

OKALOOSA



COUNTY

TRANSPORTATION DISADVANTAGED SERVICE PLAN (TDSP) *FY 2022 – 2026*

(THE COORDINATED PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION PLAN)



Adopted by the Okaloosa County TD Coordinating Board
August 24, 2022
Update Approved May 9, 2023



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TABLE OF CONTENTS

Local Coordinating Board Membership Certification	5
Roll Call Voting Sheet	6
General Information	7
DEVELOPMENT PLAN	9
INTRODUCTION TO THE SERVICE AREA	9
Background of the Transportation Disadvantaged Program	9
Community Transportation Coordinator Designation Date/History	9
Organization Charts	10
Consistency Review of Other Plans	10
Local Government Comprehensive Plans	10
Regional Policy Plan	14
Transit Development Plan	16
Commission for the Transportation Disadvantaged 5Yr/20Yr Plan	16
Okaloosa-Walton TPO Long Range Transportation Plan	17
Transportation Improvement Program	17
Public Transportation Project Priorities	17
Public Participation	18
SERVICE AREA PROFILE/DEMOGRAPHICS	18
Service Area Description	19
Demographics	19
SERVICE ANALYSIS	23
Forecasts of Transportation Disadvantaged Population	23
Needs Assessment	25
Barriers to Coordination	26
GOALS, OBJECTIVES AND STRATEGIES	26



TABLE OF CONTENTS CONTINUED

IMPLEMENTATION SCHEDULE	28
VEHICLE REPLACEMENT PLAN	29
SERVICE PLAN	30
OPERATIONS	30
Type, Hours and Days of Service	30
Accessing Services	30
Transportation Operators and Coordination Contractors	31
Public Transit Utilization	31
School Bus Utilization	31
Vehicle Inventory	31
System Safety Program Plan Certification	32
Intercounty Services	32
Emergency Preparedness and Response	32
Educational Efforts/Marketing	32
Acceptable Alternatives	32
Service Standards	32
Local Complaint and Grievance Procedure/Process	37
CTC Monitoring Procedures of Operators and Coordination Contractors	38
Coordination Contract Evaluation Criteria	38
COST/REVENUE ALLOCATION & RATE STRUCTURE JUSTIFICATION	39
QUALITY ASSURANCE	40
Community Transportation Coordinator Evaluation Process	40
APPENDICES LIST	41
A. Memorandum of Agreement between CTD and CTC	42
B. Transportation Disadvantaged Program Concept Chart	44
C. Organization Charts	46
D. Paratransit Vehicle Inventory	48
E. Safety System Program Plan (SSPP) Certifications	49
F. Glossary of Terms	51-59
G. Santa Rosa County Rider Survey Results & Comparisons	61-62
H. Santa Rosa County Rider Survey Comments	64-66
I. CTC Evaluation	68-84
J. Rate Model Worksheets	86-93



**COORDINATING BOARD MEMBERSHIP CERTIFICATION
OKALOOSA COUNTY, FLORIDA**

NAME: OKALOOSA-WALTON TRANSPORTATION PLANNING ORGANIZATION

ADDRESS: P. O. Box 11399, Pensacola, FL 32524

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

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

REPRESENTATION	MEMBER	ALTERNATE	TERM
(1) Chair (Elected Official & Vice Chair)	Nathan Boyles	Yvonne Earle	
(2) Florida Department of Transportation	Toni Prough	Zachary Balassone	
(3) Department of Children and Families	Melissa Sidoti	Dorothea Jones	
(4) Local Public Education	Jay McInnis	Timothy Duffy	
(5) Florida Department of Education	Lelia Trippe	Scott Solomon	
(6) Veterans Services	Beatrice Love-Moore	Vacant	
(7) Community Action	Briley Kennedy	Aubrey Robbie	
(8) Elderly	Vacant	Vacant	
(9) Disabled	Vacant	Vacant	
(10) Citizen Advocate/User	Pedro Rodriguez	Vacant	2022-2025
(11) Citizen Advocate	Yvonne Earle	Vacant	2022-2025
(12) Children at Risk	Vacant	Vacant	
(13) Mass/Public Transit	N/A	N/A	
(14) Department of Elder Affairs	Sharon Searcy	Anna Dyess	
(15) Private Transportation Industry	Donna Morgan	Vacant	2022-2025
(16) Agency for Health Care Administration	John Vinski	Agency Staff	
(17) Agency for Person with Disabilities	Annette Zeeb	Dwayne Jones	
(18) Workforce Development Board	Will Miles	Michele Burns	
(19) Local Medical Community	Vacant	Vacant	

SIGNATURE: 

TITLE: O-W TPO Chairman

DATE: 6/15/2023

OKALOOSA Membership Certification 2023-2024



Local Coordinating Board – Roll Call Vote

The Local Coordinating Board for **Okaloosa County** hereby certifies that the rates contained in the **Okaloosa County Transportation Disadvantaged Service Plan (TDSP)** have been thoroughly reviewed and approved.

Okaloosa County Transportation Disadvantaged Service Plan annual update was reviewed and approved by this Board at an official meeting held on **May 9, 2023**.

5/09/2023

Date

Nathan Boyles, Chairman

Approved by the Commission for the Transportation Disadvantaged:

Date

Executive Director

Okaloosa County Transportation Disadvantaged Service Plan Local Coordinating Board for Okaloosa County – Roll Call Vote

Representation	Member	Meeting Attendance		Approval Vote		
		Present	Absent	Yes	No	Abstain
(1) Chair (Elected Official)	Nathan Boyles	X		X		
(2) Florida Department of Transportation	Toni Prough		X			
(3) Department of Children and Families	Melissa Sidoti	X		X		
(4) Local Public Education	Jay McInnis		X			
(5) Florida Department of Education	Lelia Trippe		X			
(6) Veteran Services	Beatrice Love-Moore	X		X		
(7) Community Action	Briley Kennedy	X		X		
(8) Elderly	Vacant		---			
(9) Disabled	Vacant		---			
(10) Citizen Advocate/User	Pedro Rodriguez		X			
(11) Citizen Advocate	Yvonne Earle	X		X		
(12) Children at Risk	Vacant		---			
(13) Mass/Public Transit	N/A		---			
(14) Department of Elder Affairs	Sharon Searcy	X		X		
(15) Private Transportation Industry	Donna Morgan		X			
(16) Agency for Health Care Administration	John Vinski	X		X		
(17) Agency for Person with Disabilities	Dwayne Jones	X		X		
(18) Workforce Development Board	Will Miles	X		X		
(19) Local Medical Community	Vacant		---			



General Information

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

Federal Transit Administration (FTA) programs through authorizing legislation that amends Chapter 53 of Title 49 of the U.S. Code President Obama signed the [Fixing America's Surface Transportation \(FAST\) Act](#), reauthorizing surface transportation programs through Fiscal Year 2020 and extended until FY21. The American Rescue Plan Act of 2021 (ARP), which President Biden signed on March 11, 2021, includes \$30.5 billion in [federal funding](#) to support the nation's public transportation systems as they continue to respond to the COVID-19 pandemic and support the President's call to vaccinate the U.S. population. Federal transit law requires that projects selected for funding under the [Enhanced Mobility for Individuals and Individuals with Disabilities \(Section 5310\) Program](#) be "included in a locally developed, coordinated public transit-human services transportation plan," and that the plan be "developed and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private, and nonprofit transportation and human services providers and other members of the public" utilizing transportation services. These coordinated plans identify the transportation needs of individuals with disabilities, older adults, and people with low incomes, provide strategies for meeting these needs, and prioritize transportation services for funding and implementation. Florida's Transportation Disadvantaged Service Plan is developed through the input of Local Coordinating Boards whose membership includes citizens, public transportation, and human service providers. In addition to being a statutory requirement of Chapter 427, the Transportation Disadvantaged Service Plan may also be used to satisfy this federal requirement.

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

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

The Planning Agency is responsible for ensuring that the Transportation Disadvantaged Service Plan is completed, approved and signed by the Local Coordinating Board.

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



The general information provided in this section is from the Florida Commission for the Transportation Disadvantaged Instruction Manual for the Memorandum of Agreement and the Transportation Disadvantaged Service Plan 2007/2008 (Rev. November 2007).

According to Florida Statutes [ss 427.011(1)], Transportation Disadvantaged (TD) persons are defined as “those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, shopping, social activities, or children who are handicapped or high-risk or at risk as defined in s. 411.202.”

The primary goal of community transportation is to provide people with access to places for work, medical care, and shopping so that they can live vital, productive and rewarding lives. It is easy to take such access for granted in our society, yet the lack of transportation resources is a major barrier for many people who are unable to drive or do not have access to a car and must depend on friends or family to help them meet their basic daily needs. The inability to travel often leads to isolation, withdrawal from society and neglect of medical needs.

The Okaloosa County Transportation Disadvantaged Service Plan (TDSP) addresses the needs of elderly, disabled or economically disadvantaged people in Okaloosa County and reflects a careful review of various data, travel patterns, policies, agency responsibilities and funding to define a five-year detailed implementation plan (which is updated annually) to help meet those needs.

The TDSP is comprised of three parts:

Development Plan – identifies long term goals and objectives for the local program based on data provided. The goals and objectives offer accountability and opportunities to implement strategies to address the needs and gaps of local transportation for the disadvantaged.

Service Plan – identifies the operational and administrative structure as it exists today.

Quality Assurance – describes the methods utilized to evaluate the services provided by the Community Transportation Coordinator (CTC), transportation providers, and the Planning Agency. This section also discusses the local service standards established by the coordinating board that are used to monitor and evaluate the effectiveness of the system.

The TDSP is developed in accordance with Florida Law and Title VI of the Civil Rights Act of 1964, which prohibits discrimination in public accommodation on the basis of race, color, religion, sex, national origin, handicap, or of marital status. Persons believing they have been discriminated against on these conditions may file a complaint with the Florida Commission on Human Relations at 850-488-7082 or 800-342-8170 (voice messaging).



Development Plan

INTRODUCTION TO THE SERVICE AREA

The preparation and development of a Transportation Disadvantaged Service Plan (TDSP) provides agencies, coordinators, planners and citizens with a blueprint for coordinated service, a framework for service performance evaluation and a means to project vision in the transportation disadvantaged services for the future. A strategic approach has been used to develop this TDSP. First, an evaluation of the current strengths and weaknesses of the service area is accomplished. This includes compiling a database of demographics and existing conditions, and reviewing TD related plans and service providers. This will answer the question: Where are we? Secondly, there is an in-depth assessment of the goals and objectives, which will provide direction and answer the question: Where do we go from here? This is accomplished by reviewing the supply and demand of services and funding provided. An evaluation of existing services versus TD needs and demands is undertaken using a transportation service supply and condition approach. Thirdly, we answer the question: How do we get where we want to go from where we are? This is accomplished by developing a plan to achieve the service area's goals while building on the strengths and eliminating the weaknesses.

Background of the Transportation Disadvantaged Program

The State of Florida is a recognized leader of providing coordinated human services transportation for individuals that are transportation disadvantaged. In 1989, a major commitment to mobility in the State of Florida was formalized when the legislature revised Chapter 427 Florida Statutes (F.S.) creating the Florida Coordinated Transportation System (FCTS) and a dedicated funding source. The FCTS includes the Commission for the Transportation Disadvantaged (CTD); Designated Official Planning Agencies (DOPA); Community Transportation Coordinators (CTC); Local Coordinating Boards (LCB); Transportation Operators (TO); purchasing and funding agencies/entities; and most importantly, those in need, the Transportation Disadvantaged (TD). Chapter 427 defines TD persons as those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation. The legislation also includes children who are "high-risk" or "at-risk" of developmental disabilities.

The local organization providing the coordination is Okaloosa County Board of County Commissioners and the operational services for Okaloosa County is provided by Okaloosa County Transit. They have been instrumental in providing transportation disadvantaged services to the community since 1987. A history of how Okaloosa County Transit came to provide services in Okaloosa County is discussed in the following section.

Community Transportation Coordinator Designation Date/History

Okaloosa County Coordinated Transportation, Inc. began service the summer of 1987 as a project of the Okaloosa County Council on Aging, Inc. After being designated as the Community Transportation Coordinator (CTC) by the Commission for the Transportation Disadvantaged, Okaloosa County Coordinated Transportation, Inc. staff gathered data from the agencies mandated to participate in coordination in order to plan and develop a coordinated transportation system.

In 1990, the Ft. Walton Metropolitan Planning Organization (now the Okaloosa-Walton Transportation Planning Organization) recommended and the Commission for Transportation Disadvantaged officially designated Okaloosa County Coordinated Transportation, Inc. as the Community Transportation Coordinator (CTC) for Okaloosa County.



In 2003, the Okaloosa County Board of County Commissioners (BCC) assumed the role as CTC in order to better coordinate the county transit system with transportation disadvantaged services. Okaloosa County BCC completed an Invitation to Negotiate in 2018, selecting MV Transportation, Inc as their contract operator for Fix Route and Dial-A-Ride. MV began providing service January 1, 2019. Okaloosa County BCC was again selected as the CTC in 2022 and are serving in that role for a five year period from July 1, 2022 to June 30, 2027.

Organization Charts

Organizational charts have been included in the appendices. The charts identify those involved in the provision of service, from the Commission for the Transportation Disadvantaged, through the local Coordinating Board, to the Community Transportation Coordinator and the Planning Agency, and to the consumers. The Transportation Disadvantaged Program Concept Chart and the CTC Organization Chart are located in the Appendices.

Consistency Review of Other Plans

The Transportation Disadvantaged Service Plan is consistent, where applicable, with local government Comprehensive Plans, Regional Policy Plans, Transit Development Plans, Commission for the Transportation Disadvantaged 5Yr/20Yr Plan, MPO Long Range Transportation Plans, and Transportation Improvement Programs.

This section summarizes and reviews all relevant previous plans, studies and documents pertaining to the Transportation Disadvantaged program in the service area. The following plans have been found to be relevant and are summarized and reviewed here. They are:

- Local Government Comprehensive Plans
- Regional Policy Plan
- Transit Development Plan
- Commission for the Transportation Disadvantaged 5yr/20Yr Plan
- Long Range Transportation Plan
- Transportation Improvement Program
- Public Transportation Project Priorities

Local Government Comprehensive Plans

Local governments located within Okaloosa County that have a comprehensive plan that addresses public transportation are as follows: (1) Okaloosa County, (2) Crestview, (3) Destin, and (4) Fort Walton Beach. Public transportation for the other municipalities (Cinco Bayou, Laurel Hill, Mary Esther, Niceville, Shalimar, and Valparaiso) is inclusive under the Comprehensive Plan of Okaloosa County.

Okaloosa County (2009)

The TDSP is consistent with the following items from the Comprehensive Plan of Okaloosa County. The transportation section of the Okaloosa County Comprehensive Plan covers Cinco Bayou, by reference.

Transportation

Goal 1: Provide a safe, economic and efficient transportation system that maximizes the mobility of people and goods.

Objective 1.1: Develop a Long Range Transportation Plan that identifies multi-modal and intermodal transportation facilities that will function as an integrated system and address the mobility needs of the area.

Policy 1.1.2: Participate in the development of the Five Year Transit Development Plan especially in the establishment of numerical indicators against which the achievement of the mobility goals of the community can be measured, such as modal split, annual transit trips per capita, and automobile occupancy rates.



Objective 1.7: Maintain and improve access to important regional facilities including airports, educational facilities, parks, historical and recreational areas and military installations.

Policy 1.7.1: Coordinate roadway and transit service improvements with the Okaloosa County Airport Master Plan, the Fort Walton Beach MPO, the FDOT 5-Year Transportation Plan, and the Continuing Florida Aviation System Plan (CFAST) to ensure that future transportation access needs of the County's airport facilities are met.

Policy 1.7.2: Promote the implementation of the Ft. Walton Beach Urbanized Area MPO 202 Plan as it relates to roadway improvements improving access to major attractors in Okaloosa County, including airports and other related public transportation facilities.

Policy 1.7.3: Ensure that the Five Year Transit Development Plan includes strategies to address motorized and non-motorized access to all major attractors in Okaloosa County, including intermodal terminals and access to aviation and rail facilities.

Goal 2: Provide an energy efficient transportation system.

Objective 2.2: Reduce energy consumption by promoting actions to increase the occupancy of vehicles [e.g., ridesharing, mass transit, High Occupancy Vehicles (HOV) lanes or to reduce travel demand].

Goal 3: Provide a transportation system in harmony with environmental, social, economic and aesthetic features of the area.

Objective 3.2: Encourage accessible public transportation for the transportation disadvantaged through coordination of local social service transportation.

Policy 3.2.1: Continue to support the provision of transportation disadvantaged by the designated provider.

Policy 3.2.2: Coordinate plans for transportation-disadvantaged services with the development of the Five-Year Transit Development Plan as updates are completed.

Goal 4: Provide a transportation system that optimizes preservation and efficiency of existing transportation facilities.

Objective 4.1: Minimize the need for construction of new highways through development of a Congestion Management System and identification of strategies to reduce travel demand, encourage alternative modes of travel and implement traffic operations improvements.

Policy 4.1.3: Support and promote public awareness campaigns that focus attention on the societal and environmental impacts and costs of travel choices, and that make people aware of the range of travel choices available. Make information available at all county office on any commuter assistance programs, public transit, the coordinated transportation system program, and any bicycle/pedestrian programs endorsed by the County.

NOTE: On March 24, 2014, TPO staff met with Okaloosa County staff, representatives from the municipalities within Okaloosa County, and FDOT to discuss a long term financial plan and a plan for more of a coordinated effort at the local level supporting planning, programming, policy development, operations, maintenance and further overall development of the transit system. Discussions included the idea of developing a Transit Cooperative Board, for interested municipalities within Okaloosa County, in order for each to contribute funding to the transit system as well as to have input in decisions regarding the system.



The TDSP is consistent with the following items from the Comprehensive Plan of the City of Crestview.

Transportation Element

Goal 8.A: Provide a safe, cost effective and functional roadway and transportation system for all residents and visitors to the City of Crestview.

Objective 8.A.1: Continually provide for safe, convenient, efficient and cost effective motorized and non-motorized traffic circulation with the City upon adopted of this Ordinance.

Policy 8.A.1.9: In cooperation with the MPO, participate in the development of the “Five Year Transit Development Plan” with emphasis on the establishment of numerical indicators against the mobility goals of the City can be measures, such as modal split, annual transit trips and automobile occupancy rates.

Policy 8.A.1.10: Continue to support the Okaloosa County Coordinated Transportation Program, the WFRPC’s Park and Ride program, and the County’s “WAVE” public transit system. Also, the City will continue its active participation with the MPO and the development of its Congestion Management System Plan in order to increase use of alternatives to single occupancy vehicles, alter trip patterns and improve traffic flow, among other things.

