people or goods by rail lines that have been or will be constructed to serve freight or passenger markets within a city or between cities.
- (11) "Rail service development project" means a project undertaken by a public agency to determine whether a new or innovative technique or measure can be utilized to improve or expand rail service. The duration of the project funding shall be limited according to the type of project and in no case shall exceed 3 years. Rail service development projects include those projects and other actions undertaken to enhance railroad operating efficiency or increased rail service, including measures that result in improved speed profiles, operations, or technological applications that lead to reductions in operating costs and increases in productivity or service.
- (12) "Railroad" or "rail system" means any common carrier fixed-guideway transportation system such as the conventional steel rail-supported, steel-wheeled system as well as the high-speed rail system defined in s. 341.8203.
- (13) "Railroad capital improvement project" means a project identified by the rail component of the Florida Transportation Plan, which project involves the leasing, acquisition, design, construction, reconstruction, or improvement to the existing intercity rail transportation system or future segments thereof, including such items as locomotives and other rolling stock, tracks, terminals, and rights-of-way for the continuance or expansion of rail service as necessary to ensure the continued effectiveness of the state's rail facilities and systems in meeting mobility and industrial development needs.
- (14) "Railroad operations" means the use of the rail corridor to conduct commuter rail service, intercity rail passenger service, or freight rail service.
- (15) "Train" means any locomotive engine that is powered by diesel fuel, electricity, or other means, with or without cars coupled thereto, and operated upon a railroad track or any other form of fixed guideway, except that the term does not include a light rail vehicle such as a streetcar or people mover.

History—s. 1, ch. 84-333; s. 38, ch. 86-243; s. 42, ch. 95-143; s. 32, ch. 2004-5; s. 5, ch. 2009-271; s. 1, ch. 2012-174.

**341.302 Rail program; duties and responsibilities of the department.**—The department, in conjunction with other governmental entities, including the rail enterprise and the private sector, shall develop and implement a rail program of statewide application designed to ensure the proper maintenance, safety, revitalization, and expansion of the rail system to assure its continued and increased availability to respond to statewide mobility needs. Within the resources provided pursuant to chapter 216, and as authorized under federal law, the department shall:

- (1) Provide the overall leadership, coordination, and financial and technical assistance necessary to assure the effective responses of the state's rail system to current and anticipated mobility needs.
- (2) Promote and facilitate the implementation of advanced rail systems, including high-speed rail and magnetic levitation systems.
- (3) Develop and periodically update the rail system plan, on the basis of an analysis of statewide transportation needs.
  - (a) The plan may contain detailed regional components, consistent with regional transportation plans, as needed to ensure connectivity within the state's regions, and it shall be consistent with the Florida Transportation Plan developed pursuant to s. 339.155. The rail system plan shall include an identification of priorities, programs, and funding levels required to meet statewide and regional needs. The rail system plan shall be developed in a manner that will assure the maximum use of existing facilities and the optimum integration and coordination of the various modes of transportation, public and private, in the most cost-effective manner possible. The rail system plan shall be updated no later than January 1, 2011, and at least every 5 years thereafter, and include plans for both passenger rail service and freight rail service, accompanied by a report to the Legislature regarding the status of the plan.
  - (b) In recognition of the department's role in the enhancement of the state's rail system to improve freight and passenger mobility, the department shall:
    1. Work closely with all affected communities along an impacted freight rail corridor to identify and address anticipated impacts associated with an increase in freight rail traffic due to implementation of passenger rail.
    2. In coordination with the affected local governments and CSX Transportation, Inc., finalize all viable alternatives from the department's Rail Traffic Evaluation Study to identify and develop an alternative route for through freight rail traffic moving through Central Florida, including the counties of Polk and Hillsborough, which would address, to the extent practicable, the effects of commuter rail.
    3. Provide technical assistance to a coalition of local governments in Central Florida, including the counties of Brevard, Citrus, Hernando, Hillsborough, Lake, Marion, Orange, Osceola, Pasco, Pinellas, Polk, Manatee, Sarasota, Seminole, Sumter, and Volusia, and the municipalities within those counties, to develop a regional rail system plan that addresses passenger and freight opportunities in the region, is consistent with the Florida Rail System Plan, and incorporates appropriate elements of the Tampa Bay Area Regional Authority Master Plan, the Metroplan Orlando Regional Transit System Concept Plan, including the SunRail project, and the Florida Department of Transportation Alternate Rail Traffic Evaluation.
    4. As part of the work program of the department, formulate a specific program of projects and financing to respond to identified railroad needs.
    5. Provide technical and financial assistance to units of local government to address identified rail transportation needs.
    6. Secure and administer federal grants, loans, and apportionments for rail projects within this state when necessary to further the statewide program.
    7. Develop and administer state standards concerning the safety and performance of rail systems, hazardous material handling, and operations. Such standards shall be developed jointly with representatives of affected rail systems, with full consideration given to nationwide industry norms, and shall define the minimum acceptable standards for safety and performance.
    8. Conduct, at a minimum, inspections of track and rolling stock; train signals and related equipment; hazardous materials transportation, including the loading, unloading, and labeling of hazardous materials at shippers', receivers', and transfer points; and train operating practices to determine adherence to state and federal standards. Department personnel may enforce any safety regulation issued under the Federal Government's preemptive authority over interstate commerce.
    9. Assess penalties, in accordance with the applicable federal regulations, for the failure to adhere to the state standards.
    10. Administer rail operating and construction programs, which programs shall include the regulation of maximum train operating speeds, the opening and closing of public grade crossings, the construction and rehabilitation of public grade crossings, and the installation of traffic control devices at public grade crossings, the administering of the programs by the department including participation in the cost of the programs.
    11. Coordinate and facilitate the relocation of railroads from congested urban areas to nonurban areas when relocation has been determined feasible and desirable from the standpoint of safety, operational efficiency, and economics.
    12. Implement a program of branch line continuance projects when an analysis of the industrial and economic potential of the line indicates that public involvement is required to preserve essential rail service and facilities.
    13. Provide new rail service and equipment when:
      - (a) Pursuant to the transportation planning process, a public need has been determined to exist;
      - (b) The cost of providing such service does not exceed the sum of revenues from fares charged to users, services purchased by other public agencies, local fund participation, and specific legislative appropriation for this purpose; and
      - (c) Service cannot be reasonably provided by other governmental or privately owned rail systems.

The department may own, lease, and otherwise encumber facilities, equipment, and appurtenances thereto, as necessary to provide new rail services; or the department may provide such service by contracts with privately owned service providers.

(14) Furnish required emergency rail transportation service if no other private or public rail transportation operation is available to supply the required service and such service is clearly in the best interest of the people in the communities being served. Such emergency service may be furnished through contractual arrangement, actual operation of state-owned equipment and facilities, or any other means determined appropriate by the secretary.

- (15) Assist in the development and implementation of marketing programs for rail services and of information systems directed toward assisting rail systems users.
- (16) Conduct research into innovative or potentially effective rail technologies and methods and maintain expertise in state-of-the-art rail developments.
- (17) In conjunction with the acquisition, ownership, construction, operation, maintenance, and management of a rail corridor, have the authority to:
  - (a) Assume obligations pursuant to the following:
    - 1.a. The department may assume the obligation by contract to forever protect, defend, indemnify, and hold harmless the freight rail operator, or its successors, from whom the department has acquired a real property interest in the rail corridor, and that freight rail operator's officers, agents, and employees, from and against any liability, cost, and expense, including, but not limited to, commuter rail passengers and rail corridor invitees in the rail corridor, regardless of whether the loss, damage, destruction, injury, or death giving rise to any such liability, cost, or expense is caused in whole or in part, and to whatever nature or degree, by the fault, failure, negligence, misconduct, nonfeasance, or misfeasance of such freight rail operator, its successors, or its officers, agents, and employees, or any other person or persons whomsoever;

or

b. The department may assume the obligation by contract to forever protect, defend, indemnify, and hold harmless National Railroad Passenger Corporation, or its successors, and officers, agents, and employees of National Railroad Passenger Corporation, from and against any liability, cost, and expense, including, but not limited to, commuter rail passengers and rail corridor invitees in the rail corridor, regardless of whether the loss, damage, destruction, injury, or death giving rise to any such liability, cost, or expense is caused in whole or in part, and to whatever nature or degree, by the fault, failure, negligence, misconduct, nonfeasance, or misfeasance of National Railroad Passenger Corporation, its successors, or its officers, agents, and employees, or any other person or persons whomsoever.

2. The assumption of liability of the department by contract pursuant to sub-paragraph 1.a. or sub-paragraph 1.b. may not in any instance exceed the following parameters of allocation of risk:

a. The department may be solely responsible for any loss, injury, or damage to commuter rail passengers, or rail corridor invitees, or trespassers, regardless of circumstances or cause, subject to sub-paragraph b. and subparagraphs 3., 4., 5., and 6.

b.(i) In the event of a limited covered accident, the authority of the department to protect, defend, and indemnify the freight operator for all liability, cost, and expense, including punitive or exemplary damages, in excess of the deductible or self-insurance retention fund established under paragraph (b) and actually in force at the time of the limited covered accident exists only if the freight operator agrees, with respect to the limited covered accident, to protect, defend, and indemnify the department for the amount of the deductible or self-insurance retention fund established under paragraph (b) and actually in force at the time of the limited covered accident.

(ii) In the event of a limited covered accident, the authority of the department to protect, defend, and indemnify National Railroad Passenger Corporation for all liability, cost, and expense, including punitive or exemplary damages, in excess of the deductible or self-insurance retention fund established under paragraph (b) and actually in force at the time of the limited covered accident exists only if National Railroad Passenger Corporation agrees, with respect to the limited covered accident, to protect, defend, and indemnify the department for the amount of the deductible or self-insurance retention fund established under paragraph (b) and actually in force at the time of the limited covered accident.

3. When only one train is involved in an incident, the department may be solely responsible for any loss, injury, or damage if the train is a department train or other train pursuant to subparagraph 4., but only if:

a. When an incident occurs with only a freight train involved, including incidents with trespassers or at grade crossings, the freight rail operator is solely responsible for any loss, injury, or damage, except for commuter rail passengers and rail corridor invitees; or

b. When an incident occurs with only a National Railroad Passenger Corporation train involved, including incidents with trespassers or at grade crossings, National Railroad Passenger Corporation is solely responsible for any loss, injury, or damage, except for commuter rail passengers and rail corridor invitees.

4. For the purposes of this subsection:

a. Any train involved in an incident that is neither the department's train nor the freight rail operator's train, hereinafter referred to in this subsection as an "other train," may be treated as a department train, solely for purposes of any allocation of liability between the department and the freight rail operator only, but only if the department and the freight rail operator share responsibility equally as to third parties outside the rail corridor who incur loss, injury, or damage as a result of any incident involving both a department train and a freight rail operator train, and the allocation as between the department and the freight rail operator, regardless of whether the other train is treated as a department train, shall remain one-half each as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident. The involvement of any other train shall not alter the sharing of equal responsibility as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident; or

b. Any train involved in an incident that is neither the department's train nor the National Railroad Passenger Corporation's train, hereinafter referred to in this subsection as an "other train," may be treated as a department train, solely for purposes of any allocation of liability between the department and National Railroad Passenger Corporation only, but only if the department and National Railroad Passenger Corporation share responsibility equally as to third parties outside the rail corridor who incur loss, injury, or damage as a result of any incident involving both a department train and a National Railroad Passenger Corporation train, and the allocation as between the department and National Railroad Passenger Corporation, regardless of whether the other train is treated as a department train, shall remain one-half each as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident. The involvement of any other train shall not alter the sharing of equal responsibility as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident.

5. When more than one train is involved in an incident:

a.(i) If only a department train and freight rail operator's train, or only an other train as described in sub-subparagraph 4.a. and a freight rail operator's train, are involved in an incident, the department may be responsible for its property and all of its people, all commuter rail passengers, and rail corridor invitees, but only if the freight rail operator is responsible for its property and all of its people, and the department and the freight rail operator each share one-half responsibility as to trespassers or third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident; or

(ii) If only a department train and a National Railroad Passenger Corporation train, or only an other train as described in sub-subparagraph 4.b. and a National Railroad Passenger Corporation train, are involved in an incident, the department may be responsible for its property and all of its people, all commuter rail passengers, and rail corridor invitees, but only if National Railroad Passenger Corporation is responsible for its property and all of its people, all National Railroad Passenger Corporation's rail passengers, and the department and National Railroad Passenger Corporation each share one-half responsibility as to trespassers or third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident.

b.(i) If a department train, a freight rail operator train, and any other train are involved in an incident, the allocation of liability between the department and the freight rail operator, regardless of whether the other train is treated as a department train, shall remain one-half each as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident; the involvement of any other train shall not alter the sharing of equal responsibility as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident; and, if the owner, operator, or insurer of the other train makes any payment to injured third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident, the allocation of credit between the department and the freight rail operator as to such payment shall not in any case reduce the freight rail operator's third-party-sharing allocation of one-half under this paragraph to less than one-third of the total third party liability; or

(ii) If a department train, a National Railroad Passenger Corporation train, and any other train are involved in an incident, the allocation of liability between the department and National Railroad Passenger Corporation, regardless of whether the other train is treated as a department train, shall remain one-half each as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident; the involvement of any other train shall not alter the sharing of equal responsibility as to third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident; and, if the owner, operator, or insurer of the other train makes any payment to injured third parties outside the rail corridor who incur loss, injury, or damage as a result of the incident, the allocation of credit between the department and National Railroad Passenger Corporation as to such payment shall not in any case reduce National Railroad Passenger Corporation's third-party-sharing allocation of one-half under this sub-paragraph to less than one-third of the total third party liability.

6. Any such contractual duty to protect, defend, indemnify, and hold harmless such a freight rail operator or National Railroad Passenger Corporation shall expressly include a specific cap on the amount of the contractual duty, which amount shall not exceed \$200 million without prior legislative approval, and the department to purchase liability insurance and establish a self-insurance retention fund in the amount of the specific cap established under this subparagraph, provided that:

a. No such contractual duty shall in any case be effective nor otherwise extend the department's liability in scope and effect beyond the contractual liability insurance and self-insurance retention fund required pursuant to this paragraph; and

b.(i) The freight rail operator's compensation to the department for future use of the department's rail corridor shall include a monetary contribution to the cost of such liability coverage for the sole benefit of the freight rail operator.

(ii) National Railroad Passenger Corporation's compensation to the department for future use of the department's rail corridor shall include a monetary contribution to the cost of such liability coverage for the sole benefit of National Railroad Passenger Corporation.

