

FY 2025-2026
LEE COUNTY
TRANSPORTATION
DISADVANTAGED
SERVICE PLAN



Prepared by:

Lee County Metropolitan Planning Organization

Lee County Transit, Lee County Community Transportation Coordinator

Lee County Local Coordinating Board



TRANSPORTATION DISADVANTAGED SERVICE PLAN CONTENTS

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Florida Commission for the



Transportation Disadvantaged

COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

GLOSSARY OF TERMS, STATUTES AND ABBREVIATIONS

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

Accidents: when used in reference to the AOR, the total number of reportable accidents that occurred whereby the result was either property damage of \$1000.00 or more, or personal injury that required evacuation to a medical facility, or a combination of both.

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

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

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

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

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

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

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

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

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

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

(AWI) Agency for Workforce Innovation: The Agency for Workforce Innovation is Florida's lead state workforce agency and directly administers the state's Labor Market Statistics program, Unemployment Compensation, Early Learning and various workforce development programs.

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

Bus Lane: a street or highway lane intended primarily for buses, either all day or during specified periods, but used by other traffic under certain circumstances.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Employees: the total number of persons employed in an organization.

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

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

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

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

(FS) Florida Statutes: the laws governing the state of Florida.

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

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

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

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

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

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

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

(JARC) Job Access and Reverse Commute Program: provides formula funding to states and designated recipients to support the development and maintenance of job access projects designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment.

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

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

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

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

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

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

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

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

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

transportation coordinator as being responsible for the arrangement of the provision of transportation disadvantaged services for a designated service area.

(MP) Metropolitan Planning Organization: the area-wide organization responsible for conducting the continuous, cooperative and comprehensive transportation planning and programming in accordance with the provisions of 23 U.S.C. s. 134, as provided in 23 U.S.C. s. 104(f)(3). Also serves as the official planning agency referred to in Chapter 427, F.S.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Operating Statistics: data on various characteristics of operations, including passenger trips, vehicle miles, operating costs, revenues, vehicles, employees, accidents, and roadcalls.

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

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

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

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

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

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

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

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

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

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

Program Trip: a passenger trip supplied or sponsored by a human service agency for the purpose of transporting clients to and from a program of that agency (e.g., sheltered workshops, congregate dining, and job training).

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Trip Priorities: various methods for restricting or rationing trips.

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

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

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

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

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

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

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

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

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

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

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

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

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

LEE COUNTY LOCAL COORDINATING BOARD MEMBERSHIP CERTIFICATION

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

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

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

Signature:  Date: June 21, 2024
MPO Vice Chair

	The Lee LCB has a Representative of:	Voting Member	Term Expires	Alternate's Name	Term Expires
1	The MPO or DOPA shall appoint one elected official to serve as the official Chairperson for all Coordinating Board meetings.	Vice Mayor, Michael Miller		No alternate by law.	
2	A. A local representative of the Florida Department of Transportation (FDOT)	Stacy Booth	Agency	Dale Hanson Michelle Peronto	Agency
3	B. A local representative of the Florida Department of Children and Families	Tabitha Larrauri	Agency	Vacant	Agency
4	C. A local representative of the Public Education Community which could include, but not be limited to, a representative of the District School Board, School Board Transportation Office, or Headstart Program in areas where the School District is responsible	Roger Lloyd	Agency	David Rivera Jennifer Charles	Agency
5	D. In areas where they exist, a local representative of the Division of Vocational Rehabilitation Services or the Division of Blind Services, representing the Department of Education	Adam Long	Agency	Vacant	Agency
6	E. A person recommended by the local Veterans Service Office, representing Veterans of the county	Sgt Mills	September 2026	Vacant	
7	F. A person recognized by the Florida Association for Community Action representing the economically disadvantaged	Vacant	Agency	Vacant	Agency
8	G. A person over age 60 representing the Elderly in the county	Steve Henry	July 2025	Vacant	

	The Lee LCB has a Representative of:	Voting Member	Term Expires	Alternate's Name	Term Expires
9	H. A person with a disability representing the disabled in the county	Paul Lewis	September 2025	Vacant	
10	I--1.[One of Two] Citizen Advocates in the County	Derek Felder	January 2025	Vacant	
	I--2. [One of two] Citizen Advocates this one must be a person who uses the transportation service(s) of the system as their primary means of transportation.	Kathleen Hoover	May 2025	Vacant	
12	J. A local representative for children at risk.	Tracy Filla		Vacant	
13	K. In areas where they exist, the Chairperson or designee of the local Mass Transit or Public Transit System's Board, except in cases where they are also the Community Transportation Coordinator.	LeeTran is CTC.	Agency	Vacant	Agency
14	L. A local representative of the Florida Department of Elder Affairs	Valerine Oliver	Agency	Vacant	Agency
15	M. An experienced representative of the local private for profit transportation industry. In areas where such representative is not available, a local private non-profit representative will be appointed, except where said representative is also the Community Transportation Coordinator.	Michael Griffin Vice-Chair	December 2024 (3)	Ryan Williams	November 2024 (2)
16	N. A local representative of the Florida Agency for Health Care Administration	Mike Stahler	Agency	Vacant	Agency
17	O. A representative of the Regional Workforce Development Board established in Chapter 445, <i>Florida Statutes</i>	Carmen Henry	Agency	Vacant	Agency
18	P. A representative of the local medical community, which may include, but not be limited to, kidney dialysis centers, long term care facilities, hospitals, local health department or other home and community based services, etc.	Ambar Rodriguez	Agency	Brittini Vizcaino	Agency
19	Q. A representative of the Agency for Persons with Disabilities.	Leah Watson	Agency	Donna Fain	Agency

TDSP VOTE
May 7, 2025

REPRESENTATION	MEMBER	YES	NO	ALTERNATE	YES	NO	ABSENT
Chairperson	Mike Miller	X					
FDOT	Stacy Booth			V. Upthegrove	X		
DCF	Tabitha Larraunti			Vacant			X
Lee School District	Roger Lloyd			David Rivera			X
FDOE	Adam Long						X
Veterans	Sgt. Mills	X		Vacant			
Community Action	Vacant			Vacant			X
Elderly	Steve Henry	X		Vacant			
Representing the Disabled	Paul Lewis			Vacant			X
Citizen Advocate	Derek Felder	X		Vacant			
Citizen Advocate Using System	Kathleen Hoover			Vacant			X
Children at Risk	Tracy Filla			Vacant			X
Public Transit	N/A LeeTran is the CTC						
DEA	Valerine Oliver	X		Vacant			
Private Transportation Industry	Michael Griffin	X		Ryan Williams			
AHCA	Mike Stahler			Vacant			X
Career Source SWFL	Carmen Henry	X					
Local medical community	Ambar Rodriguez			Brittini Vizcaino			X
APD	Leah Watson			Donna Fain			X

The Coordinating Board hereby certifies that the rates contained herein have been thoroughly reviewed, evaluated and approved. This Transportation Disadvantaged Service Plan was reviewed in its entirety and approved by this Board on May 7, 2025.

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

Date **5/7/2025** **Michael Miller – City of Sanibel**



Approved by the Commission for the Transportation Disadvantaged

Date **Karen Sommerset, Executive Director**

I. DEVELOPMENT PLAN

A. INTRODUCTION TO THE SERVICE AREA

1. Background of the Transportation Disadvantaged Program

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

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

“those persons who because of physical or mental disability, income status, age are unable to transport themselves or purchase transportation and are, therefore, dependent on others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities or children who are person with a disability or high-risk or at risk as defined in s. 422.202, Florida Statutes.”

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

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

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

Florida Commission for the Transportation Disadvantaged (CTD)

The Florida Commission for the Transportation Disadvantaged is an independent commission housed administratively within the Florida Department of Transportation and reports to the Governor and the Legislature. The purpose of the Commission is to accomplish the coordination of transportation services to the transportation disadvantaged. The Commission is responsible for establishing policies, procedures and standards for the delivery of statewide coordinated transportation disadvantaged services; administering the Transportation Disadvantaged Trust Fund; providing statewide training and technical assistance to local partners in establishing coordinated transportation systems, managing contracts, and developing a five-year plan to address the transportation needs of transportation disadvantaged persons.

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

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

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

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

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

Designated Official Planning Agencies (DOPA)



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

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

The planning agency is responsible for:

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

Local Coordinating Board (LCB)

The DOPA is responsible for appointing a local coordinating board in each county. The purpose of the coordinating board is to provide advice and direction to the Community Transportation Coordinator (CTC) concerning the coordination of transportation services. According to Rule 41-2 of the Florida

Administrative Code, there are 18 members appointed to the local coordinating board. The DOPA appoints an elected official to serve as the official chairperson for all local coordinating board meetings. The Vice Chairperson is elected annually by the voting members of the Board.

The duties of the Local Coordinating Board include:

- Review and approve the Memorandum of Agreement and the Transportation Disadvantaged Service Plan drafted by the CTC, prior to submittal to the Commission.
- Evaluate services provided by the CTC under the approved Transportation Disadvantaged Service Plan.
- In cooperation with the CTC, review and provide recommendations to the Commission on funding applications affecting the transportation disadvantaged.
- Review the coordination strategies of service provision to the transportation disadvantaged in the designated service area.
- Evaluated multi-county or regional transportation opportunities.
- Appoint a Grievance Committee to serve as a mediator.
- Prepare a consolidated Annual Budget Estimate.
- Review and approve the Coordinated Transportation Development Service Plan (TDSP) and its updates for consistency with approved guidelines, goals and objectives of the Local Coordinating Board.
- Work in conjunction with the planning agencies in the recommended selection of the Community Transportation Coordinator.

Community Transportation Coordinator (CTC)

The Community Transportation Coordinator is the agency or organization in each county responsible for ensuring that coordinated transportation services are provided to serve the transportation disadvantaged.



Community Transportation Coordinator (CTC) Overview

The Community Transportation Coordinator is the designated agency or organization in each county responsible for ensuring that coordinated transportation services are provided to serve the transportation disadvantaged within a given county. The Community Transportation Coordinator may provide all or a portion of transportation disadvantaged service in a designated service area. Community Transportation Coordinators may also subcontract or broker services if it is cost-effective and efficient.

CTC Responsibilities

The Community Transportation Coordinator (CTC) is responsible for the short-range operational planning, administration, monitoring, coordination, arrangement and delivery of transportation disadvantaged services originating within their designated service area on a full-time basis. In that context they have the following powers and duties:

- Develop, implement and monitor an approved Coordinated Transportation Disadvantaged Service Plan.
- Execute uniform contracts for service.
- Collect annual operating data for submittal to the TD Commission.
- Review annually all transportation operator contracts.
- Maximize the utilization of school bus and public transportation services in accordance with Chapter 427.0158. Establish an S.O.P in-regards to bus passes for those that are able to utilize the city bus (out of the corridor).
- In cooperation with a functioning Coordinating Board, review all applications for local, government, federal and state transportation disadvantaged funds, and develop and implement cost effective coordination strategies.
- In cooperation with the Coordinating Board, develop and implement and monitor a one-year approved Transportation Disadvantaged Service Plan.
- In cooperation with the Coordinating Board, develop and negotiate a Memorandum of Agreement outlining the services planned for submittal to the Commission.
- Ensuring Have full responsibility for the delivery of transportation services Chapter 427.015(2), F.S.

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

Lee County Transit - LeeTran is the designated CTC for Lee County.

CTC Designation & Agreement

On July 1, 2021, LeeTran entered into a five-year agreement with the Florida Commission for the Transportation Disadvantaged. The agreement covers Fiscal Years 2021/22 through 2025/26.

Existing Conditions

Florida Unemployment Rate

☆ Unemployment Rate in Florida (FLUR)

Observations ▾

Mar 2025: **3.6**

Updated: Apr 21, 2025 12:54 PM CDT

Next Release Date: May 21, 2025

Units:

Percent,

Seasonally Adjusted

Frequency:


Monthly

1Y

5Y

10Y

Max

Edit Graph 

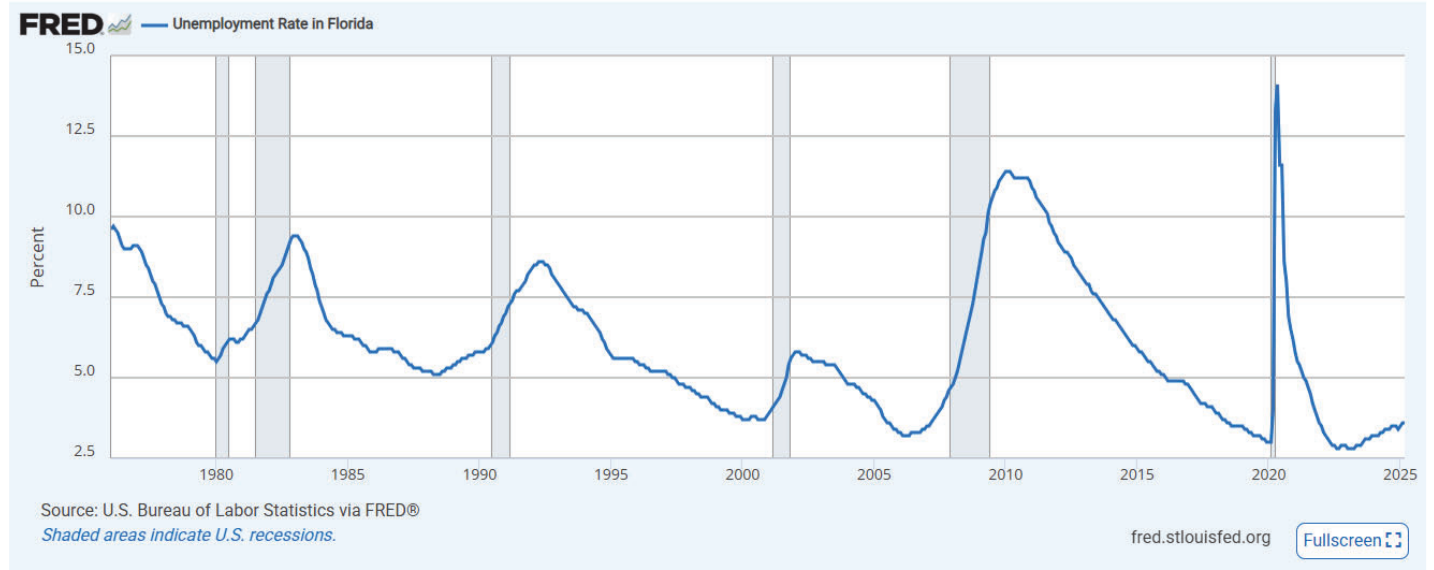
Download 

View Map 

1976-01-01

to

2025-03-01



Florida Housing Market

Home prices in Florida were up 1.0% year-over-year in February. At the same time, the number of homes sold fell 10.2% and the number of homes for sale rose 18.5%.