Policy 8.A.1.12: As part of the 2008 Evaluation and Appraisal Report Amendments, the City will adopt congestion management system goals, objectives and policies in the form of a multi-modal transportation district (MMTD) in coordination with the FDOT, TPO and Okaloosa County. The MMTD district will be implemented through policies including but not limited to providing for improvements to the Okaloosa County “WAVE” public transit system including placing transit facilities within an appropriate radius from residential development along SR 85 in the City’s boundaries; requiring the City to work with the TPO, Okaloosa County and the Eglin AFB to create opportunities for workforce commuter service to include identification of feasible park and ride locations; requiring all new residential developments to promote the use of workforce commuter service to residents employed by the AFB; working with the AFB, Okaloosa County, FDOT and the TPO to promote use of the workforce commuter service.

Objective 8.A.2: Maintain the design function of roadways for present and future residents upon adoption of this Ordinance.

Policy 8.A.2.4: The City shall update its concurrency management system to allow for the implementation of its proportionate fair share ordinance and generation of funds from permitted development. The City shall dedicate a portion of these proportionate fair share funds to the completion of a comprehensive long-range transportation plan, implementation of any express transit service between Crestview and Eglin AFB, and for funding short term improvements to relieve congested facilities.

Goal 13.A: Provide coordination of this plan (ordinance) with Okaloosa County, other local government (as appropriate) and other governmental agencies providing services within the City.

Objective 13.A.1: To review, on an annual basis, actions that have taken place to coordinate the Comprehensive Plan of Crestview with the Plans of other units of government and the Okaloosa County School Board.

Policy 13.A.2.8: The City shall coordinate with Okaloosa County, the Emerald Coast Regional Council (ECRC), the Okaloosa-Walton Transportation Planning Organization, Ride On Commuter Services, FDOT, and Eglin AFB (and other military installations in the region) to plan and implement express transit service between park-and-ride locations in Crestview and Eglin AFB (and between Crestview and other military installations if feasible). The City will also participate in regional efforts to develop and implement other transportation demand management strategies to reduce peak travel demand on SR 85.

NOTE: In July 2012, the Crestview City Council voted to begin amending the city’s comprehensive plan to drop transportation concurrency thereby eliminating the proportionate fair share that would generate funds from permitted development that would go towards funding the express transit service between Crestview and Eglin AFB.



The TDSP is consistent with the following items from the Comprehensive Plan of the City of Destin.

Section 2-1: Transportation Goals, Objective and Policies.

The purpose of this element is to establish the desired and projected transportation system within the City of Destin and to plan for future motorized and non-motorized transportation systems. Future transportation systems are supported by the data inventory and analysis of existing and project transportation conditions, and by the goal, objectives and policies of this element.

Goal 2-1: Multimodal Transportation System. Develop an efficient, high quality, multimodal transportation system that balances community circulation needs with regional travel demand.

Objective 2-1.3: Adopt A Multimodal Transportation District. The City shall implement a multimodal transportation district (MMTD) that allows for a more balanced approach to designing the City's transportation system. Rather than focusing solely on increasing roadway capacity to meet the needs of future development, the MMTD shall decrease the emphasis on automobile mobility and help reduce vehicle miles of travel per person while promoting accessibility by all modes through redevelopment of the built environment and improvement of cycling, pedestrian, and transit networks. While the operations of the existing road network will be maintained and enhanced with strategic new connections, reconstruction, and widening projects as appropriate, investment in sidewalks, cycling facilities, and transit service will be significantly increased. Urban design standards shall ensure that development is designed to be integrated and accessible, encouraging increased use of non-auto forms of transportation.

Policy 2-1.3.3: Design Development to be Supportive of Multimodal Transportation. On-site multimodal transportation infrastructure to provide connections to public sidewalks, cycling facilities, transit stops, buildings, parking and adjacent land uses. Shade trees, lighting, street furniture, and other amenities along sidewalks and at transit stops to improve the design and accessibility on the on-site multimodal transportation infrastructure.

Policy 2-1.3.4: Expand Pedestrian and Cycling infrastructure. The City shall enhance the existing pedestrian and cycling network through filling gaps in the network and providing new pedestrian and cycling facilities throughout the city. These facilities shall provide a continuous pedestrian and cycling network between residential areas, the Community Redevelopment Areas (CRA), and transit connections.

Policy 2-1.3.5: Expand and Enhance Transit Coverage and Service. The City shall continue to coordinate with Okaloosa County and provide financial support through a local match to Okaloosa County Transit to extend service coverage to the north of Harbor Boulevard/Emerald Coast Parkway and expand the existing service to Harbor Boulevard/Emerald Coast Parkway to year-round operation at 20-minute headways for 14 hours of service per day. The City shall coordinate with Okaloosa County on future updates of the Transit Development Plan to ensure continued enhancement of transit service within the City. Each development shall contribute towards establishing transit stops at a maximum of ¼-mile spacing on Harbor Boulevard/Emerald Coast Parkway through dedication of right-of-way or provision of infrastructure; creating an unobstructed, paved path between an existing or planned transit stop and the development; and providing a financial contribution towards the costs of expanding transit service coverage. The city shall also encourage the implementation of private shuttle services as a component of planned development.

Section 3-1: Housing Goals, Objectives, and Implementing Policies.

Goal 3-1: Quality Residential Environment. Allocate land area to accommodate a supply of housing responsive to the diverse housing needs of the existing and projected future population and assist the private sector in providing affordable quality housing in neighborhoods protected from incompatible uses and served by adequate public facilities.

Objective 3-1.9: Coordinate Housing Type and Location with Transportation Programs. Land use and transportation planning shall be coordinated to assure that affordable housing, higher density housing, and housing for special groups are accessible to future public transportation programs or transit systems.

Policy 3-1.9.2: Transportation Programs. The City shall make available information and brochures regarding any transportation programs available to the elderly, disabled, or transportation disadvantaged by



Okaloosa County, the Okaloosa-Walton Transportation Planning Organization, or the Emerald Coast Regional Council.

Section 8-1: Intergovernmental Coordination Goals, Objectives, and Implementing Policies.

Goal 8-1: Provide for Improved Intergovernmental Coordination. The City of Destin shall undertake actions necessary to establish governmental relationships designed to improve the coordination of public and private entities involved in development activities, resource conservation, and growth management, including the achievement of consistency among all government agencies implementing plans and programs affecting the City.

Objective 8-1.1: Intergovernmental Coordination Activities. The City shall review, on an annual basis, actions it has taken to coordinate the Comprehensive Plan of Destin with the plans of other units of government and shall continue to improve coordination activities.

Policy 8-1.1.2: Transportation Issues. The City shall participate as a member on the technical advisory committees for the TPO. Regional transportation issues, including transit and programs for the transportation disadvantaged, shall be coordinated through the TPO.

Fort Walton Beach (2011)

The TDSP is consistent with the following items from the Comprehensive Plan of the City of Ft. Walton Beach.

Transportation Element

Goal B: Provide for a safe, energy efficient, cost effective and uncongested multimodal transportation system in the city, as well as to and from the surrounding regional areas, in a manner that not only accommodates today's demand but also reasonably anticipates growth.

Objective B.3: Coordinate the traffic circulation system, including multimodal systems, with the future land use shown on the future land use map series.

Policy B.3.2: The City shall participate in the preparation of corridor studies for all designated principal and minor arterial roadways and will coordinate the studies with adjacent communities. The corridor studies shall consider land uses adjoining the corridor, access management, and multi-modal transportation options including sidewalks, bikeways, and transit.

Policy B.3.4: The City shall continue to coordinate with Okaloosa County in the provision of transit services within the City and seek methods to improve transit services to residents and visitors in the City.

Policy B.3.5: The City will prioritize multi-modal improvements based on the needs identified on the sidewalk network map, the bikeways map, and the mass transit map.

Objective B.6: Integrate a safe system of bikeways and pedestrian facilities into the City.

Policy B.6.4: When fixed route transit service is implemented, transit stops will be provided and include sidewalk access.

Objective B.7: Maintain a transportation concurrency exception area (TCEA) coterminous with the Fort Walton Beach Community Redevelopment Area (CRA).

Policy B.7.7: The City will maintain and update strategies to achieve improvements to the multi-modal transportation system. Strategies may include transit stops and shelters.

Objective B.8: Meet the needs of the transportation disadvantaged.

Policy B.8.1.: The City will coordinate with transit providers to ensure accessibility of demand responsive services to City residents.

Policy B.8.2: The City will coordinate with transit providers to ensure compliance with transit requirements of the Americans with Disabilities Act (ADA).

Regional Policy Plan

On May 20, 2004, a new regional transportation planning partnership of the four western counties in West Florida was created. The new "Northwest Florida Regional Transportation Planning Organization," a partnership of the then Pensacola Metropolitan Planning Organization (MPO), serving Escambia and Santa Rosa Counties, and the Okaloosa – Walton Transportation Planning Organization (TPO), serving Okaloosa and Walton Counties, was created by interlocal agreement using Chapter 163, Florida Statutes, as its basis and written to comply with the new requirements for regional transportation coordination in Paragraph 339.175(5)(i)(2), approved by the Legislature in 2003. The new legislation authorized contiguous metropolitan



planning organizations and individual political subdivisions to enter into agreements to coordinate transportation plans and policies.

This process began as a result of Census 2000, which illustrated that the Fort Walton Beach Urbanized Area extended westward, well beyond the Okaloosa County Line, resulting in an intrusion of almost 5 miles to Navarre in Santa Rosa County. Traffic patterns clearly indicate a high number of residents of Navarre head to Okaloosa County for jobs and shopping. Since much of the developed portion of Santa Rosa County is within the Pensacola Urbanized Area and Santa Rosa Commissioners have sat on the Pensacola Metropolitan Planning Organization since the mid-1970s, the Pensacola MPO and Okaloosa-Walton TPO each adopted a policy to maintain separate organizations, using the Santa Rosa-Okaloosa County Line as the boundary, during reorganization in 2003.

However, the Florida Department of Transportation also noted the overlap of urbanized areas, prompting the Secretary Tom Barry to write letters to each organization in February 2003, recommending two options: either merge into a single metropolitan planning organization spanning the four-county region; or establish a formal process to coordinate and develop a regional transportation plan and priorities. Creation of the Northwest Florida Regional Transportation Planning Organization was the start of implementing a formal coordination process resulting in a regional transportation plan and priorities.

The members of the North- Florida Regional TPO are the Florida-Alabama TPO (formerly Pensacola MPO) and the Okaloosa-Walton TPO. Each organization appoints eight representatives to the Regional TPO, for a total of sixteen voting representatives. Non-voting representatives are the Secretary of the Florida Department of Transportation District 3 and the Chairman of the Eglin Air Force Base Encroachment Committee.

The Northwest Florida RTPO's activities include identifying regional significant transportation projects, which improve mobility across county and metropolitan planning area boundaries. A regional transportation network map and priorities were adopted on September 21, 2005.

A primary focus for the RTPO is the challenge along the US 98 corridor of encroachment, environmental protection, evacuation, and economic growth. A workshop was held on February 2, 2005 to address these issues. The workshop brought together federal and state transportation officials, state legislators, members of all the transportation planning organizations between Baldwin County, Alabama and Bay County, Florida and other stakeholders.

The Regional Transportation Network Criteria adopted on September 21, 2005 is as follows:

Regionally significant transportation facilities and services are those that serve regional transportation needs, such as access within the region and access to and from areas outside of the region. These facilities and service include:

- (a) Corridors – highway, waterway, rail, fixed guideway, and **regional transit corridors** serving military, major regional commercial, industrial, or medical facilities; and
- (b) Regional Transportation Hubs – military installations, passenger terminals (e.g., commuter rail, light rail, intercity **transit**, etc.), commercial service and major reliever airports, deepwater and special generator seaports, and major regional freight terminals and distribution centers.

Regionally significant facilities exhibit one or more of the following characteristics:

- ◆ Serves the goals of the Strategic Intermodal System (SIS) and the Florida Intrastate Highway System (FIHS),
- ◆ Facility is, or provides service to, regional transportation hubs, including those listed in Paragraph (b),



- ◆ Facility or service is an integral part of an interconnected regional transportation network,
- ◆ Facility is included on the STRAHNET System to meet military mobility needs,
- ◆ Facility or service provides for interstate travel and commerce and is important to the economic vitality (tourism) of the region,
- ◆ Facility or service crosses county or state boundaries,
- ◆ Roadway facility is functionally classified as an arterial roadway,
- ◆ Facility serves as a hurricane evacuation or emergency support route, which provides access to Logistical Support Areas (LSA),
- ◆ Facility or service is used by a significant number of persons who live or work outside the county in which the facility or service is located,
- ◆ Facility or service is a fixed guideway transit facility (includes ferry service) that offers an alternative to regional highway travel, or
- ◆ Facility provides connection to institutions or higher learning or major medical facilities.

Facilities and services that are determined to be regionally significant do not have to be part of the State Highway System.

Transit Development Plan

A Transit Development Plan (TDP) is required for grant program recipients as outlined in Section 341.052, Florida Statutes. The TDP is developed in accordance to FDOT Rule 14-73.001 in order to receive state public transit grant funds. The TDP is based on a 10-year horizon and is updated every 5 years. The TDP is to be adopted by the provider's governing body.

The Okaloosa County Transit Development Plan (TDP) Major Update (FY 2022 – 2031) was approved by the Florida Department of Transportation (FDOT) on July 9, 2021. TDP Executive Summary can be located at: [Okaloosa County TDP Executive Summary](#). Updates from the TDP are incorporated in this Update of the Okaloosa County Transportation Disadvantaged Service Plan (TDSP) as applicable. The Okaloosa County Transportation Disadvantaged Service Plan (TDSP) is consistent with the TDP Major Update.

Commission for the Transportation Disadvantaged 5Yr/20Yr Plan

The TDSP is consistent with the Commission for the Transportation Disadvantaged 5Yr/20Yr Plan, specifically the following key areas:

CTD Mission: To ensure the availability of efficient, cost effective and quality transportation services for transportation disadvantaged persons.

Guiding Principles: (1) Remember the customer/rider's needs first. (2) The Commission should work together in a collaborative and creative manner. (3) Promote the value and quality of service while looking for opportunities.

The Commission will be able to measure progress towards vision attainment by evaluating annual changes in the following performance measures: (1) cost per trip; (2) CTD cost as a percentage of total trip cost; (3) federal funding for TD; and (4) state funding for TD.

The quality of TD services will be measured by the expectation that a qualified individual will be picked up in a reasonably reliable, timely, safe and professional manner, as appropriate, given the locale.

The Commission will be able to measure progress towards vision attainment by evaluating annual changes in the following performance measures: (1) number of trips provided; (2) number of passengers/customers served; and (3) number of passenger complaints.



Maintain and preserve an efficient and effective transportation infrastructure that is accessible to all eligible transportation disadvantaged citizens while meeting the needs of the community.

The Commission will be able to measure progress towards vision attainment by conducting annual surveys and evaluating changes in the survey responses.

Establish a statewide and transportation disadvantaged system that functions seamlessly by coordinating service and operations across local government lines and that is flexible enough to accommodate and link special riders with providers.

The Commission will be able to measure progress toward vision attainment by evaluating annual changes in the following performance measures: (1) cost per trip; (2) number of passengers/customers served; and (3) trips per passenger.

Okaloosa-Walton TPO Long Range Transportation Plan

The Long Range Transportation Plan (LRTP) is a blueprint for maintaining and enhancing the regional transportation system. The LRTP identifies roadway, transit, bicycle and pedestrian, intelligent transportation systems (ITS), and other improvements needed over the next 25 years. Developing the LRTP is a collaborative effort between the public, local governments, and state and federal partners. Over the course of the study, the TPO will examine future transportation needs of the region and determine how to best address those needs. The LRTP includes a Needs Plan and a Cost Feasible Plan. The Needs Plan, as its name implies, is a plan that identifies all of the transportation projects necessary to meet future demands. The Needs Plan is reviewed and prioritized. The prioritized projects are included in the Cost Feasible Plan based on anticipated funding. Currently, forecasted revenues will not fund all identified projects. For the most update Okaloosa-Walton LRTP information please visit: [OW-TPO LRTP](#).

Transportation Improvement Program

The TDSP is consistent with the O-W TPO Transportation Improvement Program (TIP) since the TIP is developed by the O-W TPO in cooperation with the Florida Department of Transportation (FDOT), and Okaloosa County Transit Manger (EC Rider & Dial-A-Ride). These cooperating agencies provide the O-W TPO with estimates of available federal and state funds for use in development of the financial plan. The TIP is financially constrained for each year and identifies the federal, state, and regionally significant projects that can be implemented using existing revenue sources as well as those projects that are to be implemented through use of projected revenue sources based upon the FDOT Final Work Program and locally dedicated transportation revenues.

The transit projects are drawn from the TPO Five Year Transit Development Plan and priorities are developed by the TPO as the transit authority. Projects support the EC Rider and the Community Transportation Coordinator (CTC). The CTC receives funding directly for the Commission for the Transportation Disadvantaged. Other funding sources include the Federal Transit Administration (FTA) and FDOT.

Specific TIP information can be found at <http://owtpo.dtstiptool.com/> this Interactive TIP tool has been developed to facilitate ease of access to information regarding funding and development phases of all federal, state and local transportation projects within the TPO Planning Area. Project data can be acquired through mapping, printed reports, or a general search function.

Public Transportation Project Priorities

The TDSP is consistent with the O-W TPO Project Priorities. The Public Transportation Project Priorities are developed by the EC Rider and approved by the O-W TPO. These projects fall into two categories: Capital Improvements and Operating Assistance. Capital Improvements include the construction of facilities or purchase of equipment to maintain or expand service, while Operating Assistance provides the funds necessary to make up the difference between the revenue generated by the service and the actual cost of the service (commonly known as the operating deficit). The source of public transportation projects is the Okaloosa County Transit Development Plan (TDP). Public Transportation Project Priorities are provided annually.



Public Participation

Representatives of public, private and non-profit and human services providers as well as the public participate in the development, and updates to the Okaloosa County Transportation Disadvantaged Service Plan. The Transportation Disadvantaged Service Plan is developed with input of the Okaloosa County Local Coordinating Board whose membership includes citizens, local government and human service providers.

The Okaloosa County Transit Division Manager contacts human service agencies to discuss transportation services and receives comments about Dial-A-Ride community transportation services. The Program Manager visits dialysis centers, medical facilities, nursing homes and agencies to receive comments regarding transportation services.