(b) Purchase liability insurance, which amount shall not exceed \$200 million, and establish a self-insurance retention fund for the purpose of paying the deductible limit established in the insurance policies it may obtain, including coverage for the department, any freight rail operator as described in paragraph (a), National Railroad Passenger Corporation, commuter rail service providers, governmental entities, or any ancillary development, which self-insurance retention fund or deductible shall not exceed \$10 million. The insureds shall pay a reasonable monetary contribution to the cost of such liability coverage for the sole benefit of the insured. Such insurance and self-insurance retention fund may provide coverage for all damages, including, but not limited to, compensatory, special, and exemplary, and be maintained to provide an adequate fund to cover claims and liabilities for loss, injury, or damage arising out of or connected with the ownership, operation, maintenance, and management of a rail corridor.

(c) Incur expenses for the purchase of advertisements, marketing, and promotional items.

(d) Without altering any of the rights granted to the department under this section, agree to assume the obligations to indemnify and insure, pursuant to s. 343.545, freight rail service, intercity passenger rail service, and commuter rail service on a department-owned rail corridor, whether ownership is in fee or by easement, or on a rail corridor where the department has the right to operate.

Neither the assumption by contract to protect, defend, indemnify, and hold harmless; the purchase of insurance; nor the establishment of a self-insurance retention fund shall be deemed to be a waiver of any defense of sovereign immunity for torts nor deemed to increase the limits of the department's or the governmental entity's liability for torts as provided in s. 768.28. The requirements of s. 287.022(1) shall not apply to the purchase of any insurance under this subsection. The provisions of this subsection shall apply and inure fully as to any other governmental entity providing commuter rail service and constructing, operating, maintaining, or managing a rail corridor on publicly owned right-of-way under contract by the governmental entity with the department or a governmental entity designated by the department. Notwithstanding any law to the contrary, procurement for the construction, operation, maintenance, and management of any rail corridor described in this subsection, whether by the department, a governmental entity under contract with the department, or a governmental entity designated by the department, shall be pursuant to s. 287.057 and shall include, but not be limited to, criteria for the consideration of qualifications, technical aspects of the proposal, and price. Further, any such contract for design-build shall be procured pursuant to the criteria in s. 337.11(7).

(18) Exercise such other functions, powers, and duties in connection with the rail system plan as are necessary to develop a safe, efficient, and effective statewide transportation system.

History.—s. 2, ch. 84-333; s. 16, ch. 89-301; s. 72, ch. 92-152; s. 53, ch. 93-164; s. 58, ch. 95-257; s. 35, ch. 99-385; s. 6, ch. 2009-271; s. 22, ch. 2011-4; s. 2, ch. 2012-174; ss. 44, 45, ch. 2014-53; ss. 63, 64, ch. 2015-222; ss. 99, 100, ch. 2016-62; s. 2, ch. 2017-138.

#### 341.3025 Multicounty public rail system fares and enforcement.—

(1) Any entity that owns or operates a public rail system in two or more counties of the state may adopt rules and regulations relating to the operation and management of its rail system, including regulations relating to fares, fees, and charges for the use of the facilities and services of the system.

(2) It is unlawful for any person to ride the rail system without payment of the appropriate fare or to cause goods or other items for which a fee is charged to be carried on the rail system without payment of the fee.

(3)(a) Any person riding the rail system without paying the appropriate fare or causing goods or other items for which a fee is charged to be carried without paying such fee shall be subject to citation by an enforcement officer of the system and, in addition to any other penalty provided by law, is guilty of a noncriminal violation punishable by a fine of \$50 per each such violation.

(b) The citation issued to a person in violation of this section shall state the reason for the citation, the amount of the fine, and the court having jurisdiction of the offense.

(c) Each enforcement officer issuing a citation for an alleged violation of this section shall deposit the original and one copy of the citation with a court having jurisdiction over the alleged offense within 5 days.

after issuance to the violator.

- (d) The entity operating the system shall maintain a copy of the citation.
- (e) Upon the deposit of the original and one copy of such citation with a court having jurisdiction over the alleged offense, the original or copy of such citation may be disposed of only by trial in the court or other official action by a judge of the court, including forfeiture of the bail, or by the deposit of sufficient bail with or payment of a fine to the entity by the person to whom such citation has been issued.
- (f) The entity shall maintain or cause to be maintained a record of the disposition of each citation issued.
- (4)(a) Any person cited for an offense under this section shall sign and accept a citation indicating a promise to appear.
- (b) Any person who does not elect to appear shall pay the fine either by mail or in person within 30 days of the date of receiving the citation. If the person cited follows the procedure provided in this paragraph, he or she shall be deemed to have admitted the infraction and to have waived his or her right to a trial on the issue of commission of the infraction. Such admission shall not be used as evidence in any other proceeding.
- (c) Any person electing to appear before the judge shall be deemed to have waived his or her right to pay the penalty. The judge, after a trial, shall make a determination as to whether an infraction has been proven and may impose a civil penalty not to exceed \$500. If the judge determines that no infraction has been committed, no cost or penalties shall be imposed, and any cost or penalty which has been paid shall be returned.

(d) Any person who fails to appear or otherwise properly respond to a citation issued under this section shall also be charged with the offense of failing to respond to such citation and, upon conviction, be guilty of a misdemeanor of the second degree, punishable as provided in s. 775.082 or s. 775.083. A written warning to this effect shall be provided at the time such citation is issued.

(e) The commission of an offense must be proved beyond a reasonable doubt at any trial.

(5) For the purpose of enforcing the payment of such fares, fees, and charges for use of the facilities and services of the system, such entity shall have the authority:

(a) To employ enforcement officers or contract with a private firm or company to verify payment of appropriate fares or fees and to issue citations to persons traveling on the system without paying the appropriate fare or to persons who cause goods or other items for which a fee is charged to be carried without paying such fee. Such enforcement officers who are not licensed security officers shall not carry firearms or other weapons or have arrest authority; armed security officers performing fare inspection services shall not have arrest authority and shall be licensed as required by chapter 493 and all other applicable laws and regulations.

(b) To maintain records of citations issued and to accept payment of fines and costs.

(6) All fines and forfeitures received by any court from violations of this section shall be paid monthly, less any administrative costs, to the entity operating the system.

(7)(a) The Legislature recognizes the importance of encouraging the seamless use of local and regional public transportation systems by residents of and visitors to the state wherever possible. The paramount concern is to encourage the implementation of fare collection systems that are interoperable and compatible with multiple public transportation systems throughout the state.

(b) Notwithstanding any other provision of law to the contrary, in order to facilitate the ease of transfer from one public transportation system to another, any new public rail system that is constructed after December 1, 2010, by the state, an agency of the state, a regional transportation authority, or one or more counties or municipalities shall use a universally accepted contactless fare media that is compatible with the American Public Transportation Association's Contactless Fare Media System Standard or the applicable bankcard contactless media standards and allows users to purchase fares at a single point of sale with coin, cash, or credit card. Additionally, any existing public rail system that is adding a new fare media system or is upgrading its existing fare media system shall use a universally accepted contactless fare media that is compatible with the American Public Transportation Association's Contactless Fare Media System Standard or the applicable bankcard contactless media standards and allows users to purchase fares at a single point of sale with coin, cash, or credit card.

(8) Venue for prosecution or recovery for violations of rules or regulations adopted pursuant to this section shall be in the county where the entity which owns and operates the public rail system maintains its principal place of business.

History.—s. 1, ch. 88-360; s. 73, ch. 92-152; s. 38, ch. 93-164; s. 506, ch. 95-148; s. 55, ch. 95-257; s. 26, ch. 2010-225.

#### 341.303 Funding authorization and appropriations; eligibility and participation.—

(1) APPROPRIATIONS REQUESTS.—

(a) Rail funds shall be requested on the basis of the funding required for the implementation of the rail component of the work program.

(b) No state funds shall be allocated or expended for operation deficits of any intercity or commuter rail projects except as specifically allowed for approved rail service development projects.

(2) PROJECT ELIGIBILITY.—Any project that is necessary to carry out those duties and responsibilities enumerated in s. 341.302, that is consistent with the approved local government comprehensive plan of the unit of government of the areas served by the rail service, and that is contained in the adopted work program is eligible for the expenditure of state funds in accordance with the fund participation rates established in this section.

(3) FUND PARTICIPATION; CAPITAL ASSISTANCE.—

(a) The department may fund up to 50 percent of the nonfederal and nonprivate share of the costs of any eligible railroad capital improvement project that is local in scope.

(b) The department is authorized to fund up to 100 percent of the cost of any eligible railroad capital improvement project that is statewide in scope or involves more than one county if no other governmental unit of appropriate jurisdiction exists.

(c) The department is authorized to fund up to 100 percent of the costs of any railroad capital improvement project involving the acquisition of rights-of-way for future transportation purposes. Departmental fund participation in such project shall be credited as part of the appropriate share of the participation by the department in total project cost for any future project involving such rights-of-way.

(4) FUND PARTICIPATION; OPERATING COSTS.—

(a) The department is authorized to fund up to 100 percent of the net operating costs of any eligible intercity or commuter rail system for up to 7 years, beginning from the open-to-service date.

(b) The term "net operating costs" means all operating costs of the project less any federal funds, fares, or other sources of income to the project.

(5) FUND PARTICIPATION; FLORIDA RAIL ENTERPRISE.—The department, through the Florida Rail Enterprise, is authorized to use funds provided pursuant to s. 201.15(4)(a)4. to fund:

(a) Up to 50 percent of the nonfederal share of the costs of any eligible passenger rail capital improvement project.

(b) Up to 100 percent of planning and development costs related to the provision of a passenger rail system, including, but not limited to, preliminary engineering, revenue studies, environmental impact studies, financial advisory services, engineering design, and other appropriate professional services.

(c) The high-speed rail system.

(d) Projects necessary to identify or address anticipated impacts of increased freight rail traffic resulting from the implementation of passenger rail systems as provided in s. 341.302(3)(b).

(6) FLORIDA RAIL ENTERPRISE; BUDGET.—

(a) The Florida Rail Enterprise shall be a single budget entity and shall develop a budget pursuant to chapter 216. The enterprise's budget shall be submitted to the Legislature along with the department's budget. All passenger rail funding by the department shall be included in this budget entity.

(b) Notwithstanding the provisions of s. 216.301 to the contrary and in accordance with s. 216.351, the Executive Office of the Governor shall, on July 1 of each year, certify forward all unexpended funds appropriated or provided pursuant to this section for the enterprise. Of the unexpended funds certified forward, any unencumbered amounts shall be carried forward. Such funds carried forward shall not exceed 5 percent of the original approved operating budget of the enterprise pursuant to s. 216.181(1). Funds carried forward pursuant to this section may be used for any lawful purpose, including, but not limited to, promotional and market activities, technology, and training. Any certified-forward funds remaining unexpended on September 30 of each year shall be carried forward.

History.—s. 3, ch. 84-333; s. 21, ch. 85-81; s. 23, ch. 88-168; s. 19, ch. 89-301; s. 2, ch. 89-351; s. 74, ch. 92-152; s. 37, ch. 93-164; s. 8, ch. 2009-271; s. 31, ch. 2015-229.

341.501 High-technology transportation systems; joint project agreement or assistance.—Notwithstanding any other provision of law, the Department of Transportation may enter into a joint project agreement with, or otherwise assist, private or public entities, or consortia thereof, to facilitate the research, development, and demonstration of high-technology transportation systems, including, but not limited to, systems using magnetic levitation technology. The department may, subject to s. 339.135, provide funds to match any available federal aid or aid from other states or jurisdictions for effectuating the research, development, and demonstration of high-technology transportation systems. To be eligible for funding under this section, the project must be located in Florida.

History.—s. 64, ch. 93-164; s. 58, ch. 96-323; s. 56, ch. 97-100; ss. 54, 88, ch. 2002-20.

341.8201 Short title.—Sections 341.8201-341.842 may be cited as the "Florida Rail Enterprise Act."

History.—s. 28, ch. 2002-20; s. 31, ch. 2003-1; s. 9, ch. 2009-271.

341.8203 Definitions.—As used in ss. 341.8201-341.842, unless the context clearly indicates otherwise, the term:

(1) "Associated development" means property, equipment, buildings, or other related facilities which are built, installed, used, or established to provide financing, funding, or revenues for the planning, building, managing, and operation of a high-speed rail system and which are associated with or part of the rail stations. The term includes air and subsurface rights, services that provide local area network devices for transmitting data over wireless networks, parking facilities, retail establishments, restaurants, hotels, offices, advertising, or other commercial, civic, residential, or support facilities.

(2) "Communication facilities" means the communication systems related to high-speed passenger rail operations, including those which are built, installed, used, or established for the planning, building, managing, and operating of a high-speed rail system. The term includes the land; structures; improvements; rights-of-way; easements; positive train control systems; wireless communication towers and facilities that are designed to provide voice and data services for the safe and efficient operation of the high-speed rail system; voice, data, and wireless communication amenities made available to crew and passengers as part of a high-speed rail service; and any other facilities or equipment used for operation of, or the facilitation of communications for, a high-speed rail system. Owners of communication facilities may not offer voice or data service to any entity other than passengers, crew, or other persons involved in the operation of a high-speed rail system.

(3) "Enterprise" means the Florida Rail Enterprise.

(4) "High-speed rail system" means any high-speed fixed guideway system for transporting people or goods, which system is, by definition of the United States Department of Transportation, reasonably expected to reach speeds of at least 110 miles per hour, including, but not limited to, a monorail system, dual track rail system, suspended rail system, magnetic levitation system, pneumatic repulsion system, or other system approved by the enterprise. The term includes a corridor, associated intermodal connectors, and structures essential to the operation of the line, including the land, structures, improvements, rights-of-way, easements, rail lines, rail beds, guideway structures, switches, yards, parking facilities, power relays, switching houses, and rail stations and also includes facilities or equipment used exclusively for the purposes of design, construction, operation, maintenance, or the financing of the high-speed rail system.

(5) "Joint development" means the planning, managing, financing, or constructing of projects adjacent to, functionally related to, or otherwise related to a high-speed rail system pursuant to agreements between any person, firm, corporation, association, organization, agency, or other entity, public or private.

(6) "Rail station," "station," or "high-speed rail station" means any structure or transportation facility that is part of a high-speed rail system designed to accommodate the movement of passengers from one

mode of transportation to another at which passengers board or disembark from transportation conveyances and transfer from one mode of transportation to another.

(7) "Railroad company" means a person developing, or providing service on, a high-speed rail system.

(8) "Selected person or entity" means the person or entity to whom the enterprise awards a contract to establish a high-speed rail system pursuant to ss. 341.8201-341.842.