[Overview](#)

[Supply](#)

[Demand](#)

[Migration](#)

[News](#)

Search Trends by City, Zip...



Florida Housing Market Overview

What is the housing market like right now?

In February 2025, home prices in Florida were up 1.0% compared to last year, selling for a median price...

[Read More](#)

Median Sale Price

\$412,200

+1.0% year-over-year

of Homes Sold

25,209

-10.2% year-over-year

Median Days on Market

75

+13 year-over-year

All Home Types

1 year

3 years

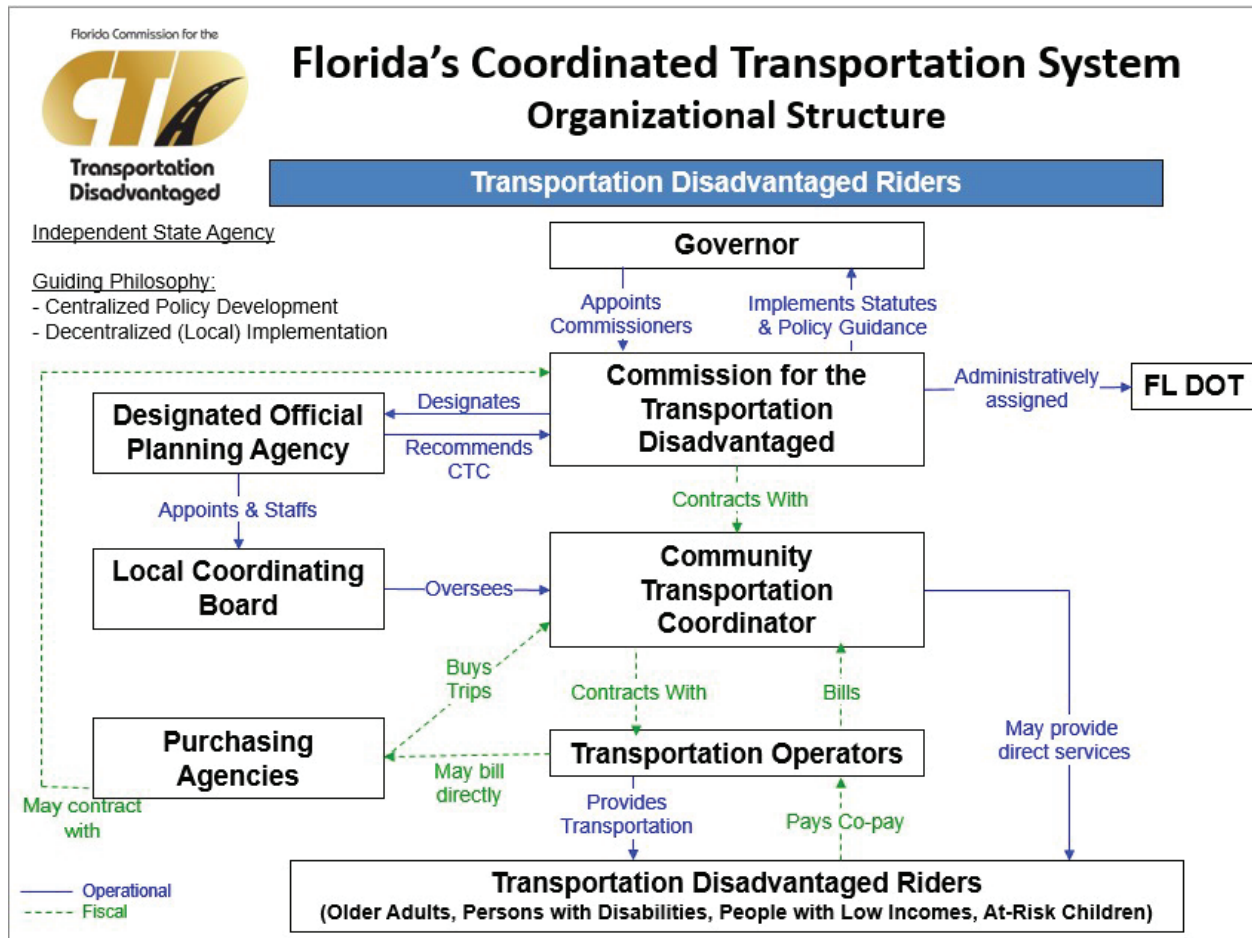
5 years



Based on Redfin calculations of home data from MLS and/or public records.

https://www.southwestcoastrealty.com/files/files/Lee_County_Single_Family_Homes

3. Organization Structure



4. Consistency Review of Other Plans

a. Local Government Comprehensive Plans

The local comprehensive planning process involves essentially four basic steps:

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

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

b. Strategic Regional Policy Plan

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

c. LeeTran Ten-Year Transit Development Plan 2017-2026

The Transit Development Plan (TDP) serves as the long-range financial and planning document for Lee County's transit system, LeeTran. It must align with local government comprehensive plans to ensure consistency in regional transportation planning.

Transit agencies are required to develop and maintain a TDP in accordance with Florida state statutes to remain eligible for State Transit Block Grants. To maintain compliance, LeeTran must:

- Submit an Annual Progress Report to the Florida Department of Transportation (FDOT) every September.
- Conduct a major update TDP update every five years.

The latest TDP major update covers the period 2017-2026 and serves as the foundation for the future transit planning, funding, and service improvements. The Transportation Disadvantaged Service Plan is developed in coordination with the TDP to ensure consistency, to the maximum extent feasible. This alignment helps improve mobility options for transportation-disadvantaged individuals while supporting broader transit development goals.

LeeTran is currently in the process of updating its Transit Development Plan (TDP). This plan outlines a transit agency's vision for public transportation within their service area and is a guide to support future services, ensuring alignment with community needs, and regional transportation goals.

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

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

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

e. 2045 Long Range Transportation Plan for the Fort Myers-Cape Coral Metropolitan Area Adopted: December 2020

The purpose of the Lee County Metropolitan Planning Organization's (MPO) 2045 Long Range Transportation Plan (LRTP) is to develop a process and a plan to address the future multimodal transportation needs of the Lee County area. It is a plan which coordinates and guides the capital improvement programs of the Florida Department of Transportation (FDOT) and its member local governments, as well as recognizes the ongoing maintenance and operational activities of these entities. The Transportation Disadvantaged Service Plan is consistent, to the maximum extent feasible, with the Lee County MPO Long Range Plan.

Transportation Improvement Program (TIP)

The TIP lists those highway, aviation, transportation enhancement, transit, transportation disadvantaged program, and intermodal projects that are currently programmed in the Florida Department of

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

g. LeeTran TLC Plan Locally Coordinated Human Services Transportation Plan

In 2008, LeeTran together with the Lee County MPO developed the Locally Coordinated Human Services Transportation Plan (LCHSTP) to meet the criteria outlined in the SAFETEA-LU legislation regarding the Federal Transit Administration (FTA) Section 5316 “Job Access Reverse Commute (JARC)” Program, the Federal Transit Administration (FTA) Section 5317 New Freedoms (NF) Program, and Federal Transit Administration (FTA) Section 5310 Special Needs of Elderly and Individuals with Disabilities (E&D) funding programs. The LCHSTP assists the County in taking a broader perspective for coordinating public transportation services in the area and is specifically meant to ensure that public transportation services and improvements benefit elderly, disabled, low income and unemployed populations. The JARC funding allocation was \$147,513 in FY 2006, \$155,494 in FY 2007 \$168,452 in FY 2008, \$197,719 in FY 2009, \$189,042 in FY 2010, \$188,758 in FY 2011, \$190,561 in FY 2012 and \$19,056 in FY 2013 and the New Freedom funding allocation was \$102,886 in FY 2006, \$117,307 in FY 2007, \$126,721 in FY 2008, \$146,069 in FY 2009, \$143,358 in FY 2010, \$144,098 in FY 2011, \$145,773 in FY 2012, and \$145,773 in FY 2013. As of May 2020, this program is no longer in existence.

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

List of the priorities from the TLC Plan:

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

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

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

- Operating assistance

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

1. Public Participation



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

ADA accessible locations and open to the public In

The Local Coordinating Board meetings are held in ADA accessible locations and open to the public. In addition to the membership listed above, the mailing list for the LCB quarterly agendas include transportation partners, transportation disadvantaged passengers and advocates, human service organizations, faith-based and community-based organizations, local school districts and others. The Lee County LCB seeks input from the public at all its meetings and makes a concerted effort to include many community partners and advocacy groups in the planning, evaluation and service development processes throughout the year. In addition, an annual public hearing is held and advertised to the public as required under the CTD regulations.

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

B. SERVICE AREA PROFILE/DEMOGRAPHICS

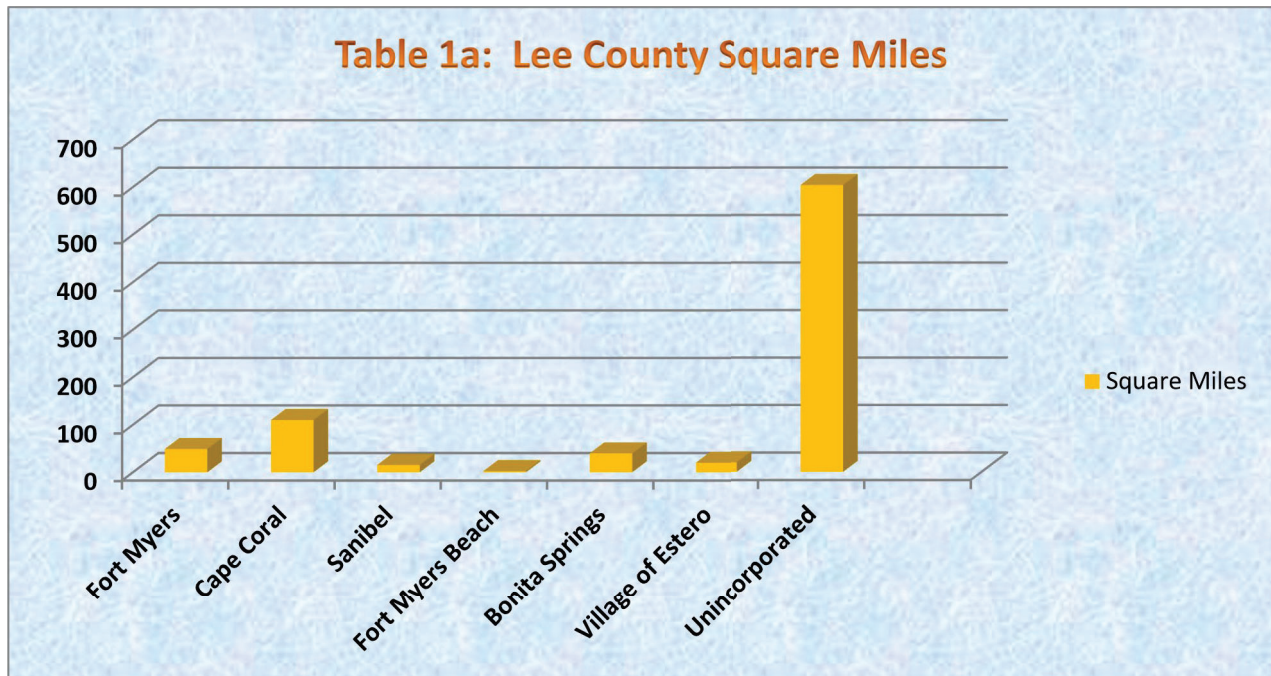
1. Service Area Description

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

TABLE 1

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

Source: Lee **Square Miles For Each Incorporated Municipality and the County** County Property Appraiser's Office GIS Dept. (2016)