Public participation activities include participation in the Annual National Dump the Pump Day with promotions through local available venues. Okaloosa County promotes on the local television programs such as "Focus on Okaloosa". Transit continues to work with local military family service agencies by promoting the service via distribution of the Ride Guide and other public transit material.

Okaloosa Walton TPO Public Participation Plan can be found at: [OW TPO Public Participation](#).

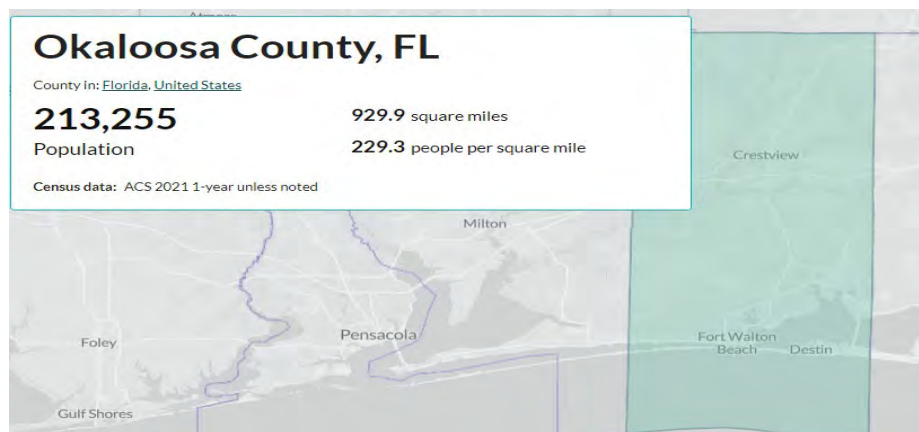


The Transportation Disadvantaged **Public Workshop was held on May 9, 2023**. The Workshop was available in person and online to offer an opportunity for anyone with comments or questions to address the Local Coordinating Board.

The Workshop was promoted using the following methods: Eblast and News Release to appropriate lists, Facebook post, regular Public Notice Procedure, placed Display Ad in appropriate area publication and posted on the ECRC Calendar.

SERVICE AREA PROFILE/DEMOGRAPHICS

The majority of the information contained in this section, Service Area Profile/Demographics, has been obtained United States Census Data American Community Surveys (ACS) 2021 1-year estimates unless noted <https://www.census.gov/programs-surveys/acs>.



Service Area Description

Okaloosa County has a total area of 1,076.57 square miles (930.2 square miles of land and 146.37 square miles of water). Okaloosa County, part of the Florida Panhandle, is bordered by the State of Alabama to the north, Santa Rosa County to the west, Walton County to the east, and the Gulf of Mexico to the south.

Demographics

Demographic information has been obtained from Census data: ACS 2021 1-year unless noted.

Land Use

Land use patterns play an important role in the effectiveness and efficiency of public transportation services. Much of Okaloosa County is characterized by relatively low densities. One of the significant land uses in the area that affects transportation is Eglin Air Force Base. The geographical location of the base separates the northern part of the county, Crestview, from the southern part of the county, Fort Walton Beach, causing development to be spread out and divided. This creates a challenge in providing public transportation services.

Population/Composition

This section is intended to provide a description of the population of the service area. Population information contained in this section includes: population, minority and non-minority population, age distributions, family households, family size, household size, income, and employment.

	Census	Estimated Population				
	2020	2025	2030	2035	2040	2045
Okaloosa County	211,668	223,600	233,800	241,900	248,900	254,800
Florida	21,538,187	23,164,000	24,471,100	25,520,800	26,405,500	27,176,700

Source: Bureau of Economic and Business Research (BEBR) - Medium estimates

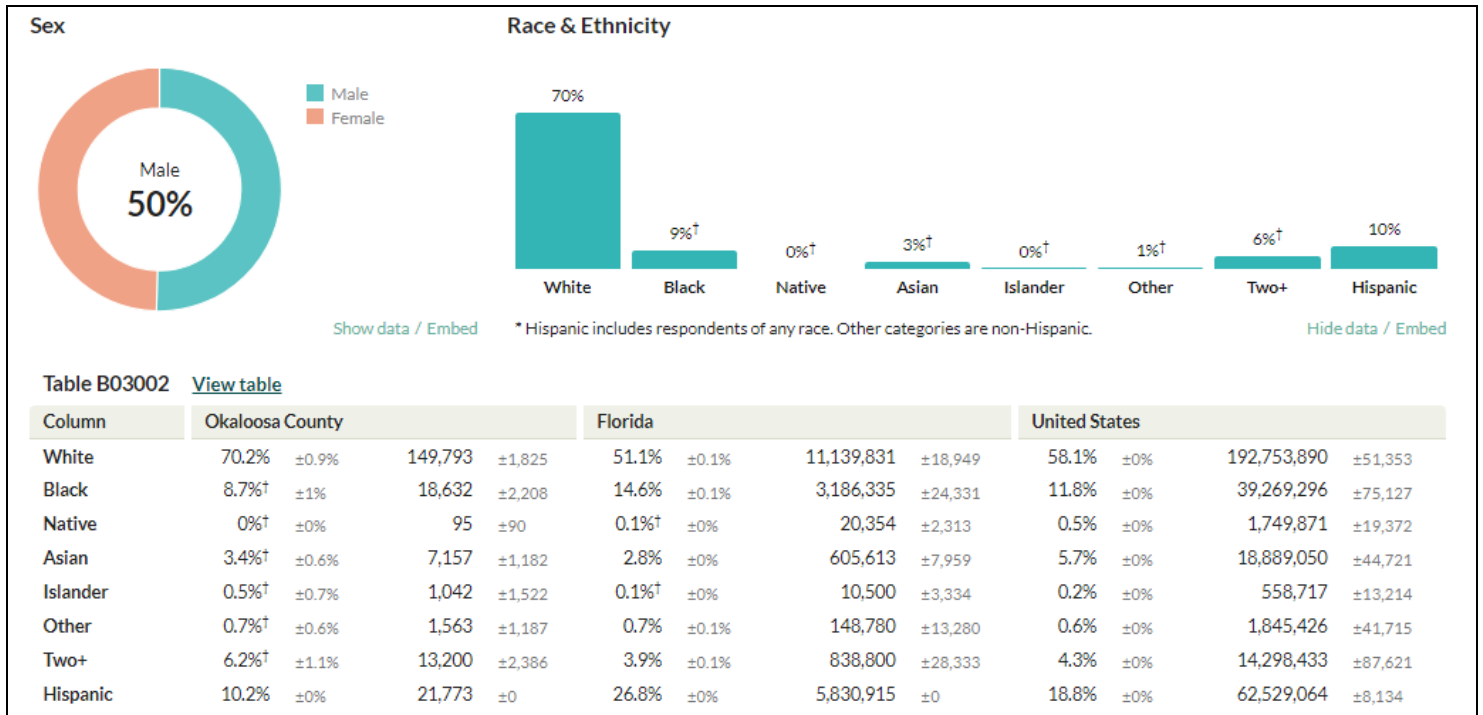
	April 1 2022 (Estimate)	Total Change	April 1 2020 (Census)
Okaloosa County	215,751	4,083	211,668
Cinco Bayou	455	-2	457
Crestview	27,542	408	27,134
Destin	14,472	541	13,931
Fort Walton Beach	21,011	89	20,922
Laurel Hill	627	43	584
Mary Esther	4,396	414	3,982
Niceville	16,186	414	15,772
Shalimar	774	37	737
Valparaiso	4,926	174	4,752
UNINCORPORATED	125,362	1,965	123,397

Source: Bureau of Economic and Business Research (BEBR)



Minority and non-minority population

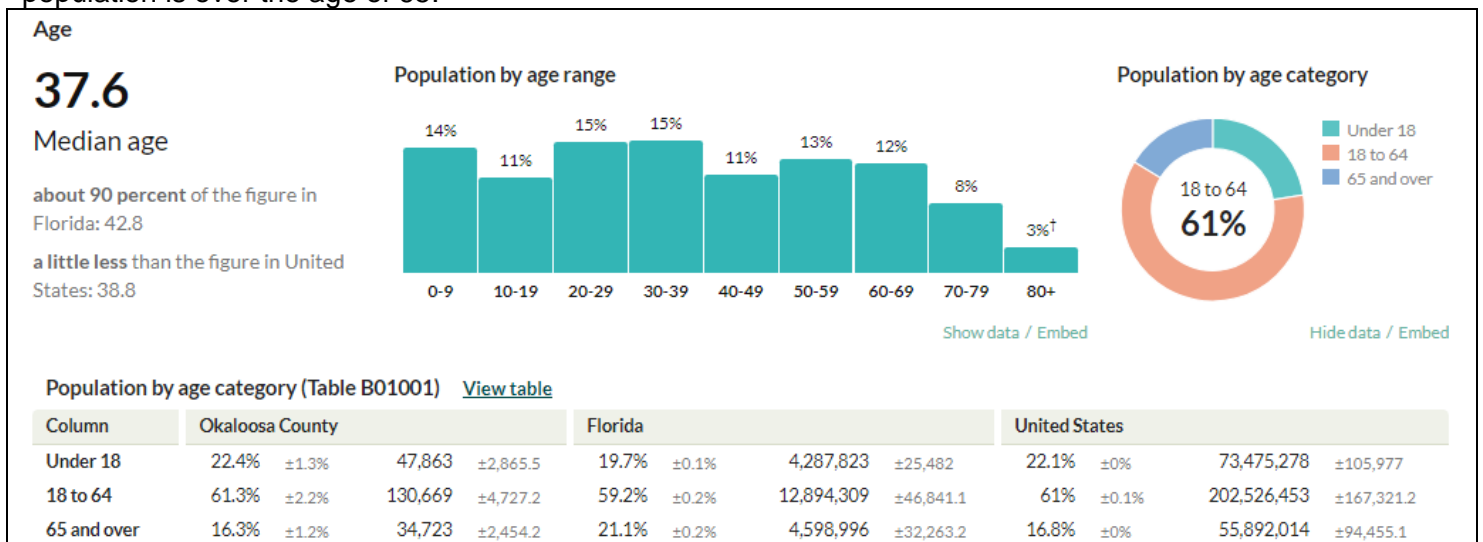
Minority population in Okaloosa County continues to trend well below that of the rest of the state of Florida. Most recent estimates from 2021 indicate just over 70% of persons in Okaloosa County are of a non-minority status. As a comparison, the rest of Florida has a non-minority population that represents 51.1% of residents statewide.



Age distributions

The age distribution of Okaloosa County is similar to the age distribution of Florida as a whole. The median age of residents in Okaloosa County is 37.6, which is below Florida's median age of 42.8.

The age of a population is an important factor in planning for public transit. The transit-dependent population cohort, considered to be persons under 18 years of age and persons 65 years and older, represents 38.7% of the population in Okaloosa County. This population is more likely to use public transit because those under the age of 18 either cannot legally operate a motor vehicle or typically do not have access to an automobile. Additionally, the elderly population often does not have adequate access to automobiles and are no longer able to drive due to limitations and impairments from aging. Approximately 16.3% of the Okaloosa County population is over the age of 65.



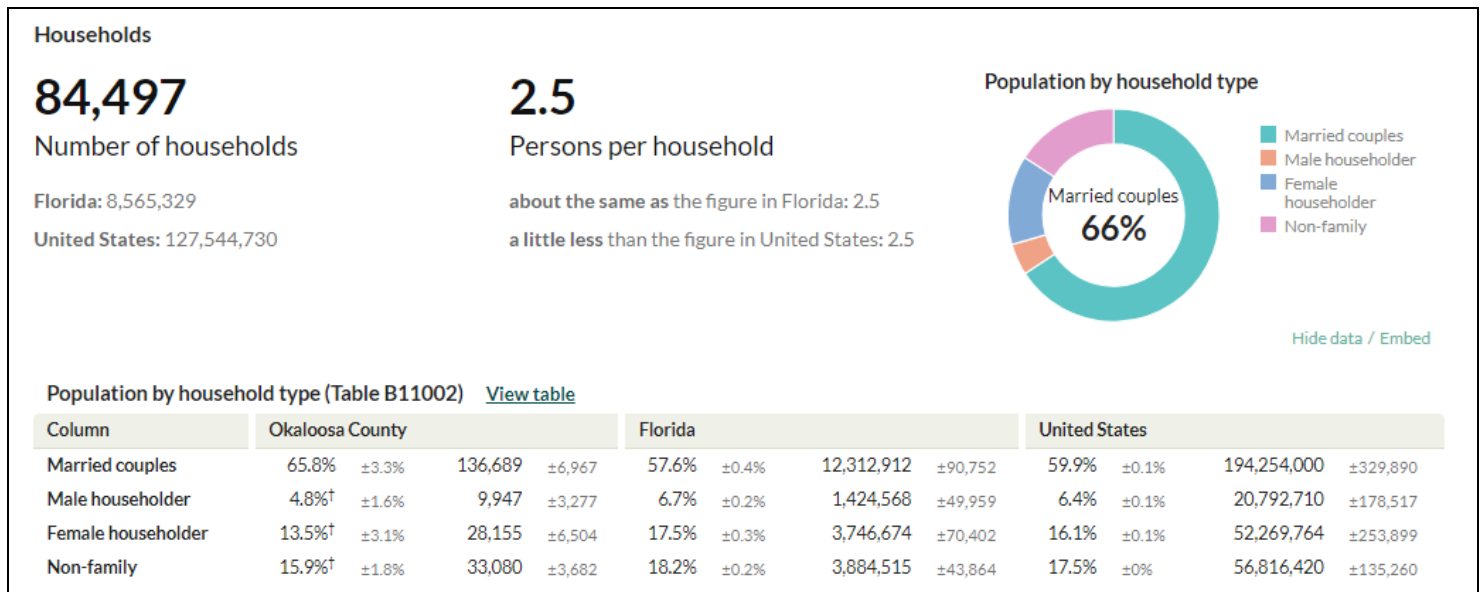
Family households

The term 'households' refer to the people living in a household, in this case those which comprise a family. A family household is a household with one or more people related to a householder by birth, marriage, or adoption.

Household size

According to the U.S. Census Bureau, a household “includes all the persons who occupy a housing unit as their usual place of residence” and a housing unit is a “house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters.”

In 2021 Okaloosa County has an average household size of 2.5.



Income information

The median household income for Okaloosa County, of \$69,823 is about 10 % higher than the State median household income of \$63,062. Median household income is an important variable to identify geographic areas where incomes are not sufficient to support the cost of personal automobiles and therefore will have a higher reliance on transit.

Households with lower incomes are often heavily reliant on public transportation due to the annual cost of a vehicles and insurance and fuel costs. Percentage of person living below the poverty line in Okaloosa County is 9.1% which is 4% lower than the state.



Income

\$36,875

Per capita income

about the same as the amount in
Florida: \$36,196

a little less than the amount in United
States: \$38,332

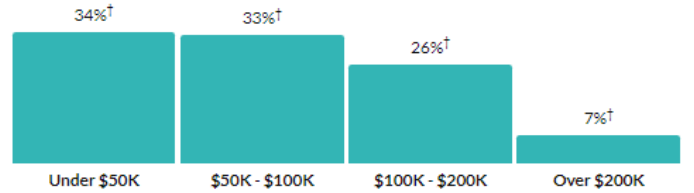
\$69,823

Median household income

about 10 percent higher than the
amount in Florida: \$63,062

about the same as the amount in
United States: \$69,717

Household income



[Hide data / Embed](#)

Household income (Table B19001) [View table](#)

Column	Okaloosa County				Florida				United States			
Under \$50K	34.1%†	±3.5%	28,814	±3,102.2	39.8%	±0.4%	3,408,230	±35,614.2	36.5%	±0.1%	46,510,495	±128,378.1
\$50K - \$100K	33.1%†	±3.3%	27,979	±2,921.8	31%	±0.3%	2,657,370	±30,016.9	29.6%	±0.1%	37,720,152	±107,083.7
\$100K - \$200K	25.7%†	±2.8%	21,685	±2,484.3	21.4%	±0.3%	1,835,732	±26,559.3	24.2%	±0.1%	30,837,651	±97,102.1
Over \$200K	7.1%†	±1.5%	6,019	±1,241	7.8%	±0.2%	663,997	±17,588	9.8%	±0.1%	12,476,432	±60,207

Poverty

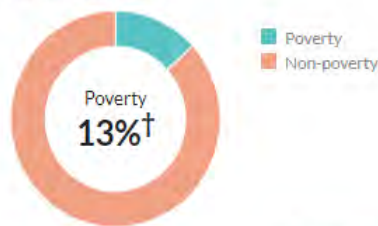
9.1%

Persons below poverty line

about two-thirds of the rate in Florida: 13.1%

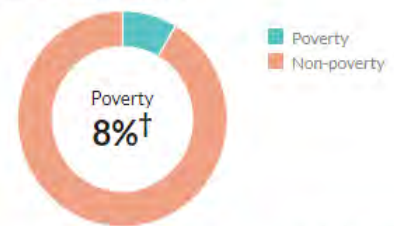
about two-thirds of the rate in United States:
12.8%

Children (Under 18)



[Show data / Embed](#)

Seniors (65 and over)