History.—s. 30, ch. 2002-20; s. 15, ch. 2004-366; s. 11, ch. 2009-271; s. 4, ch. 2013-213.

#### 341.822 Powers and duties.—

(1) The enterprise shall locate, plan, design, finance, construct, maintain, own, operate, administer, and manage the high-speed rail system in the state.

(2)(a) In addition to the powers granted to the department, the enterprise has full authority to exercise all powers granted to it under this chapter. Powers shall include, but are not limited to, the ability to plan, construct, maintain, repair, and operate a high-speed rail system, to acquire corridors, and to coordinate the development and operation of publicly funded passenger rail systems in the state.

(b) It is the express intention of ss. 341.8201-341.842 that the enterprise be authorized to plan, develop, own, purchase, lease, or otherwise acquire, demolish, construct, improve, relocate, equip, repair, maintain, operate, and manage the high-speed rail system; to expend funds to publicize, advertise, and promote the advantages of using the high-speed rail system and its facilities; and to cooperate, coordinate, partner, and contract with other entities, public and private, to accomplish these purposes.

(c) The enterprise shall establish a process to issue permits to railroad companies for the construction of communication facilities within a new or existing public or private high-speed rail system. The enterprise may adopt rules to administer such permits, including rules regarding the form, content, and necessary supporting documentation for permit applications; the process for submitting applications; and the application fee for a permit under s. 341.825. The enterprise shall provide a copy of a completed permit application to municipalities and counties where the high-speed rail system will be located. The enterprise shall allow each such municipality and county 30 days to provide comments to the enterprise regarding the application, including any recommendations regarding conditions that may be placed on the permit.

(3) The enterprise shall have the authority to employ procurement methods available to the department under chapters 255, 287, 334, and 337, or otherwise in accordance with law. The enterprise may also solicit proposals and, with legislative approval as evidenced by approval of the project in the department's work program, enter into agreements with private entities, or consortia thereof, for the building, operation, ownership, or financing of the high-speed rail system.

(4) The executive director of the enterprise shall appoint staff, who shall be exempt from part II of chapter 110.

(5) The powers conferred upon the enterprise under ss. 341.8201-341.842 shall be in addition and supplemental to the existing powers of the department, and these powers shall not be construed as repealing any provision of any other law, general or local, but shall supersede such other laws that are inconsistent with the exercise of the powers provided under ss. 341.8201-341.842 and provide a complete method for the exercise of such powers granted.

(6) Any proposed rail enterprise project or improvement shall be developed in accordance with the Florida Transportation Plan and the work program under s. 339.135.

History.—s. 2, ch. 2001-153; s. 32, ch. 2002-20; s. 13, ch. 2009-271; s. 5, ch. 2013-213.

#### 341.8225 Department of Transportation sole governmental entity to acquire, construct, or operate high-speed rail projects; exception.—

(1) No governmental entity other than the department may acquire, construct, maintain, or operate the high-speed rail system except upon specific authorization of the Legislature.

(2) Local governmental entities, as defined in s. 334.03(13), may negotiate with the department for the design, right-of-way acquisition, and construction of any component of the high-speed rail system within areas of their respective jurisdictions or within counties with which they have interlocal agreements.

History.—s. 14, ch. 2009-271; s. 92, ch. 2012-174.

#### 341.825 Communication facilities.—

(1) LEGISLATIVE INTENT.—The Legislature intends to:

(a) Establish a streamlined process to authorize the location, construction, operation, and maintenance of communication facilities within a new or existing high-speed rail system.

(b) Expedite the expansion of the high-speed rail system's wireless voice and data coverage and capacity for the safe and efficient operation of the high-speed rail system and the safety, use, and efficiency of its crew and passengers as a critical communication facilities component.

(2) APPLICATION SUBMISSION.—A railroad company may submit to the enterprise an application to obtain a permit to construct communication facilities within a new or existing high-speed rail system. The application shall include an application fee limited to the amount needed to pay the anticipated cost of reviewing the application, not to exceed \$10,000, which shall be deposited into the State Transportation Trust Fund. The application must include the following information:

(a) The location of the proposed communication facilities.

(b) A description of the proposed communication facilities.

(c) Any other information reasonably required by the enterprise.

(3) APPLICATION REVIEW.—The enterprise shall review each application for completeness within 30 days after receipt of the application.

(a) If the enterprise determines that an application is not complete, the enterprise shall, within 30 days after the receipt of the initial application, notify the applicant in writing of any errors or omissions. An applicant shall have 30 days within which to correct the errors or omissions in the initial application.

(b) If the enterprise determines that an application is complete, the enterprise shall act upon the permit application within 60 days of the receipt of the completed application by approving in whole, approving with conditions as the enterprise deems appropriate, or denying the application, and stating the reason for issuance or denial. In determining whether an application should be approved, approved with modifications or conditions, or denied, the enterprise shall consider any comments or recommendations received from a municipality or county and the extent to which the proposed communication facilities:

1. Are located in a manner that is appropriate for the communication technology specified by the applicant.

2. Serve an existing or projected future need for communication facilities.

3. Provide sufficient wireless voice and data coverage and capacity for the safe and efficient operation of the high-speed rail system and the safety, use, and efficiency of its crew and passengers.

(c) The failure to adopt any recommendation or comment may not be a basis for challenging the issuance of a permit.

(4) EFFECT OF PERMIT.—

(a) A permit authorizes the permittee to locate, construct, operate, and maintain the communication facilities within a new or existing high-speed rail system, subject to the conditions set forth in the permit. Such activities are not subject to local government land use or zoning regulations.

(b) A permit may include conditions that constitute variances and exemptions from rules of the enterprise or any other agency, which would otherwise be applicable to the communication facilities within the new or existing high-speed rail system.

(c) Notwithstanding any other provisions of law, the permit shall be in lieu of any license, permit, certificate, or similar document required by any local agency.

(d) Nothing in this section is intended to impose procedures or restrictions on railroad companies that are subject to the exclusive jurisdiction of the federal Surface Transportation Board pursuant to the Interstate Commerce Commission Termination Act of 1995, 49 U.S.C. ss. 10101, et seq.

(5) MODIFICATION OF PERMIT.—A permit may be modified by the applicant after issuance upon the filing of a petition with the enterprise.

(a) A petition for modification must set forth the proposed modification and the factual reasons asserted for the modification.

(b) The enterprise shall act upon the petition within 30 days by approving or denying the application, and stating the reason for issuance or denial.

History.—s. 6, ch. 2013-213.

#### 341.836 Associated development.—

(1) The enterprise, alone or as part of a joint development, may undertake associated developments to be a source of revenue for the establishment, construction, operation, or maintenance of the high-speed rail system. Such associated developments must be consistent, to the extent feasible, with applicable local government comprehensive plans and local land development regulations and otherwise be in compliance with ss. 341.8201-341.842.

(2) Sections 341.8201-341.842 do not prohibit the enterprise, the selected person or entity, or a party to a joint venture with the enterprise or its selected person or entity from obtaining approval, pursuant to any other law, for any associated development that is reasonably related to the high-speed rail system.

History.—s. 44, ch. 2002-20; s. 16, ch. 2009-271.

#### 341.838 Fares, rates, rents, fees, and charges.—

(1) The enterprise may establish, revise, charge, and collect fares, rates, rents, fees, charges, and revenues for the use of and for the services furnished, or to be furnished, by the system and to contract with any person, partnership, association, corporation, or other body, public or private, in respect thereof. Such fares, rates, rents, fees, and charges shall be reviewed annually by the enterprise and may be adjusted as set forth in the contract setting such fares, rates, rents, fees, or charges. The funds collected pursuant to this section shall, with any other funds available, be used to pay the cost of designing, building, operating, financing, and maintaining the system and each and every portion thereof, to the extent that the payment of such cost has not otherwise been adequately provided for.

(2) Fares, rates, rents, fees, and charges established, revised, charged, and collected by the enterprise pursuant to this section shall not be subject to supervision or regulation by any other department, commission, board, body, bureau, or agency of this state other than the enterprise.

History.—s. 46, ch. 2002-20; s. 18, ch. 2009-271.

**341.839 Alternate means.**—Sections 341.8201-341.842 provide an additional and alternative method for accomplishing the purposes authorized therein and are supplemental and additional to powers conferred by other laws. Except as otherwise expressly provided in ss. 341.8201-341.842, none of the powers granted to the enterprise under ss. 341.8201-341.842 are subject to the supervision or require the approval or consent of any municipality or political subdivision or any commission, board, body, bureau, or official.

History.—s. 47, ch. 2002-20; s. 19, ch. 2009-271.

#### 341.840 Tax exemption.—

(1) The exercise of the powers granted under ss. 341.8201-341.842 will be in all respects for the benefit of the people of this state, for the increase of their commerce, welfare, and prosperity, and for the improvement of their health and living conditions. The design, construction, operation, maintenance, and financing of a high-speed rail system by the enterprise, its agent, or the owner or lessee thereof, as herein authorized, constitutes the performance of an essential public function.

(2)(a) For the purposes of this section, the term "enterprise" does not include agents of the enterprise other than contractors who qualify as such pursuant to subsection (7).

(b) For the purposes of this section, any item or property that is within the definition of the term "associated development" in s. 341.8203(1) may not be considered part of the high-speed rail system as defined

In s. 341.8203(4).

(3)(a) Purchases or leases of tangible personal property or real property by the enterprise, excluding agents of the enterprise, are exempt from taxes imposed by chapter 212 as provided in s. 212.08(6). Purchases or leases of tangible personal property that is incorporated into the high-speed rail system as a component part thereof, as determined by the enterprise, by agents of the enterprise or the owner of the high-speed rail system are exempt from sales or use taxes imposed by chapter 212. Leases, rentals, or licenses to use real property granted to agents of the enterprise or the owner of the high-speed rail system are exempt from taxes imposed by s. 212.031 if the real property becomes part of such system. The exemptions granted in this subsection do not apply to sales, leases, or licenses by the enterprise, agents of the enterprise, or the owner of the high-speed rail system.

(b) The exemption granted in paragraph (a) to purchases or leases of tangible personal property by agents of the enterprise or by the owner of the high-speed rail system applies only to property that becomes a component part of such system. It does not apply to items, including, but not limited to, cranes, bulldozers, forklifts, other machinery and equipment, tools and supplies, or other items of tangible personal property used in the construction, operation, or maintenance of the high-speed rail system when such items are not incorporated into the high-speed rail system as a component part thereof.

(4) Any bonds or other security, and all notes, mortgages, security agreements, letters of credit, or other instruments that arise out of or are given to secure the repayment of bonds or other security, issued by the enterprise, or on behalf of the enterprise, their transfer, and the income therefrom, including any profit made on the sale thereof, shall at all times be free from taxation of every kind by the state, the counties, and the municipalities and other political subdivisions in the state. This subsection, however, does not exempt from taxation or assessment the leasehold interest of a lessee in any project or any other property or interest owned by the lessee. The exemption granted by this subsection is not applicable to any tax imposed by chapter 220 on interest income or profits on the sale of debt obligations owned by corporations.

(5) When property of the enterprise is leased to another person or entity, the property shall be exempt from ad valorem taxation only if the use by the lessee qualifies the property for exemption under s. 196.199.

(6) A leasehold interest held by the enterprise is not subject to intangible tax. However, if a leasehold interest held by the enterprise is subleased to a nongovernmental lessee, such subleasehold interest shall be deemed to be an interest described in s. 199.023(1)(d), Florida Statutes 2005, and is subject to the intangible tax.

(7)(a) In order to be considered an agent of the enterprise for purposes of the exemption from sales and use tax granted by subsection (3) for tangible personal property incorporated into the high-speed rail system, a contractor of the enterprise that purchases or fabricates such tangible personal property must be certified by the enterprise as provided in this subsection.

(b)1. A contractor must apply for a renewal of the exemption not later than December 1 of each calendar year.

2. A contractor must apply to the enterprise on the application form adopted by the enterprise, which shall develop the form in consultation with the Department of Revenue.

3. The enterprise shall review each submitted application and determine whether it is complete. The enterprise shall notify the applicant of any deficiencies in the application within 30 days. Upon receipt of a completed application, the enterprise shall evaluate the application for exemption under this subsection and issue a certification that the contractor is qualified to act as an agent of the enterprise for purposes of this section or a denial of such certification within 30 days. The enterprise shall provide the Department of Revenue with a copy of each certification issued upon approval of an application. Upon receipt of a certification from the enterprise, the Department of Revenue shall issue an exemption permit to the contractor.

(c)1. The contractor may extend a copy of its exemption permit to its vendors in lieu of paying sales tax on purchases of tangible personal property qualifying for exemption under this section. Possession of a copy of the exemption permit relieves the seller of the responsibility of collecting tax on the sale, and the Department of Revenue shall look solely to the contractor for recovery of tax upon a determination that the contractor was not entitled to the exemption.

2. The contractor may extend a copy of its exemption permit to real property subcontractors supplying and installing tangible personal property that is exempt under subsection (3). Any such subcontractor may extend a copy of the permit to the subcontractor's vendors in order to purchase qualifying tangible personal property tax-exempt. If the subcontractor uses the exemption permit to purchase tangible personal property that is determined not to qualify for exemption under subsection (3), the Department of Revenue may assess and collect any tax, penalties, and interest that are due from either the contractor holding the exemption permit or the subcontractor that extended the exemption permit to the seller.

(d) Any contractor authorized to act as an agent of the enterprise under this section shall maintain the necessary books and records to document the exempt status of purchases and fabrication costs made or incurred under the permit. In addition, an authorized contractor extending its exemption permit to its subcontractors shall maintain a copy of the subcontractor's books, records, and invoices indicating all purchases made by the subcontractor under the authorized contractor's permit. If, in an audit conducted by the Department of Revenue, it is determined that tangible personal property purchased or fabricated claiming exemption under this section does not meet the criteria for exemption, the amount of taxes not paid at the time of purchase or fabrication shall be immediately due and payable to the Department of Revenue, together with the appropriate interest and penalty, computed from the date of purchase, in the manner prescribed by chapter 212.

(e) If a contractor fails to apply for a high-speed rail system exemption permit, or if a contractor initially determined by the enterprise to not qualify for exemption is subsequently determined to be eligible, the contractor shall receive the benefit of the exemption in this subsection through a refund of previously paid taxes for transactions that otherwise would have been exempt. A refund may not be made for such taxes without the issuance of a certification by the enterprise that the contractor was authorized to make purchases tax-exempt and a determination by the Department of Revenue that the purchases qualified for the exemption.