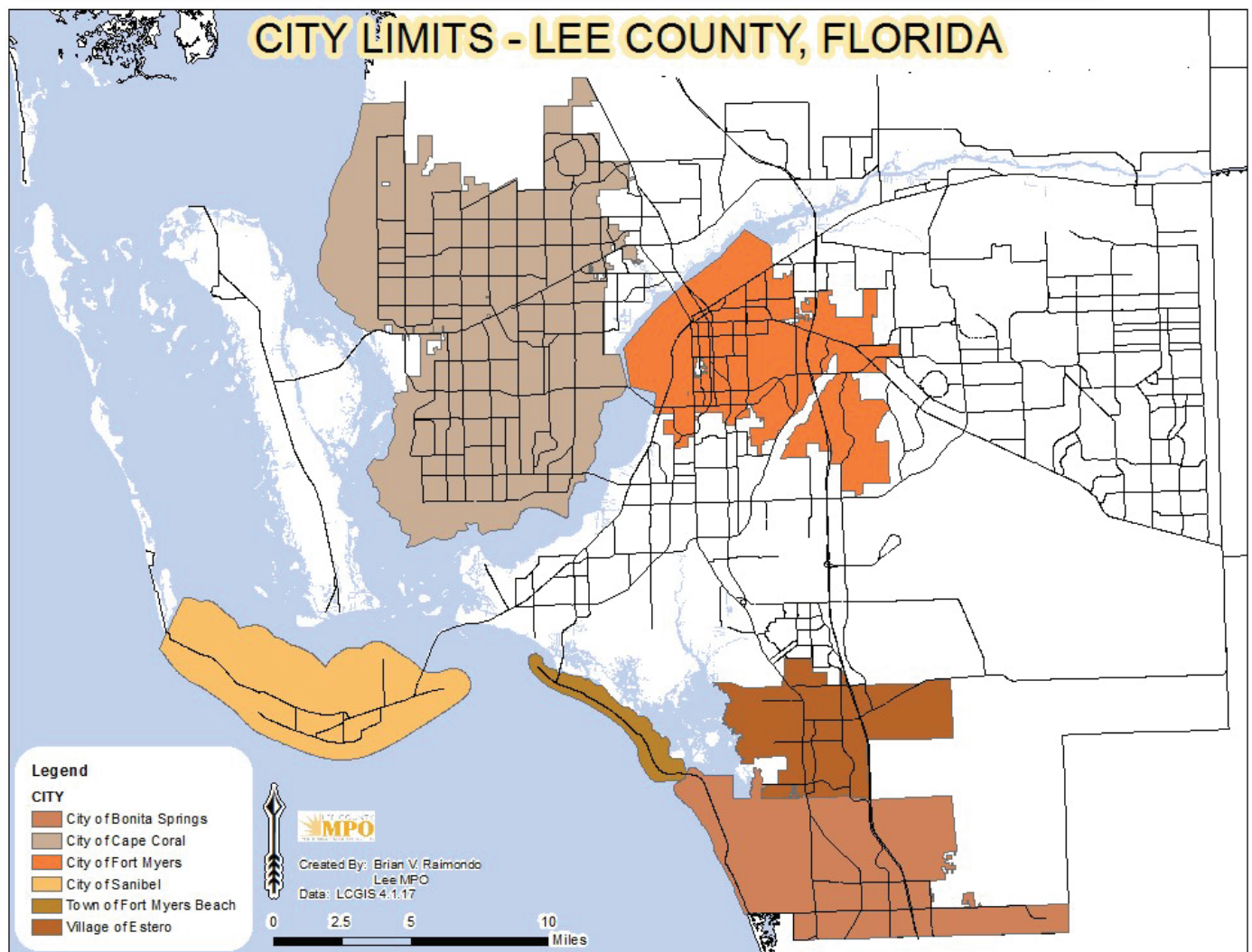


Demographics

a. Land Use

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

Disadvantaged program in Lee County because the demand for TD trips are still increasing as the DRI's are building out and population in those areas continue to grow.



Area	2024 Estimate	2023 Estimate	2022 Estimate	2021 Estimate	2020 Actual	2019 Estimate	2018 Estimate
Florida	23,014,551	22,634,867	22,276,132	21,898,945	21,538,187	21,189,849	20,854,945
Lee County	827,016	800,989	802,178	782,579	760,822	743,871	724,796
Bonita Springs	56,066	54,868	55,502	54,746	53,644	54,437	51,176
FM Beach	3,665	3,255	5,589	5,584	5,582	6,520	6,406
Fort Myers	100,780	97,711	96,755	91,544	86,395	87,871	81,798
Sanibel	5,971	5,946	6,485	6,443	6,382	6,756	6,701
Cape Coral	220,236	213,301	208,053	201,554	194,016	185,837	180,175
Estero	37,993	37,507	37,842	37,213	36,939	32,412	31,806

2017 Estimate	2016 Estimate	2015 Estimate	2014 Estimate	2013 Estimate	2010 Actual	2000 Actual
20,524,865	20,201,450	19,879,230	19,585,096	19,337,590	18,802,847	15,982,378
708,797	691,400	674,981	660,699	648,719	618,754	440,888
50,137	48,388	46,568	45,819	45,229	43,857	32,797
6,328	6,276	6,624	6,250	6,323	6,277	6,561
79,106	76,108	72,395	69,437	67,081	62,298	48,208
6,659	6,591	6,502	6,490	6,497	6,469	6,064
175,063	170,474	166,508	163,599	161,069	154,305	102,286
30,945	30,565	30,118				

Source: Bureau of Economic and Business Research Estimates of Population released annually (April 1st estimate)

State and County estimates (2013 - 2019) revised to reflect 2020 Census Data, BEBR "Special Population Report, Revised annual Population Estimates for Florida and Its Counties, 2010-2020, with Components of Growth"

TABLE 3
LEE COUNTY POPULATION PROJECTIONS - 2010 THROUGH 2035

	2010	2015	2020	2025	2030	2035
Low	585,600	620,400	649,800	667,800	673,800	668,500
Medium	622,900	701,000	789,600	875,700	957,100	1,034,400
High	660,300	789,600	935,000	1,089,500	1,251,400	1,420,700

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

b. Employment

TABLE 4
LEE COUNTY MAJOR EMPLOYERS 2016

Southwest Florida Top Employers
2023

FGCU | FLORIDA GULF COAST UNIVERSITY
Regional Economic
Research Institute

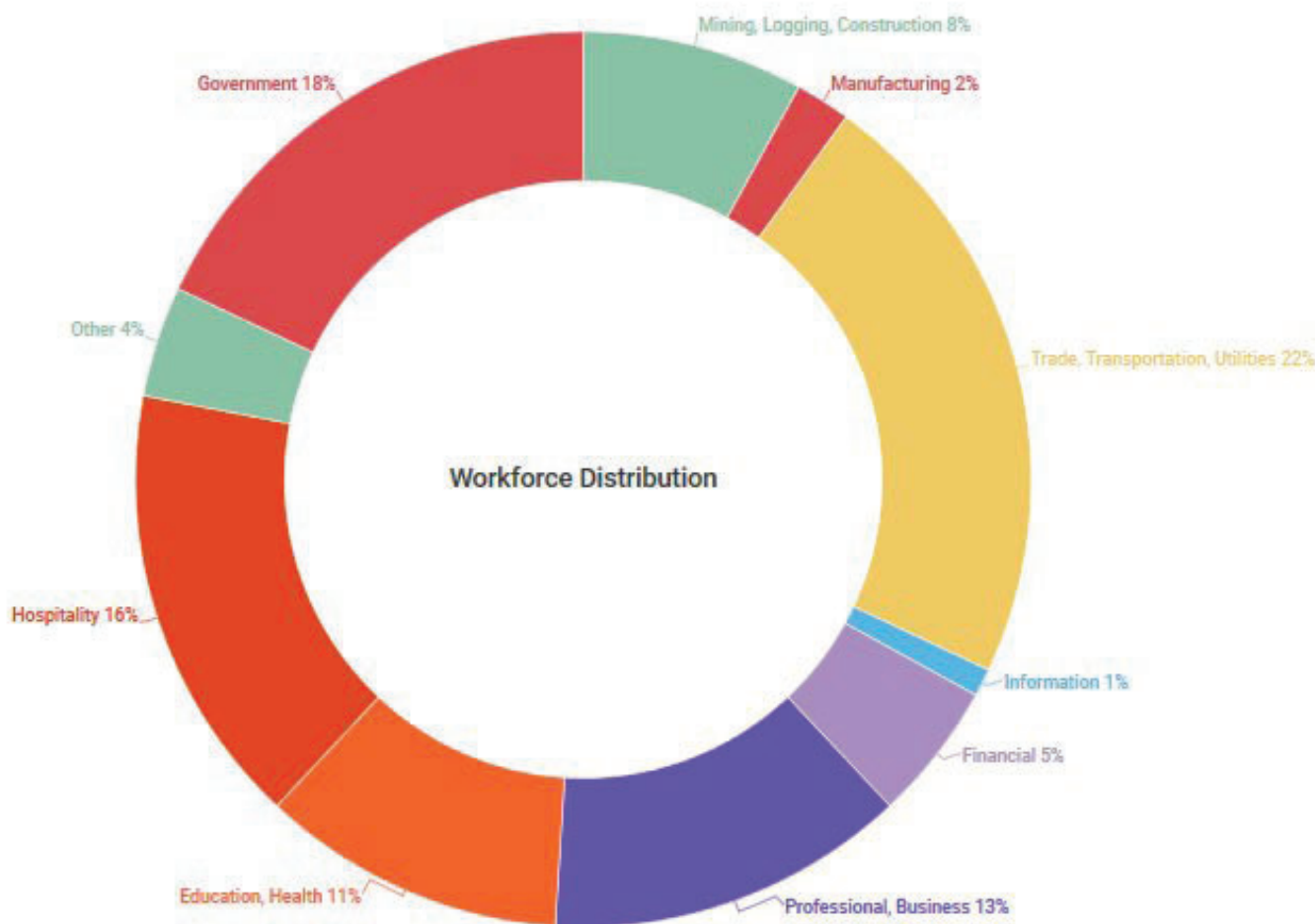
Area	Rank	Business Name	
Lee County ▼	1	Lee Memorial Health System	13,558
	2	Lee County Public Schools	11,174
	3	Lee County Local Government	9,377
	4	Publix Super Market	5,199
	5	Chicos Fas Inc.	3,903
	6	Herc Rentals	2,400
	7	Amazon	2,200
	8	Gartner	2,100
	9	Florida Gulf Coast University	1,778
	10	Walmart	1,509
	11	Shell Point Retirement Community	1,401
	12	Radiology Regional Center	1,247
	13	Florida SouthWestern State College	1,245
	14	McDonald's	1,150
	15	Hertz	1,073
	16	Home Depot	1,070
	17	Hope Hospice	1,021
	18	South Seas Island Resort	980
	19	Walsh Group	971
	20	Walgreens	833
	21	Salus Care	811
	22	News-Press	728
	23	CVS Pharmacy	617
	24	Lee County Electric Co-op	593
	25	WCI Communities	589

Source: RERI Analysis of data obtained from Bureau of Labor Statistics and DatabaseUSA, obtained through Lightcast

Note: Local County Government employment represents employment figures obtained from the Quarterly Census of Employment and Wages, and represents all city governments, county governments and similar governing bodies.

Source: Lee County Economic Development <http://www.leecountybusiness.com/lee-county-workforce/>

Table 5



Source: Lee County Economic Development <http://www.leecountybusiness.com/lee-county-workforce/>

Major Trip Generators/Attractors

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

Tables 6, 7, 8 and 9 and the following map show the major trip generators and attractors in Lee County.

TABLE 6
SHOPPING/ENTERTAINMENT

Edison Mall	Page Field Commons	Gulf Coast Town Center	Coconut Point Mall
Miromar Outlets	Wal-Mart (US 41 North)	Coral Point Mall (Cape Coral)	Coralwood Mall (Cape Coral)

Lee County Sports Complex	Lakes Regional Park	City of Palms Park	Lovers Key State Park
Lee Civic Center	Koreshan State Park	Sunsplash Water Park (Cape Coral)	Harborside Convention Center
Greyhound Track	Lynn Hall Park	Edison Home	Southwest Florida International Airport
Bonita Beach Park	Ding Darling Refuge	jetBlue Park	

Source: Lee County MPO 2020

TABLE 7
RECREATION FACILITIES

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

Source: Lee County Office of Economic Development 2020

TABLE 8
MEDICAL FACILITIES

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

Source: Lee County MPO 2020

SHOPPING, ENTERTAINMENT AND MEDICAL FACILITIES

Legend

- Entertainment Venues
- Medical Facilities
- Shopping Centers
- Road/Centreline
- Parks

0 2.5 5 10 Miles

Lee County MPO
METROPOLITAN PLANNING ORGANIZATION
Created By: Brian V. Raimondo
2-7-12
J:\GIS\Transportation Data\Shopping-Entertainment

Education

As of January 2018, The Lee County school system operates 118 schools, 45 elementary, 17 middle, 4 K8, 13 high schools, 16 Special Centers, 2 High Tech Centers and 21 charter schools. A total of 85,466 students were enrolled. Sixty private schools are also located in the County.