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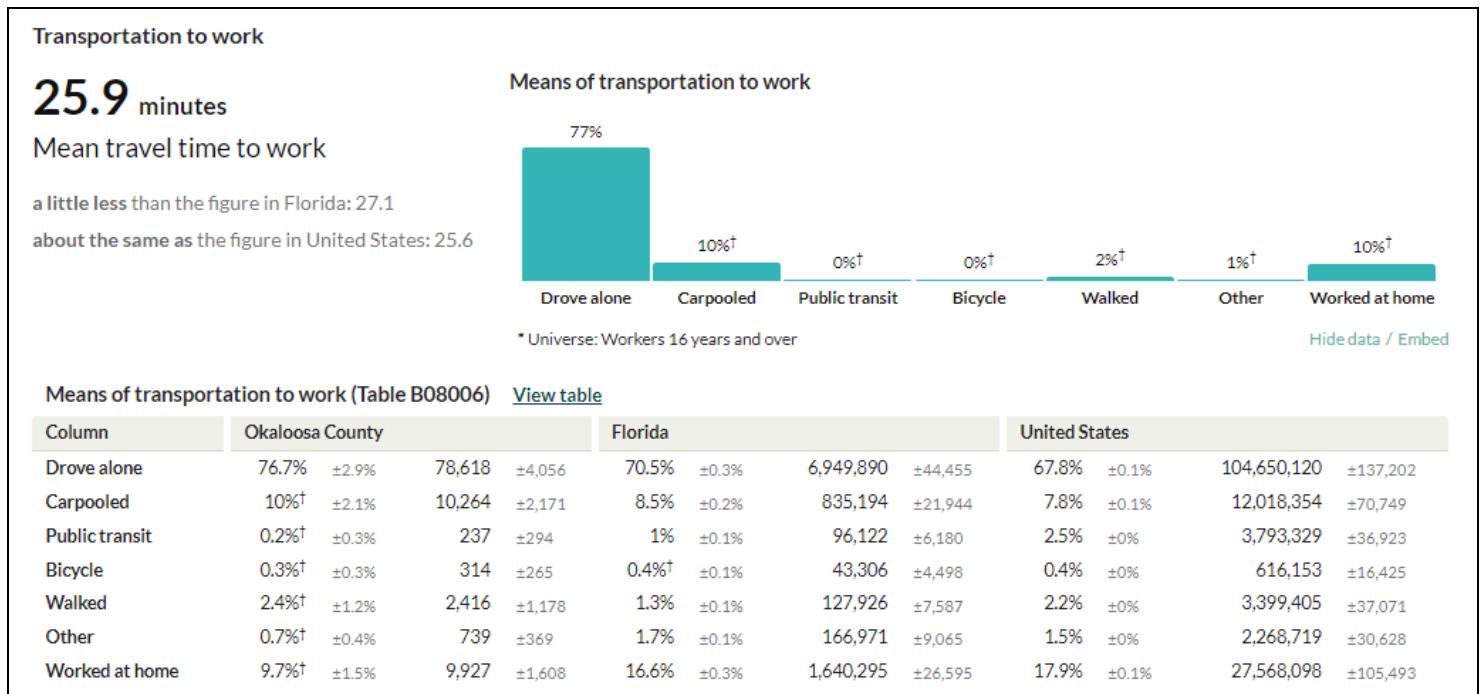
Seniors (65 and over) (Table B17001) [View table](#)

Column	Okaloosa County				Florida				United States			
Poverty	8.5%†	±2.7%	2,889	±923	11%	±0.3%	498,861	±12,042.5	10.3%	±0.1%	5,623,616	±38,389.1
Non-poverty	91.5%	±5.4%	31,211	±1,199.3	89%	±0.5%	4,037,941	±13,330.9	89.7%	±0.1%	49,118,178	±44,581.4

Employment

Employment and labor characteristics also help to understand land use and travel patterns that affect transit service. Like population density, Okaloosa County has a relatively low overall employment density that poses a challenge to finding transit-supportive areas. This is compounded by the fact that Eglin Air Force Base is a major land use that physically splits the county north-south. The region's major employers are the US military, the Okaloosa and Walton County school boards, and Northwest Florida State College. These large employers create an exceptional demand on the transportation system. After the military, tourism is the second largest contributor to the local economy. Along the coastal areas are more service and tourist-oriented jobs than in the northern portions of the county. Other large employers include area hospitals and several military contractors.





SERVICE ANALYSIS

The majority of the information contained in this section has been obtained from United States Census Data American Community Surveys (ACS) 2021 1-year estimates and input into the Transportation Disadvantaged Service Plan (TDSP) ridership forecasting model prepared by the Center for Urban Transportation Research (CUTR).

The analysis of Okaloosa County community transportation services is composed of three criteria: forecasts of transportation disadvantaged population, needs assessment, and barriers to coordination.

Forecasts for Transportation Disadvantaged Population

Guidelines were developed for the Commission for the Transportation Disadvantaged and intended to provide consistency among TD population estimates across the state. The state's Coordinated Transportation System serves two population groups. The first group, the Potential TD Population includes persons who are elderly, disabled, or low-income and children who are a high risk or at-risk.

Persons in the first group are eligible to receive government and social service agency subsidies for transportation trips. In addition to the subsidies received by the first group, the TD Population is eligible to receive transportation trips paid for with TD Trust Fund monies for general transportation requirements which include trips to such places as: work, the grocery store and for non-Medicaid medical appointments.



Estimated Transportation Disadvantaged Population

County Pop. By Age	Total Pop by Age	% of Total Pop	Population Below Poverty Level by Age	% of Total Pop Below Poverty Level by Age	Total Population with a Disability by Age	% of Total Pop with a Disability by Age	Total Pop with Disability and Below Poverty Level by Age	% Total Pop with a Disability and Below Poverty Level by Age
< 5 Years of Age	13,169	6.7%	2,943	1.5%	38	0.1%	0	0.00%
5-17	33,762	17.1%	3,238	1.6%	2,445	1.2%	282	0.14%
18-34	39,966	20.3%	4,030	2.0%	3,983	2.0%	582	0.29%
35-64	76,325	38.7%	5,479	2.8%	13,269	6.7%	3,253	1.65%
Total Non Elderly	163,222	82.7%	15,690	8.0%	19,735	10.0%	4,117	2.09%
65-74	20,717	10.5%	1,599	0.8%	6,608	3.3%	897	0.45%
75+	13,383	6.8%	1,290	0.7%	7,210	3.7%	751	0.38%
Total Elderly	34,100	17.3%	2,889	1.5%	13,818	7.0%	1,648	0.84%
Total	197,322	100%	18,579	9.4%	33,553	17.0%	5,765	2.92%

Source: 2021 American Community Survey 1 year estimates, CUTR and ECRC

Non-elderly/disabled/ low income	4,117
Non-elderly/ disabled/not low income	15,618
Elderly/disabled/low income	1,648
Elderly/ disabled/not low income	12,170
Elderly/non-disabled/low income	1,241
Elderly/non-disabled/not low income	19,041
Low income/not elderly/not disabled	11,573
Total	65,408
General TD Population	% of Total
TD Population Est	65,408
	33.1%

Source: 2021 American Community Survey 1 year estimates, CUTR and ECRC

Okaloosa County

Forecast Estimates of potential TD Population						
General TD Population Forecast	2021	2022	2023	2024	2025	2026
Non-elderly/disabled/ low income	4,117	4,227	4,339	4,455	4,573	4,695
Non-elderly/ disabled/not low income	15,618	16,034	16,461	16,899	17,350	17,812
Elderly/disabled/low income	1,648	1,692	1,737	1,783	1,831	1,879
Elderly/ disabled/not low income	12,170	12,494	12,827	13,169	13,519	13,879
Elderly/non-disabled/low income	1,241	1,274	1,308	1,343	1,379	1,415
Elderly/non-disabled/not low income	19,041	19,548	20,069	20,603	21,152	21,715
Low income/not elderly/not disabled	11,573	11,881	12,198	12,523	12,856	13,199
TOTAL GENERAL TD POPULATION	65,408	67,150	68,939	70,775	72,660	74,595
TOTAL POPULATION	197,322	202,578	207,973	213,512	219,199	225,038

Source: 2021 American Community Survey 1 year estimates, CUTR and ECRC



Needs Assessment

In assessing the transportation (service and capital purchase) needs and demands for individuals with disabilities, elderly, low income, and high risk and at-risk children, the following projects with estimated costs and funding sources have been identified and are summarized below.

Projects	County	Estimated Cost	Funding Source
Purchase replacement dial-a-ride vehicles to provide transportation for the elderly, disadvantaged and disabled citizens in Okaloosa County.	Okaloosa	\$1,160,000	Urbanized Area - 5307 (capital)
Provide transportation services for disadvantaged and disabled citizens in Okaloosa County coordinated through the CTC.	Okaloosa	\$300,000	Urbanized Area - 5307 (operating)
Formula (competitive) grant to enhance mobility for seniors and persons with disabilities by providing funds for programs to serve the special needs of transit-dependent populations beyond traditional public transportation services.	Okaloosa	To be determined	Enhanced Mobility of Seniors and Individuals with Disabilities - 5310
Capital and/or operating assistance to provide rural transportation services in Okaloosa County coordinated through the CTC.	Okaloosa	\$60,000	Non-Urbanized Area - 5311
Transit operating assistance for non-urbanized public Transportation in order to prevent, prepare for and respond to COVID-19.	Okaloosa		Non-Urbanized
Capital funding to replace, rehabilitate, and purchase buses, vans, and related equipment, and to construct bus-related facilities. Funds are eligible to be transferred by the state to supplement urban and rural formula grant programs (e.g., 5307 and 5311).	Okaloosa	To be determined	Bus & Bus Facilities (5339)
To determine whether a new or innovative technique or measure can be used to improve or expand public transit services. Service Development Projects specifically include projects involving the use of new technologies; services, routes, or vehicle frequencies; the purchase of special transportation services; and other such techniques for increasing service to the riding public.	Okaloosa	To be determined	Public Transit Service Development Funds
Provide transportation services coordinated by the CTC to other human services organizations.	Okaloosa	\$ 730,268 TBD \$ 25,000 \$ 52,020	CTD-TD Medicaid County Farebox



Barriers to Coordination

The following are continued barriers to adequate coordination:

- A. Lack of commitment with scarce tax dollars.
- B. Not enough funding to cover demand.
 - 1) Securing Local funding.
 - 2) Specific issues directly related to funding sources.
- C. Reluctance of some medical providers to cooperate with transportation coordinator.
- D. No AHCA providers in local area.
- E. Eglin Air Force Base geographical location is a barrier separating the North part (Crestview) from the Southern part of Okaloosa County.

GOALS, OBJECTIVES, AND STRATEGIES

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

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

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

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

The following Goals and Objectives were updated. The Objectives and Strategies are consistent with previous year's Objectives and Strategies. The goals are categorized into service availability, efficiency, quality of service, necessary funding and program accountability. The strategies are pursuant to adequate funding available.



GOAL 1: Ensure availability of transportation services to the Transportation Disadvantaged	
OBJECTIVES	STRATEGIES
1. Provide service to riders who only have demand response service as means of transportation.	a. Continue to efforts to move customers from dial-a-ride door-to-door service onto the fixed route system. b. Continue to partner with various agencies to provide transportation. (Ongoing)
2. Maximize cooperation between entities not involved in the Florida Coordinated Transportation System (FCTS).	a. Network with other Community Transportation Coordinators by sharing system improvements and funding opportunities among each other. (Continuous) b. Identify potential Coordination and Purchase of Service Contracts. (Ongoing)
3. Continue to promote passenger and general public awareness of all transportation services provided by OCT. EC Rider	a. Pursue educational and marketing opportunities for the dial-a-ride system through training, new applicant education, brochures, and presentations to community and civic groups. (Ongoing)
GOAL 2: Ensure cost-effective and efficient transportation services.	
OBJECTIVES	STRATEGIES
1. Deliver services via the most cost effective means.	a. Offer incentives such as free passes for transitioning dial-a-ride users to fixed route. b. Involve all levels of staff in identifying cost-reducing and/or efficiency-increasing measures that can be implemented. (Ongoing)
GOAL 3: Ensure quality of service provided to the Transportation Disadvantaged	
OBJECTIVES	STRATEGIES
1. Maintain courteous and respectful customer relations.	a. Continues semi-annual customer relations training and conducts semi-annual screenings to determine call hold and call answer times. (Ongoing) b. Sample on time delivery performance on a quarterly basis. (Quarterly) c. Maintain rider survey rating of overall system performance at a 90% excellent/good/satisfactory rating.
2. Maximize customer comfort and safety.	a. Maintain rider survey rating of comfort and cleanliness performance at a 90% excellent/good/satisfactory. b. Conduct safety training as required for new employees and updated for existing employees. (Immediate) c. Continue "Driver of the Quarter" program based on dependability, no accidents, and no complaints with incentives to the winning drivers. (Ongoing)
GOAL 4: Ensure necessary funding to support the program	
OBJECTIVES	STRATEGIES
1. Increase total funds to meet unmet demand for non-sponsored trips.	a. Seek funding from local government to provide local match for transportation services while pursuing private funding through community involvement with agencies. (Continuous)
GOAL 5: Ensure program accountability	
OBJECTIVES	STRATEGIES
1. Adhere to rules and contract requirements of The Commission for the Transportation Disadvantaged.	a. Comply with the Community Transportation Disadvantaged contract requirements. (Continuous) b. Comply with contract standards and submit an accurate Annual Operating Report including all Purchase of Service and Coordination Contracts data. (Continuous)



IMPLEMENTATION SCHEDULE

Increasing system efficiency is a primary component of this Implementation Plan. The implementation plan also involves execution of the plan's policies and goals & objectives. For the TDSP, the implementation plan identifies actions and activities, type of action required, responsible entity for taking action, and the timing. The Community Transportation Coordinator will provide an overview of the ongoing system improvements and review steps, as well as provide a timeline for actions and strategies to meet the above stated goals.

Action/Strategy	Responsible Agency	Time Frame to be Completed
Adopt Transportation Disadvantaged Service Plan (TDSP) Annual Update.	LCB	May
Review Okaloosa County Transit Bus Stop Assessment Plan	O-W TPO	Ongoing
Approve Transit Development Plan (TDP) Annual Progress Report.	FDOT	Yearly
Endorse TDP Annual Progress Report.	TPO	Yearly
Adopt TDSP Major Update (every 5 years).	LCB	August 2021
Review fleet requirements	CTC	Ongoing
Public Transportation marketing campaign kickoff.	TPO	TBD
Procurement and Installation of Bus Stop Shelters.	CTC	TBD
Request for Proposal of Intelligent Transportation System.	CTC	TBD
ITS System Complete.	CTC	TBD
Implement new Internal Destin Route.	CTC	TBD
Adhere to rules and contract requirements of the CTD.	CTC	Ongoing
Attend and report at public meetings.	CTC	Ongoing
Attend media events to promote public transit.	CTC	Ongoing
Continue to develop and refine the transit center concept as a means of expanding new and existing fixed-routes.	CTC	Ongoing
Deliver transportation by most cost effective means.	CTC	Ongoing
Increase total funds to meet unmet demand for non-sponsored trips.	CTC	Ongoing
Maintain courteous and respectful customer relations.	CTC	Ongoing
Maximize cooperation between coordination contractors.	CTC	Ongoing
Maximize customer comfort and safety.	CTC	Ongoing
Promote awareness of all public transit service available.	CTC	Ongoing
Provide service to riders that cannot access fixed-route service.	CTC	Ongoing



The Okaloosa County vehicle replacement plan is summarized in the table below and illustrates the projected schedule for replacing dial-a-ride vehicles.

OKALOOSA COUNTY
Dial-a-Ride Vehicle Replacement Plan
FY 2013 – 2022

Model Year	Approval Year (w/Approval from)	Manufacturer / Model	Type	# of Vehicles	Replacement Vehicle Years									
					FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
2006	2011	Ford	Sedan	4	4	4	4	4	4	R				
2014	2020	MOVT	Mini Van	2	4	4	4	4	2	2	2	R		
2017	2021	Ford	Minibus	2					2	2	2	2	R	
2017	2022	Ford	Minibus	11						11	11	11	11	R
2012	2018	Chevrolet	Cutaway											
2008	2014	Chevrolet	Cutaway	1	2	2	2	2	2	R				
2009	2015	Chevrolet	Cutaway	3	5	5	5	4	3	R				
2012	2018	Chevrolet	Cutaway	10	9	9	9	9	9	9	R			
2007	2012	Ford	Cutaway	0	2	R								
2014	2019	Chevrolet	Cutaway	5			5	5	5	5	R			
2018	2023	Replacement	Sedan							5	5	5	5	5
2020	2025	Replacement	Mini Van							1	1	2	2	2
2018	2022	Replacement	Minibus							4	4	4	4	R
2020	2024	Replacement	Minibus								14	14	14	14
2021	2025	Replacement	Minibus										2	2
2022	2026	Replacement	Minibus											15
File Location: Transdata\Transit\TDSP 2018														



Service Plan

OPERATIONS

The operations element is a profile of the Coordinator's current system which provides basic information about the Coordinator's daily operations. This element is intended to give someone with little or no knowledge of the transportation operations an adequate level of understanding. A Glossary of Terms is provided in the appendices of this plan.

Types, Hours and Days of Service

Ambulatory, wheelchair and stretcher service are provided.

Dial-a-Ride service provides door to door pick-up and drop-off.

Normal vehicle operating hours are Monday - Friday, 5:00 A.M. to 11:00 P.M.; and Saturday 6:00 A.M. to 7:00 P.M. and Sunday 7:00 A.M. to 12:00 P.M.

Service is available 7 days a week/24 hours per day. After normal vehicle operating hours, service is limited to urgent transportation needs (Hospital discharges, urgent non-emergency medical care, etc.). Service must be arranged during normal office hours.

Deviated Fixed-Route service is available in Crestview - Route 14, Ft. Walton Beach - Routes 1-5, Okaloosa Island - Route 20, Destin to Miramar Beach - Routes 30, 32, 33, and a North/South County Connector - Route 14, with service through Niceville.

Mandatory use of the deviated fixed route is required when it will satisfy the transit needs of the client and there are no contraindications of its use by the client.

Subscription trips are provided to riders requiring repetitive trips to the same destination 3 or more times per week. Subscriptions must be renewed every 60 days.

Accessing Services

Trips may be reserved up to 14 days in advance.

Reservations/Office operating hours are Monday – Friday, 7:30 A.M. to 4:30 P.M.

Reservations must be made by 12 noon the day prior to the requested ride. Reservations must be received by close of reservations operating hours 2 P.M. the last working day prior to a weekend or holiday transportation.

Reservations may be made by calling 850 833-9168 Monday through Friday 7:30 A.M. to 4:30 P.M. Reservations are closed on weekends and holidays.

Cancellations should be made as soon possible. Late cancellations (within 1 hour of scheduled pick up) will be treated as a no show.



A No Show is charged when a trip is cancelled within 1 hour of scheduled pick up time or the client is not at the scheduled pick-up location and the driver is no later than 10 minutes after the scheduled pick up time.

Non-Sponsored/transportation disadvantaged (TD) riders must complete an application with proper documentation to be eligible to utilize TD funds. Eligibility is determined based on availability of other transportation, income, disability, age, a finding of “at-risk” for children, and the ability to use the deviated fixed route system.

Shopping requests are scheduled accordingly:

- Crestview, Destin, and Niceville areas - Tuesday and Thursday from 10 a.m. to noon.
- Fort Walton Beach areas - Tuesday and Saturday 10 a.m. to noon.

Out of County trips and long distance Okaloosa trips are limited to designated days and times to best meet the needs of passengers and maximize the efficiency and effectiveness of available resources.

Transportation Operators and Coordination Contractors

Transportation operators are selected through the Competitive Bid process. A selection committee evaluates and scores the proposals based on specific evaluation criteria identified in the proposal and then recommends a contract award to the Okaloosa County Commission for approval.