(f) The enterprise may adopt rules governing the application process for exemption of a contractor as an authorized agent of the enterprise.

(g) The Department of Revenue may adopt rules governing the issuance and form of high-speed rail system exemption permits, the audit of contractors and subcontractors using such permits, the recapture of taxes on nonqualified purchases, and the manner and form of refund applications.

History.—s. 48, ch. 2002-20; s. 16, ch. 2004-366; s. 53, ch. 2007-5; s. 61, ch. 2012-174; s. 52, ch. 2013-15; s. 7, ch. 2013-213.

**341.842 Liberal construction.**—This act, being necessary for the welfare of the state and its inhabitants, shall be liberally construed to effect the purposes hereof.

History.—s. 50, ch. 2002-20.



**EXHIBIT M**

**CHAPTER 14-90, FLORIDA ADMINISTRATIVE CODE**

**CHAPTER 14-90**  
**EQUIPMENT AND OPERATIONAL SAFETY STANDARDS FOR BUS TRANSIT SYSTEMS**

14-90.002	Definitions
14-90.004	Bus Transit System Operational Standards
14-90.0041	Medical Examinations for Bus Transit System Drivers
14-90.006	Operational and Driving Requirements
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14-90.009	Bus Safety Inspections
14-90.010	Certification
14-90.012	Safety and Security Inspections and Reviews

**14-90.002 Definitions.**

Terms used in this rule chapter shall mean as defined in Section 341.031, F.S., in addition:

(1) "Bus" means any motor vehicle, other than a taxicab, which is designed or constructed for the public transport of persons for compensation and is owned, operated, leased, or controlled by a bus transit system. Buses are designated in two categories:

(a) Type I means over 22 feet in length, including bumpers.

(b) Type II means 22 feet or less in length, including bumpers and paratransit type vehicles, such as minibuses, standard vans, modified vans, station wagons, and sedans.

(2) "Bus Transit System" means a community transportation coordinator; a public transit provider; or a private contract transit provider which owns, operates, leases, or controls buses or taxicabs where such transportation consists of continuous or recurring transportation under the same contract; or a privately owned or operated transit provider that receives operational or capital funding from the Department and owns, operates, leases, or controls buses, other than nonpublic sector buses that provides transportation services available for use by the general riding public.

(3) "Community Transportation Coordinator" means a provider of transportation services or an entity that ensures such services are provided by another bus transit system.

(4) "Department" means the Florida Department of Transportation.

(5) "Drive" or "Operate" means all time spent at the controls of a bus in operation.

(6) "Driver" means any person trained and designated to drive a bus on a street or highway being used for the public transport of persons for compensation.

(7) "FMVSS" means the Federal Motor Vehicle Safety Standards in effect at the time the bus or component is manufactured.

(8) "For Compensation" means for money, property, or anything else of value whether paid, received, or realized, directly or indirectly.

(9) "Manufacturer" means the original producer of the chassis, the producer of any type of bus, or the producer of equipment installed on any bus for the purpose of transporting individuals with disabilities.

(10) "Off-Duty" means any time the driver is not on duty, required to be in readiness to work, or under any responsibility to perform work. Such time shall not be counted towards the maximum allowed on-duty hours within a 24-hour period.

(11) "On Duty" means the status of the driver from the time he or she begins work, or is required to be in readiness to work, until the time the driver is relieved from work and all responsibility for performing work. "On Duty" includes all time spent by the driver as follows:

(a) Waiting to be dispatched at bus transit system terminals, facilities, or other private or public property, unless the driver has been completely relieved from duty by the bus transit system.

(b) Inspecting, servicing, or conditioning any vehicle.

(c) Driving.

(d) Remaining in readiness to operate a vehicle (stand-by).

(e) Repairing, obtaining assistance, or remaining in attendance in or about a disabled vehicle.

(12) "Passenger" means a person who is on board, boarding, or alighting from a bus for the purposes of public transport.

(13) "Paratransit" means those elements of public transit which provide service between specific origins and destinations selected by the individual user with such service being provided at a time that is agreed upon by the user and the provider of the

service. Paratransit service is provided by taxis, limousines, “dial-a-ride” buses, and other demand-responsive operations that are characterized by their nonscheduled, non-fixed route nature.

(14) “Safe Condition” means a condition where hazards are reduced to the lowest level feasible and substantial compliance exists with all safety rules, regulations, and requirements.

(15) “Safety Review” means an on-site assessment to determine if a bus transit system has adequate safety management controls in place and functioning in accordance with the safety standards provided and incorporated by reference in this rule chapter.

(16) “Security” means freedom from harm resulting from intentional acts against passengers, employees, equipment, and facilities.

(17) “Security Program Plan” or “SPP” means a document developed and adopted by the bus transit system detailing its policies, objectives, responsibilities, and procedures for the protection and defense of the system and persons from intentional acts of harm.

(18) “Security Review” means an on-site assessment to determine if a bus transit system has security management controls in place and functioning in accordance with the security requirements provided in this rule chapter.

(19) “System Safety Program Plan” or “SSPP” means a document developed and adopted by the bus transit system detailing its policies, objectives, responsibilities, and procedures against injuries or damage.

(20) “Taxicab” means any motor vehicle of nine passenger capacity or less, including the driver, engaged in the general transportation of persons for compensation, not on a regular schedule, between fixed termini, or over regular routes, where such vehicle does not provide transportation services as a result of a contractual agreement with a bus transit system.

(21) “Trailer Bus” means a trailing or towed vehicle designed or used for the transportation of more than 10 persons, e.g., tram buses.

(22) “Twenty-four Hour Period” or “24-Hour Period” means the consecutive time beginning at 12:00.01 a.m. to 12:00.00 a.m.

(23) “Unsafe Condition” means anything which endangers human life or property.

(24) “Personal wireless communications device” means an electronic or electrical device that was not provided by the bus transit system for business purposes.

(25) “Use of a wireless communications device” means use of a mobile telephone or other electronic or electrical device, hands-on or hands-free, to conduct an oral communication; to place or receive a telephone call; to send or read electronic mail or a text message; to play a game; to navigate the Internet; to play, view, or listen to a video; to play, view, or listen to a television broadcast; to play or listen to music; or to execute a computational function. Use of an electronic or electrical device that enhances the individual’s physical ability to perform, such as a hearing aid, is not included in this definition.

(26) “Wireless communications device” means an electronic or electrical device capable of remote communication. Examples include cell phones, personal digital assistants (PDAs) and portable computers (commonly called laptop computers).

*Rulemaking Authority 334.044(2), 341.061(2), 341.041(3), 341.031 FS. Law Implemented 341.041(3), 341.061(2) FS. History—New 9-7-87, Amended 11-10-92, 8-7-05, 9-16-10.*

#### **14-90.004 Bus Transit System Operational Standards.**

(1) Each bus transit system shall develop and adopt an SSPP that complies with or exceeds the established safety standards set forth in this rule chapter.

(a) The SSPP shall address the following safety elements and requirements:

1. Safety policies and responsibilities.
2. Vehicle and equipment standards and procurement criteria.
3. Operational standards and procedures.
4. Bus driver and employee selection.
5. Driving requirements.
6. Bus driver and employee training. As part of the driver training program, specific procedures, and training shall be implemented to instruct the driver on how to safely approach and depart from a transit bus stop to avoid contact with pedestrians and other hazards.
7. Vehicle maintenance.
8. Investigations of events described under subsection 14-90.004(5), F.A.C.
9. Hazard identification and resolution.

10. Equipment for transporting wheelchairs.
11. Safety data acquisition and analysis.
12. A wireless communication plan and procedure that provides for the safe operation of the bus transit vehicle. The wireless communication plan and procedure shall assure that:
  - a. The use of a personal wireless communication device is prohibited while the transit vehicle is in motion, and
  - b. All personal wireless communications devices are turned off with any earpieces removed from the operator's ear while occupying the driver's seat.
13. A policy on the use of a wireless communications device issued to the operator by the bus transit system for business related purposes. Policies developed shall assure that:
  - a. Guidelines are developed that allow for the use of a wireless communications device in emergency situations, and
  - b. The use of a wireless communications device does not interfere with the operator's safety related duties.
14. The Bus Transit System shall develop a driver educational training program addressing:
  - a. The proper use of a wireless communications device issued to the operator by the Bus Transit System while in the performance of their safety related duties, and
  - b. The hazards associated with driving and utilizing a wireless communications device.
15. Safety standards for private contract bus transit system(s) that provide(s) continuous or recurring transportation services for compensation as a result of a contractual agreement with the bus transit system.
  - (b) Each bus transit system shall implement and comply with the SSPP during the operation of the system.
  - (c) Each bus transit system shall require that all operable transit buses be inspected at least once per year in accordance with established standards.
  - (d) Each bus transit system shall submit an annual safety certification to the Department verifying the following:
    1. Adoption of an SSPP, which meets or exceeds the established standards set forth in this rule chapter.
    2. Compliance with its adopted SSPP and that safety inspections have been performed at least once a year on all buses operated by the bus transit system, by persons meeting the requirements set forth in Rule 14-90.009, F.A.C.
  - (e) Bus transit systems shall immediately suspend affected system service operations if, at any time, continued operation of the system, or a portion thereof, poses an immediate danger to public safety.
    - (2) Each bus transit system shall develop and adopt an SPP that meets or exceeds the security requirements set forth in this rule chapter. The SPP shall be adopted separately from the SSPP.
      - (a) The SPP shall address the following security requirements:
        1. Security policies, goals, and objectives.
        2. Organization, roles, and responsibilities.
        3. Emergency management processes and procedures for mitigation, preparedness, response, and recovery.
        4. Procedures for investigation of events described under subsection 14-90.004(5), F.A.C.
        5. Procedures for the establishment of interfaces with emergency response organizations.
        6. Procedures for interagency coordination with local law enforcement jurisdictions.
        7. Employee security and threat awareness training programs.
        8. Security data acquisition and analysis.
        9. Emergency preparedness drills and exercises.
        10. Requirements for private contract transit providers that engage in continuous or recurring transportation services for compensation as a result of a contractual agreement with the bus transit system.
        11. Procedures for SPP maintenance and distribution.
      - (b) Each bus transit system shall implement and comply with the SPP during the operation of the system.
      - (c) Bus transit systems that engage in a contract with a private contract transit provider shall:
        1. Establish minimum security requirements which apply to private contract transit providers.
        2. Monitor and assure that each private contract transit provider complies with established security requirements during the term of the contract.
      - (d) Bus transit systems are prohibited by Section 119.071(3)(a), F.S., from publicly disclosing the SPP or the security portion of the SSPP, as applicable, under any circumstance.
      - (3) Bus transit systems shall establish criteria and procedures for the selection, qualification, and training of all drivers. The

criteria shall include the following:

- (a) Driver qualifications and background checks meeting minimum hiring standards.
  - (b) Driving and criminal background checks for all new drivers.
  - (c) Verification and documentation of valid driver licenses for all employees who drive buses.
  - (d) Training and testing to demonstrate and ensure adequate skills and capabilities to safely operate each type of bus or bus combination before driving on a street or highway unsupervised. As a minimum requirement, drivers shall be given explicit instructional and procedural training and testing in the following areas:
    1. Bus transit system safety and operational policies and procedures.
    2. Operational bus and equipment inspections.
    3. Bus equipment familiarization.
    4. Basic operations and maneuvering.
    5. Boarding and alighting passengers.
    6. Operation of wheelchair lifts and other special equipment.
    7. Defensive driving.
    8. Passenger assistance and securement.
    9. Handling of emergencies and security threats.
    10. Security and threat awareness.
    11. Driving conditions.
  - (e) Bus transit systems shall provide written operational and safety procedures to all bus drivers before driving on streets or highways unsupervised. At a minimum, these procedures and instructions shall address the following:
    1. Communication and handling of unsafe conditions, security threats, and emergencies.
    2. Familiarization and operation of safety and emergency equipment, wheelchair lift equipment, and restraining devices.
    3. Application and compliance with all applicable federal and state laws, rules, and regulations.
  - (f) The provisions in paragraphs (d) and (e), above, shall not apply to personnel licensed and authorized by the bus transit system to drive, move, or road test a bus in order to perform repairs or maintenance services when it has been determined that such temporary operation does not create unsafe operating conditions or create a hazard to public safety.
  - (g) Bus transit systems shall maintain the following records for at least four years:
    1. Records of bus driver background checks and qualifications.
    2. Detailed descriptions of training administered and completed by each bus driver.
    3. A record of each bus driver's duty status which shall include total days worked, on-duty hours, driving hours, and time of reporting on and off duty each day.
  - (h) Each bus transit system shall establish a drug-free workplace policy statement in accordance with 49 C.F.R. Part 32 and a substance abuse management and testing program in accordance with 49 C.F.R. Parts 40 and 655, October 1, 2009, hereby incorporated by reference.
  - (i) Bus transit systems shall require that drivers write and submit a daily bus inspection report pursuant to Rule 14-90.006, F.A.C.
- (4) Bus transit systems shall establish a maintenance plan and procedures for preventative and routine maintenance for all buses operated. The maintenance plan and procedures shall assure that:
- (a) All buses operated, and all parts and accessories on such buses, including those specified in Rule 14-90.007, F.A.C., and any additional parts and accessories which may affect safety of operation, including frame and frame assemblies, suspension systems, axles and attaching parts, wheels and rims, and steering systems, are regularly and systematically inspected, maintained, and lubricated to standards that meet or exceed the bus manufacturer's recommendations and requirements.
  - (b) A recording and tracking system is established for the types of inspections, maintenance, and lubrication intervals documenting the date or mileage when these services are due. Required maintenance inspections shall be more comprehensive than daily inspections performed by the driver.
  - (c) Proper preventive maintenance is performed when a bus is assigned away from the system's regular maintenance facility or when maintenance services are performed under contract.
  - (d) Records are maintained and provide written documentation of preventive maintenance, regular maintenance, inspections, lubrication, and repairs performed for each bus under their control. Such records shall be maintained by the bus transit system for at

least four years and, at a minimum, provide the following information:

1. Identification of the bus, the make, model, and license number, or other means of positive identification and ownership.
  2. Date, mileage, description, and each type of inspection, maintenance, lubrication, or repair performed.
  3. If not owned by the bus transit system, the name of any person furnishing a bus.
  4. The name and address of any entity or contractor performing an inspection, maintenance, lubrication, or repair.
- (5) Each bus transit system shall investigate, or cause to be investigated, any event involving a bus or taking place on bus transit system controlled property resulting in a fatality, injury, or property damage as follows:
- (a) A fatality, where an individual is confirmed dead within 30 days of a bus transit system related event, excluding suicides and deaths from illnesses.
  - (b) Injuries requiring immediate medical attention away from the scene for two or more individuals.
  - (c) Property damage to bus transit system buses, non-bus transit system vehicles, other bus system property or facilities, or any other property. The bus transit system shall have the discretion to investigate events resulting in property damage less than \$1,000.
  - (d) Evacuation of a bus due to a life safety event where there is imminent danger to passengers on the bus, excluding evacuations due to operational issues.
- (6) Each investigation shall be documented in a final report that includes a description of investigation activities, identified causal factors, and any identified corrective action plan.
- (a) Each corrective action plan shall identify the action to be taken by the bus transit system and the schedule for its implementation.
  - (b) The bus transit system shall monitor and track the implementation of each corrective action plan.
- (7) Investigation reports, corrective action plans, and related supporting documentation shall be maintained by the bus transit system for a minimum of four years from the date of completion of the investigation.