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

TABLE 9
UNIVERSITIES/COLLEGES

	Florida Gulf Coast University	Barry University	Hodges University
Florida SouthWestern State College	Rasmussen College	Keiser University	Nova Southeastern University
ITT Technical Institute	Heritage Technical Institute	Southern Technical College	Florida Academy

Source: Lee MPO 2021

e. Inventory of Available Transportation Services

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

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

C. SERVICE ANALYSIS

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

1. TD Population Forecasts

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

CALCULATION OF GENERAL TRANSPORTATION DISADVANTAGED POPULATION

Lee County

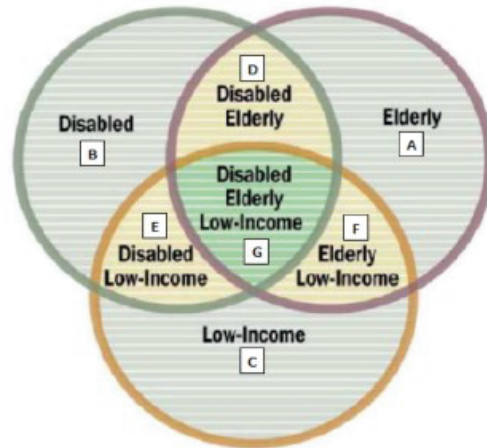
Census Data from 2013

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

Double Counts Calculations

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

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



CALCULATION OF CRITICAL NEED TRANSPORTATION DISADVANTAGED POPULATION

Lee County					Census Data from: 2013	
County Pop. By Age	Total Population with a Disability by Age	% with a Severe Disability by Age	Total Population with a Severe Disability by Age	% of Total Pop with Severe Disability by Age	% of Severe Disability Below Poverty Level	Total Severe Disability Below Poverty Level
< 5 Years of Age	512	4.20%	22	0		
5-17	3,855	4.20%	162	0.18%		
18-34	6,627	6.30%	418	0.37%		
35-64	32,047	13.84%	4,435	1.83%		
Total Non Elderly	43,041		5,036	1.06%	28.60%	1,440
65-74	18,087	27.12%	4,905	5.44%		
75+	29,445	46.55%	13,707	19.83%		
Total Elderly	47,532		18,612	11.68%	11.70%	2,178
Total	90,573		23,648	3.72%		3,618

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

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

Low Income & Not Disabled = C + F		CALCULATION OF DAILY TRIPS FOR THE CRITICAL NEED TD POPULATION	
Assumes	85,519		
27.2%	xx % without auto access		
	23,261		
28.0%	xx % without transit access		
	6,513		
		Calculation of Daily Trips	
		Daily Trip Rates	Total
		Per Person	Daily Trips
Total Actual Critical TD Population			
Severely Disabled	23,648	0.049	1,159
Low Income ND	6,513	1.899	12,368
Totals	30,161		13,527

FORECAST OF GENERAL AND CRITICAL NEED TRANSPORTATION DISADVANTAGED POPULATIONS

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

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

Assumes Annual Service Days = 357

Annual Population Growth (as a percent) 2.66%

2. Needs Assessment

More passengers are requesting trips than CTD funding permits. As of July 2018, the CTD, Commission Transportation Disadvantaged, increased funding for TD trips in Lee County to \$108,998/month.

Funding as of July 1, 2019, is uncertain as last year Proviso and Shirley Conroy funds were incorporated in the monthly allocations. These funds will not be available as of July 1, 2019. Maintaining and/or increasing the funding level will be a legislative decision. A local match of 10% on TD funds is required.

LeeTran has been a recipient of funds through the Board of County Commissioners Partnering for Transportation Results Program which was implemented October 1, 2015 (FY15/16) in the annual amount of \$321,000. These funds are available for the CTC and other non-profit agencies to assist in meeting local match requirements for Federal Transit Administration 5310 Grant awards processed through FDOT. For FDOT FTA 5310-43, the Selection Committee of the Lee County MPO recommended LeeTran for the following:

Capital: \$46,253.00

Operating: \$163,075.70

FTA/FDOT 5310 Grants were submitted in December 2018 as follows:

5310 Cape Coral UZA Capital:

5 Paratransit Buses and 3 Vans \$645,152

Operating: \$2,396,974

5310 Bonita UZA

Capital

1 Paratransit bus and 2 Vans \$231,716

Operating: \$574,744

D. GOALS, OBJECTIVES AND STRATEGIES

Goal 1: Coordination of Service

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

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

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

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

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

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

Goal 2: Provision of Service

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

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

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

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

Goal 3: Service Quality

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

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

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

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

Goal 4: Training about and Marketing of Service

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

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

- 4.2 Have brochures, reservation information, complaint and grievance procedures and other useful information available to riders on all vehicles and at agencies.
- 4.3 Provide opportunities designed to educate the community regarding the need for sponsored transportation, the services available and the need for the expansion of services, by speaking to clubs and other networks.
- 4.4 Investigate and implement new training programs and topics, as appropriate, such as Passenger Travel training.

Goal 5: Resource Management

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

- 5.1 Increase revenue by identifying and taking advantage of existing and new private and public funding sources.
- 5.2 To reduce and/or control expenses, continue to monitor and analyze the cost of administration and operations.
- 5.3 Plan for the acquisition of air conditioned, comfortable and ADA accessible vehicles to replace an aging fleet or to expand services.
- 5.4 Continue to monitor the price of fuel per gallon and make adjustments to the rate model, price quotes, cost formulas, etc. as needed.

Goal 6: Safety

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

- 6.1 Update the SSPP at least on an annual basis.
- 6.2 Continue to make safety and loss prevention the responsibility of all personnel.
- 6.3 Continue to conduct annual safety checks on all equipment.
- 6.4 Continue to provide a hazard-free environment and a safe, drug and alcohol free workplace.
- 6.5 Require physical examinations for all personnel as set forth in the SSPP.
- 6.6 Continue drug and alcohol testing as set forth in the Substance Abuse Policy (an addendum to the SSPP, *Appendix B*).

E. IMPLEMENTATION SCHEDULE

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

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

5.4 Continue to monitor the price of fuel per gallon and make business adjustments as needed.	As Needed
6.1 Update the SSPP.	Annually
6.2 Continue to make safety and loss prevention the responsibility of all personnel.	Ongoing
6.3 Continue to conduct safety checks on all equipment.	Ongoing
6.4 Continue to provide a hazard-free environment and a safe drug and alcohol-free workplace.	Ongoing
6.5 Require physical examinations for all personnel as set forth in the SSPP.	Ongoing
6.6 Continue drug and alcohol testing as set forth in the Substance Abuse Policy.	Ongoing
6.7 To improve its awareness of accidents, the CTC shall contact the subcontractors quarterly to obtain reports including any police reports as appropriate.	Quarterly
6.8 The subcontractors should have LeeTran named insured in their insurance policies.	As Needed
6.9 Monitor subcontracted transportation operators to ensure that vehicles are maintained in accordance with FDOT recommended preventative maintenance and safety programs.	Annually
6.10 Ensure that subcontracted transportation operators carry out appropriate training programs for all driving personnel including sensitivity training, basic First Aid and CPR.	As Needed

5-Year Transportation Disadvantaged Capital Improvement Program

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

2014/15 TO 2018/19 CIP

Implementation Date	Estimated Cost	Description of Purchase	Anticipated Funding Source	New or Replacement	Date Priority Established
2014-15	\$450,175	5 Wide Body	FTA 5310 funds	Replacement	June 2014
2015-16	\$231,210	5 Low-Floor mini vans	FTA 5310 funds	Replacement	June 2015
2015-16	\$1,156,050	25 Low-Floor mini vans	FTA 5301 funds	Expansion	June 2015
2016-17	\$545,000	7 wide Body	FTA 5310 funds	Replacement	June 2017

2017-18	\$900,000	7 Wide Body 5 vans Garage equipment	FTA funds	5310	Replacement	June 2017
2018-19	\$500,000	7 Wide Body 1 van	FTA funds	5310	Replacement	June 2018

II. SERVICE PLAN

A. Operations Element

1. Types, Hours, and Days of Service

a) Types of Service

Provider	Ambulatory	Wheelchair	Stretcher	Advance Reservation	Subscription	Door to Door	Curb to Curb	Door through Door
LeeTran	✓	✓		✓	✓	✓		

1) Group Trips

A group trip is defined as three or more individuals traveling together in a vehicle at the same time.

2) Subscription Service (Standing Order)

Subscription service refers to a regular, recurring transportation service with prearranged schedules. It is designed for riders who require consistent travel arrangements. This service is characterized by:

- The same passengers being picked up and dropped off at the same locations and times on a recurring basis.
- A minimum requirement of one month of consistent travel to and from the same location at a predetermined time.
- Approval based on service availability.

3) Demand Response Service

Demand response trips are scheduled for next-day service and must be booked no later than 5:00 pm, Monday through Saturday.

- Transportation Disadvantaged trips must be scheduled at least two (2) days in advance.
- Guest riders are not permitted under this program.

4) Wheelchair Service

- Drivers are not permitted to physically load a person into a wheelchair.
- Drivers may assist passengers transferring from a wheelchair to a vehicle seat.

5) Service Hours & Availability

Office Hours:

Monday – Saturday: 8:00 am to 5:00 pm (excluding holidays).

General Service Hours:

- Monday - Sunday 6:00 am - 7:00 pm.
- Passengers must be ready for pickup up to two hours before their scheduled appointment.
- Return trips must be scheduled in advance and have a 30-minute pickup window.
- Return trips may take a minimum of 90 minutes from the time the passengers are seated in the vehicle.

6) Accessing Services

Holidays:

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

No-Show Policy:

A no-show occurs when:

- A passenger fails to appear for a scheduled trip within the pickup window.
- The passenger does not cancel a trip at least two hours before the scheduled pickup time.

- Drivers will wait for a maximum of five (5) minutes within the pickup window before classifying the trip as a no-show.

Trip Cancellations:

- Trip cancellations must be made at least two (2) hours prior to the scheduled pick-up window.
- Passengers must call Passport at (239) 533-0300 as soon as they know they need to cancel.
- Failure to cancel in advance will result in a no-show classification, which may result in fines or service suspension.

7) Transportation Disadvantaged Qualifications and Guidelines:

To qualify for TD-funded transportation services, applicants must demonstrate that they meet one or more of the following conditions:

- A recognized disability as verified by a qualified medical professional, that prevents the applicant from using LeeTran's Fixed Route service.
Note: Disability alone does not guarantee eligibility—functional ability to use fixed-route services is the determining factor.
- Applicants must verify that no other transportation resources are available to them.
- No access to personal or public transportation.
- Applicants must be 60 years or older.
- Proof of household income is required for all TD applicants. **Self-declaration is not permitted.**
*Note: Household income must be at or below 200% of the U.S. Department of Health and Human Services' federal poverty guidelines, see **Table 10**.*
- The trip origin or destination must be outside of the ¾ mile ADA corridor.
- Trips may be denied based on trip purpose and funding availability (see prioritization in Table 11).
- A \$3.00 co-pay (each way) is required
- Passengers must recertify for the TD Program every two years to maintain eligibility.

Acceptable Proof of Income Documentation

Applicants must provide at least one of the following:

Current tax return	Unemployment compensation income verification
Child support letter	Social security income letter (SSA, SSI, SSDI)
Minimum of two (2) employer pay stubs from past two months	Retirement/pension statement (includes VA)
Agency letter identifying applicant as low income or no income (must be on agency letterhead)	Temporary Assistance for Needy Families (TANF) letter, Supplemental Nutrition Assistance Program (SNAP) letter, or Department of Children & Families (DCF) benefits letter

TABLE 10

January 2025 - Poverty Guidelines

Number of People in Household	Maximum Annual Household Income
1	\$31,300.00
2	\$42,300.00
3	\$53,300.00
4	\$64,300.00
5	\$75,000.00
6	\$86,300.00
7	\$97,300.00
8	\$108,300.00

Number of People in Household	Maximum Annual Household Income
For families/households with more than 8 persons, add \$5,500 for each additional person.	

TABLE 11
TD TRUST FUND TRIP PRIORITIES

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

Complaint Process:

Individuals who wish to file complaints may:

- Call the Passport Office at (239) 533-0300
- Contact the Florida Commission for the Transportation Disadvantaged's Ombudsman Hotline at 1-800-983-2435.

Both contact numbers are posted inside all vehicles for passenger convenience.

3. Transportation Operators and Coordination Contractors

In Accordance with Rule 41-2, F.A.C., the CTC shall collaborate with and establish coordination contracts with agencies that receive government funds for transportation-disadvantaged services. If an agency can meet its own transportation needs more effectively and efficiently than the CTC from a total system perspective.

These contracts outline key requirements, including reporting, insurance, safety, and other terms specified in the Memorandum of Agreement (MOA). Additionally, they define joint utilization arrangements and cost-sharing agreements for transportation services provided through the CTC.