Coordination contractors request to enter into a Coordination Agreement with the CTC to participate in the County's Coordinated Transportation system. The Agreements are presented to the Okaloosa County Commission for approval.

Current Coordinated providers are:

Pyramid
432 Green Acres Road
Fort Walton Beach, FL 32547
850-862-7139

Pensacola Cares dba Fort Walton Beach Development Center
1045 Mar Walt Drive
Fort Walton Beach, FL 32547

Public Transit Utilization

Continued efforts to shift Dial-a-Ride users to the fixed-route system will continue. The existing fixed-route service, 10 routes, with year round service should facilitate this effort. Additionally, in conjunction with the recently formed Transit Cooperative consisting of county and municipal leaders, current and future routes will be reviewed to improve the fixed-route area of operation, hours of service, days of service, and frequency of runs.

School Bus Utilization

Current CTC resources are adequate and actually more cost effective than school bus utilization.

Vehicle Inventory

A Vehicle Inventory of the vehicles utilized in the coordinated system is included in the appendices.



System Safety Program Plan Certification

Each Transportation Operator and Coordination Contractor from whom service is purchased or funded by local government, state or federal transportation disadvantaged funds, shall ensure the purchasers that their operations and services are in compliance with the safety requirements as specified in Section 341.061, Florida Statutes, and Chapter 14-90, F.A.C. The System Safety Program Plan certification can be found in the appendices.

Intercounty Services

Transportation operators and coordination contractors are required to plan and work with county and municipal community transportation representatives, transportation operators, and coordination contractors 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.

Through the efforts of the Emerald Coast Regional Council, discussions have recently begun with Escambia, Santa Rosa, and Okaloosa Counties to study the feasibility of coordinating transportation through the 3 counties. These discussions will continue as we receive updated census data and new urbanized area boundaries are determined.

Emergency Preparedness and Response

The County contracted transportation operators and coordination contractors are an integral element of the County's Disaster Preparedness Plans. The County contracted transportation operator serves as ESF-1 in the County Emergency Operations Center. During periods of emergencies, the County contracted transportation operator supports operations by providing vehicles and drivers to meet requests by Okaloosa County Public Safety.

Educational Efforts/Marketing

Marketing efforts continue to focus on transportation services available to all residents of the County. Presentations to local service agencies as well as nationally affiliated clubs will continue. Flyers have been sent to all local clubs, organizations, and groups as well as inserts to in-house publications and the local Chambers of Commerce. Items are also published in the local newspapers and used by local radio shows. Staff has appeared on public interest television shows. The County contracted transportation operator, in conjunction with the recently formed Transportation Cooperative consisting of county and municipal leaders, will develop and circulate additional releases and advertising.

Acceptable Alternatives

Requests For Proposal (RFP) will continue to be developed to try and contract a private operator to help us expand our night and weekend services and continued efforts will be made to obtain additional stretcher service operators for our clients. Promoting the deviated fixed route system is another alternative that could reduce trip costs for riders.

Service Standards

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

Drug and Alcohol Policy. For safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Transit Administration.

Companions and children. Okaloosa County children under the age of twelve (12) require a companion. The requirement may also be imposed if the child has special needs or exhibits behavior problems. The minimum age of companion must be 18 years or older.



Child Restraints. The Okaloosa LCB, in accordance with *Florida Statute, Title XXIII, Chapter 316.613, Child restraint requirements*, must ensure children 5 years of age and under are transported in a crash tested, federally approved child restraint device. Additionally, the Okaloosa LCB has determined that infants (birth to 20 pounds) are required to be transported in an infant carrier, which is the responsibility of the parent or guardian. The transportation operator does not provide infant carriers.

The transportation operator provides limited child restraint seats for children greater than 20 pounds up to child restraint maximum rated capacity of 50 pounds. Clients must request a child restraint seat when placing their transportation reservation/request.

Rider Property. Property that can be carried by the passenger in one trip and can safely be stowed on the vehicle, shall be allowed to be transported with the passenger at no additional charge. Passenger property includes wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.

Vehicle Transfer Points. Shall provide shelter, security, and safety of passengers.

Local Toll Free Phone Number for Consumer Comment. Shall be posted inside the vehicle. The TD Helpline phone number, **1 (800) 983-2435**, shall also be posted inside all vehicles of the coordinated system. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including, advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board. All rider information/materials (brochures, user's guides, etc.) will include the TD Helpline phone number.

Out of County Trips. Shall be provided only when the rider cannot be accommodated within Okaloosa County. Medical documentation is required.

Vehicle Cleanliness. The 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.

Billing Requirements to Contracted Operators. All bills shall be paid within 7 working days to subcontractors, after receipt of said payment by the Community Transportation Coordinator, in accordance with Section 287.0585, Florida Statutes.

Rider/Trip Data. Must be maintained or accessible by the Community Transportation Coordinator on each rider being transported within the system.

Adequate Seating. For Dial-a-Ride services shall be provided to each rider and companion, 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 companion, 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.

Driver Identification. Drivers for Dial-a-Ride 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.



Passenger Assistance. The Dial-a-Ride 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. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step.

Smoking and Eating on Vehicles. Is prohibited in any vehicle.

Cancelled Late and No-Show Policies. The Community Transportation Coordinator and the Local Coordinating Board shall jointly develop a policy on passenger no-shows. Assessing fines to passengers for no-shows is acceptable but such policy and process shall be identified as follows:

Trips should be cancelled by 12 noon the day prior to the scheduled pick up time. This type of cancellation would be considered a Cancelled in Advance (CA) and would not be considered a cancel or no-show.

Trips that are cancelled after 12 noon to 2 hour prior to the scheduled pickup time will be classified as a Cancelled Late (CL) and will be documented by ECR.

Trips that are cancelled within 1 hours of the scheduled pickup time will be classified as a No-Show (NS). The contractor will contact the client to determine the cause for the no-show. The contractor will share the information within the organization to reduce No-shows and recorded in Trapeze.

Trips that are cancelled at the door are considered a No-Show. The contractor will contact the client to determine the cause for the no-show. The contractor will share the information within the organization to reduce No-shows and recorded in Trapeze.

If a driver is later than 30 minutes from the scheduled pick-up time and the client is not present or cancels at the door, the trip will be classified as a Missed Trip and will not be counted as a No-Show.

If the client frequently fails to notify the appropriate office with the terms stated above, then that client may be subject to suspension.

If the client responds to any cancelled late or no-show notifications and provides acceptable, verifiable evidence that the cancelled late or no-show was due to unforeseen and unavoidable circumstances, the missed trip will not be counted against the client.

Cancellations should be called into the transportation coordinator offices at 850 833-9168.

No Show Policy.

EC Rider has established the following “No Show” policy for Dial-a-Ride clients. Passengers who establish a pattern or practice of excessive “No Shows” shall be subject to suspension of service. This policy is necessary in order to recognize the negative impact “No Shows” have on other passengers and service provided.

A passenger is considered a “No Show” if the passenger fails to board at the scheduled pick up locations when the driver has wait 5 minutes during the 1 hour pick up window. EC Rider has a 1 hour pick up window that means that means your ride may arrive anytime from 30 minutes prior to your scheduled pick time to 30 minutes after your scheduled pick up time

Example: If your scheduled pick up time is 9 AM the driver may arrive anytime between 8:30 AM – 9:30 AM.

All riders must then be ready to board the vehicle during the entire 1 hour pick-up window and the driver will only wait 5 minutes.



If you're a driver arrives before your scheduled pick up time, the rider does not have to board the vehicle until the scheduled pick up time and the driver will only wait 5 minutes after the scheduled time.

An individual is considered a "No Show" if he/she is not available for pick up as described above.

Each leg of a client's trip is treated separately. If a client misses a scheduled pick up, EC Rider will not cancel that passenger's return trip. If the client does not appear for the return trip, that incident will count as a "No Show" as well. A client will be counted as a "No Show" for each leg of any trip they fail to cancel and do not appear.

Clients will not be penalized for "No Shows" or late cancellations due to circumstances beyond their control.

Example: Cancellations due but, not limited to power outages, family emergency, illness or error caused by EC Rider.

Once a client shows a trend or has in excess of **3 cancellations in a 30 day period**, call the client to remind them of their increasing "No Shows" and explain the affect "No Shows" have to the systems resources and other clients. Explain when to call to avoid a "No Show". You will frequently find a simple reason and solution to the "No Show" such as client has relocated, on vacation, in the hospital, visiting family transporting and some forget they are on a "standing order".

Excessive "No Shows" in excess of **3 trips per 30 day period** may or may not result in sanctions as described below.

Once a client shows a trend or has in excess of **3 cancelations** in a 1 month period, call the client to remind them of their increasing "No Shows" and explain the affect "No Shows" have to the systems resources and other clients. Explain when to call to avoid a "No Show". You will frequently find a simple reason and solution to the "No Show" such as client has relocated, on vacation, in the hospital, visiting family transporting and some forget they are on a "standing order". Document the call, date, time, person spoke with and the details of the conversation from both perspectives.

Excessive "No Shows" in excess of **6 for 2 months**. Notify the client a second time, reminding them of the previous documented conversation. If necessary, send a warning letter. Reference your previous conversations, outline the "No Show" incidents and explain the consequences if the trend continues and reaches a 3 month rolling period.

Excessive "No Shows" in excess of **9 for 3 months**. Notify the client telephonically and in writing they will be suspended from service for a period of up to 30 days. Once the 30 days has passed, the client may begin receiving service. If the "No Show" trend continues in excess of **3 in a 30 day period** following the reinstatement of services, the client may be suspended for additional periods of time.

Pick-Up Window. Clients are to be ready for pick up 30 minutes prior to their scheduled pick-up time. The "pick up window" for your trip will be 30 minutes before or 30 minutes after your scheduled pick up time. For scheduled returns, clients are expected to be dropped off 30 minutes before or after the scheduled drop off.

Negotiated Times. Under certain circumstances pick-up times may be negotiated with riders to allow more efficient scheduling. Pick-up window adjustments of up to one hour may be required depending on the travel distance and the number of passengers being transported.

- The one-hour window.
- Additional time for the trip distance.



- Additional time for peak periods (rush hour).
- Additional time for other passengers scheduled on the vehicle.
- Additional “negotiated” time of up to one hour if necessary.

Pick-up window for Negotiated Times: One hour before the appointment time plus applicable additional time for trip distance, peak periods and additional passengers.

- (1) Up to 60 minutes in negotiated time may be added to your one-hour window to allow more efficient scheduling system wide on cross-county or out of county trips.
- (2) Estimated travel time for trip distance will be included.
- (3) Estimated additional time for peak periods will be included when applicable.
- (4) Up to 20 minutes for additional passengers will be added when applicable.

Appointment/Requested Late Drop-off Time. For clients with appointment or a requested late drop-off time, the operators are expected to be deliver clients no earlier than 30 minutes before and no later than the appointment or requested late drop-off time.

Suspension Removal. Suspension will only be removed by the sponsoring agency and the CTC or transportation operator.

Upon any conversation following a suspension of service the clients or representatives must be counseled on the policies and responsibilities of using the coordinated system (i.e., canceling trips appropriately, shared ride, cost to CTC, future loss of transportation.) If a client feels that he/she had been unfairly suspended the client may appeal through the Grievance Procedure of the LCB or CTC.

Communication Equipment. All vehicles providing service within the coordinated system, shall be equipped with two-way communications in good working order and audible to the driver at all times to the base.

Vehicle Air Conditioning, Heating Equipment, and Camera System. All vehicles providing service within the coordinated system, shall have working air conditioners, heaters and cameras in each vehicle. Vehicles that do not have a working air conditioner, heater or camera will be scheduled for repair or replacement as soon as possible.

First Aid Policy. Drivers are ~~not~~ required to have First Aid training.

Cardiopulmonary Resuscitation. Drivers are ~~not~~ required to have CPR training.

On-Time Performance. The primary operator will have a 90% on-time performance rate for all completed trips.

Income Eligibility - Income eligibility will be based on 200% of the Federal Poverty Guideline based on the most current federal fiscal year. Income eligibility may be adjusted by the Program Manager based on the availability of resources. Individual exceptions meeting the Federal Poverty Guideline must be approved, in writing, by the Program Manger or CTC. Any adjustments or exceptions will be briefed and approved at the next available Local Coordinating Board (LCB) meeting.

Advance Reservation Requirements. Advance reservations for Dial-a-Ride trips must be made by 12 Noon CT the day prior to the requested ride. Additionally, reservations must be received by 2:00 p.m. CT the last working day prior to weekend or holiday. Same day demand response trips, which provide little advance notification, will be reviewed on a case-by-case basis.

Public Transit Ridership. Continue efforts to move customers from Dial-a-Ride door-to-door service onto the fixed route system to provide greater independence for applicable riders.



Complaints. Total complaints per year shall not exceed 0.5% (0.005) of the total trips per year.

Accidents. The maximum allowable number of accidents during any one evaluation period will be 1 chargeable accident per 100,000 miles.

RoadCalls. There should be no less than 10,000 miles between each roadcall.

Call Answering Time. The CTC office attempts to answer all calls within 12 seconds, approximately four rings.

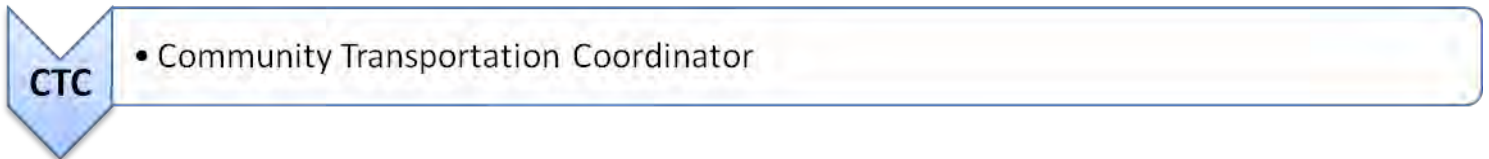
Driver Criminal Background Screening. All drivers in the coordinated system must have a favorable Level 2 background screening.

Local Complaint and Grievance Procedure/Process

The Community Transportation Coordinator (CTC) has established the following grievance procedure as authorized by the Commission for the Transportation Disadvantaged pursuant to Chapter 427, Florida Statutes and Rule 41-2, F.A.C.

A formal grievance is a written complaint to document any concerns or an unresolved service complaint regarding the operation or administration of TD services. The CTC shall make every effort to resolve any problems at the complaint stage prior to becoming a grievance.

Step 1:



The CTC formal grievance process shall be open to addressing concerns by any person or agency including but not limited to: purchasing agencies, users, potential users, private-for-profit operators, private non-profit operators, the designated official planning agency, elected officials, and drivers.

By contacting the CTC office, a written copy of the grievance process and rider policies will be made available to anyone, upon request. The CTC will be responsible for posting on all vehicles in plain view of riders, including transportation subcontractors and coordination contractors, the contact person and telephone number for access to information regarding reporting service complaints or filing a formal grievance.

All grievances filed must contain the following information:

1. The name and address of the complainant.
2. A statement of the reasons for the grievance and supplemented by supporting documentation, made in a clear and concise manner.
3. An explanation of the requested relief desired by the complainant.

All formal grievances submitted to the CTC shall be mailed to:

Okaloosa Board of County Commissioners
Transit Division Manager
600 Transit Way
Fort Walton Beach, FL 32547
Phone: 850-609-7003



Step 2:



- Local Coordinating Board

If the aggrieved party is not satisfied with the CTC decision, they may have the Local Coordinating Board (LCB) Grievance Committee hear the grievance and make recommendations to the CTC on their behalf.

To request a LCB Grievance Committee contact the Okaloosa County Transportation Disadvantaged Coordinating Board Chair at P.O. Box 11399, Pensacola, FL 32524-1399 (phone 850-332-7976 x231 or 1-800-226-8914).

Step 3:



- Commission for the Transportation Disadvantaged

If satisfaction cannot be achieved at the local level, a grievance/complaint can be submitted to the Commission for the Transportation Disadvantaged (CTD) Ombudsman Program/TD Hotline at 1-800-983-2435.

Similar to the LCB, the Commission for the Transportation Disadvantaged can hear a grievance and make recommendations or advise the CTC. Apart from these grievance processes, aggrieved parties also have recourse through Chapter 120, F.S., administrative hearing process or the judicial court system.

Note: At any point in the grievance process, the grievant may submit the grievance to the, CTC, Local Coordinating Board (LCB) or the Commission for Transportation Disadvantaged Ombudsman.

CTC Monitoring Procedures of Operators and Coordination Contractors and Coordination Contract Evaluation Criteria

The CTC conducts an annual evaluation of its Operators and Coordination Contractors to ensure contractual compliance. The CTC monitors Operators and Coordination Contractors by examining the areas listed in the Safety Compliance Review. The review is conducted on an annual basis to ensure compliance with the Safety System Program Plan, Commission and locally approved standards, and insurance requirements. The evaluation report is provided to the Local Coordinating Board for review.

A written letter and report are issued to the Operators and Coordination Contractors citing items that require corrections. A deadline is given for corrections to be made. A follow-up monitoring is conducted if necessary.



COST/REVENUE ALLOCATION & RATE STRUCTURE JUSTIFICATION

The Commission has established the Rate Calculation Model, a standard process for the development of rates for transportation services that are arranged or provided by the Coordinator. This model can be used by the Commission in comparing and approving rates to be paid to and used by Coordinators and in determining cost-based rates to be charged to all purchasing agencies.

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

The Commission's rate calculation model is used to develop rates for non-sponsored trips. Other purchasing agencies have their methods of developing rates for transportation services using vehicle mile rates and/or pick up fees.

Rates for transportation services are included in the service rates summary table below. The summary details type of service provided, unit rate whether passenger mile or trip, and cost per unit.

The Okaloosa County CTC has chosen to use the Contracted Services Rates. The Rate Model Worksheets are located in the appendices for reference.

Okaloosa County Service Rates Summary

		FY 2021/22 Contracted Srv Passenger Mile Rate Only	FY 2022/23 Contracted Srv Passenger Mile Rate Only	FY 2023/24 Contracted Srv Passenger Mile Rate Only
Ambulatory	Passenger Mile	\$ 2.80	\$ 2.80	\$ 2.86
Wheelchair	Passenger Mile	\$ 2.80	\$ 2.80	\$ 2.86
Stretcher	Passenger Mile	---	---	---



Quality Assurance

The Local Coordinating Board reviews and approves the Service Plan and it is submitted to the Commission for the Transportation Disadvantaged for final action. The Commission provides feedback on what areas of the plan need to be modified for next year.

The previous Transportation Disadvantaged Service Plan (TDSP) signed review letter and roll call sheet are included in the appendices. The previous TDSP was approved and no items were cited as deficient or inadequate.