*Rulemaking Authority 334.044(2), 341.061(2) FS. Law Implemented 119.071, 341.041(3), 341.061(1)(b), 341.061(2)(a) FS. History—New 9-7-87, Amended 11-10-92, 8-7-05, 6-24-08, 9-16-10.*

#### **14-90.0041 Medical Examinations for Bus Transit System Drivers.**

- (1) Bus transit systems shall establish medical examination requirements for all applicants to driver positions and for existing drivers. The medical examination requirements shall include a pre-employment examination for applicants, an examination at least once every two years for existing drivers, and a return to duty examination for any driver prior to returning to duty after having been off duty for 30 or more days due to an illness, medical condition, or injury.
- (2) Medical examinations shall be performed and recorded according to qualification standards adopted by the bus transit system, provided the medical examination qualification standards adopted by the bus transit system meet or exceed those provided in Department Form Number 725-030-11, Medical Examination Report for Bus Transit System Driver, Rev. 05/09, hereby incorporated by reference. Copies of Form Number 725-030-11 are available from the Florida Department of Transportation, Public Transit Office, 605 Suwannee Street, Mail Station 26, Tallahassee, Florida 32399-0450 or on-line at [www.dot.state.fl.us/transit](http://www.dot.state.fl.us/transit).
- (3) Medical examinations shall be performed by a Doctor of Medicine or Osteopathy, Physician Assistant, or Advanced Registered Nurse Practitioner licensed or certified by the State of Florida. If medical examinations are performed by a Physician Assistant or Advanced Registered Nurse Practitioner, they must be performed under the supervision or review of a Doctor of Medicine or Osteopathy.
  - (a) An ophthalmologist or optometrist licensed by the State of Florida may perform as much of the medical examination as pertains to visual acuity, field of vision, and color recognition.
  - (b) Upon completion of the medical examination, the medical examiner shall complete, sign, and date the medical examination form and maintain the original at his or her office.
  - (c) Upon completion of the medical examination, the examiner shall complete, sign, and date the medical examination certificate and provide a copy to the driver's employer. If the transit agency decides to adopt qualification standards other than those listed in Department form 725-030-11, the adopted standard's medical examination certificate or a signed letter from the medical examiner attesting to the completion of a medical examination shall be given to the transit agency in lieu of the Department's medical examination certificate. The adopted standards medical certification or letter must provide all of the information required on the Department's medical examination certificate.

(d) Upon completion of the medical examination the driver shall provide their driver license number, signature, and date on the medical examination certificate.

(4) Bus transit systems shall have on file a completed and signed medical examination certificate or a signed letter from the medical examiner attesting to the completion of a medical examination for each bus driver, dated within the past 24 months.

(a) Medical examination certificates or a signed letter from the medical examiner attesting to the completion of a medical examination of the employee bus drivers shall be maintained by the bus transit system for a minimum of four years from the date of the examination.

(b) Bus Transit Systems shall not allow a driver to operate a transit bus without having on file a completed medical examination certificate or a signed letter from the medical examiner attesting to the completion of a medical examination dated within the past 24 months.

*Rulemaking Authority 334.044(2), 341.061(2) FS. Law Implemented 334.044(12), 341.041(3), 341.061(1)(a), (b), (2) FS. History--New 11-10-92, Amended 8-7-05, 6-24-08, 9-16-10.*

#### **14-90.006 Operational and Driving Requirements.**

(1) Bus transit systems shall not permit a driver to drive a bus when such driver's license has been suspended, cancelled, or revoked. Bus transit systems shall require a driver who receives a notice that his or her license to operate a motor vehicle has been suspended, cancelled, or revoked to notify his or her employer of the contents of the notice immediately, no later than the end of the business day following the day he or she received the notice.

(2) Buses shall be operated at all times in compliance with applicable traffic regulations, ordinances, and laws of the jurisdiction in which they are being operated.

(3) A driver shall not be permitted or required to drive more than 12 hours in a 24-hour period, or drive after having been on duty for 16 hours in a 24-hour period. A driver shall not be permitted to drive until the requirement of a minimum eight consecutive hours of off-duty time has been fulfilled. A driver's work period shall begin from the time he or she first reports for duty to his or her employer. A driver is permitted to exceed his or her regulated hours in order to reach a regularly established relief or dispatch point, provided the additional driving time does not exceed one hour.

(4) To ensure uniform interpretation of subsections 14-90.002(10), (11), (22) and 14-90.006(3), F.A.C., the following practical applications are provided:

(a) A driver is required to drive from 4 a.m. – 8 a.m., off-duty from 8 a.m. – 3 p.m., then required to drive from 3 p.m. – 11 p.m. Driving hours and on-duty hours are the same. 4 hours + 8 hours = 12 hours driving. This driver has met the maximum allowed driving hours within a 24-hour period and cannot be permitted or required to drive until a minimum eight consecutive hours off-duty has been fulfilled. This driver cannot be permitted or allowed to drive before 7 a.m.

(b) A driver is required to drive from 4 a.m. – 8 a.m., off-duty from 8 a.m. – 11 a.m., then required to be on-duty, not driving, from 11 a.m. – 11 p.m. Driving hours = 4 hours and on-duty not driving hours = 12 hours for a total of 16 hours on-duty. This driver has met the maximum allowed on-duty hours within a 24-hour period and cannot be permitted or required to drive until a minimum eight consecutive hours off-duty has been fulfilled. This driver cannot be permitted or allowed to drive before 7 a.m.

(c) A driver is required to be on-duty, not driving, from 4 a.m. – 8 a.m., off-duty from 8 a.m. – 11 a.m., then on-duty, not driving from 11 a.m. – 11 p.m. On-duty not driving hours = 4 hours + 12 hours for a total of 16 hours on-duty. This driver has met the maximum allowed on-duty hours within a 24-hour period and cannot be permitted or required to drive until a minimum eight consecutive hours off-duty has been fulfilled. The driver cannot be permitted or allowed to drive before 7 a.m.

(d) A driver is required to be on-duty, not driving, from 4 a.m. – 8 a.m., then off-duty from 8 a.m. – 11 a.m., then on-duty, driving from 11 a.m. – 11 p.m. On-duty, not driving hours = 4 hours and on-duty driving hours = 12 hours for a total of 16 hours on-duty. This driver has met the maximum allowed driving and on-duty hours within a 24-hour period and cannot be permitted or required to drive until a minimum eight consecutive hours off-duty has been fulfilled. This driver cannot be permitted or allowed to drive before 7 a.m.

(5) A driver shall not be permitted or required to be on duty more than 72 hours in any period of seven consecutive days; however, any 24 consecutive hours of off duty time shall constitute the end of any such period of seven consecutive days. A driver who has reached the maximum 72 hours of on duty time during the seven consecutive days shall be required to have a minimum of 24 consecutive hours off duty prior to returning to on duty status.

(6) A driver is permitted to drive for more than the regulated hours for the safety and protection of the public when conditions

such as adverse weather, disaster, security threat, a road or traffic condition, medical emergency, or an accident occur.

(7) Bus transit systems shall not permit or require any driver to drive a bus when his or her ability is impaired, or likely to be impaired, by fatigue, illness, or other causes, likely to create an unsafe condition.

(8) Bus transit systems shall require pre-operational or daily inspection and reporting of all defects and deficiencies likely to affect safe operation or cause mechanical malfunctions.

(a) An inspection or test shall be made of the following parts and devices to ascertain that they are in safe condition and in good working order:

1. Service brakes.
2. Parking brakes.
3. Tires and wheels.
4. Steering.
5. Horn.
6. Lighting devices.
7. Windshield wipers.
8. Rear vision mirrors.
9. Passenger doors.
10. Exhaust system.
11. Equipment for transporting wheelchairs.
12. Safety, security, and emergency equipment.

(b) Bus transit systems shall review daily inspection reports and document corrective actions taken as a result of any deficiencies identified by daily inspections.

(c) Bus transit systems shall retain records of daily bus inspections and any corrective action documentation a minimum of two weeks.

(9) A bus with any passenger door in the open position shall not be operated with passengers aboard. The doors shall not be opened until the bus is stopped. A bus with any inoperable passenger door shall not be operated with passengers aboard, except to move a bus to a safe location.

(10) During darkness, interior lighting and lighting in stepwells on buses shall be sufficient for passengers to enter and exit safely.

(11) Passengers shall not be permitted in the stepwells of any bus while the bus is in motion, or to occupy an area forward of the standee line.

(12) Passengers shall not be permitted to stand on buses not designed and constructed for that purpose.

(13) Buses shall not be refueled in a closed building. The fueling of buses when passengers are being carried shall be reduced to the minimum number of times necessary during such transportation.

(14) Bus transit systems shall require the driver to be properly secured to the driver's seat with a restraining belt at all times while the bus is in motion.

(15) Buses shall not be left unattended with passengers aboard for longer than 15 minutes. The parking or holding brake device shall be properly set at any time the bus is left unattended.

(16) Buses shall not be left unattended in an unsafe condition with passengers aboard at any time.

*Rulemaking Authority 334.044(2), 341.041(3), 341.061(2)(a) FS. Law Implemented 341.061(2) FS. History—New 9-7-87, Amended 5-31-89, 11-10-92, 8-7-05, 6-24-08, 9-16-10.*

#### **14-90.007 Vehicle Equipment Standards and Procurement Criteria.**

(1) Every bus transit system shall ensure that buses procured and operated meet the following minimum standards:

(a) The capability and strength to carry the maximum allowed load and not exceed the manufacturer's gross vehicle weight rating (GVWR), gross axle weighting, or tire rating.

(b) Structural integrity that mitigates or minimizes the adverse effects of collisions.

(c) Federal Motor Vehicle Safety Standards (FMVSS), 49 C.F.R. Part 571, Sections 102, 103, 104, 105, 108, 207, 209, 210, 217, 302, 403 and 404, Rev. 10/09, hereby incorporated by reference.

(2) Proof of strength and structural integrity tests on new buses procured shall be submitted by manufacturers or bus transit



systems to the Department.

(3) In addition to the above, every bus operated in this state shall be equipped as follows:

(a) Mirrors. There shall be two exterior rear vision mirrors, one at each side. The mirrors shall be firmly attached to the outside of the bus and located as to reflect to the driver a view of the highway to the rear along both sides of the vehicle. Each exterior rear vision mirror, on Type I buses, shall have a minimum reflective surface of 50 square inches. Neither the mirror nor the mounting shall protrude farther than the widest part of the vehicle body except to the extent necessary to produce a field of view meeting or exceeding the requirements of this section. All Type I buses shall, in addition to the above requirements, be equipped with an inside rear vision mirror capable of giving the driver a clear view of seated and standing passengers. Buses having a passenger exit door that is located inconveniently for the driver's visual control shall be equipped with additional interior mirrors to enable the driver to view the passenger exit door. In lieu of interior mirrors, trailer buses and articulated buses may be equipped with closed circuit video systems or adult monitors in voice control with the driver.

(b) Wiring and Batteries. Electrical wiring shall be maintained so as not to come in contact with moving parts, heated surfaces, or be subject to chafing or abrasion which may cause insulation to become worn. Every Type I bus manufactured on or after February 7, 1988, shall be equipped with a storage battery electrical power main disconnect switch. The disconnect switch shall be practicably located in an accessible location adjacent to or near to the battery and be legibly and permanently marked for identification. Every storage battery on a public-sector bus shall be mounted with proper retainment devices in a compartment which provides adequate ventilation and drainage.

(c) Brake Interlock Systems. All Type I buses having a rear exit door shall be equipped with a rear exit door/brake interlock that automatically applies the brake upon driver activation of the rear exit door to the open position. Brake interlock application shall remain activated until deactivated by the driver and the rear exit door returns to the closed position. The rear exit door brake interlock on such buses shall be equipped with an identified override switch enabling emergency release of the brake interlock function. The override switch shall not be located within reach of the seated driver. Air pressure application to the brake during brake interlock operation, on buses equipped with rear exit door/brake interlock, shall be regulated at the equipment's original manufacturer's specifications.

(4) Standee Line and Warning. Every bus designed and constructed to allow standees shall be plainly marked with a line of contrasting color at least two inches wide, or be equipped with some other means to indicate that all passengers are prohibited from occupying a space forward of a perpendicular plane drawn through the rear of the driver's seat and perpendicular to the longitudinal axis of the bus. A sign shall be posted at or near the front of the bus stating that it is a violation for a bus to be operated with passengers occupying an area forward of the line.

(5) Handrails and Stanchions. Every bus designed and constructed to allow standees shall be equipped with overhead handrails for standee passengers. Overhead handrails shall be continuous, except for a gap at the rear exit door, and terminate into vertical stanchions or turn up into a ceiling fastener. Every Type I and Type II bus designed for carrying more than 16 passengers shall be equipped with handrails, stanchions, or bars at least 10 inches long and installed to permit safe on-board circulation, seating and standing assistance, and boarding and alighting by elderly and handicapped persons. Type I buses shall be equipped with a safety bar and panel directly behind each entry and exit stepwell.

(6) Flooring, Steps, and Thresholds. Flooring, steps, and thresholds on all buses shall have slip resistant surfaces without protruding or sharp edges, lips, or overhangs, in order to prevent tripping hazards. All step edges and thresholds shall have a band of color(s) running the full width of the step or edge which contrasts with the step tread and riser, either light-on-dark or dark-on-light.

(7) Doors. Power activated doors on all buses shall be equipped with a manual device designed to release door closing pressure.