4. Coordinated Transportation Agreements

LeeTran has established Coordination Agreements with multiple transportation providers across Lee County, enhancing access to specialized transportation services for the transportation-disadvantaged community. These agencies play a critical role in expanding access to specialize transportation services:

Agency Name	Contact Name	Contact Information
Sally J. Pimentel Deaf & Hard of Hearing Center	Amy Turner, Executive Director	Sally J. Pimentel Deaf & Hard of Hearing Center 1860 Boy Scout Drive B208 Fort Myers, FL 33907 Phone: 239-461-0334 Mobile: 239-462-2039 Video Phone: (239) 247-5821 amyturner@dhhc.life
Dr. Ella Piper Center for Social Services	Melissa Bonner, Executive Director Stephanie Leonard, Transportation Specialist	Dr. Piper Center for Social Services, Inc. 2607 Dr. Ella Piper Way Fort Myers, FL 33916 (239) 332-5346 melissa@drpipercenter.org stephanie@drpipercenter.org
Hope Hospice and Community Services, Inc.	Jim Lampley, CFO Neil Bardill	Hope Hospice and Community Services, Inc. 9470 Health Park Circle (239) 483-4673 Jill.Lampley@hopehcs.org BardillN@chaptershealth.org
Lighthouse of Southwest Florida, Inc.	Amy Singer, CEO	Lighthouse of SWFL 35 W. Mariana Ave. N. Fort Myers, FL 33903 (239) 997-7797 asinger@lighthouseswfl.org
Sunrise Community of SW Florida, Inc.	Margaret Feldman, Vice President	Sunrise Community of SW Florida, Inc. 9040 Sunset Drive Miami, FL 33173 (786) 314-6097 mfeldman@sunrisegroup.org

Lee County Transit (LeeTran)



LeeTran operates the fixed route public transportation service in Lee County, as a department of Lee County Government. LeeTran currently operates 25 bus routes in season, 22 during off-season. Twenty-five of the bus routes operate on a scheduled fixed-route system at least six days per week. Five of the routes are either seasonal or are adjusted for seasonal service. Fifteen routes operate on Sundays. LeeTran provides trolley service along Fort Myers Beach and seasonal trolley service in the Riverfront District of downtown Fort Myers. Three TRAM routes connect the Town of Fort Myers Beach during season. One route provides access to the park-and-ride lots located on the mainland side of the Mantanzas Pass Bridge, while the other provides service along Estero Blvd on Fort Myers Beach. The trolley system operates as two separate routes during seasonal service and the two routes are combined into one during non-seasonal months. The seasonal Riverfront District Trolley service in downtown Fort Myers is a seasonal service with two routes providing service within the downtown area of the City of Fort Myers and the other connecting the downtown with North Fort Myers.

The regular one-way bus fare is \$1.50. Reduced-fares are available to students, seniors 65 and older, persons with disabilities, individuals with Medicare cards, and children 6 years and under ride for free. The bus service is marketed to riders of all age groups. Passengers must be able to board, disembark and carry their own packages on and off the vehicles.

Ultra Micro Transit Service

LeeTran rolled out its first-ever mobility-on-demand initiative in 2022, in the Bonita Springs area. Following the successful launch of the ULTRA program, LeeTran began the planning process of expanding the program to Lehigh Acres thanks to a grant awarded by Florida Department of Transportation. The mobility-on-demand ridesharing model has gained popularity during recent years with well-known brands like Uber. The concept has expanded to allow public transit agencies to offer more personalized service.

LeeTran's ULTRA On-Demand Transit service features a multi-person vehicle that takes patrons anywhere within the defined service area. The on-demand service is available seven days a week from 7 a.m. to 6 p.m. Passengers are able to use the Uber app or make ride requests via the telephone at 239-533-8726. The Ultra Micro Transit Service began in Bonita Springs on February 14, 2022. The Ultra Micro Transit Service began in Lehigh Acres on March 2, 2023. The fare for MOD service is \$3.00 per ride.

ADA Paratransit Service

The Americans with Disabilities Act ADA requires that entities that operate fixed-route transit service also provide complementary door-to-door paratransit service for individuals living within a $\frac{3}{4}$ mile of fixed bus routes who are unable to use the fixed-route service due to a disability or impairment. To meet the requirements of the ADA, LeeTran has created Passport, LeeTran's ADA paratransit service. This service is available to ADA-eligible persons in Lee County during regular fixed bus route service hours seven days a week. Passport is used to complement the fixed-route system by serving ADA-eligible elderly and persons with a disability who live within the prescribed distance from a fixed bus route.

LeeTran ADA Paratransit Service Ridership Numbers

FY	Trips	Vehicle Miles
2018	133,765	1,721,871
2017	119,593	1,577,665
2016	119,069	1,571,231
2015	113,789	1,476,936
2014	109,281	1,488,560
2013	104,303	1,369,823
2012	102,274	1,310,353
2011	99,568	1,252,054

4. Public Transit Utilization

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

5. Vehicle Inventory

Vehicle inventories are shown as *Exhibit C*.

6. System Safety Program Plan (SSPP) Certification

LeeTran's Annual Safety Certification is shown as *Exhibit D*.

7. Emergency Preparedness & Response

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

The CTC, through contractual agreements with carriers and in the SSPP establishes policies for the handling of emergencies, accidents and delays. Bus Operators are required to notify and appropriate emergency personnel immediately if an emergency, accident or delay occurs. Appropriate emergency personnel can include police, fire or ambulance. Solicit appropriate medical or

emergency assistance, if an accident or other emergency occurs. The CTC must also be notified of schedule delays. The carrier must also submit a written accident or incident report and management analysis, within 24 hours. If bodily injury and/or property damage exceeds levels outlined in U.S. DOT, the driver is required to undergo drug and alcohol testing as per Federal guidelines.

10. Educational Efforts/Marketing:

LeeTran has public information brochures and Passenger Guides. In addition to the brochure, LeeTran visits various government, community and social service agency meetings.

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

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

- **Florida's Transportation Disadvantaged Voluntary Dollar Program**

In a campaign called "Put Your Dollar to Work" the Commission for the Transportation Disadvantaged is asking that Floridians help friends and neighbors who need transportation services by voluntarily contributing a dollar to the trust fund for the Transportation Disadvantaged. This opportunity is available because of a law passed by the 1994 Florida Legislature which allows for citizens who register their vehicles or renew their registrations to voluntarily contribute additional funds (in increments of a dollar) to be used to offer more rides to people who use coordinated transportation.

Funding for the program comes from revenues collected from the vehicle registrations. For every registration or renewal \$1.50 is ear marked for the Transportation Disadvantaged (TD) Trust Fund. If you wish to make a voluntary contribution, there is a place on the vehicle registration form to indicate that your additional money is to go to the TD Trust Fund.

-Voluntary Dollar Program website address: <https://www.fdot.gov/ctd/volunteer-dollar-program>

-LeeTran website address: <https://www.leegov.com/leetran/td-service>

- **Human Services Mobility Coordinator (HSMC):**

The HSMC at LeeTran is responsible for interviewing clients to assess eligibility and suitability for transportation programs. This role includes conducting participants assessments, determining appropriate program placements, and referring individuals to ridership rates, ensuring equitable access to mobility services.

11. Acceptable Alternatives

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

Service Standards

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

Rule	41-2.006(4)(d), FAC: Passenger property that can be carried by the passenger and/or driver in one trip and can safely bestowed on the vehicle, shall be allowed to be transported with the passenger at no additional charge. Additional requirements may be negotiated for carrying and loading rider property beyond this amount.	
Compliance	Evaluated at the CTC Annual Review.	
Monitoring	Passengers shall be allowed to have four pieces of personal property which they can place on their lap or stow under their	

	seat. Passengers must be able to independently carry all items brought onto the vehicle. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices or intravenous devices.	Verified by bus ride.
Rule	41-2.006(4)(e), FAC: Vehicle transfer points shall provide shelter, security and safety of passengers.	
Compliance	The CTC does not generally use transfers in the coordinated system, but if they are used, vehicle transfer points shall be located in a safe, secured place that provides shelter.	
Monitoring	Evaluated at the CTC Annual Review.	N/A
Rule	41-2.006(4)(f), FAC: A local toll-free phone number for complaints or grievances shall be posted inside the vehicle. The local complaint process shall be outlined as a section in the Local Service Plan. This shall include advising the unsatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the Local Coordinating Board.	
Compliance	The local toll-free phone number will be included in the complaint process. This number will be posted on right visor of all vehicles in 3" sized numbers: (800) 741-1570.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride; sticker on bus.
Rule	41-2.006(4)(g), FAC: Out of service area trips shall be provided when determined locally and approved by the Local Coordinating Board, except in instances where local ordinances prohibit such trips.	
Compliance	LeeTran does not provide out of County trips.	
Monitoring	Evaluated at the CTC Annual Review.	Verified by bus ride.

Rule	41-2.006(4)(h), FAC: Interior of all vehicles shall be free from dirt, grime, oil, trash, torn upholstery, damaged or broken seats, protruding metal or other objects or materials which could soil items placed in the vehicle or provide discomfort for the passenger.	Verified by bus ride.
Compliance	All vehicles shall be cleaned and maintained (interior and exterior) on a regular schedule.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	41-2.006(4)(i), FAC: Billing requirements of the CTC subcontractors shall be determined locally by the Local Coordinating Board and provided in the Local Service Plan. All payments shall be paid to subcontractors within seven calendar days after receipt of said payment by the CTC. If the contractor receives less than full payment, then the contractor shall be required to disburse only the funds received on a pro rata basis with each subcontractor receiving a prorated portion based on the amount due on the payment.	
Compliance	The CTC shall pay all bills to the subcontracted transportation operator within seven days after receipt of payment. Operator payments will be addressed as a standard LCB agenda item.	

Monitoring	The LCB will evaluate this at its quarterly meetings.	LeeTran does not have subcontractors.
Rule	41-2.006(4)(j), FAC: Passenger/trip database must be maintained or accessible by the CTC on each rider being transported within the system.	Verified by review of records.
Compliance	For each passenger transported within the system, the CTC will collect the name, phone number, address, funding source eligibility and special requirements on each passenger in a database. See 2.10 (2.15) for HIPPA Compliance.	
Monitoring	Evaluated at the CTC Annual Review	
Rule	41-2.006(4)(k), FAC: Adequate seating for 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.	Verified by bus ride.
Compliance	Vehicle seating will not exceed the manufacturer's recommended capacity.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	41-2.006(4)(l), FAC: Drivers for 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.	Verified by bus ride.
Compliance	Drivers shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with specific passengers, upon pickup except in situations where the driver regularly transports the rider on a recurring basis. All drivers will have a name badge displayed at all times when transporting passengers. Drivers have photo ID on their person that they can show to the passenger upon request.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	Rule 41-2.006(4)(m), FAC: The 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 seatbelt or utilization of wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. In door-through-door paratransit service	Verified by bus ride.
	categories, the driver shall also be required to open and close doors to buildings, except in situations in which assistance in opening/closing building doors would not be safe for passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian and driver.	
Compliance	All drivers shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include holding hands, or allowing the passenger to hold an arm; opening the vehicle door, fastening the seat belt or utilization of wheelchair securement devices, storage of mobility assistive devices and closing the vehicle door. Other assistance may be provided as needed and accepted. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down any steps; only ramps are to be used.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	Rule 41-2.006(4)(n), FAC: Smoking is prohibited in any vehicle. Requirements for drinking and eating on board the vehicle will be addressed in the Local Service Plan.	Verified by bus ride; signage is on bus.
Compliance	Smoking, eating and drinking is prohibited on any vehicle in the coordinated system.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	Rule 41-2.006(4)(o), FAC: The CTC and the LCB shall jointly develop a policy on passenger no shows. Assessing fines to passengers for no shows is acceptable but such policy and process shall be identified in the local Service Plan.	Automated phone call the night before to reduce no-shows.
Compliance	<p>Passenger No-Shows are defined as trips not canceled one hour before scheduled pickup. When a passenger is considered a no-show, the driver will attempt to communicate with them through CTC dispatch. They will be notified through the use of a door hanger which notes the time the driver arrived. For a TD Grant non-sponsored trip, upon the third no-show, the CTC will send a letter to the person to provide notice that their service will be suspended for thirty days.</p> <p>For trips sponsored by other funding sources, the CTC shall contact the agency when a no-show occurs. Agencies should also contact the CTC when they become aware of cancellations or no-show situations.</p> <p>The policy on no-shows shall be communicated to the passengers and agencies by the CTC when adopted, and thereafter to all newly enrolled passengers. The information shall be distributed in the appropriate format and shall be available in alternative formats upon request.</p>	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	Rule 41-2.006(4)(p), FAC: All vehicles ordered or put into service after the adoption of this section of the Rule, and providing service within the coordinated system, shall be equipped with two-way communications in good working	Verified by bus ride.
	order and be audible to the driver at all times to the base.	
Compliance	All vehicles are equipped with two-way radios or cell phones.	
Monitoring	Evaluated at the CTC Annual Review.	