Community Transportation Coordinator Evaluation Process

A Local Coordinating Board subcommittee assists the planning agency in evaluating the Community Transportation Coordinator on an annual basis. The evaluation of the CTC is based on performance indicators, measures of effectiveness and efficiency, and level of coordination. The evaluation worksheets are included in the appendices.

In an effort to monitor the services provided to the transportation disadvantaged by the CTC, an annual survey of the riders is conducted. The data is used to identify areas where the CTC is achieving its goals and objectives and areas where they are not. The rider surveys were conducted at the beginning of the year.

A summary of the survey results along with a comparison of the previous four years are included in the appendices along with the comments that were submitted.

A vast majority of riders rated the overall satisfaction of service as “very good or good”. The survey results indicate that **33%** of the trips are for medical/dental purposes and **44%** of the trips are for school or work purposes.

If community transportation was not provided, **28%** indicated that they would not be able to make the trip while **39%** said they would try and ride with someone else.



Appendices

- A. Memorandum of Agreement between CTD and CTC
- B. Transportation Disadvantaged Program Concept Chart
- C. Organization Chart
- D. Paratransit Vehicle Inventory
- E. Safety System Program Plan (SSPP) Certifications
- F. Glossary of Terms
- G. Rider Survey Results & Comparisons
- H. Rider Survey Comments
- I. CTC Evaluation
- J. Rate Model Worksheets



APPENDIX A

Memorandum of Agreement between CTD and CTC (New Agreement was not available)



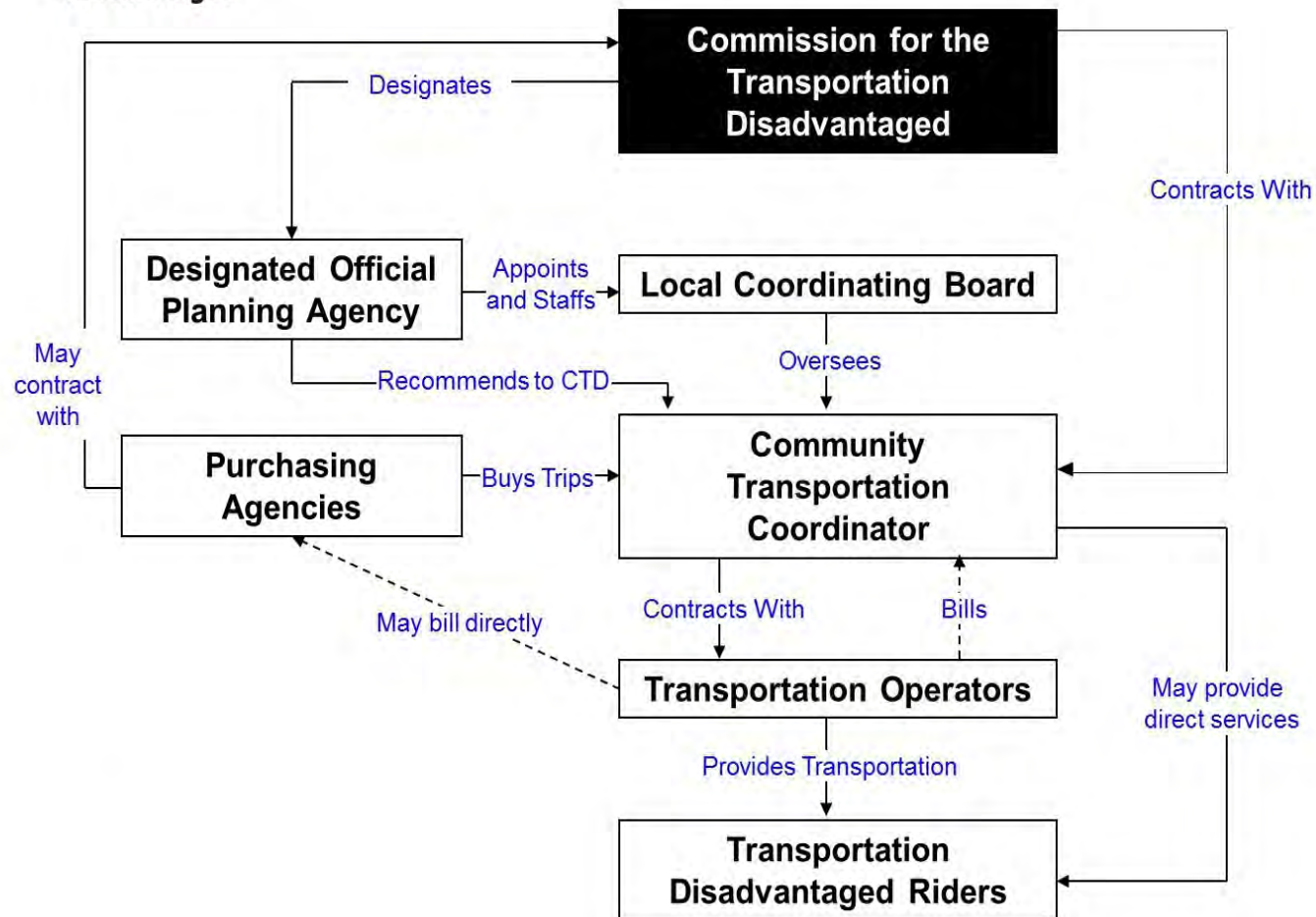
APPENDIX B

Transportation Disadvantaged Program Concept Chart





Coordinated Transportation System Organization

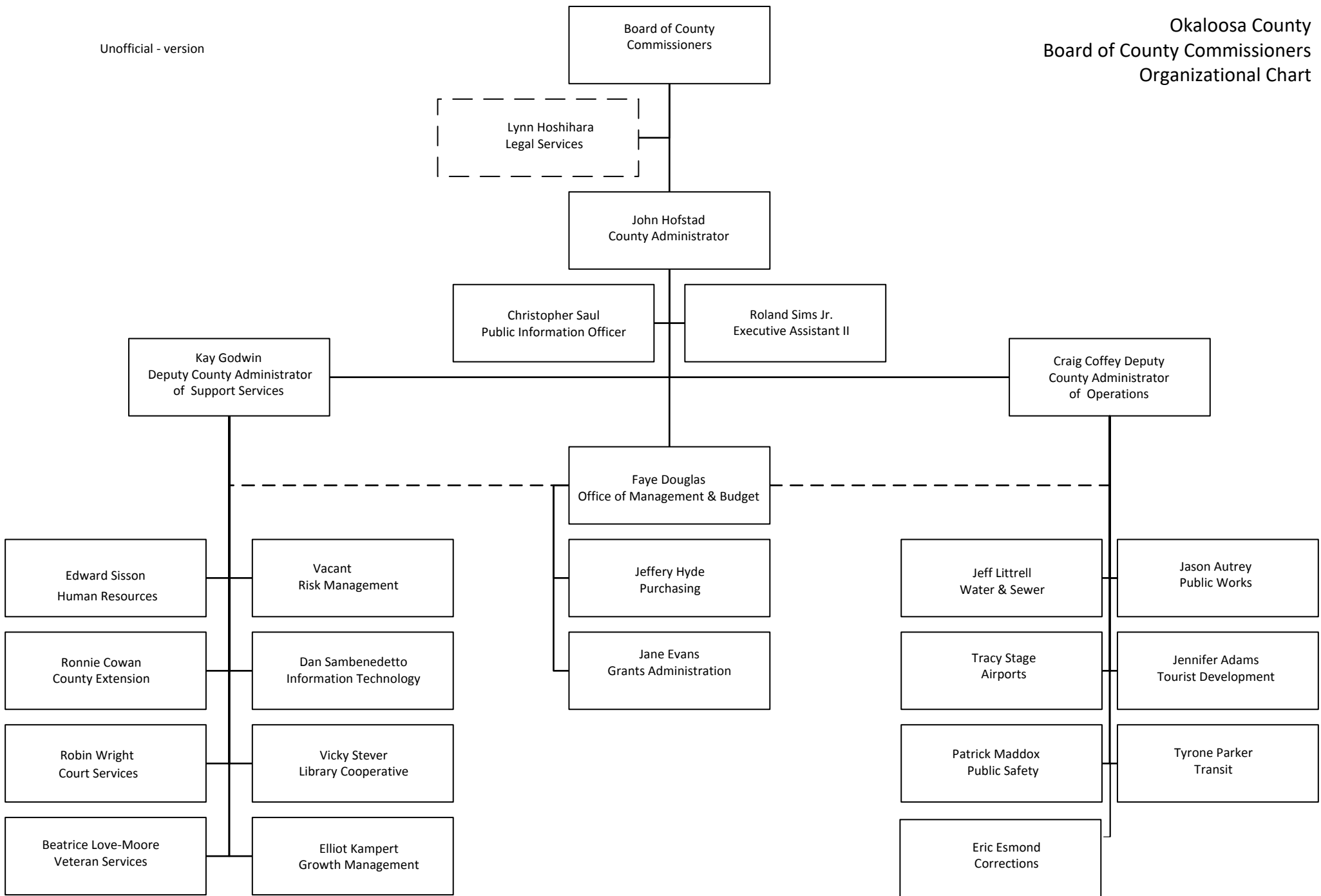


APPENDIX C

Organization Chart



Okaloosa County
Board of County Commissioners
Organizational Chart



APPENDIX D

Paratransit Vehicle Inventory



OKALOOSA COUNTY VEHICLE INVENTORY									
Vehicle #	Year	Type	AMB	W/C	Stretcher	Manf	VIN	Cost	Rpl Year
92	2014	Cutaway	12	2	0	Chevrolet	1GB6G5BG5E1198173	\$74,882.00	2020
93	2015	Cutaway	12	2	0	Chevrolet	1GB6G5BG3E1199130	\$74,882.00	2020
94	2015	Cutaway	12	2	0	Chevrolet	1GB6G5BG9E1199410	\$74,882.00	2020
95	2014	Cutaway	12	2	0	Chevrolet	1GB6G5BG7E1195470	\$71,922.00	2020
96	2008	Cutaway	12	2	0	Chevrolet	1GBE4V1958F413419	\$91,513.00	2014
97	2014	Cutaway	12	2	0	Chevrolet	1GB6G5BG8E1195865	\$71,922.00	2020
98	2014	Cutaway	12	2	0	Chevrolet	1GB6G5BG1E1195142	\$71,922.00	2020
99	2015	Cutaway	20	2	0	Ford	1FDGF5GY6FEA54366	\$95,503.00	2020
100	2007	Trolley	30	2	0	Freight	4UZAB9BV55CU61711	\$139,939.00	2017
101	2007	Trolley	30	2	0	Freight	4UZAB9BV27CZ21068	\$139,939.00	2017
505	2017	Minibus	5	3	0	Ford	1FDVU4XG2HKA67571	\$68,887.00	2021



APPENDIX E

Safety System Program Plan (SSPP) Certifications (New SSPP Certifications not provided)



APPENDIX F

Glossary of Terms



Glossary of Terms

Commission for the Transportation Disadvantaged - Glossary of Terms and Abbreviations

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

Accidents: when used in reference to the AOR, the total number of reportable accidents that occurred through negligence of the transportation provider whereby the result was either property damage of \$1,000.00 or more, or personal injury that required evacuation to a medical facility, or a combination of both.

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

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

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

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

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

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

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

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

Bus: any motor vehicle designed for carrying more than 10 passengers and used for the transportation of persons of 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 written 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 A 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 written 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 operate any transportation services itself, but contracts with transportation operators for the delivery of all transportation services.

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

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

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

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



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

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

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

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

Disabled Passenger: anyone which 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 customer to vehicles and notifies the appropriate drivers.

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



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

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

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

(QAPE) Quality Assurance and Program Evaluation.

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

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

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



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

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

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

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

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

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

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

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

Sole Provider: (also referred to as Sole Source) 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, 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, 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.

(TPO) Transportation Planning Organization.

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 or density.

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

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

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

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

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

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

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

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

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



APPENDIX G

Rider Survey Results and Comparisons



OKALOOSA COUNTY RIDER SURVEY RESULTS & COMPARISONS

QUESTION	#	RESPONSE	MV 2021	MV 2022	MV 2023	MV 2021	MV 2022	MV 2023
DEPENDABILITY - Schedule a trip for the time period I need?	1	A - Very Good	4	14	66	33%	67%	61%
		B - Good	5	5	29	42%	24%	27%
		C - Neutral	0	1	8	0%	5%	7%
		D - Poor	1	1	2	8%	5%	2%
		E - Very Poor	2	0	4	17%	0%	4%
		Total	12	21	109	100%	100%	100%
SERVICE RUNS WHEN I NEED IT?	2	A - Very Good	5	12	60	42%	57%	55%
		B - Good	3	7	30	25%	33%	28%
		C - Neutral	2	1	12	17%	5%	11%
		D - Poor	1	0	4	8%	0%	4%
		E - Very Poor	1	1	3	8%	5%	3%
		Total	12	21	109	100%	100%	100%
EASY TO ARRANGE TRIPS?	3	A - Very Good	5	11	60	42%	52%	55%
		B - Good	2	5	34	17%	24%	31%
		C - Neutral	1	4	11	8%	19%	10%
		D - Poor	3	0	4	25%	0%	4%
		E - Very Poor	1	1	0	8%	5%	0%
		Total	12	21	109	100%	100%	100%
IT IS CONVENIENT TO CHANGE SCHEDULED TRIPS WHEN NECESSARY?	4	A - Very Good	3	10	51	25%	48%	47%
		B - Good	4	4	30	33%	19%	28%
		C - Neutral	2	4	23	17%	19%	21%
		D - Poor	2	1	4	17%	5%	4%
		E - Very Poor	1	2	1	8%	10%	1%
		Total	12	21	109	100%	100%	100%
COMFORT / CLEANLINESS The vehicles are clean and maintained?	5	A - Very Good	10	15	71	83%	71%	65%
		B - Good	1	5	28	8%	24%	26%
		C - Neutral	0	1	7	0%	5%	6%
		D - Poor	0	0	2	0%	0%	2%
		E - Very Poor	1	0	1	8%	0%	1%
		Total	12	21	109	100%	100%	100%
THE DRIVER PROVIDES A SAFE AND COMFORTABLE RIDE?	6	A - Very Good	5	16	90	42%	76%	83%
		B - Good	4	5	16	33%	24%	15%
		C - Neutral	1	0	3	8%	0%	3%
		D - Poor	1	0	0	8%	0%	0%
		E - Very Poor	1	0	0	8%	0%	0%
		Total	12	21	109	100%	100%	100%
WAITING TIME - The vehicle picks me up within 30 minutes of my scheduled time?	7	A - Very Good	7	14	66	58%	67%	61%
		B - Good	1	5	28	8%	24%	26%
		C - Neutral	2	0	13	17%	0%	12%
		D - Poor	0	2	0	0%	10%	0%
		E - Very Poor	2	0	2	17%	0%	2%
		Total	12	21	109	100%	100%	100%
I ARRIVED AT MY DESTINATION AT THE SCHEDULED TIME?	8	A - Very Good	10	10	70	83%	48%	64%
		B - Good	0	9	32	0%	43%	29%
		C - Neutral	0	1	6	0%	5%	6%
		D - Poor	1	1	1	8%	5%	1%
		E - Very Poor	1	0	0	8%	0%	0%
		Total	12	21	109	100%	100%	100%



OKALOOSA COUNTY RIDER SURVEY RESULTS & COMPARISONS

QUESTION	#	RESPONSE	MV 2021	MV 2022	MV 2023	MV 2021	MV 2022	MV 2023
COST - Amount I pay for my trip is reasonable?	9	A - Very Good	6	18	86	50%	86%	79%
		B - Good	4	2	19	33%	10%	17%
		C - Neutral	1	1	3	8%	5%	3%
		D - Poor	1	0	1	8%	0%	1%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	12	21	109	100%	100%	100%
THE RESERVATIONIST IS PLEASANT?	10	A - Very Good	8	17	83	67%	81%	76%
		B - Good	4	2	17	33%	10%	16%
		C - Neutral	0	2	8	0%	10%	7%
		D - Poor	0	0	1	0%	0%	1%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	12	21	109	100%	100%	100%
THE DRIVERS ARE COURTEOUS AND HELPFUL?	11	A - Very Good	7	17	89	58%	81%	82%
		B - Good	4	4	15	33%	19%	14%
		C - Neutral	0	0	5	0%	0%	5%
		D - Poor	1	0	0	8%	0%	0%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	12	21	109	100%	100%	100%
OVERALL COURTESY OF EMPLOYEES?	12	A - Very Good	7	17	85	58%	81%	78%
		B - Good	3	4	20	25%	19%	18%
		C - Neutral	0	0	3	0%	0%	3%
		D - Poor	2	0	1	17%	0%	1%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	12	21	109	100%	100%	100%
OVERALL SATISFACTION OF SERVICES?	13	A - Very Good	7	11	76	58%	52%	70%
		B - Good	3	9	23	25%	43%	21%
		C - Neutral	0	0	9	0%	0%	8%
		D - Poor	2	1	0	17%	5%	0%
		E - Very Poor	0	0	1	0%	0%	1%
		Total	12	21	109	100%	100%	100%
WHERE ARE YOU GOING ON YOUR TRIP (FINAL DESTINATION)?	14	A. Med/Dent	7	4	36	58%	19%	33%
		B. Sch/Wrk	3	13	48	25%	62%	44%
		C. Groc/Shop	1	2	9	8%	10%	8%
		D. Rec/Errand	0	1	6	0%	5%	6%
		E. Other	1	1	10	8%	5%	9%
		Total	12	21	109	100%	100%	100%
ON AVERAGE, HOW OFTEN DO YOU USE COMMUNITY TRANSPORTATION A MONTH?	15	A. Rarely	0	2	6	0%	10%	6%
		B. 1-2 days	1	0	7	8%	0%	6%
		C. 3-4 days	2	1	12	17%	5%	11%
		D. 5-10 days	1	7	12	8%	33%	11%
		E. 11+ days	8	11	72	67%	52%	66%
		Total	12	21	109	100%	100%	100%
IF NOT BY COMMUNITY TRANSPORTATION, HOW WOULD YOU MAKE THIS TRIP?	16	A. Drive	1	2	7	8%	10%	6%
		B. Would not go	6	12	31	50%	57%	28%
		C. Carpool	3	4	42	25%	19%	39%
		D. Other	1	3	20	8%	14%	18%
		E. Bus Service	1	0	9	8%	0%	8%
		Total	12	21	109	100%	100%	100%



APPENDIX H

Rider Survey Comments



OKALOOSA COUNTY COMMUNITY TRANSPORTATION

2023 RIDER SURVEY COMMENTS

1. Happy past 24 years.
2. Fine nothing wrong.
3. Thank you.
4. Debbie was wonderful. Great driver. Felt very safe. Debbie was kind and helpful. 😊
5. Thankful for EC Rider.
6. Your driver's are excellent.
7. A good drive.
8. We need weekend drivers.
9. Good driver.
10. I don't have a car. Only work Monday - Friday because no weekend availability. I work in a hotel.
11. Usually just use the fixed route buses.
12. Need to go to Silver Sands in Destin - least 2 more miles.
13. Great person.
14. If I drive it is very risky.
15. Only complications I have experienced was when there was a shortage of drivers. Richard was fantastic, as most drivers are. Cleveland is very through and pleasant, so grateful.
16. Some of the vehicles need to be clean the sand out before putting them to run.
17. Need the bus to improve the pick-up and delivery times.
18. It would be great if you could add 1 or 2 more bicycle on the rack. Too often someone has to leave their bicycle or wait another hour for a bus.
19. Met Lloyd today. Very kind, understanding. As always reservationist, and dispatcher staff are extremely efficient. My life depends on this transit service!
20. Run a little later in the night. Bus stop from Chevron gas station is too far.
21. Need weekend routes.