(8) Emergency Exits. All buses shall have an emergency exit door, or in lieu thereof, shall be provided with emergency escape push-out windows. Each emergency escape window shall be in the form of a parallelogram with dimensions of not less than 18" by 24", and each shall contain an area of not less than 432 square inches. There shall be a sufficient number of push-out or kick-out windows in each vehicle to provide a total escape area equivalent to 67 square inches per seat, including the driver's seat. No less than 40% of the total escape area shall be on one side of the vehicle. Emergency escape kick-out or push-out windows and emergency exit doors shall be conspicuously marked with a sign or light and shall always be kept in good working order so that they may be readily opened in an emergency. All such windows and doors shall not be obstructed, either inside or outside, so as to hinder escape. Buses equipped with an auxiliary door for emergency exit shall be equipped with an audible alarm and light indicating to the driver when a door is ajar or opened while the engine is running. Supplemental security locks operable by a key are prohibited on emergency exit doors unless these security locks are equipped and connected with an ignition interlock system or an audio visual

alarm located in the driver's compartment. Any supplemental security lock system used on emergency exits shall be kept unlocked whenever a bus is in operation.

(9) Tires and Wheels. Tires shall be properly inflated in accordance with manufacturer's recommendations.

(a) No bus shall be operated with a tread groove pattern depth:

1. Less than  $\frac{4}{32}$  ( $\frac{1}{8}$ ) of an inch, measured at any point on a major tread groove for tires on the steering axle of all buses. The measurements shall not be made where tie bars, humps, or fillets are located.

2. Less than  $\frac{2}{32}$  ( $\frac{1}{16}$ ) of an inch, measured at any point on a major tread groove for all other tires of all buses. The measurements shall not be made where tie bars, humps, or fillets are located.

(b) No bus shall be operated with recapped, regrooved, or retreaded tires on the steering axle.

(c) Wheels shall be visibly free from cracks and distortions and shall not have missing, cracked, or broken mounting lugs.

(10) Suspension. The suspension system of all buses, including springs, air bags, and all other suspension parts shall be free from cracks, leaks, or any other defect which may cause its impairment or failure to function properly.

(11) Steering and Front Axle. The steering system of all buses shall have no indication of leaks which would or may cause its impairment to function properly, and shall be free from cracks and excessive wear of components that may cause excessive free play or loose motion in the steering system or above normal effort in steering control.

(12) Seat Belts. Every bus shall be equipped with an adjustable driver's restraining belt in compliance with the requirements of FMVSS 209, "Seat Belt Assemblies" 49 C.F.R. 571.209, Rev. 10/09, and FMVSS 210, "Seat Belt Assembly Anchorages" 49 C.F.R. 571.210, Rev. 10/09, hereby incorporated by reference.

(13) Safety Equipment. Every bus shall be equipped with one fully charged dry chemical or carbon dioxide fire extinguisher, having at least a 1A:BC rating, and bearing the label of Underwriter's Laboratory, Inc. The fire extinguishers shall be maintained as follows:

(a) Each fire extinguisher shall be securely mounted on the bus in a conspicuous place or in a clearly marked compartment and be readily accessible.

(b) Each fire extinguisher shall be maintained in efficient operating condition and be equipped with some means of determining if it is fully charged.

(c) Every Type I bus shall be equipped with portable red reflector warning devices in compliance with Section 316.300, F.S.

(14) Persons with Disabilities. Buses used for the purpose of transporting individuals with disabilities shall meet the requirements set forth in 49 C.F.R. Part 38, Rev. 10/09 hereby incorporated by reference, as well as the following:

(a) Installation of a wheelchair lift or ramp shall not cause the manufacturer's GVWR, gross axle weight rating, or tire rating to be exceeded.

(b) Except in locations within 3 1/2 inches of the bus floor, all readily accessible exposed edges or other hazardous protrusions of parts of wheelchair lift assemblies or ramps that are located in the passenger compartment shall be padded with energy absorbing material to mitigate injury in normal use and in case of a collision. This requirement shall also apply to parts of the bus associated with the operation of the lift or ramp.

(c) The controls for operating the lift shall be at a location where the bus driver or lift attendant has a full view, unobstructed by passengers, of the lift platform, its entrance and exit, and the wheelchair passenger, either directly or with partial assistance of mirrors. Lifts located entirely to the rear of the driver's seat shall not be operable from the driver's seat, but shall have an override control at the driver's position that can be activated to prevent the lift from being operated by the other controls (except for emergency manual operation upon power failure).

(d) The installation of the wheelchair lift or ramp and its controls and the method of attachment in the bus body or chassis shall not diminish the structural integrity of the bus nor cause a hazardous imbalance of the bus. No part of the assembly, when installed and stowed, shall extend laterally beyond the normal side contour of the bus, nor vertically beyond the lowest part of the rim of the wheel closest to the lift.

(e) Each wheelchair lift or ramp assembly shall be legibly and permanently marked by the manufacturer or installer with the following information:

1. The manufacturer's name and address.

2. The month and year of manufacture.

3. A certificate that the wheelchair lift or ramp securement devices, and their installation, conform to State of Florida requirements applicable to accessible buses.

(15) Wheelchairs. Wheelchair lifts, ramps, securement devices, and restraints shall be inspected and maintained as required by this rule chapter. Instructions for normal and emergency operation of the lift or ramp shall be carried or displayed in every bus.

*Rulemaking Authority 334.044(2), 341.041(3), 341.061(2)(a) FS. Law Implemented 341.061(2)(a) FS. History—New 9-7-87, Amended 11-10-92, 8-2-94, 8-7-05, 6-24-08, 9-16-10.*

#### **14-90.009 Bus Safety Inspections.**

(1) Each bus transit system shall require that all buses operated by such bus transit system, and all buses operated by a private contract transit provider, be inspected at least annually in accordance with bus inspection procedures set forth in this rule.

(2) It shall be the bus transit system's responsibility to ensure that each individual performing a bus safety inspection is qualified as follows:

(a) Understands the requirements set forth in this rule chapter and can identify defective components.

(b) Is knowledgeable of and has mastered the methods, procedures, tools, and equipment used when performing an inspection.

(c) Has at least one year of training and/or experience as a mechanic or inspector in a vehicle maintenance program, and has sufficient general knowledge of buses owned and operated by the bus transit system to recognize deficiencies or mechanical defects.

(3) Each bus receiving a safety inspection shall be checked for compliance with the requirements for safety devices and equipment, as referenced or specified herein. Specific operable equipment and devices as required by this rule chapter, include the following as applicable to Type I and II buses:

(a) Horn.

(b) Windshield wipers.

(c) Mirrors.

(d) Wiring and batteries.

(e) Service and parking brakes.

(f) Warning devices.

(g) Directional signals.

(h) Hazard warning signals.

(i) Lighting systems and signaling devices.

(j) Handrails and stanchions.

(k) Standee line and warning.

(l) Doors and brake interlock devices.

(m) Stepwells and flooring.

(n) Emergency exits

(o) Tires and wheels.

(p) Suspension system.

(q) Steering system.

(r) Exhaust system.

(s) Seat belts.

(t) Safety equipment.

(u) Equipment for transporting wheelchairs.

(v) Working speedometer.

(4) A safety inspection report shall be prepared by the individual(s) performing the inspection and shall include the following:

(a) Identification of the individual(s) performing the inspection.

(b) Identification of the bus transit system operating the bus.

(c) The date of the inspection.

(d) Identification of the bus inspected.

(e) Identification of the equipment and devices inspected including the identification of equipment and devices found deficient or defective.

(f) Identification of corrective action(s) for any deficient or defective items found and date(s) of completion of corrective action(s).

(5) Records of annual safety inspections and documentation of any required corrective actions shall be retained a minimum of

four years by the bus transit system for compliance review.

*Rulemaking Authority 334.044(2), 341.041(3), 341.061(2)(a) FS. Law Implemented 341.061(2) FS. History—New 9-7-87, Amended 11-10-92, 8-7-05, 9-16-10.*

#### **14-90.010 Certification.**

(1) Each bus transit system shall annually submit a safety and security certification to the Department. The certification shall be submitted no later than February 15, for the prior calendar year period. The certification shall attest to the following:

- (a) The adoption of an SSPP and an SPP in accordance with established standards set forth in this rule chapter.
- (b) Compliance with its adopted SSPP and SPP.
- (c) Performance of safety inspections on all buses operated by the system in accordance with this rule chapter.
- (d) Reviews of the SSPP and SPP have been conducted to ensure they are up to date.

(2) The certification shall include:

(a) The name and address of the bus transit system, and the name and address of the entity(ies) who performed bus safety inspections and security assessments during the prior calendar year, if different from that of the bus transit system.

(b) A statement signed by an officer or person directly responsible for management of the bus transit system attesting to compliance with this rule chapter.

*Rulemaking Authority 334.044(2), 341.041(3), 341.061(2) FS. Law Implemented 334.044(28), 341.061(1), 341.061(2) FS. History—New 9-7-87, Amended 8-7-05, 9-16-10.*

#### **14-90.012 Safety and Security Inspections and Reviews.**

(1) The Department, or its contractor, shall conduct inspections of bus transit systems to ascertain compliance with the provisions of this rule chapter.

(2) The Department, or its contractor, shall conduct safety and security reviews of any bus transit system the Department believes to be in noncompliance with its SSPP or SPP, or providing passenger service operations in an unsafe manner, or if there is evidence of an immediate danger to public safety. The Department shall prepare and submit a report of the review to the affected bus transit system. The report shall be submitted to the bus transit system within three business days of completion of the review and shall contain the following:

(a) Identification of the findings, including a detailed description of any deficiency.

(b) Required corrective action and a schedule for implementation of the corrective action to be taken for each deficiency.

(c) Any required suspension of bus transit system service, should the Department determine the continued operation of the service, or a portion thereof, poses an immediate danger to public safety.

(3) The Department shall initiate the following actions to suspend the affected bus transit system service if any deficiency or unsafe condition exists, to the extent that the continued operation of the system, or a portion thereof, poses an immediate danger or threat to public safety.

(a) Immediately notify the affected bus transit system of the unsafe condition, followed by a certified letter describing the deficiency or unsafe condition. The notification shall include the following:

1. The required corrective action for the deficiency or unsafe condition.

2. The requirement for the bus transit system to certify, in writing to the Department, the completion of the required corrective action in accordance with an established implementation schedule.

(b) Conduct an on-site review of the bus transit system to verify the correction of the deficiency in accordance with this rule and the established implementation schedule.

(c) Suspend affected passenger service operations if the bus transit system fails to correct the deficiency in accordance with this rule and the established implementation schedule.

*Rulemaking Authority 334.044(2), 341.041(3), 341.061(2)(a) FS. Law Implemented 334.044(28), 341.041(3), 341.061(1)(d), 341.061(2)(c) FS. History—New 11-10-92, Amended 8-7-05, 9-16-10.*

**EXHIBIT N**

**2016-2017 ANNUAL OPERATIONS REPORT**

# FLCTD

## Annual Operations Report

### Section I: Face Sheet

County: <b>Bradford</b>	Fiscal Year: <b>July 1, 2016 - June 30, 2017</b>
<b>Status: Submitted to FLCTD</b>	
<b>Report Date:</b>	08/23/2017
<b>Period Covered:</b>	July 1, 2016 - June 30, 2017
<b>Coordinator's Name:</b>	Suwannee River Economic Council, Inc.
<b>Address:</b>	P.O. Box 70
<b>City:</b>	Live Oak
<b>Zip Code:</b>	32064
<b>Service Area:</b>	Bradford
<b>Contact Person:</b>	Matt Pearson
<b>Title:</b>	Executive Director
<b>Phone:</b>	(386) 362 - 4115
<b>Fax:</b>	(386) 362 - 4078
<b>Email:</b>	mattpearson@suwanneec.net
<b>Network Type:</b>	Partial Brokerage
<b>Organization Type:</b>	Private Non-Profit

**CTC Certification:**

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

**CTC Representative (signature)**

\_\_\_\_\_

**LCB Statement:**

I, \_\_\_\_\_, 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: **Bradford**

Fiscal Year: **July 1, 2016 - June 30, 2017**

**Status: Submitted to FLCTD**

**Section II: Coordinated System General Information**

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

Number of Private Non-Profits: 2

Number of Private For-Profits: 0

**Public Entities:**

School Board: 0

Municipality: 0

County: 0

Transit Authority: 0

Other: 0

**Total: 2**

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

1

# FLCTD

## Annual Operations Report

### Section III: Passenger Trip Info

County: <b>Bradford</b>		Fiscal Year: <b>July 1, 2016 - June 30, 2017</b>	
<b>Status: Submitted to FLCTD</b>			
<b>Section III: Passenger Trip Information</b>			
<b>1a. One-Way Passenger Trips</b>			
Type of Service	Service Area		Total
	Within	Outside	
<b>Fixed Route/Fixed Schedule</b>			
Daily Trip Tickets	0	0	0
Weekly Passes	0	0	0
Monthly Passes	0	0	0
<b>Deviated Fixed Route Service</b>	0	0	0
<b>Paratransit</b>			
Ambulatory	19338	5097	24435
Non-Ambulatory	1971	339	2310
Stretcher	118	0	118
<b>Other Services</b>			
School Board Trips	0	0	0
<b>Total Trips</b>	<b>21427</b>	<b>5436</b>	<b>26863</b>
<b>1b. How many of the total trips were provided by contracted transportation providers (do not include the CTC, if the CTC provides transportation services)?</b>			0
<b>1c. How many of the total trips were provided by coordination contractors?</b>			12931
<b>2. One-Way Trips by Funding Source</b>			
Agency for Health Care Administration			4941
Agency for Persons with Disabilities			12931
Agency for Workforce Innovation			0
Commission for the Transportation Disadvantaged			7824
Department of Children and Families			0
Department of Community Affairs			0
Department of Education			0
Department of Elder Affairs			1167
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
<b>Total:</b>	26863
<b>3. One-Way Trips by Passenger Type</b>	
Was this information obtained by sampling?	yes
<b>Elderly</b>	
Low Income:	5104
Disabled:	437
Low Income and Disabled:	477
Other:	0
<b>Children</b>	
Low Income:	494
Disabled:	121
Low Income and Disabled:	0
Other:	0
<b>Other</b>	
Low Income:	6283
Disabled:	728
Low Income and Disabled:	13219
Other:	0
<b>Total:</b>	26863
<b>4. One-Way Passenger Trips - by Purpose</b>	
Was this information obtained by sampling?	yes
Medical Purpose	10857
Employment Purpose	0
Education/Training/Daycare Purpose	8836
Nutritional Purpose	3408
Life-Sustaining/Other Purpose	3762
<b>Total:</b>	26863
<b>5. Unduplicated Passenger Head Count</b>	
5a. Paratransit/Deviated Fixed Route/ School Brd	572