Rule	<u>Rule 41-2.006(4)(q), FAC:</u> All vehicles ordered or put into service after the adoption of this section of the rule and providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.	Verified by bus ride.
Compliance	All vehicles have working air conditioning and heating. Vehicles that do not have a working air conditioner and heater will be scheduled for repair or replacement as soon as possible. Should a vehicle incur a problem, it will be repaired as soon as possible. The priority of the LCB is that the CTC provide transportation. If a vehicle's air conditioning or heating is not functioning properly, and if there are no other vehicles available, the passengers will be transported.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	<u>41-2.006(4)(r), FAC:</u> First Aid policy shall be determined locally and provided in the local Service Plan.	First Aid kit on bus and is verified by bus ride. Also, driver training records are verified.
Compliance	FTA no longer requires transit bus operators to be CPR certified. All vehicles are equipped with a First Aid kit.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	<u>41-2.006(4)(s), FAC:</u> Cardiopulmonary Resuscitation [CPR] policy shall be determined locally and provided in the Local Service Plan.	Driver training records are verified.
Compliance	FTA no longer requires transit bus operators to be CPR certified.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	<u>41-2.006(4)(t), FAC:</u> Driver criminal background screening shall be determined locally, dependent upon purchasing agencies' requirements and provided in the local TDSP.	Driver records are verified.
Compliance	All drivers in the coordinated system have a favorable FDLE background, using DCF policies and procedures.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	<u>41-2.006(4)(u), FAC:</u> In areas where fixed route transportation is available, the CTC should jointly establish with the LCB a percentage of total trips that will be placed on the fixed route system.	Per APR the rate is 5.4% on fixed route.
Compliance	The LCB has established a goal of 2.2% to be placed with the fixed-route transit system.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	<u>41-2.006(4)(v), FAC:</u> The CTC should establish and address the passenger pick-up window in the local TDSP. This policy should also be communicated to contracted operators, drivers,	

	purchasing agencies and passengers.	
Compliance	Passengers are not given a set pick-up time. Instead, they are told to be ready for their ride to arrive up to two hours before their destination appointment time. The CTC may negotiate special pick-up arrangements with the customer, in advance, as the situation dictates. Passengers will be dropped off at their appointment with certain exceptions negotiated in advance. All return trips are scheduled in advance. Passengers should expect their return vehicle to arrive at the scheduled time, up to 30 minutes after the scheduled return time. Passengers can expect their return trip to take up to a minimum of 120 minutes from the time they are seated on the vehicle.	Complaint logs are reviewed.
Monitoring	Evaluated from the annual CTC customer complaint surveys. Doesn't apply to ADA trips.	
Rule	41-2.006(4)(w), FAC: The CTC and the LCB should jointly establish and address the percentage of trips that will be on time in the local Transportation Disadvantaged Service Plan. This performance measure should be communicated to contracted operators, drivers, purchasing agencies and passengers.	
Compliance	The CTC will have an 85% on-time performance rate for all completed trips. The Evaluations of the CTC's on-time performance will be measured based upon the time the person is to be dropped off for their appointment and the time the person is to be picked up on a scheduled return trip. These are considered separate trips.	
Monitoring	Evaluated from the annual CTC customer complaint surveys. Doesn't apply to ADA trips.	Records are verified.
Rule	41-2.006(4)(x), FAC: The CTC should establish and address in the TDSP a minimum two (2) day advanced notification time to obtain services. This policy should also be communicated to contracted operators, drivers, purchasing agencies and passengers.	
Compliance	There will be a minimum two (2) day notice requirement for all trips scheduled within the coordinated system. (72 business hours for Medicaid trips.) Non-Medicaid reservations must be made before noon the day before the requested trip. Passengers with an urgent need to travel should call the CTC. Same day trip requests cannot be guaranteed, however, the CTC will attempt to assist the passenger.	
Monitoring	As established.	TDSP reviewed.

Rule	<u>41-2.006(4)(y), FAC:</u> The CTC and the LCB should jointly establish and address in the service plan a performance measure to evaluate the safety of the coordinated system. This measure should be used in the CTC evaluation of its contracted operators and the LCB's evaluation of the CTC.	
Compliance	The standards for crashes will be 1.2, or fewer, accidents per 100,000 miles for the evaluation period, based on the AOR definitions of crashes.	
Monitoring	This information is part of the annual AOR.	
Rule	<u>41-2.006(4)(z), FAC:</u> The CTC and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the reliability of the vehicles used in the coordinated system. This measure should be used in the CTC evaluation of its contracted operators and the LCB's evaluation of the CTC.	Yes, per AOR and APR.
Compliance	The standard for road calls will be an average of 10,000 miles or more between each road call (e.g., the system wide total, not each individual vehicle).	
Monitoring	This information is part of the annual AOR.	
Rule	<u>41-2.006(4)(aa), FAC:</u> This performance measure can be used to address the accessibility of the service. The CTC and the LCB should jointly determine if a standard for call hold time is needed in the coordinated system and address this in the local service plan. If determined to be necessary, this standard should be included in the LCB's evaluation of the CTC.	Reviewed annually.
Compliance	The customer should not be put on hold for more than 3 minutes on average.	
Monitoring	Evaluated at the CTC Annual Review.	
Rule	<u>41-2.006(4)(bb), FAC:</u> The CTC and the LCB should jointly establish and address in the local service plan a performance measure to evaluate the quality of service provided within the coordinated system. This measure should be used in the CTC's evaluation of its contracted operators, and the LCB's evaluation of the CTC.	Yes, per AOR and APR.
Compliance	Complaints shall not exceed 1% of total trips provided during the evaluation period. The LCB should evaluate the CTC based upon the number of complaints that are resolved, versus unresolved.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	

Lee County CTC – Policies and Standards, Evaluation and Monitoring - Other		
Policy	2.01 Service Effectiveness 2.01a – Expense, 2.01b – Revenue, 2.01c – Subsidy, 2.01d – Ridership, 2.01.e – Service Quality, 2.01f – Level of Service, 2.01g -- Safety	Yes, per AOR and APR.
Compliance	The CTC shall continually look for methods to: 1) Increase the number of passenger trips per driver hour; 2) Minimize any yearly increase to the cost per passenger trip; and 3) Minimize any yearly increase to the cost per driver hour.	
Monitoring	This information is part of the annual AOR.	
Policy	2.02 Contract Monitoring	Monitoring is conducted annually in June.
Compliance	The CTC will perform an annual evaluation of the contracted operators using the LCB evaluation process, using applicable portions of the evaluation materials, and provide a copy of the annual evaluation of the operators.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	2.03 Ride time	Yes, per review of complaint log.
Compliance	The CTC will make every effort to abide by funding agencies stated ride times. Passengers can expect to return home up to two hours from their requested pick-up time. In situations where it becomes apparent that the ride time will exceed this (crashes or vehicular breakdowns), the CTC will make every effort to contact the families of the passengers by telephone.	
Monitoring	The CTC needs to document which agencies have ride time limits and other exceptions. Community Care for the Elderly (CCE) = 120 minutes. This policy does not apply to ADA trips.	
Policy	2.04 Voice Mail Changes	Yes, this takes place when needed.
Compliance	The CTC must ensure that customers are provided with sufficient notification of pending major changes to the phone system for scheduling trips or for reporting complaints. The recording should be offered in English and in Spanish, the date of the change and describing the changes that will take place.	
Monitoring	Voice mail changes need to be announced in advance and detailed.	
Policy	2.05 Standardization of Transportation Operator and Coordination Contracts.	Yes, the suggested formats are being used.
Compliance	The suggested contract format is used.	
Monitoring	Evaluated at the CTC Annual Review.	

Policy	2.06 Eligibility Criteria	
Compliance	TD trips are trips of “last resort.” If no funding agency is available and if the person meets the definitions of transportation disadvantaged, then they are eligible for transportation. The LCB’s policy is for the CTC to provide	
	transportation to persons whose household income is at 200% of the poverty levels. Persons to be transported contact the CTC for an application or visit LeeTran website. The CTC will transport the general public who shall be charged the going rate for trips.	Yes, the records are reviewed.
Monitoring	As established	
Policy	2.07 Prioritization of Trips	Yes, the records are reviewed.
Compliance	The CTC, LCB and planning staff have prioritized trips in the TDSP.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	2.08 Insurance: The CTC requires that the CTC carry \$100,000 per person/\$200,000 per incident in insurance, pursuant to Rule 41-2.006, FAC.	Yes, the records are reviewed.
Compliance	The CTC carries \$1 million per County regulations. The CTC requires its subcontracted operators to carry \$100,000/\$200,000. The subcontractors must have the CTC named as an additional insured. Insurance requirements for subcontractors are covered in more detail in the operators’ contracts. The CTC carries \$1 million per County regulations. The CTC requires its subcontracted operators to carry \$100,000/\$200,000. The subcontractors must have the CTC named as an additional insured. Insurance requirements for subcontractors are covered in more detail in the operators’ contracts.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	2.09 System Safety Program Plans (SSPP)	Yes, the records are reviewed.
Compliance	Updated annually.	
Monitoring	Evaluated at the CTC Annual Review.	
Policy	2.10 Co-pays: LCB’s Policy on the \$3.00 fare co-payment on the non-sponsored trip grant; other copayment issues.	Yes, the records are reviewed.
Compliance	The CTC charges a \$3.00 fare on each non-sponsored trip. The monies collected are used for the local match for the trip grant. All co-payments are \$3.00.	

Monitoring	As established	
Policy	2.11 Inclement Weather	
Compliance	The LCB has a policy regarding provision of transportation to persons during storms. Components of the policy include: 1. The CTC is closed when LeeTran is closed; when ADA services stop. The CTC becomes a member of the Lee County Emergency Operations Team. 2. The CTC has the right to not transport clients of a center, if they believe that they will not be able to get a person back. (The CTC has the right to cancel trips.) 3. An agency program director has the right to call the CTC the morning of the trip and cancel trips for the day, if they feel the weather is too severe. This is based on if the Lee County Schools are not transporting that day. (On weekends, or days when schools are shut, the CTC	

	shall use its best judgment.) 4. Centers must work with the CTC to develop a contingency plan that outlines what the center will do with its clients, in the event that the CTC cannot come pick the clients up at the appointed time due to severe storms. The contingency plan should be developed with the understanding that the delay may be for an unknown length of time. Centers should make sure that the family members of clients receive a copy of the contingency plan (or a page that outlines what the family members should expect.) 5. The features in 2, 3 and 4 should free up enough trips to allow the CTC to go get people who were transported out to a location without a contingency plan. 6. Clients at centers will be picked up as soon as it is safe to do so, and as soon as there are trips available. 7. For the purpose of this policy, a storm was defined as “sustained wind of 39 miles per hour or more, and/or major flooding of streets.” “Gale force” winds are 39 to 46 mph.	
Monitoring	Presence of letters on file; Copies of Agencies’ contingency plans on file with the CTC; CTC is to monitor storm warnings and weather conditions.	Yes, the records are reviewed.

Policy	2.12 Distribution of Replacement Vehicles Acquired Through Grants.	
Compliance	Vehicles received through any grant funding source will be used to replace existing ADA-compliant or non-ADA regulation compliant vehicles currently in the system, according to the following priorities: 1.) Gasoline vehicles with over 175,000 miles, or diesel vehicles with over 225,000 miles, or vehicles over 5 years old; 2.) Non-ADA accessible vehicles; 3.) All other vehicles including sedans, standard vans, and other ADA accessible vehicles. It is the goal to have each vehicle in our system ADA compliant.	All of LeeTran’s vehicles are ADA compliant. The updated Vehicle inventory is supplied to the Planning Agency annually.

Monitoring	The CTC will update the TDSP annually with an inventory of all vehicles used in the coordinated transportation system as Exhibit D.	
Policy	2.13 Required Use of Seatbelts	
Compliance	<p>Passengers riding vehicles equipped with seatbelts will be required to use them. Persons utilizing wheelchairs will have the chair restrained, and will be required to utilize a personal securement device to ensure that they stay in the chair. All wheelchairs for transport must be complete and well maintained and in good working order to include fully operational brakes. Section 37.165(c)(3) of the DOT's ADA regulations allows a transit operator to establish a policy that requires all riders to have their common wheelchairs secured while aboard a transit vehicle. Therefore, service will be denied to a rider who refuses to allow his or her common wheelchair to be secured. Wheelchairs will be adequately secured or stored. If a passenger refuses to be secured, the passenger will not be transported. The CTC is to communicate it to all passengers and funding agencies. Under Section 37.5 of the DOT's ADA regulations, a transit operator is not permitted to mandate the use by wheelchair users of seatbelts and shoulder harnesses, unless the operator</p>	All vehicles are equipped with seatbelts and all passengers use them. All vehicles have wheelchair securement systems for the common wheelchairs.
	mandates the use of these devices by all passengers, including those sitting in vehicle seats. All passengers are required to use seatbelts.	
Monitoring	CTC will ensure that all appropriate vehicles are equipped with functioning seatbelts.	
Policy	2.14 Disruptive Passengers	
Compliance	<p>When an agency has an existing policy regarding behavioral problems, the CTC abides by the agencies' existing policy, unless such behavior endangers other passengers, the driver or other motorists. In that case, the CTC may take whatever action is necessary to ensure the safety of all concerned. If no policy exists and for TD passengers, the CTC will deal with behavioral problems including, but not limited to: fighting, intoxication and abusive behaviors as follows:</p> <p>First incident, a written warning to advise the person or his/her parent, guardian or responsible agency that an incident has occurred. (Unless the First Incident is of a serious, life-threatening nature, then skip immediately to Step 2. It is also understood that the Driver may call 911 if needed.)</p> <p>Second incident, the CTC will meet with all concerned parties and decide if transportation on the para-transit system is appropriate.</p>	The CTC reports this to the LCB on a case-by-case basis.

	Third incident, the CTC will meet with all concerned parties and decide if transportation on the para-transit system is appropriate.	
Monitoring	The LCB will evaluate this at its quarterly meetings.	
Policy	2.15 Compliance with HIPPA	
Compliance	The CTC is compliant with HIPPA regulations.	
Monitoring	As required	CTC is in compliance with HIPPA.
Policy	2.16 Use of Scooter Mobility Devices	
Compliance	LeeTran can transport scooter mobility devices.	
Monitoring	As established	Monitored during bus rides.
Policy	2.17 Definition of Group Trip	
Compliance	A group trip shall be defined as three individuals or more.	
Monitoring	As established	Monitored during bus rides.

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

LeeTran's Passport program will provide all trip under the TD program.