Okaloosa County Community Transportation 2023 Rider Survey Comments

22. Important to make sure times Transit Buses correct.
23. More obvious bus stops.
24. Additional buses
25. Bus schedules are needed. Improve the dependability of the service.
26. A good driver, polite to all who ride.
27. I appreciate EC Rider service because without this service I would not be able to have a job unless I pay a substantial amount to get back and forth, an amount that I and other most likely cannot afford.
28. You need a better scheduling system. Also you need planned trips to certain places, i.e. (Walmart). Fixed routes.
29. Wish it was easier to pay for rides. (Electronic)
30. We need city buses in Crestview.
31. Dispatch person is very rude when I call them to see where my bus is. Doesn't answer phone.
32. Best Drivers.
33. Pleasant, enjoyable.
34. Times for Crestview, Ft. Walton, and Destin in routes should meet up better
35. Signs posted with route numbers on stops. Brochures for to have the stops and times.
36. Need to be on time.
37. Bus run a little later in the night and at Chevron gas station.
38. Thank you 😊
39. A weekend schedule is needed for those who use the bus to and from work.
40. Bus stop marking labeled with route number especially for the elderly.
41. The buses need to clean, sweep, mop, and sanitize at the end of the day.
42. The number 33 bus could go down 98 further.
43. Make trip at night. When working people are coming home.



Okaloosa County Community Transportation 2023 Rider Survey Comments

44. Unless from a know rider, no one knows about the bus. A bus every half hour instead of hour would be useful. More people need to know about the bus.
45. Posted bus stops with seats on each side. 4 x 4 post.
46. Some drivers need more people skills
47. Debbie Jacobs is always so sweet. I love riding route 30 when she drives on Monday.
48. Drivers are excellent. When non med trips are terrible to make times even weeks ahead. Not knowing if you have the ride until the day before.
49. Thank you!
50. Provide bus schedules. Bus schedules apps. Increase the bus service time.
51. Okaloosa Transient Drivers Do A Wonderful Job On A Daily Basis With Transporting Patients/ Clients. They Are Courteous, Helpful, Friendly, And Safe Drivers. This Is An Awesome Responsibility! However, Quite A Bit Of Confusion Comes In To The Situation Concerning Schedule/Timing Between Motive Care And Oskaloosa Co. Transient System. It Would Be Very Beneficial To Both Companies To Start Showing More Effort In NOT Leaving People Out Here At The Medical Establishments For Hours On Edge Because Motive Care Won't Send Another Driver To Pick Up Patients When They Are Left Out There By Another Transportation. This Does Come Down To Health And Safety!
52. You need to bring back fixed route transit. There was one to Walmart but I haven't been scheduled for it for more than a year. There is a new mall on Ferdon Blvd. and you need to have a fixed route to the new mall. I would ride often. I love it, you guys. This is an essential service. You also need a card reader to except payment, for the safety of the drivers.
53. I am referring to my experience 6-8 years ago after my Heart surgery and Cardiology Therapy, mostly. Good driver - Michelle



APPENDIX I

CTC Evaluation





OKALOOSA COUNTY



TRANSPORTATION DISADVANTAGED COORDINATING BOARD

OKALOOSA COUNTY TRANSPORTATION DISADVANTAGED **CTC EVALUATION**

Approved on February 22, 2023

2/22/2023

Date

Chair

Gyenne Earle



CTC EVALUATION WORKBOOK

Florida Commission for the



Transportation Disadvantaged

CTC BEING REVIEWED: OKALOOSA COUNTY BOCC

COUNTY: OKALOOSA COUNTY

ADDRESS: 600 TRANSIT WAY, FORT WALTON BEACH, FL

CONTACT: TYRONE PARKER PHONE: (850) 609-7003

REVIEW PERIOD: FY 2021-2022 REVIEW DATE: JANUARY 25, 2023

CONDUCTING THE REVIEW: LOCAL COORDINATING BOARD

CONTACT INFORMATION: HOWARD K. VANSELOW 850-332-7976, EXT 231

HOWARD.VANSELOW@ECRC.ORG

APPROVED



EVALUATION INFORMATION

USING THE AOR, COMPILE THIS INFORMATION:

1. OPERATING ENVIRONMENT: ☐ RURAL ☒ SMALL URBAN
2. ORGANIZATION TYPE: ☐ PRIVATE-FOR-PROFIT
☐ PRIVATE NON-PROFIT
☒ GOVERNMENT
☐ TRANSPORTATION AGENCY
3. NETWORK TYPE: ☐ SOLE PROVIDER
☐ PARTIAL BROKERAGE
☒ COMPLETE BROKERAGE
4. NAME THE OPERATORS THAT YOUR COMPANY HAS CONTRACTS WITH:
 - **MV Transportation (Started January 1, 2019)**
5. NAME THE GROUPS THAT YOUR COMPANY HAS COORDINATION CONTRACTS WITH:
 - **Pyramid Inc.**
 - **Pensacola Care**
6. NAME THE ORGANIZATIONS AND AGENCIES THAT PURCHASE SERVICE FROM THE CTC AND THE PERCENTAGE OF TRIPS EACH REPRESENTS?

Name of Agency	% of Trips
Commission for the Transportation Disadvantaged (CTD)	57.62%
Agency for Health Care Administration (AHCA) / MEDICAID	10.72%
Agency for Persons with Disabilities (APD)	0.00%
Department of Elder Affairs (DOEA)	4.11%
Department of Education (DOE)	0.00%
Other (Rural-5311)	27.55%

7. REVIEW AND DISCUSS TD HELPLINE CALLS:

	Number of calls	Closed Cases	Unsolved Cases
Total Calls	None Reported		0



COMPLIANCE WITH CHAPTER 427, F.S.

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

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

Daily onsite Monitoring is performed. Monthly, quarterly and annual data is collected and reviewed.

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

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

If vehicles are in place Annually.

Is a written report issued? **X** Yes ☐ No

Annual Report

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

Follow-up to ensure corrections carried out and brought into compliance.

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

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

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

NOT USING



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

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

The CTC's software system is designed so that when the reservationist book a trip, the software will recognize if the trip is within $\frac{3}{4}$ mile of a fixed-route bus stop. If the trip is located $\frac{3}{4}$ mile of a stop, the reservationist will supply this information to the client and applications are reviewed to see if riders are near a bus route and able to ride a fixed route.

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

☐ Yes ☒ No

If YES, what is the goal?

Is the CTC accomplishing the goal? N/A ☐ Yes ☐ No

IS THE CTC IN COMPLIANCE WITH THIS REQUIREMENT? **Not applicable** ☐ Yes ☐ No

Although there is no goal CTC will continue to work on ways to transfer riders to fixed route. CTC and Contract operator have a Mobility Manager who will also help provide training to riders to navigate the fixed route system.

Compliance with 41-2.006(1), Minimum Insurance Compliance "...ensure compliance with the minimum liability insurance requirement of \$200,000 per person and \$300,000 per incident..."

WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS?

\$200,000 per person and \$300,000 per occurrence

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

\$5,000,000 per person and \$5,000,000 per occurrence

HOW MUCH DOES THE INSURANCE COST (per operator)?

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

☒ Yes ☐ No If yes, was this approved by the Commission? ☐ Yes ☒ No
Cost is part of the operator contract and is under the MV Corporate umbrella.

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



Compliance with 41-2.011(2), Evaluating Cost-Effectiveness of Coordination Contractors and Transportation Alternatives.

“...contracts shall be reviewed annually by the Community Transportation Coordinator and the Coordinating Board as to the effectiveness and efficiency of the Transportation Operator or the renewal of any Coordination Contracts.”

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

Reduces the number of trips under non-sponsored. Coordination Contractors can efficiently handle their clients, including group trips.

2. DO YOU HAVE TRANSPORTATION ALTERNATIVES? ☒ Yes ☐ No

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

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

Observed during LCB ride along and office visit.

Compliance with Commission Standards “...shall adhere to Commission approved standards...”

Commission Standards	Comments
Local toll free phone # must be posted in all vehicles.	See Trip Observations
Vehicle Cleanliness	Observed – Interior clean/Exterior raining
Passenger/Trip Database	Discussed – Paper and Tablet
Adequate seating	Observed
Driver Identification	Observed
Passenger Assistance	Observed
No Smoking, Eating and Drinking	Observed
Two-way Communications	Observed
Air Conditioning/Heating	Observed
Billing Requirements	Explained during Evaluation



TRIP OBSERVATION

Date of Observation:

JAN. 9, 2023

#1

SCANNED 1/10/23

Person conducting the observation:

YVONNE EARLE

Location:

DEPOT TO MAIL WALK TO BOBBIKES / BURNETTE PUB

Number of Passengers picked up/dropped off:

2

Ambulatory

☒

Non-Ambulatory

Was the driver on time?

☒

Yes

☐

No, how many minutes late/early?

☐

Yes

☐

No, how many minutes late/early?

☐

Yes

☐

No, how many minutes late/early?

Did the driver provide any passenger assistance?

☐

Yes

☒

No

Was the driver wearing any identification?

☒

Yes

☐

Uniform

☒

Name Tag

☒

ID Badge

☐

No

Did the driver render an appropriate greeting?

☒

Yes

No

☐

Driver regularly transports the rider, not necessary

Did the driver ensure the passengers were wearing their seat belts?

☒

Yes

☐

No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?

☒

Yes

☐

No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?

☒

Yes

☐

No

Does the vehicle have working heat and air conditioning?

☒

Yes

☐

No

Does the vehicle have two-way communications in good working order?

☒

Yes

☐

No

If used, was the lift in good working order?

NA ☐

Yes

☐

No

Was there safe and appropriate seating for all passengers?

☒

Yes

☐

No

Did the driver properly use the lift and secure the passenger?

NA ☐

Yes

☐

No

If no, please explain:

Comments:

SEAT BELT ISSUE 1ST SEAT BEHIND DRIVER
I PULLED TO HARD AND WOULD NOT RETRACK
SO IT WOULD NOT TIGHTEN. DRIVER MADE
2.5 MIN. SO. SO SORRY. V. ...

TRIP OBSERVATION

Date of Observation:

JAN 9, 2023

#2

Person conducting the observation:

YVONNE EARLE

Location:

FWB TO MAIL WART TO WAYNE, FWB

Number of Passengers picked up/dropped off:

1

Ambulatory

Non-Ambulatory

☒

Yes

☐

No, how many minutes late/early?

☐

Yes

☐

No, how many minutes late/early?

☐

Yes

☐

No, how many minutes late/early?

Did the driver provide any passenger assistance?

☒

Yes

☐

No

Was the driver wearing any identification?

☒

Yes

☐

Uniform

☒

Name Tag

☒

ID Badge

☐

No

Did the driver render an appropriate greeting?

☒

Yes

No

☐

Driver regularly transports the rider, not necessary

Did the driver ensure the passengers were wearing their seat belts?

☒

Yes

☐

No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?

☒

Yes

☐

No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?

☒

Yes

☐

No

Does the vehicle have working heat and air conditioning?

☒

Yes

☐

No

Does the vehicle have two-way communications in good working order?

☒

Yes

☐

No

If used, was the lift in good working order?

☒

Yes

☐

No

Was there safe and appropriate seating for all passengers?

☒

Yes

☐

No

Did the driver properly use the lift and secure the passenger?

☒

Yes

☐

No

If no, please explain:

Comments:



TRIP OBSERVATION

Date of Observation:

JAN 9, 2023

#3 /

Person conducting the observation:

YVONNE EARLE

Location:

FWB-SHERRY TO MAR WALK

Number of Passengers picked up/dropped off:

1

Ambulatory

Non-Ambulatory

Was the driver on time?

☒

Yes

☐

No, how many minutes late/early?

☐

Yes

☐

No, how many minutes late/early?

☐

Yes

☐

No, how many minutes late/early?

Did the driver provide any passenger assistance?

☐

Yes

☒

No

Was the driver wearing any identification?

☒

Yes

☐

Uniform

☒

Name Tag

☒

ID Badge

☐

No

Did the driver render an appropriate greeting?

☒

Yes

No

☐

Driver regularly transports the rider, not necessary

Did the driver ensure the passengers were wearing their seat belts?

☒

Yes

☐

No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?

☒

Yes

☐

No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?

☒

Yes

☐

No

Does the vehicle have working heat and air conditioning?

☒

Yes

☐

No

Does the vehicle have two-way communications in good working order?

☒

Yes

☐

No

If used, was the lift in good working order?

☒

Yes

☐

No

Was there safe and appropriate seating for all passengers?

☒

Yes

☐

No

Did the driver properly use the lift and secure the passenger?

☒

Yes

☐

No

If no, please explain:

Comments:



TRIP OBSERVATION

Date of Observation:

JAN 9, 2023

#4 /

Person conducting the observation:

YVONNE EARLE

Location:

MAR WALK TO HIGHLAND

Number of Passengers picked up/dropped off:

1

Ambulatory

Non-Ambulatory

Was the driver on time?



Yes



No, how many minutes late/early?



Yes



No, how many minutes late/early?



Yes



No, how many minutes late/early?

Did the driver provide any passenger assistance?



Yes



No

Was the driver wearing any identification?

☒ Yes



Uniform

☒ Name Tag

☒ ID Badge

☐ No

Did the driver render an appropriate greeting?



Yes

No



Driver regularly transports the rider, not necessary

Did the driver ensure the passengers were wearing their seat belts?



Yes



No

Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?



Yes



No

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?



Yes



No

Does the vehicle have working heat and air conditioning?



Yes



No

Does the vehicle have two-way communications in good working order?



Yes



No

If used, was the lift in good working order?



Yes



No

Was there safe and appropriate seating for all passengers?



Yes



No

Did the driver properly use the lift and secure the passenger?



Yes



No

If no, please explain:

Comments:



Compliance with Local Standards “...shall adhere to Commission approved standards...”

Local Standards	Comments
Transport of Escorts and dependent children policy	Okaloosa County children under the age of twelve (12) require an escort. The requirement may also be imposed if the individual has special needs or exhibits behavior problems.
Use, Responsibility, and cost of Child restraint devices	Any child 5 years of age or younger must be transported by using a crash-tested, federally approved car seat. The infant carrier is the responsibility of the parent or guardian. Car seats available upon request.
Out-of-Service Area trips	Shall be provided when resources are available. HMO out of service area trips are also provided when available.
CPR/1st Aid	First Aid will be administered as needed & 911 will be called for additional assistance. Drivers are required to complete 1st Aid and CPR training every 2 years.
Driver Criminal Background Screening	All drivers in the coordinated system must have a favorable Level II Background screening, expanded 50 states check, Florida Department of Law Enforcement and FBI background screening.
Rider Personal Property	Property that can be carried by the passenger in one trip, and can safely be stowed on the vehicle, and out of the way as to not cause interference if there is an emergency, shall be allowed to be transported with the passenger at no additional charge. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.
Advance reservation requirements	Reservations/Office operating hours are Monday – Friday, 7:30 A.M. to 4:30 P.M., excluding holidays. Trips reservations requested on Tuesdays through Saturdays must be made by 12 noon the day prior to the requested ride. Reservations for trips requested on Sundays and Mondays must be requested no later than 12 noon on the preceding Friday.
Pick-up Window Change per TDSP update	Clients are to be ready for pick up 30 minutes prior to their scheduled pick-up time. The “pick-up window” for your trip will be 30 minutes before or 30 minutes after your scheduled pickup time. For scheduled returns, clients are expected to be dropped off 30 minutes before or after the scheduled drop off.



Measurable Standards/Goals	Standard/Goal	Latest Figures	MET/ NOT MET
Public Transit Ridership	No goal		
On-time performance	CTC > 90%	20-21 94.93% 21-22 94.33%	MET
Passenger No-shows: 5,024 / 39,365	< 5%	20-21 10.93% 21-22 12.76%	UNMET
Accidents 6 / 429,055 miles	CTC 1/100,000 miles	20-21 1.58 / 100,000 21-22 1.40 / 100,000	UNMET
Roadcalls 27 / 429,055 miles	CTC 1/10,000 miles	20-21 .71 / 10,000 21-22 .63 / 10,000	MET
Complaints 17 / 39,365 trips	CTC < 0.5% of trips	20-21 .02% 21-22 .04%	MET
Call-Hold Time	No goal New Goal of under 4:15 minutes	20-21 4:04 21-22 4:45	N/A

CTD AND LOCAL STANDARDS

Findings:

Recommendations:

Comments: Although the Accident goal was unmet – accidents are not broken down into preventable and unpreventable for this report. Accidents are discussed and broken down further during the TD Local Coordinating Board meeting and on the Quarterly report.

The No-show goal was not met mainly due to not enforcing No-show policies. Going forward they will start to reimplement and start enforcing the No-show policy to help meet the goal for next year.



Trips

Funding Source	# TRIPS	% TRIPS
Commission for the Transportation Disadvantaged (CTD)	22,681	57.62%
Agency for Health Care Administration (AHCA) / MEDICAID	4,221	10.72%
Agency for Persons with Disabilities (APD)	0	0.00%
Department of Elder Affairs (DOEA)	1,618	4.11%
Department of Education (DOE)	0	0.00%
Other (Rural-5311)	10,845	27.55%
Totals	39,365	

Passenger Satisfaction - The planning agency conducts the rider survey each year. The results are included in the TDSP update.