5b. Fixed Route	0
<b>Total:</b>	572
<b>6. Number of Unmet Trip Requests</b>	
<b>Unmet Trip Requests by Type of Trip</b>	22
Unmet Medical	0
Unmet Employment	0
Unmet Education/Training/Daycare	0
Unmet Nutritional	0
Unmet Life-Sustaining/Other	22
<b>Reason Trip was Denied (Optional)</b>	
Lack of Funding:	0
Lack of Vehicle Availability:	0
Lack of Driver Availability:	0
Other:	0
<b>7.) Number of Passenger No-shows</b>	
	165
<b>Passenger No-Shows by Funding Source (optional)</b>	
CTD:	0
AHCA:	0
AWI:	0
DCF:	0
APD:	0
DOE:	0
DOEA:	0
Other:	0
<b>8. Complaints</b>	
Complaints by Service	1
Complaints by Policy	0
Complaints by Vehicle	0
Complaints by Other	0
<b>Complaint Total:</b>	1
<b>9. Commendations</b>	
Commendations by CTC	0

Commendations by Transportation Providers	0
Commendations by Coordination Contractors	0
<b>Total Commendations:</b>	<b>0</b>

# FLCTD

## Annual Operations Report

### Section IV: Vehicle Info

County: <b>Bradford</b>	Fiscal Year: <b>July 1, 2016 - June 30, 2017</b>		
<b>Status: Submitted to FLCTD</b>			
<b>Section IV: Vehicle Information</b>			
<b>1. Mileage Information</b>			
	<b>Vehicle Miles</b>		<b>Revenue Miles</b>
CTC:	180845		162555
Transportation Providers:	0		0
Coordination Contractors:	68939		64527
School Bus Utilization Agreement:	0		0
<b>Total:</b>	<b>249784</b>		<b>227082</b>
<b>2. Roadcalls</b>			
	1		
<b>3. Accidents</b>			
	<b>Chargeable</b>		<b>Non-Chargeable</b>
Total Accidents Person Only:	0		0
Total Accidents Vehicle Only:	2		0
Total Accidents Person & Vehicle:	0		0
<b>Total Accidents:</b>	<b>2</b>		<b>0</b>
<b>Grand Total:</b>	<b>2</b>		
<b>4. Total Number of Vehicles</b>			
	10		
		<b>Count</b>	<b>Percentage</b>
a. Total vehicles that are wheelchair accessible:		8	80.00%
b. Total vehicles that are stretcher equipped:		1	10.00%

# FLCTD

## Annual Operations Report

### Section V: Employee Info

County: <b>Bradford</b>	Fiscal Year: <b>July 1, 2016 - June 30, 2017</b>		
<b>Status: Submitted to FLCTD</b>			
<b>Section V: Employee Information</b>			
<b>1. CTC and Transportation Provider Employee Information</b>			
			<b>Hours</b>
Full-Time Drivers	3		7863
Part-Time Drivers	5		931
Volunteer Drivers	0		0
<b>Total Hours:</b>			8794
Maintenance Employees	0		
Dispatchers	1		
Schedulers	0		
Call Intake/Reserv./Cust. Serv.	0		
Other Operations Employees	0		
			<b>Hours</b>
Other Volunteers	0		0
Administrative Support	1		
Management Employees	1		
<b>Total</b>	<b>11</b>		
<b>2. Coordination Contractors Employee Information</b>			
			<b>Hours</b>
Full-Time Drivers	3		6859
Part-Time Drivers	3		3223
Volunteer Drivers	0		0
<b>Total Hours:</b>			10082
Maintenance Employees	0		
Dispatchers	0		
Schedulers	0		
Call Intake/Reserv./Cust. Serv.	0		

Other Operations Employees	0	
		<b>Hours</b>
Other Volunteers	0	0
Administrative Support	0	
Management Employees	0	
<b>Total</b>	6	
		<b>TOTAL HOURS: 18876</b>

# FLCTD

## Annual Operations Report

### Section VI: Revenue Sources

County: <b>Bradford</b>		Fiscal Year: <b>July 1, 2016 - June 30, 2017</b>	
<b>Status: Submitted to FLCTD</b>			
<b>Section VI: Financial Data</b>			
<b>1. Detailed Revenue and Trips Provided by Funding Source</b>			
<b>Revenue Source</b>	<b>CTC and Transportation Providers</b>	<b>Coordination Contractors</b>	<b>TOTAL REVENUES</b>
<b>Agency for Health Care Administration</b>			
Medicaid Non-Emergency	\$137,983.00	\$0.00	\$137,983.00
Medicaid Non-Emergency (under fixed fee service with AHCA)	\$0.00	\$0.00	\$0.00
<b>Agency for Persons with Disabilities</b>			
Comm Care for Dis Adults/Aging & Adult Services	\$0.00	\$0.00	\$0.00
Developmental Services	\$0.00	\$148,877.00	\$148,877.00
Other (specify)	\$0.00	\$0.00	\$0.00
<b>Agency for Workforce Innovation</b>			
WAGES/Workforce Board	\$0.00	\$0.00	\$0.00
Other (specify)	\$0.00	\$0.00	\$0.00
<b>Commission for the Transportation Disadvantaged</b>			
Non-Sponsored Trip Program	\$141,126.00	\$0.00	\$141,126.00
Non-Sponsored Cap. Equip.	\$0.00	\$0.00	\$0.00
Rural Capital Equip.	\$47,578.00	\$0.00	\$47,578.00
TD Other (specify)	\$0.00	\$0.00	\$0.00
<b>Department of Children and Families</b>			
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
<b>Department of Community Affairs</b>			
Community Services	\$0.00	\$0.00	\$0.00
Other (specify)	\$0.00	\$0.00	\$0.00
<b>Department of Education</b>			
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
<b>Department of Elder Affairs</b>			
Older Americans Act	\$18,432.00	\$0.00	\$18,432.00
Community Care for the Elderly	\$0.00	\$0.00	\$0.00
Other (specify)	\$0.00	\$0.00	\$0.00
<b>Department of Health</b>			
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
<b>Department of Juvenile Justice</b>			
(specify)	\$0.00	\$0.00	\$0.00
<b>Department of Transportation</b>			
49 USC 5307 (Section 9)	\$0.00	\$0.00	\$0.00
49 USC 5310 (Section 16)	\$0.00	\$0.00	\$0.00
49 USC 5311 (Section 18)	\$152,734.00	\$0.00	\$152,734.00
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
<b>Local Government</b>			
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
<b>Local Non-Government</b>			
Farebox	\$0.00	\$0.00	\$0.00
Donations, Contributions	\$0.00	\$0.00	\$0.00
In-Kind Services	\$0.00	\$0.00	\$0.00
Other Non-Government	\$20,960.00	\$0.00	\$20,960.00
<b>Other Federal or State Programs</b>			



(specify)	\$0.00	\$0.00	\$0.00
(specify)	\$0.00	\$0.00	\$0.00
(specify)	\$0.00	\$0.00	\$0.00
<b>GRAND TOTAL:</b>			
	\$518,813.00	\$148,877.00	\$667,690.00

**FLCTD**  
**Annual Operations Report**  
**Section VII: Expense Sources**

County: <b>Bradford</b>		Fiscal Year: <b>July 1, 2016 - June 30, 2017</b>	
<b>Status: Submitted to FLCTD</b>			
<b>Section VII: Financial Data</b>			
<b>2. Expense Sources</b>			
<b>Expense Item</b>	<b>Community Transportation Coordinator</b>	<b>Coordination Contractor</b>	<b>TOTAL EXPENSES</b>
Labor (501):	\$216,027.00	\$68,585.00	\$284,612.00
Fringe Benefits (502):	\$116,888.00	\$23,209.00	\$140,097.00
Services (503):	\$21,604.00	\$3,652.00	\$25,256.00
Materials and Supplies Cons. (504):	\$108,386.00	\$43,919.00	\$152,305.00
Utilities (505):	\$18,152.00	\$106.00	\$18,258.00
Casualty and Liability (506):	\$22,838.00	\$35,483.00	\$58,321.00
Taxes (507):	\$143.00	\$138.00	\$281.00
<b>Purchased Transportation Services (508)</b>			
Bus Pass Expenses:	\$0.00	\$0.00	\$0.00
School Bus Expenses:	\$0.00	\$0.00	\$0.00
Other:	\$0.00	\$0.00	\$0.00
Miscellaneous (509):	\$1,407.00	\$0.00	\$1,407.00
Interest (511):	\$0.00	\$0.00	\$0.00
Leases and Rentals (512):	\$14,107.00	\$0.00	\$14,107.00
Annual Depreciation (513):	\$0.00	\$8,430.00	\$8,430.00
Contributed Services (530):	\$20,960.00	\$0.00	\$20,960.00
Allocated Indirect Expenses:	\$0.00	\$0.00	\$0.00
<b>GRAND TOTAL:</b>	<b>\$540,512.00</b>	<b>\$183,522.00</b>	<b>\$724,034.00</b>

**EXHIBIT O**

**2017-2018 TRANSPORTATION DISADVANTAGED  
TRUST FUND ALLOCATIONS**

FY2017-18 Transportation Disadvantaged Trip and Equipment Grant Allocations

County	Trip & Equipment Grant			Voluntary Dollar			Proviso - Statute Formula			FY2017-18 Total Funds
	FY2017-18 Allocation	Local Match (10%)	Total Funds	Funding	Local Match (10%)	Total Funds	Funding	Local Match (10%)	Total Funds	
Alachua	\$596,659	\$66,295	\$662,954	\$52	\$6	\$58	\$69,853	\$7,761	\$77,614	\$740,626
Baker	\$233,963	\$26,996	\$260,959	\$1	\$0	\$1	\$20,227	\$2,247	\$22,474	\$282,434
Bay	\$414,801	\$46,089	\$460,890	\$20	\$2	\$22	\$51,237	\$5,693	\$56,930	\$517,843
Bradford	\$211,399	\$23,489	\$234,888	\$1	\$0	\$1	\$12,984	\$1,443	\$14,427	\$249,316
Brevard	\$1,405,982	\$156,220	\$1,562,202	\$229	\$25	\$254	\$0	\$0	\$0	\$1,562,457
Broward	\$3,890,054	\$432,228	\$4,322,282	\$944	\$105	\$1,049	\$0	\$0	\$0	\$4,323,331
Calhoun	\$205,022	\$22,780	\$227,802	\$1	\$0	\$1	\$14,824	\$1,647	\$16,471	\$244,273
Charlotte	\$440,261	\$48,918	\$489,179	\$28	\$3	\$31	\$0	\$0	\$0	\$489,209
Citrus	\$533,812	\$59,312	\$593,124	\$24	\$3	\$27	\$0	\$0	\$0	\$593,151
Clay	\$601,114	\$66,679	\$667,793	\$98	\$10	\$98	\$61,310	\$6,812	\$68,122	\$735,915
Collier	\$684,409	\$76,045	\$760,454	\$63	\$7	\$70	\$0	\$0	\$0	\$760,524
Columbia	\$266,170	\$29,574	\$295,744	\$17	\$2	\$19	\$25,790	\$2,866	\$28,656	\$324,419
DeSoto	\$208,593	\$23,177	\$231,770	\$1	\$0	\$1	\$15,308	\$1,701	\$17,009	\$248,780
Dixie	\$180,381	\$20,042	\$200,423	\$0	\$0	\$0	\$13,327	\$1,481	\$14,808	\$215,231
Duval	\$1,702,471	\$189,163	\$1,891,634	\$437	\$49	\$486	\$0	\$0	\$0	\$1,892,120
Escambia	\$589,118	\$65,457	\$654,575	\$178	\$20	\$198	\$0	\$0	\$0	\$654,771
Flagler	\$397,098	\$44,122	\$441,220	\$63	\$7	\$70	\$4,206	\$4,578	\$46,784	\$487,075
Franklin	\$174,010	\$19,334	\$193,344	\$0	\$0	\$0	\$10,622	\$1,169	\$11,691	\$205,035
Gadsden	\$382,974	\$42,552	\$425,526	\$22	\$2	\$24	\$40,472	\$4,496	\$44,968	\$470,519
Gilchrist	\$175,818	\$19,513	\$195,129	\$1	\$0	\$1	\$8,008	\$890	\$8,898	\$204,028
Glades	\$195,594	\$21,733	\$217,327	\$0	\$0	\$0	\$15,802	\$1,756	\$17,558	\$234,884
Gulf	\$216,226	\$24,026	\$240,251	\$0	\$0	\$0	\$17,170	\$1,908	\$18,078	\$259,329
Hamilton	\$168,850	\$18,761	\$187,611	\$0	\$0	\$0	\$9,665	\$1,074	\$10,739	\$198,350
Hardee	\$229,468	\$25,496	\$254,964	\$3	\$0	\$3	\$20,471	\$2,275	\$22,746	\$277,714
Hendry	\$230,738	\$26,638	\$256,376	\$2	\$0	\$2	\$26,627	\$2,947	\$29,474	\$285,852
Hernando	\$444,813	\$49,424	\$494,237	\$36	\$4	\$40	\$44,786	\$4,976	\$49,762	\$544,039
Highlands	\$495,279	\$55,031	\$550,310	\$33	\$4	\$37	\$56,007	\$6,223	\$62,230	\$612,577
Hillsborough	\$2,044,516	\$227,168	\$2,271,684	\$186	\$21	\$207	\$295,746	\$32,861	\$328,607	\$2,600,297
Holmes	\$250,145	\$27,784	\$277,939	\$0	\$0	\$0	\$18,878	\$2,209	\$22,087	\$300,026
Indian River	\$383,856	\$42,628	\$426,284	\$20	\$2	\$22	\$37,635	\$4,182	\$41,817	\$468,123
Jackson	\$318,457	\$35,384	\$353,841	\$36	\$4	\$40	\$35,070	\$3,897	\$38,967	\$392,848
Jefferson	\$208,551	\$23,172	\$231,723	\$2	\$0	\$2	\$16,188	\$1,799	\$17,987	\$249,711
Lafayette	\$163,043	\$18,116	\$181,159	\$0	\$0	\$0	\$9,633	\$1,070	\$10,703	\$191,862
Lake	\$766,272	\$85,141	\$851,413	\$147	\$16	\$163	\$0	\$0	\$0	\$851,576
Lee	\$1,147,938	\$127,549	\$1,275,487	\$775	\$86	\$861	\$139,561	\$15,507	\$155,068	\$1,431,415
Leon	\$486,452	\$54,050	\$540,502	\$119	\$13	\$132	\$0	\$0	\$0	\$540,634
Levy	\$313,610	\$34,846	\$348,456	\$12	\$1	\$13	\$35,195	\$3,911	\$39,106	\$387,575
Liberty	\$223,278	\$24,809	\$248,087	\$0	\$0	\$0	\$22,372	\$2,486	\$24,858	\$272,945
Madison	\$210,210	\$23,357	\$233,567	\$0	\$0	\$0	\$17,706	\$1,967	\$19,673	\$253,240
Manatee	\$724,418	\$80,491	\$804,909	\$82	\$9	\$91	\$0	\$0	\$0	\$804,999
Marion	\$724,293	\$80,477	\$804,770	\$101	\$11	\$112	\$86,614	\$9,624	\$96,238	\$901,119
Martin	\$370,164	\$41,129	\$411,293	\$79	\$9	\$88	\$34,858	\$3,873	\$38,731	\$450,112
Miami-Dade	\$4,264,460	\$473,829	\$4,738,289	\$821	\$91	\$912	\$0	\$0	\$0	\$4,739,201
Monroe	\$310,421	\$34,491	\$344,912	\$77	\$9	\$86	\$37,689	\$4,185	\$41,854	\$386,852
Nassau	\$303,922	\$33,769	\$337,691	\$44	\$5	\$49	\$30,747	\$3,416	\$34,163	\$371,902
Okaloosa	\$464,673	\$51,630	\$516,303	\$27	\$3	\$30	\$0	\$0	\$0	\$516,333
Okeechobee	\$238,141	\$26,460	\$264,601	\$2	\$0	\$2	\$20,511	\$2,279	\$22,790	\$287,394
Orange	\$2,872,070	\$319,119	\$3,191,189	\$692	\$68	\$658	\$0	\$0	\$0	\$3,191,848
Osceola	\$788,687	\$86,407	\$875,094	\$16	\$2	\$18	\$0	\$0	\$0	\$875,092
Palm Beach	\$3,491,843	\$387,983	\$3,879,826	\$978	\$109	\$1,087	\$0	\$0	\$0	\$3,880,913
Pasco	\$796,317	\$88,480	\$884,797	\$155	\$17	\$172	\$0	\$0	\$0	\$884,969
Pinellas	\$3,285,941	\$365,105	\$3,651,046	\$291	\$32	\$323	\$0	\$0	\$0	\$3,651,370
Polk	\$1,107,450	\$123,050	\$1,230,500	\$178	\$20	\$198	\$0	\$0	\$0	\$1,230,698
Putnam	\$393,089	\$43,677	\$436,766	\$1	\$0	\$1	\$45,606	\$5,067	\$50,673	\$487,440
Saint Johns	\$581,624	\$64,625	\$646,249	\$127	\$14	\$141	\$91,894	\$10,210	\$102,104	\$748,494
Saint Lucie	\$738,964	\$82,107	\$821,071	\$62	\$7	\$69	\$0	\$0	\$0	\$821,140
Santa Rosa	\$326,611	\$36,290	\$362,901	\$14	\$2	\$16	\$37,405	\$4,156	\$41,561	\$404,478
Sarasota	\$1,224,222	\$136,025	\$1,360,247	\$313	\$36	\$348	\$0	\$0	\$0	\$1,360,595
Seminole	\$927,464	\$103,052	\$1,030,516	\$143	\$16	\$159	\$0	\$0	\$0	\$1,030,675
Sumter	\$398,248	\$44,250	\$442,498	\$12	\$1	\$13	\$37,260	\$4,140	\$41,400	\$483,911
Suwannee	\$236,148	\$26,239	\$262,387	\$3	\$0	\$3	\$20,270	\$2,252	\$22,522	\$284,912
Taylor	\$210,124	\$23,347	\$233,471	\$4	\$0	\$4	\$22,784	\$2,532	\$25,316	\$258,792
Union	\$180,776	\$20,086	\$200,862	\$0	\$0	\$0	\$7,828	\$870	\$8,698	\$209,560
Volusia	\$1,303,946	\$144,883	\$1,448,829	\$133	\$15	\$148	\$0	\$0	\$0	\$1,448,978
Wakulla	\$218,153	\$24,239	\$242,392	\$0	\$0	\$0	\$17,381	\$1,931	\$19,312	\$261,704
Walton	\$307,886	\$34,210	\$342,096	\$7	\$1	\$8	\$35,801	\$3,978	\$39,779	\$381,883
Washington	\$235,874	\$26,208	\$262,082	\$1	\$0	\$1	\$18,893	\$2,099	\$20,992	\$283,075
<b>TOTALS</b>	<b>\$48,696,907</b>	<b>\$5,410,765</b>	<b>\$54,107,672</b>	<b>\$7,803</b>	<b>\$866</b>	<b>\$8,669</b>	<b>\$1,750,000</b>	<b>\$194,444</b>	<b>\$1,944,444</b>	<b>\$56,060,785</b>