TD TRUST FUND TRIP PRIORITIES

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

13. LOCAL SERVICE COMPLAINT AND FORMAL GRIEVANCE PROCEDURE/PROCESS

This section was reviewed by the LCB and approved on May 4, 2022.

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



A summary of the Service Complaint process is provided.



A summary of the Formal Grievance Procedures is provided.

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



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

Existence of Complaint Policy and Procedures:

The Lee County Local Coordinating Board for the Transportation Disadvantaged has adopted procedures for the Community Transportation Coordinator to use to address complaints from agencies, users, potential users, subcontractors, and other interested parties. The policies are to be followed by the Community Transportation Coordinator (CTC) – LeeTran's Passport Program and any of its operators. These procedures provide definitions of terms used in the process, identify how complaints are received by the CTC; provide a process and forms for the CTC to record complaints, and how the complaints were resolved; explains how the CTC is to collect monthly and annual data for reporting to the LCB, and explains what to do when a complaint cannot be resolved. The procedures also provide contact names and addresses.

Definitions:

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

Service complaints are routine incidents that occur on a daily basis, are reported to the driver or dispatcher, or to other individuals involved with the daily operations, and are resolved within the course of a reasonable time period suitable to the complainant. Service complaints should be recorded as 'complaints.' The CTC is to total these service complaints on a yearly basis for the CTD's Annual Operating Report, (AOR). Service Complaints may include but are not limited to:

- "My bus is late." [beyond the On-Time Policy for the service area.] Late trips (late pickup and or late drop-off;)
- No-show by transportation operator;
- No-show by client;
- Client behavior;
- Driver behavior;
- Passenger discomfort;
- Service denial (refused service to client without an explanation as to why, e.g. may not qualify, lack of TD funds, etc.)

If unresolved, a routine service complaint can result in a formal grievance. (The Local Coordinating Board has a separate "Formal Grievance Procedure," contained in the TDSP. Please review it for additional information.) Local service complaints are driven by the inability of the CTC or transportation operators to meet local service standards established by the CTC and LCB.

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

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

The LCB shall “appoint a Grievance Committee to serve as a mediator to process and investigate complaints, from agencies, users, potential users of the system and the CTC in the designated service area, and make recommendations to the Coordinating Board for improvement of service.

The Coordinating Board shall establish procedures to provide ... opportunities for issues to be brought before such committee and to address them in a timely manner...” The LCB does not have “adjudicative” or “determinative” powers.

Forms to Use to record a complaint:

The CTC shall use the form below to log complaints. This form is consistent with that provided by the Commission for the Transportation Disadvantaged’s Uniform Service Reporting [for Service Complaints] January 1996. This document, which is available upon request from the Commission for the Transportation Disadvantaged, is a guide to the proper method to identify a complaint, determine its validity, complete a service report, and achieve customer satisfaction. Carriers are to use the same forms. Each complaint shall be assigned a Log Number to assist in tracking the resolution of each complaint. All service complaints should be recorded.

Letting the Consumer know how to complain:

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

Posting of Contacts in the Vehicles:

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

Reporting Complaints:

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

SAMPLE COMPLAINT FORM

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

--	--	--	--	--

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

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

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

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

Agency Surveys:

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

Standards & Policies:

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

Commission’s Ombudsman Hotline:

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

LEE COUNTY LCB CONTACTS FOR SERVICE COMPLAINTS

ENTITY	CONTACT INFORMATION	PHONE
Community Transportation Coordinator	Dominic Gemelli, Transit Director Lee County Transit - LeeTran	Customer Service: (239) 533-0300 Reservations: (239) 533-0300
Lee County MPO -- Designated	Lee Metropolitan Planning Org.	(239) 244-2220
Official Planning Agency	815 Nicholas Pkwy, Cape Coral, FL 33915	

Local Coordinating Board Chairperson	Hon. Jessica Cosden Raimondo Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220
Commission for the Transportation Disadvantaged	Ombudsman Hotline	(800) 983-2435
		TDD (800) 648-4084

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

Authority

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

It should be noted that there is a difference between “hearing” a grievance and “hearing and determining” a grievance. Neither the Grievance Resolution Committee nor the Local Coordinating Board has the authority to “hear and determine” a grievance. They only have the authority to “Hear” and advise. When an entity makes a determination of the rights, duties, privileges, benefits, or legal relationships of a specified person or persons, it is exercising “adjudicative” or “determinative” powers. Deciding a grievance between two independent parties may fall within these parameters, depending on the nature of the grievance. Chapter 427, *Florida Statutes*, grants no adjudicative powers to anyone.

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

Formal Grievance Policy and Procedures:

Section 1: Creation

- 1.1 There is hereby created a formal grievance procedure for the Lee County transportation disadvantaged program as specified by the Commission for the Transportation Disadvantaged pursuant to Chapter 427, *Florida Statutes*, and Rule 41-2.012, *Florida Administrative Code*, hereinafter referred to as the Grievance Process. The following rules and procedures shall constitute the grievance process to be utilized in the Coordinated Community Transportation System in Lee County.

Section 2: Definitions

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

- A) **Community Transportation Coordinator:** (CTC) Means a transportation entity recommended by a Metropolitan Planning Organization or by the appropriate designated official planning agency as provided for in Chapter 427 *Florida Statutes*, in an area outside the purview of a Metropolitan Planning Organization and approved by the Commission for the Transportation Disadvantaged, to ensure that coordinated transportation services are provided to serve the transportation disadvantaged population in a designated service area.
- B) **Designated Official Planning Agency (DOPA)** means the official body or agency designated by the Commission for the Transportation Disadvantaged to fulfill the functions of transportation disadvantaged planning in areas not covered by a Metropolitan Planning Organization. The Metropolitan Planning Organization shall serve as the designated official planning agency in areas covered by such organizations.
- C) **Transportation Disadvantaged (TD)** user of the system, “Those persons who because of physical or mental disability, income status, or age, or who for other reasons are unable to transport themselves or to purchase transportation, and are therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life sustaining activities, or children who are disabled or high risk or at risk as defined in Chapter 411.202, *Florida Statutes*.”
- D) **Agency:** Means an official, officer, commission, authority, council, committee, department, division, bureau, board, section, or any other unit or entity of the state or of a city, town, municipality, county, or other local governing body or a private nonprofit entity providing transportation services as all or part of its charter.
- E) **Transportation Operator:** Means one or more public, private for-profit or private nonprofit entities engaged by the community transportation coordinator to provide service to transportation disadvantaged persons pursuant to a Transportation Disadvantaged Service Plan, (TDSP).
- F) **Service Complaint:** events that may occur on a daily basis and are reported to the driver or dispatcher or other individuals involved with the daily operations, and are resolved within the course of a reasonable time period suitable to the complainant. For more

information, see the Local Coordinating Board's policy on Complaints, (elsewhere in the TDSP).

- G) **Formal Grievance** documents any concerns regarding the operation or administration of Transportation Disadvantaged services by the transportation operator, the Community Transportation Coordinator, the Designated Official Planning Agency, or the Local Coordinating Board. A formal grievance may also be a service complaint that has been left unresolved for more than 45 days. The formal grievance should demonstrate or establish their concerns as clearly as possible. Formal Grievances may include but are not limited to:
- Recurring or unresolved Service Complaints.
 - Violations of specific laws governing the provision of TD services i.e. Chapter 427 *F.S.*, Rule 41-2 *F.A.C.* and accompanying documents, Sunshine Law, Americans with Disabilities Act, (ADA;)
 - Coordination disputes;
 - Agency compliance; □ Conflicts of interest;
 - Supplanting of funds;
 - Billing and/or accounting procedures;
 - Policies of the Local Coordinating Board, particularly the Prioritization Policy.
- H.) **Administrative Hearing process:** Chapter 120, *Florida Statutes*.
- I.) **Ombudsman Program** means a toll-free phone number established and administered by the Commission for the Transportation Disadvantaged to enable persons to access information and /or file complaints or grievances regarding transportation services provided under the coordinated effort of the community transportation coordinator. See contact information for phone numbers.

Section 3: Objectives

- 3.1 The objective of the LCB's grievance process shall be to process, investigate and make recommendations in a timely manner on formal grievances that are not resolved between the grievant and the other party or parties. It is not the objective of the grievance process to have "adjudicative" or "determinative" powers.
- 3.2 The CTC and its service operators and other transportation subcontractors must post the contact person's name and telephone number regarding the reporting of complaints (and the reporting of grievances) in each vehicle.
- 3.3 The grievance procedures and all documents pertaining to the grievance process will be made available to the grieving party.
- 3.4 The grievance procedures and all documents pertaining to the grievance process will be made available, upon request, in a format accessible to persons with disabilities.
- 3.5 Other than this grievance process, aggrieved parties with proper standing may also have recourse through Chapter 120, *Florida Statutes*, the Administrative Hearing Process, or through the judicial court system.

Section 4: Membership

- 4.1 The local coordinating board's ad hoc grievance resolution committee shall be composed of a minimum of three (3) voting members or alternates of the LCB. Members shall be appointed to the ad hoc grievance resolution committee by the LCB chairperson or his/her designee. The ad hoc grievance resolution committee membership shall include a representative of users of the coordinated transportation system. The LCB chairperson or his/her designee reserves the right to make reappointments to the ad hoc grievance resolution committee should any conflicts of interest arise.
- 4.2 The LCB chairperson or his/her designee shall appoint one member of the ad hoc grievance resolution committee to serve as its chairperson.
- 4.3 The LCB chairperson's designee shall be a member of the TD planning staff from the planning agency. The TD planning staff serves as facilitators to the grievance process. Every effort shall be made by the participants of the ad hoc grievance resolution committee to conduct the process as diplomatically as possible.
- 4.4 In cases where a grievance involves the private or personal or professional interests of a member of the ad hoc grievance resolution committee, such member shall be disqualified from hearing such a grievance.
- 4.5 Local Coordinating Board members who represent affected agencies will be invited to grievance hearings as advisors.
- 4.6 No member of the Local Coordinating Board shall appear before the Grievance Committee as an agent or attorney for any person.

Section 5: Terms of Members

- 5.1 The members of the ad hoc grievance resolution committee shall serve at the pleasure of the LCB chairperson or his/her designee, for the duration of the grievance for which they are appointed.
- 5.2 The members of the ad hoc grievance resolution committee may be removed for cause by the LCB chairperson or his/her designee.
- 5.3 The quorum shall be a simple majority. Meetings shall be held at such times as the ad hoc grievance resolution committee may determine and/or as necessitated by the formally filed grievance.

Section 6: Grievance Procedures

- 6.1 Grievance procedures have been developed by the Local Coordinating Board, based upon guidelines from the Commission for the Transportation Disadvantaged.
- 6.2 The Local Coordinating Board's grievance procedures are for the purposes of listening to the grievance, providing advice and making recommendations to the affected parties of the grievance. The Local Coordinating Board may not exercise adjudicative powers. Aggrieved parties with

proper standing may also have recourse through Chapter 120, *Florida Statutes*, Administrative Hearing Process, or the judicial court.

- 6.3 When necessary, the designated official Planning agency's Transportation Disadvantaged Program staff shall provide assistance to individuals to prepare written grievances.
- 6.4 The formal grievance process shall be open to any person or agency wishing to address concerns involving: purchasing agencies, users, potential users, private for-profit operators, private nonprofit operators, the Coordinator, the Designated Official Planning Agency, elected officials, and drivers.
- 6.5 The administrators of the grievance process shall make every effort to ensure that the grieving party has exercised the other procedures in place, including the LCB's Complaint procedures or the CTC's internal complaints procedures for its subcontractors.

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

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

Section 7: Filing the formal grievance

- 7.1 The grievant should demonstrate or establish their concerns as clearly as possible. The grievance should try to demonstrate or establish a clear violation of a specific law, regulation, or contractual arrangement. Copies of pertinent laws and regulations may be obtained from the Designated Official Planning Organization's Transportation Disadvantaged Program staff.
- 7.2 The grievance must be filed to the Grievance Committee within ninety (90) days after the occurrence of the event giving rise to the grievance. The grievance shall be sent to:

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

- 7.3 The grievance shall include:
 - a. the name and address and telephone number of the grievant; They do not have to have an address or phone in order to file a grievance, but they need a place which will receive mail for them, and a phone where we may contact them.
 - b. a statement of the grounds for the grievance, supplemented by supporting documentation, made in a clear and concise manner. This shall include a description of the efforts taken by the grievant to resolve the issue; and
 - c. an explanation by the relief desired by the grievant.