Date of Rider Surveys: **January 2023 – March 2023**

OVERALL SATISFACTION OF SERVICE				
		A - Very Good	11	52%
		B - Good	9	43%
		C - Neutral	0	0%
		D – Poor	1	5%
		E - Very Poor	0	0%
		Total	21	
Unduplicated Head Count	379	Percentage of Surveys Returned	5.54%	
20-21	509		1.57%	



COSTS BY EXPENSE CATEGORY

CTC EXPENSE CATEGORY BY ACCOUNT (500-599)	2019-2020 Trips: 66,206		2020-2021 Trips: 41,209		2021-2022 Trips: 39,365	
	Expense	Cost/ Trip	Expense	Cost/ Trip	Expense	Cost/ Trip
Labor (501)	\$142,259	\$2.15	\$198,725	\$4.82	\$174,293	\$4.43
Fringe Benefits (502)	\$21,803	\$0.33	\$21,642	\$0.53	\$23,097	\$0.59
Services (503)	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Materials & Supplies Consumed (504)	\$471,915	\$7.13	\$217,188	\$5.27	\$327,733	\$8.33
Utilities (505)	\$22,923	\$0.35	\$21,535	\$0.52	\$37,848	\$0.96
Casualty and Liability Costs (506)	\$5,631	\$0.09	\$5,420	\$0.13	\$4,776	\$0.12
Taxes (507)	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Miscellaneous Expenses (509)	\$2,194	\$0.03	\$0	\$0.00	\$0	\$0.00
Interest Expense	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Leases & Rentals	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Annual Depreciation & Amortization	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Contributed Service - Allowable Expenses	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Allocated Indirect Expenses (if applicable)	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Purchased Transportation Services						
Bus Pass	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
School Board (School Bus)	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Transportation Network Companies (TNC)	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Taxi	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
Contracted Operator	\$1,617,736	\$24.43	\$1,965,515	\$47.70	\$2,008,122	\$51.01
SYSTEM TOTAL	\$2,284,461	\$34.51	\$2,430,025	\$58.97	\$2,575,869	\$65.44

1. Which expenses are especially high?

Overall cost per trip have gone up largely due to less trips.

2. Are these high expenses acceptable? Are they approved?

Expenses are reasonable and all cost are reviewed by the Operator, Director and County staff.

3. What strategies could reduce the unacceptable costs?



Level of Competition Worksheet 2

1. Inventory of Transportation Operators in the Service Area

	Column A Operators Available	Column B Operators Contracted in the System.	Column C Include Trips	Column D % of all Trips
Private Non-Profit				
Private For-Profit	1	0	39,365	100%
Government				
Public Transit Agency				
Total	1			

2. How many of the operators are coordination contractors? **0**
3. Of the operators included in the local coordinated system, how many have the capability of expanding capacity? **The capability to expand with additional Funding and Vehicles.**

Does the CTC have the ability to expand? **Yes**

4. Indicate the date the latest transportation operator was brought into the system.
January 2019
5. Does the CTC have a competitive procurement process? **Yes**
6. In the past five (5) years, how many times have the following methods been used in selection of the transportation operators?

Once

	Low bid		Requests for proposals
	Requests for qualifications		Requests for interested parties
	Negotiation only	X	Invitation to Negotiate (ITN)

Which of the methods listed above was used to select the current operators?

Invitation to Negotiate (ITN)



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

<input checked="" type="checkbox"/>	Capabilities of operator
<input checked="" type="checkbox"/>	Age of company
<input checked="" type="checkbox"/>	Previous experience
<input checked="" type="checkbox"/>	Management
<input checked="" type="checkbox"/>	Qualifications of staff (Key)
<input checked="" type="checkbox"/>	Resources
<input checked="" type="checkbox"/>	Economies of Scale
<input checked="" type="checkbox"/>	Contract Monitoring
<input checked="" type="checkbox"/>	Reporting Capabilities
<input checked="" type="checkbox"/>	Financial Strength
<input checked="" type="checkbox"/>	Performance Bond
<input checked="" type="checkbox"/>	Responsiveness to Solicitation

<input checked="" type="checkbox"/>	Scope of Work
<input checked="" type="checkbox"/>	Safety Program
<input checked="" type="checkbox"/>	Capacity
<input checked="" type="checkbox"/>	Training Program
<input checked="" type="checkbox"/>	Insurance
<input checked="" type="checkbox"/>	Accident History
<input checked="" type="checkbox"/>	Quality
	Community Knowledge
<input checked="" type="checkbox"/>	Cost of the Contracting Process
<input checked="" type="checkbox"/>	Price
	Distribution of Costs
	Other: (list)

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

How many responded? **4**

The request for bids/proposals was distributed:

 X **Locally** **X** **Statewide** **X** **Nationally**

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

Level of Availability (Coordination) Worksheet 3

Planning – What are the coordinated plans for transporting the TD population? Transportation Disadvantaged Service Plan (TDSP)

Public Information – How is public information distributed about transportation services in the community? Articles in local paper, brochures at agencies, ride guides, web site, through the LCB, radio, events, public service announcements, County's Facebook and webpage.

Certification – How are individual certifications and registrations coordinated for local TD transportation services? The certifications are processed in the office.

Eligibility Records – What system is used to coordinate which individuals are eligible for special transportation services in the community? Eligibility records are consistent with the TDSP. They are maintained through the transportation software and filed.



Call Intake – To what extent is transportation coordinated to ensure that a user can reach a Reservationist on the first call? There are two reservationists; the lines rollover to other staff if the lines are busy.

Reservations – What is the reservation process? How is the duplication of a reservation prevented? Computer software allows for scheduling without duplication.

Trip Allocation – How is the allocation of trip requests to providers coordinated? N/A.

Scheduling – How is the trip assignment to vehicles coordinated? Scheduler and software assign trips to the drivers and assigns trips to vehicles accordingly.

Transport – How are the actual transportation services and modes of transportation coordinated? The scheduler uses data collected for next day trips to develop manifests for drivers, by vehicle and two-way communication and tablets are used for add-on and changes.

Dispatching – How is the real time communication and direction of drivers coordinated? Dispatch is available to drivers by two way communication and tablets.

General Service Monitoring – How is the overseeing of transportation operators coordinated? Daily with on-site observation. Monthly, Quarterly and Annual monitoring for contracted operator.

Daily Service Monitoring – How are real-time resolutions to trip problems coordinated? Dispatch, receptions and supervisor are located in the same office. Two-way communications is maintained with the drivers and 3 road supervisor.

Trip Reconciliation – How is the confirmation of official trips coordinated? Through the driver manifests, road supervisors and office staff validating paperwork/data.

Billing – How is the process for requesting and processing fares, payments, and reimbursements coordinated? Monthly invoices through office and county staff. Fares and co-pays are collected daily

Reporting – How is operating information reported, compiled, and examined? Using the transportation software, the trip data is used to produce the necessary reports which are reviewed.

Cost Resources – How are costs shared between the coordinator and the operators (s) in order to reduce the overall costs of the coordinated program? Cost are shared by sharing facilities, using county fuel contract and maintenance staff.

Information Resources – How is information shared with other organizations to ensure smooth service provision and increased service provision? Through the local coordinating board, advertising, community, center meetings, County's Facebook and webpage.

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



APPENDIX J

Rate Model Worksheet



Preliminary Information Worksheet

Version 1.4

CTC Name: Okaloosa County Board of County Commissioners
County (Service Area): Okaloosa County
Contact Person: Booker Tyrone Parker
Phone # 850-609-7003

Check Applicable Characteristic:

ORGANIZATIONAL TYPE:

- ☒ Governmental
- ☐ Private Non-Profit
- ☐ Private For Profit

NETWORK TYPE:

- ☒ Fully Brokered
- ☐ Partially Brokered
- ☐ Sole Source

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



Comprehensive Budget Worksheet

Version 1.4

CTC: Okaloosa County Board of County Commissioners
County: Okaloosa County

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

	Prior Year's ACTUALS from Oct 1st of 2021 to Sept 30th of 2022	Current Year's APPROVED Budget, as amended from Oct 1st of 2022 to Sept 30th of 2023	Upcoming Year's PROPOSED Budget from Oct 1st of 2023 to Sept 30th of 2024	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

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

Local Non-Govt

Farebox	\$ 139,390	\$ 136,525	\$ 140,621	-2.1%	3.0%	
Medicaid Co-Pay Received						
Donations/ Contributions						
In-Kind, Contributed Services						
Other						
Bus Pass Program Revenue						

Local Government

District School Board						
Compl. ADA Services						
County Cash	\$ 86,827	\$ 87,016	\$ 87,016	0.2%	0.0%	
County In-Kind, Contributed Services						
City Cash						
City In-Kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						

CTD

Non-Spons. Trip Program	\$ 547,960	\$ 452,642	\$ 452,642	-17.4%	0.0%	
Non-Spons. Capital Equipment						
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						

USDOT & FDOT

49 USC 5307	\$ 1,829,501	\$ 1,898,271	\$ 1,920,700	3.8%	1.2%	
49 USC 5310						
49 USC 5311 (Operating)						
49 USC 5311(Capital)	\$ -	\$ 538,125	\$ 538,125		0.0%	
Block Grant	\$ -	\$ -				
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)	\$ 531,185	\$ 521,796	\$ 521,796	-1.8%	0.0%	
Bus Pass Program Revenue						

AHCA

Medicaid						
Other AHCA (specify in explanation)	\$ 150,000	\$ 150,000	\$ 150,000	0.0%	0.0%	
Bus Pass Program Revenue						

DCF

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

DOH

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

DOE (state)

Carl Perkins						
Div of Blind Services						
Vocational Rehabilitation	\$ 500	\$ 500	\$ 500	0.0%	0.0%	
Day Care Programs						
Other DOE (specify in explanation)						
Bus Pass Program Revenue						

AWI

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

DOEA

Older Americans Act	\$ 30,000	\$ 30,000	\$ 30,000	0.0%	0.0%	
Community Care for Elderly						
Other DOEA (specify in explanation)						
Bus Pass Program Revenue						

DCA

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

APD

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

DJJ

(specify in explanation)						
Bus Pass Program Revenue						

Other Fed or State



Comprehensive Budget Worksheet

Version 1.4

CTC: Okaloosa County Board of County Commissioners
County: Okaloosa County

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

	Prior Year's ACTUALS from Oct 1st of 2021 to Sept 30th of 2022	Current Year's APPROVED Budget, as amended from Oct 1st of 2022 to Sept 30th of 2023	Upcoming Year's PROPOSED Budget from Oct 1st of 2023 to Sept 30th of 2024	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± \$50,000
1	2	3	4	5	6	7

XXXX						
XXXX						
XXXX						
Bus Pass Program Revenue						
Other Revenues						
Interest Earnings						
XXXX						
XXXX						
Bus Pass Program Revenue						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue is Short By = <input type="text"/> None <input type="text"/>						
Total Revenues =	\$3,315,363	\$3,814,875	\$3,841,400	15.1%	0.7%	

EXPENDITURES (CTC/Operators ONLY / Do NOT include Coordination Contractors!)						
Operating Expenditures						
Labor	\$ 168,541	\$ 420,760	\$ 446,006	149.6%	6.0%	
Fringe Benefits	\$ 77,531	\$ 202,105	\$ 214,231	160.7%	6.0%	
Services						
Materials and Supplies	\$ 399,390	\$ 399,500	\$ 399,750	0.0%	0.1%	
Utilities	\$ 50,000	\$ 50,000	\$ 50,000	0.0%	0.0%	
Casualty and Liability						
Taxes						
Purchased Transportation:						
Purchased Bus Pass Expenses						
School Bus Utilization Expenses						
Contracted Transportation Services	\$ 2,619,901	\$ 2,742,510	\$ 2,731,413	4.7%	-0.4%	
Other						
Miscellaneous						
Operating Debt Service - Principal & Interest						
Leases and Rentals						
Contrib. to Capital Equip. Replacement Fund						
In-Kind, Contributed Services	\$ -	\$ -	\$ -			
Allocated Indirect						
Capital Expenditures						
Equip. Purchases with Grant Funds						
Equip. Purchases with Local Revenue						
Equip. Purchases with Rate Generated Rev.						
Capital Debt Service - Principal & Interest						
Total Expenditures =	\$3,315,363	\$3,814,875	\$3,841,400	15.1%	0.7%	

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



Budgeted Rate Base Worksheet

Version 1.4

CTC: Okaloosa County Board of County Commissioners

County: Okaloosa County

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

Upcoming Year's BUDGETED Revenues		What amount of the Budgeted Revenue in col. 2 will be generated at the rate per unit determined by this spreadsheet, OR used as local match for these type revenues?		What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?	
from Oct 1st of 2023 to Sept 30th of 2024			Budgeted Rate Subsidy Revenue EXcluded from the Rate Base		
1	2	3	4	5	
Bus Pass Program Revenue	\$ -	\$ -	\$ -	\$ -	
Other Fed or State					
xxx	\$ -		\$ -		
xxx	\$ -		\$ -		
xxx	\$ -		\$ -		
Bus Pass Program Revenue	\$ -	\$ -	\$ -	\$ -	
Other Revenues					
Interest Earnings	\$ -	\$ -	\$ -	\$ -	
xxxx	\$ -		\$ -		
xxxx	\$ -		\$ -		
Bus Pass Program Revenue	\$ -	\$ -	\$ -	\$ -	
Balancing Revenue to Prevent Deficit					
Actual or Planned Use of Cash Reserve	\$ -	\$ -	\$ -	\$ -	
Total Revenues =	\$ 3,841,400	\$ 483,142	\$ 3,358,258	\$ 538,125	

EXPENDITURES (CTC/Operators ONLY)	
Operating Expenditures	
Labor	\$ 446,006
Fringe Benefits	\$ 214,231
Services	\$ -
Materials and Supplies	\$ 399,750
Utilities	\$ 50,000
Casualty and Liability	\$ -
Taxes	\$ -
Purchased Transportation:	
Purchased Bus Pass Expenses	\$ -
School Bus Utilization Expenses	\$ -
Contracted Transportation Services	\$ 2,731,413
Other	\$ -
Miscellaneous	\$ -
Operating Debt Service - Principal & Interest	\$ -
Leases and Rentals	\$ -
Contrib. to Capital Equip. Replacement Fund	\$ -
In-Kind, Contributed Services	\$ -
Allocated Indirect	\$ -
Capital Expenditures	
Equip. Purchases with Grant Funds	\$ -
Equip. Purchases with Local Revenue	\$ -
Equip. Purchases with Rate Generated Rev.	\$ -
Capital Debt Service - Principal & Interest	\$ -
	\$ -
Total Expenditures =	\$ 3,841,400
minus EXCLUDED Subsidy Revenue =	\$ 3,358,258
Budgeted Total Expenditures INCLUDED in	
Rate Base =	\$ 483,142
Rate Base Adjustment ¹ =	
Adjusted Expenditures Included in Rate	
Base =	\$ 483,142

\$ 2,820,133

Amount of
Budgeted Operating
Rate Subsidy
Revenue

¹ Rate Base Adjustment Cell

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

¹ The Difference between Expenses and Revenues for Fiscal Year:

2021 - 2022

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



Worksheet for Program-wide Rates

CTC: Okaloosa County E Version 1.4
County: Okaloosa County

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

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

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

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

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

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

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

PROGRAM-WIDE RATES

Total Projected Passenger Miles = 166,147

Rate Per Passenger Mile = \$ 2.91

Total Projected Passenger Trips = 15,629

Rate Per Passenger Trip = \$ 30.91

Fiscal Year

2023 - 2024

Avg. Passenger Trip Length = 10.6 Miles

Rates If No Revenue Funds Were Identified As Subsidy Funds

Rate Per Passenger Mile = \$ 23.12

Rate Per Passenger Trip = \$ 245.79

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

Vehicle Miles

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

Vehicle Revenue Miles (VRM)

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

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

Passenger Miles (PM)

The cumulative sum of the distances ridden by each passenger.



Worksheet for Multiple Service Rates

CTC: Okaloosa Count Version 1.4
County: Okaloosa County

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

SECTION I: Services Provided

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

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

SECTION II: Contracted Services

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

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

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

Ambulatory	Wheelchair	Stretcher	Group
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Complete Cells Below	Complete Cells Below	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Ambulatory	Wheelchair	Stretcher	Group
\$ 318,325	\$ 156,840		
111,400	54,747		
10,470	5,159		

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

Ambulatory	Wheelchair	Stretcher	Group
\$ 2.86	\$ 2.86		
\$ 30.40	\$ 30.40		
Go to # 4 below for Ambulatory Service	Go to # 4 below for Wheelchair Service	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

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

Combination Trip and Mile Rate			
\$ 2.86	\$ 2.86		
STOP! Do NOT Complete Sections III - V for Ambulatory Service	STOP! Do NOT Complete Sections III - V for Wheelchair Service	Do NOT Complete Section II for Stretcher Service	Do NOT Complete Section II for Group Service

SECTION III: Escort Service

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

<input type="radio"/> Yes <input checked="" type="radio"/> No
Skip #2 - 4 and Section IV and Go to Section V

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

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



Worksheet for Multiple Service Rates

CTC: Okaloosa Count Version 1.4
County: Okaloosa County

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

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

SECTION IV: Group Service Loading

1. If the message "You Must Complete This Section" appears to the right, what is the projected total number of Group Service Passenger Miles? (otherwise leave blank)..... Do NOT Complete Section IV
- And what is the projected total number of Group Vehicle Revenue Miles? Loading Rate 0.00 to 1.00

SECTION V: Rate Calculations for 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: 2023 - 2024					
	Ambul	Wheel Chair	Stretcher	Group	
	Leave Blank	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	0	111,400	54,747	0	0
Rate per Passenger Mile =	\$2.86	\$2.86	\$0.00	\$0.00	\$0.00
				per passenger	per group

Does Not = Total Projected Passenger Miles, with adjmt for contracted services

	Ambul	Wheel Chair	Stretcher	Group	
	Leave Blank	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	0	10,474	5,159	0	0
Rate per Passenger Trip =	\$30.40	\$30.40	\$0.00	\$0.00	\$0.00
				per passenger	per group

Does Not = Total Projected Passenger Trips, with adjmt. for contracted services

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

...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =

Combination Trip and Mile Rate				
Ambul	Wheel Chair	Stretcher	Group	
Leave Blank	Leave Blank	Leave Blank	Leave Blank	\$0.00
\$2.86	\$2.86	\$0.00	\$0.00	\$0.00
See Sect. II	See Sect. II		per passenger	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	
\$23.10	\$23.16	\$0.00	\$0.00	\$0.00
			per passenger	per group
\$245.73	\$245.71	\$0.00	\$0.00	\$0.00
			per passenger	per group
Program These Rates Into Your Medicaid Encounter Data				