\* Allocations and match were rounded to whole dollars

**EXHIBIT P**

**FLORIDA COMMISSION FOR THE TRANSPORTATION DISADVANTAGED  
RATE CALCULATION MODEL INSTRUCTIONS  
AND WORKSHEETS**

# Preliminary Information Worksheet

Version 1.4

<b>CTC Name:</b>	
<b>County (Service Area):</b>	
<b>Contact Person:</b>	
<b>Phone #</b>	

Check Applicable Characteristic:

**ORGANIZATIONAL TYPE:**

- Governmental
- Private Non-Profit
- Private For Profit

**NETWORK TYPE:**

- Fully Brokered
- Partially Brokered
- Sole Source

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

**Comprehensive Budget Worksheet**

Version 1.4

CTC: 0  
County: 0

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

	Prior Year's ACTUALS from July 1st of 2015 to June 30th of 2016	Current Year's APPROVED Budget, as amended from July 1st of 2016 to June 30th of 2017	Upcoming Year's PROPOSED Budget from July 1st of 2017 to June 30th of 2018	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

<b>REVENUES (CTC/Operators ONLY / Do NOT include coordination contractors!)</b>						
<b>Local Non-Govt</b>						
Farebox						
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other						
<b>Bus Pass Program Revenue</b>						
<b>Local Government</b>						
District School Board						
Compl. ADA Services						
County Cash						
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
<b>Bus Pass Program Revenue</b>						
<b>CTD</b>						
Non-Spons. Trip Program						
Non-Spons. Capital Equipment						
Rural Capital Equipment						
Other TD (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>USDOT &amp; FDOT</b>						
49 USC 5307						
49 USC 5310						
49 USC 5311 (Operating)						
49 USC 5311(Capital)						
Block Grant						
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>AHCA</b>						
Medicaid						
Other AHCA (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>DCF</b>						
Alcohol, Drug & Mental Health						
Family Safety & Preservation						
Comm. Care Dis./Aging & Adult Serv.						
Other DCF (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>DOH</b>						
Children Medical Services						
County Public Health						
Other DOH (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>DOE (state)</b>						
Carl Perkins						
Div of Blind Services						
Vocational Rehabilitation						
Day Care Programs						
Other DOE (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>AWI</b>						
WAGES/Workforce Board						
Other AWI (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>DOEA</b>						
Older Americans Act						
Community Care for Elderly						
Other DOEA (specify in explanation)						
<b>Bus Pass Program Revenue</b>						
<b>DCA</b>						
Community Services						
Other DCA (specify in explanation)						
<b>Bus Pass Admin. Revenue</b>						

# Comprehensive Budget Worksheet

Version 1.4

CTC: 0  
County: 0

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

	Prior Year's ACTUALS from July 1st of 2015 to June 30th of 2016	Current Year's APPROVED Budget, as amended from July 1st of 2016 to June 30th of 2017	Upcoming Year's PROPOSED Budget from July 1st of 2017 to June 30th of 2018	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price.  Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

**APD**

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

**DJJ**

(specify in explanation)  
Bus Pass Program Revenue

**Other Fed or State**

XXX  
XXX  
XXX  
Bus Pass Program Revenue

**Other Revenues**

Interest Earnings  
XXXX  
XXXX  
Bus Pass Program Revenue

**Balancing Revenue to Prevent Deficit**

Actual or Planned Use of Cash Reserve

Balancing Revenue is Short By =  None  None  
Total Revenues = \$0 \$0 \$0

**EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors!)**

**Operating Expenditures**

Labor  
Fringe Benefits  
Services  
Materials and Supplies  
Utilities  
Casualty and Liability  
Taxes  
Purchased Transportation:  
Purchased Bus Pass Expenses  
School Bus Utilization Expenses  
Contracted Transportation Services  
Other  
Miscellaneous  
Operating Debt Service - Principal & Interest  
Leases and Rentals  
Contrib. to Capital Equip. Replacement Fund  
In-Kind, Contributed Services  
Allocated Indirect

**Capital Expenditures**

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

**PROFIT**

Total Expenditures = \$0 \$0 \$0

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







# Worksheet for Program-wide Rates

CTC: 0  
County: 0

Version 1.4

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

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

PROGRAM-WIDE RATES		Fiscal Year
Total <u>Projected</u> Passenger Miles =	<input type="text"/>	2017 - 2018
<b>Rate Per Passenger Mile =</b>		
Total <u>Projected</u> Passenger Trips =	<input type="text"/>	
<b>Rate Per Passenger Trip =</b>		
		<b>Avg. Passenger Trip Length = ##### Miles</b>

Rates If No Revenue Funds Were Identified As Subsidy Funds	
<b>Rate Per Passenger Mile = \$</b>	-
<b>Rate Per Passenger Trip = \$</b>	-

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

**Vehicle Miles**

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

**Vehicle Revenue Miles (VRM)**

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

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

**Passenger Miles (PM)**

The cumulative sum of the distances ridden by each passenger.

### Worksheet for Multiple Service Rates

Version 1.4

CTC: 0  
County: 0

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

#### SECTION I: Services Provided

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

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

#### SECTION II: Contracted Services

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

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

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

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

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

Leave Blank	Leave Blank	Leave Blank
Do NOT Complete Section II for Group Service	Do NOT Complete Section II for Group Service	Do NOT Complete Section II for Group Service

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

<b>Ambulatory</b>	<b>Wheelchair</b>	<b>Stretcher</b>	<b>Group</b>
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Go to Section III for Ambulatory Service	Go to Section III for Wheelchair Service	Go to Section III for Stretcher Service	Do NOT Complete Section II for Group Service

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

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

CTC: 0  
County: 0

### Worksheet for Multiple Service Rates

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

#### SECTION III: Escort Service

1. Do you want to charge all escorts a fee?  Yes  No

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

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)  
 Loading Rate to 1.00

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

- 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: 2017 - 2018	
Ambul	Leave Blank
Wheel Chair	0
Stretcher	0
Group	0
Rate per Passenger Mile =	\$0.00
Projected Passenger Miles (excluding totally contracted services addressed in Section III) =	0
Ambul	Leave Blank
Wheel Chair	0
Stretcher	0
Group	0
Rate per Passenger Trip =	\$0.00
Projected Passenger Trips (excluding totally contracted services addressed in Section III) =	0
Ambul	Leave Blank
Wheel Chair	0
Stretcher	0
Group	0
Rate per Passenger Mile for Balance =	\$0.00

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

Ambul	#DIV/0!	Wheel Chair	#DIV/0!	Stretcher	#DIV/0!	Group	#DIV/0!
Rate per Passenger Mile =		Rate per Passenger Mile =		Rate per Passenger Mile =		Rate per Passenger Mile =	

Program These Rates Into Your Medicaid Encounter Data

### Worksheet for Multiple Service Rates

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.

Version 1.4

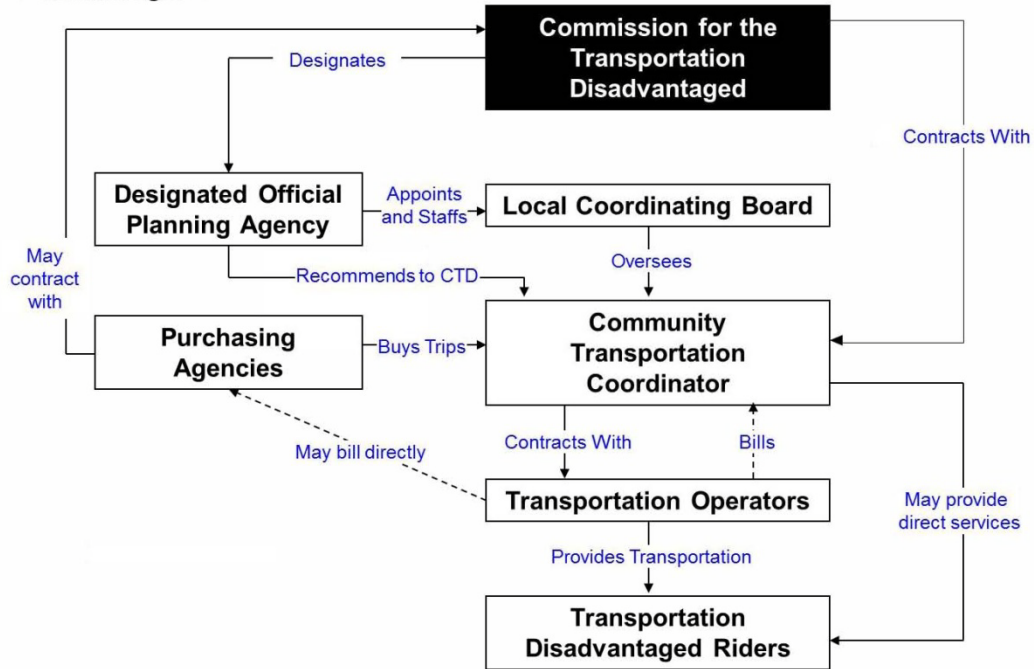
CTC: 0  
County: 0

**EXHIBIT Q**

**FLORIDA'S TRANSPORTATION DISADVANTAGED PROGRAM  
CONCEPT CHART**



# Coordinated Transportation System Organization





**EXHIBIT R**  
**GLOSSARY OF TERMS**

## COMMISSION FOR THE TRANSPORTATION DISADVANTAGED GLOSSARY OF TERMS AND ABBREVIATIONS

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

**Accidents:** when used in reference to the AOR, the total number of reportable accidents that occurred whereby the result was either property damage of \$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.

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

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

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

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

**Bus:** any motor vehicle designed for carrying more than 10 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 community transportation coordinator 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.

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

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

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

**Disabled 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.

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

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

**Effectiveness Measure:** a performance measure that indicates the level of consumption per unit of output. 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.

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

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

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

**Local Government:** an elected and/or appointed public body existing to coordinate, 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.

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

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

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

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

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

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

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

**Operating Cost per 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 can not schedule the trip in advance because the provider does not know the exact time a passenger will call to request his/her trip.