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

- 7.4 The date the formal grievance containing items a, b, and c, above is received in writing shall be the date the formal grievance was filed.
- 7.5 Upon receipt of the formal grievance, the designated official planning agency transportation disadvantaged planning staff will have 10 working days to contact the grievant by telephone*, to discuss the materials received, and ask for additional information which may be necessary in order to file the grievance. (* when the designated official planning agency makes or attempts to make these telephonic contacts, they will enter records of the calls into a log for that grievance.)
- 7.6 If the designated official planning agency transportation disadvantaged planning staff is unable to establish contact by telephone within the 10 working days; they will write a letter to the grievant, and send it by certified mail to the grievant. The letter will indicate that the formal grievance has been received, and that telephonic contact was unsuccessful, and that the grievance has either been filed, or that additional information is necessary in order to file the grievance.
- 7.7 The designated official planning agency will have 10 working days from the date the grievance was filed to contact the Chairperson of the LCB, by telephone to inform of the receipt of the formal grievance, and proceed with the selection of the ad hoc grievance resolution committee. If the chairperson is not available, the DOPA staff may then contact the Vice-Chairperson.
- 7.8 The designated official planning agency will have ten 10 working days from the date the grievance was filed to contact the CTC (if the grievance involves the CTC) to inform that a formal grievance has been filed.
- 7.9 The designated official planning agency will have 10 working days from the date the LCB chair was contacted about the grievance [in Section 7.7] to contact members of the LCB to establish the membership of the ad hoc grievance resolution committee. Pursuant to Section 4.2 of this Process, the chairperson of the ad hoc grievance resolution committee will be established at this time.
- 7.10 After the designated official planning agency has received an agreement to serve as a member of the ad hoc grievance resolution committee from the sufficient amount of LCB members, the designated official planning agency will have ten 10 working days to set up a meeting to mediate the grievance. The grievant, the chairperson of the ad hoc grievance resolution committee, and the designated official planning agency staff will attend the mediation. (The CTC will be included in this meeting, if the grievance involves the CTC.)
- 7.11 After the mediation meeting, the DOPA shall prepare a report regarding the meeting outcome. The report shall be sent to the grievant, the LCB chairperson, and the chairperson (and all members) of the ad hoc grievance resolution committee within 10 working days of the date of the meeting.
- 7.12 The Chairperson of the ad-hoc Grievance Committee or DOPA staff will check with the grieving party in 10 working days, to determine whether they are resolved.
- 7.13 If mediation is successful, the grievance is closed.

Section 8: If Mediation is not successful:

- 8.1 If the grievance is not resolved through mediation the grievant may request in writing that their grievance be heard by the ad hoc grievance resolution committee. The grievant has 10 days from

their receipt of the report (mentioned in Section 7.11) to notify the chairperson of the ad hoc grievance resolution committee through the DOPA.

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

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

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

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

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

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

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

A. Call to Order;

B. Presentation of Grievance;

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

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

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

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

E. Close meeting.

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

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

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

- 10.1 If the grievance is not resolved through the meeting of the ad hoc grievance resolution committee, the grievant may request in writing that their grievance be heard by the local coordinating board. This request shall be sent to the Chairperson of the Local Coordinating Board, through the designated official planning agency, and must be made within 10 working days of their receipt of the ad hoc grievance resolution committee's report (in Section 9.5) Immediately following the meeting of the ad hoc grievance resolution committee, the grievant may make their request that their grievance be heard by the Local Coordinating Board, however, the time frame will "wait" until the ad hoc grievance resolution committee's report is prepared and received, as described in 9.5.
- 10.2 The Local Coordinating Board chairperson shall have 15 working days to set a meeting date. Members of the Local Coordinating Board shall have at least 10 working days notice of such meeting. The meeting of the local coordinating board shall be advertised appropriately (14 days in advance).
- 10.3 The grievance shall be presented at the meeting of the local coordinating board. The Local Coordinating Board will follow a meeting agenda in accordance with the procedures herein set forth:
 - A. Call to Order;
 - B. Presentation of Grievance;
 1. Presentation of Grievance by Grievant, which will also include witnesses, if applicable
 2. Response of concerned parties, which will include witnesses, if applicable.
 - C. Discussion of grievance, which shall take place in accordance with Roberts Rules of Order amongst the Local Coordinating Board, staff, the grievant and other interested parties. Discussion shall focus solely on the grievance as filed by the grievant;
 - D. Following discussion of the grievance, the Local Coordinating Board may submit a recommendation to the appropriate parties in response to the grievance; and
 - E. Close meeting.
- 10.4 The results, findings and recommendations of the LCB shall be outlined in a final report to be completed within 10 working days of the meeting. The report shall be forwarded to the grievant, members of the Local Coordinating Board, the Community Transportation Coordinator, and all other persons/agencies directly involved in this grievance process.
- 10.5 If the grievance has not been resolved through these LCB procedures, the grievant may request that their grievance be heard by the Commission for the Transportation Disadvantaged.

Section 11: Prohibition against Retaliation

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

Appeals to the Commission for the Transportation Disadvantaged

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

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

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

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

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

LEE COUNTY LCB GRIEVANCE RESOLUTION CONTACTS

ENTITY	CONTACT INFORMATION	PHONE
Community Transportation Coordinator	Dominic Gemelli, Transit Director Lee County Transit - LeeTran	Customer Service: (239) 533-0300 Reservations: (239) 533-0300
Lee County MPO -- Designated Official Planning Agency	Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220

Local Coordinating Board Chairperson	Hon. Jessica Cosden Raimondo Lee Metropolitan Planning Org. 815 Nicholas Pkwy, Cape Coral, FL 33915	(239) 244-2220
		c/o Mr. Brian
Commission for the Transportation Disadvantaged	Ombudsman Hotline	(800) 983-2435
		TDD (800) 648-4084

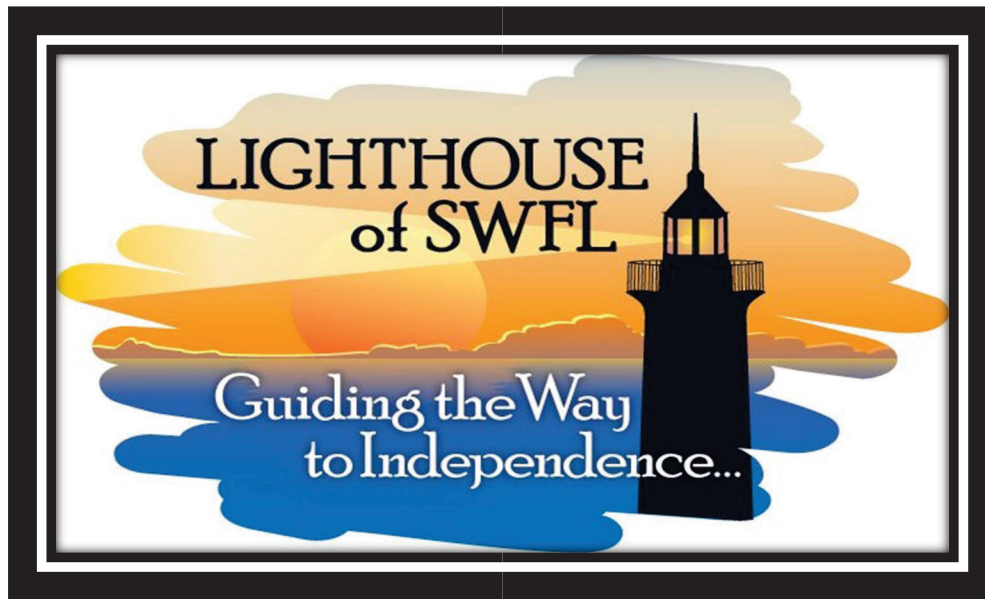
The Community Transportation Coordinator will perform an annual evaluation of contracted operators ensuring compliance with the System Safety Program Plan, locally approved standards, Commission for the Transportation Disadvantaged standards, annual operating data and insurance requirements.

15. Coordination Contract Evaluation Criteria

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

B. Cost/Revenue Allocation and Rate Structure Justification

LeeTran's rate model is shown in *Exhibit F*.



III. QUALITY ASSURANCE

A. ANNUAL EVALUATION OF THE COMMUNITY TRANSPORTATION COORDINATOR

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

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

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

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

DOPA planning staff is responsible for providing the committee with the materials needed to conduct the evaluation. This includes gathering documents such as the annual operating reports, previous evaluation reports, system safety plan reports, lists of contacts, and other documents from the CTC.

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

Planning staff and the CTC also work together on preparing the blank evaluation booklet for the committee to use. Planning staff locates the last evaluation report and updates it so that the previous year contains the

most current information, and the evaluation year is blank. Planning staff also locates the most current reports with recommendations and accompanying status reports, and updates the blank evaluation report in those sections.

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

The Evaluation Committee makes use of several resources in order to conduct the Evaluation. These resources include standardized worksheets and reports from the Commission for the Transportation Disadvantaged; material from different sections of the TDSP, including the goals and objectives and standards and policies, and passenger surveys compiled by the CTC, and previous evaluations.

Committee members and Planning staff conduct interviews with the CTC's staff to complete the Worksheets. Then the Committee evaluates the CTC based on the findings obtained during these interviews. The Committee communicates findings, suggestions, and develops recommendations which are forwarded through planning staff to the LCB as draft final report.

The Draft Evaluation Report contains findings, suggestions and recommendations. These are distributed to the Local Coordinating Board, for its review and approval. If the LCB has additional recommendations, planning staff adds these to the Report, and then Planning staff sends the LCB's approved evaluation report on the Coordinator to the CTD, and uses the recommendations to prepare the annual update of the Transportation Disadvantaged Service Plan.

EXHIBIT A

LEE COUNTY'S COMMUNITY TRANSPORTATION COORDINATOR DESIGNATION MEMORANDUM OF AGREEMENT TD2112

Contract # TD2112

Effective: 7/01/2021 to 6/30/2026

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 Lee County Board of County Commissioners, 3401 Metro Parkway, Ft Myers, FL 33901 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 Lee county(ies), and hereafter referred to as the "Coordinator."

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

The Parties Agree:

I. The Coordinator Shall:

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

E. Accomplish this Project by:

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

F. Comply with Audit and Record Keeping Requirements by:

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

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

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

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

P. Comply with other requirements as follows:

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

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

II. The Commission Shall:

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

III. The Coordinator and the Commission Further Agree:

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

F. Notice and Contact:

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

Mr. Robert L. Codie III, LeeTran
3401 Metro Parkway, Ft. Myers, Florida 33901

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:

Lee County Board of County Commissioners
Agency Name

David Darm
Printed Name of Authorized Individual

Printed Name of Authorized Individual

Signature: _____

Signature: _____

Title: Executive Director

Title: _____

**TRANSPORTATION
DISADVANTAGED
TRANSPORTATION PROGRAM
ELIGIBILITY APPLICATION**

EXHIBIT D

ANNUAL SAFETY CERTIFICATION



**Lee County Transit Annual Certification Requirement per
14-90.010 Bus Transit System Operational Standards Certification**

In accordance with Florida Rule Chapter 14-90.004 Bus Transit System Operational Standards, specifically subchapter 14-90-010 Certification, as amended, the following certifications are provided to the Florida Department of Transportation.

The following certifications are submitted this **February 14, 2025**, for the prior calendar year period commencing January 1, 2024.

It is hereby certified that:

Lee County Transit, operating as LeeTran has adopted a Transit Bus System Safety Program Plan (SSPP) in accordance with the established standards set forth in Florida Rule Chapter 14-90.004 Bus Transit System Operational Standards and has adopted a Security Plan.

Lee County Transit complies with the requirements provided and adopted in the LeeTran Transit System Safety Program Plan (SSPP) and Security Plan.

Lee County Transit certifies the performance of safety inspections on all buses operated by the Lee County transit system in accordance with Florida Rule Chapter 14-90.004 Bus Transit System Operational Standards, as may be amended.

Lee County Transit certifies that a review of the Lee County Transit System Safety Program Plan (SSPP) and Security Plan is conducted periodically to ensure that the program plans remain in compliance.

This certification is provided by Lee County Transit which has performed the required bus safety inspections.

**Lee County Transit - LeeTran
3401 Metro Parkway
Fort Myers, Florida 33901**

The following certification is provided on behalf of Lee County Transit – LeeTran, by its Director who is directly responsible for the management of the bus transit system and attests to this agency's compliance with Florida Rule Chapter 14-90 Bus Transit System Operational Standards for Bus Transit Systems, as amended.

Date 2/11/25

Signed 
Dominic Gemelli, Director
Lee County Transit - LeeTran

EXHIBIT E

SERVICE COMPLAINT FORM

EXHIBIT F

RATE STRUCTURE

SECTION V: Rate Calculations for Multiple Services:

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

		RATES FOR FY: 2021 - 2022			
		Ambul	Chair	Stretcher	Group
Contracted Passenger Miles (excluding totally contracted services addressed in Section II) =	327,346	264,137	63,209	Leave Blank	Leave 0
Rate per Passenger Mile =		\$3.23	\$5.54	\$0.00	\$0.00
				per patient	per group
Contracted Passenger Trips (excluding totally contracted services addressed in Section II) =	27,993	22,183	5,804	Leave Blank	Leave Blank
Rate per Passenger Trip =		\$37.45	\$64.20	\$0.00	\$0.00
				per patient	per group

2. If you answered #1 above and want a COMBINED Rate per Trip **PLUS** a per Mile add-on for 1 or more services,...

		Combination Trip and Mile Rate			
		Ambul	Chair	Stretcher	Group
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =				Leave Blank	Leave \$0.00
Rate per Passenger Mile for Balance =		\$3.23	\$5.54	\$0.00	\$0.00
				per patient	per group

Rate per Passenger Mile =

Rate per Passenger Trip =

Rates If No Revenue Funds Were Identified As Subsidy Funds				
Ambul	Wheel Chair	Stretcher	Group	
\$3.38	\$5.80	\$0.00	\$0.00	\$0.00
			per patient	per group
Ambul	Wheel Chair	Stretcher	Group	
\$39.19	\$67.19	\$0.00	\$0.00	\$0.00
			per patient	per group
Program These Rates Into Your Medicaid Encounter Data				