OKALOOSA COUNTY

TRANSPORTATION DISADVANTAGED SERVICE PLAN

(THE COORDINATED PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION PLAN)

FY 2013 – 2017

FY 2015/16 ANNUAL UPDATE

Adopted May 27, 2015

Okaloosa-Walton Transportation Planning Organization OWTPO

West Florida Regional Planning Council EST '64

Staff to TPO

Coordinator

Okaloosa County Board of County Commissioners
Department of Growth Management
Janet Willis, Transit Coordinator & Grants Manager
600 Transit Way
Fort Walton Beach, FL 32547
Phone: 850.609.7003
Fax: 850.833.9286

LCB Chairperson

Commissioner Carolyn Ketchel, Chairperson
Okaloosa County Local Coordinating Board (LCB)

Planning Agency

Staff to TPO

West Florida Regional Planning Council:
Okaloosa-Walton TPO and LCB Staff
Howard Vanselow, Regional Planner
Email: howard.vanselow@wfrpc.org
Dorothy McKenzie, Administrative Professional
Post Office Box 11399
Pensacola, FL 32524-1399
Phone: 850.332.7976 / Toll Free: 800.226.8914
Fax: 850.637.1923
Website: www.wfrpc.org

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TRANSPORTATION DISADVANTAGED COORDINATING BOARD MEMBERSHIP CERTIFICATION
Okaloosa County, Florida

Name (MPO/DOPA): Okaloosa Walton Transportation Planning Organization Address: P. O. Box 11399, Pensacola, FL 32524-1399

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

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

REPRESENTATION	MEMBER'S NAME	ALTERNATE'S NAME	TERM
(1) Chair (Elected Official)	Carolyn Ketchel	Beatrice Love-Moore (Vice Chairman)	
(2) Florida Department of Transportation	Vanessa Strickland	Kathy Rudd	
(3) Department of Children and Families	Phyllis Gonzalez	Lisa Carden	
(4) Local Public Education	Jay McInnis	Sherrie Curtis	2014-2017
(5) Florida Department of Education	Cyndy Walker	Vacant	
(6) Veterans Services	Beatrice Love-Moore	Vacant	
(7) Community Action	Algie King	Samantha Ortiz	2014-2017
(8) Elderly	Cecilia Hanley	Vacant	2014-2017
(9) Disabled	William Collette	Vacant	2013-2016
(10) Citizen Advocate/User	Bernard Sternthal	Vacant	
(11) Citizen Advocate	Vacant	Vacant	
(12) Children at Risk	Vacant	Vacant	
(13) Mass/Public Transit	N/A	N/A	
(14) Department of Elder Affairs	Gwendolyn Rhodes	Sharon Searcy	
(15) Private Transportation Industry	CR Pooler	Cassandra Crosby	2014-2017
(16) Agency for Health Care Administration	John Vinski	Provider Unit Staff	
(17) Workforce Development Board	Linda Sumblin	Will Miles	
(18) Local Medical Community	Vacant	Vacant	

SIGNATURE: James T. Weale TITLE: O/W TPO Chairman DATE: 6/18/2015

Okaloosa Member Certification 2015 - 2016

Local Coordinating Board – Roll Call Vote

The Local Coordinating Board for **Okaloosa County** hereby certifies that an annual evaluation of the Community Transportation Coordinator, **Okaloosa County**, was conducted consistent with the policies of the Commission for the Transportation Disadvantaged and all recommendations of that evaluation have been incorporated in this Service Plan. We further certify that the rates contained herein have been thoroughly reviewed, evaluated, and approved. This **Okaloosa County Transportation Disadvantaged Service Plan** annual update was reviewed and approved by this Board at an official meeting held on ***May 27, 2015.***

06/02/2015
Date

Beatrice Love-Moore, Acting Chair

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
Elected Official - Chair	Carolyn Ketchel		X			
Elderly	Cecilia Hanley		X			
Disabled	William Collette	X		X		
Citizen Advocate	Vacant		---			
Citizen Advocate/User	Bernard Sternthal		X			
Veteran Services	Beatrice Love-Moore	X		X		
Community Action (Econ Disadv)	Algie King		X			
Local Public Education	Jay McInnis	X		X		
FDOT	Vanessa Strickland	X		X		
FL Dept of Children & Families	Lisa Carden - alternate	X		X		
FL Dept of Education	Cyndy Walker		X			
FL Dept of Elder Affairs	Sharon Searcy - alternate	X		X		
FL AHCA (Medicaid)	John Vinski	X		X		
Children At Risk	Vacant		---			
Private Trans Industry	C. R. Pooler		X			
Workforce Dev Board	Linda Sumblin		X			
Local Medical Community	Vacant		---			

General Information

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

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

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

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

The 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 assumed the role as CTC in order to better coordinate the county transit system with transportation disadvantaged services, contracting with Okaloosa County Coordinated Transportation, Inc. D/B/A Okaloosa County Transit (OCT) to provide both services for the citizens of Okaloosa County. **Okaloosa County BCC will need to select a contract operator through an appropriate procurement process in the near future.**

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 is shown in Figure 1. The organization chart for Okaloosa County Board of County Commissioners is shown in Figure 2 and Okaloosa County Transit in Figures 3 and 4. The West Florida Regional Planning Council (WFRPC) organization chart is included as Figure 5.

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

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, (4) Destin, and (5) 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: In July 2012, an Okaloosa County Policy Letter was released stating the following regarding Okaloosa County Transit: "The Transit budget proposed for Fiscal Year 2013 does not include any funding for the two Crestview fixed routes or the express route (Crestview/Fort Walton Connector), but does maintain funding for the four Fort Walton Beach routes, route 20 (Santa Rosa Blvd) and the three tourism routes. The Fort Walton routes are to be paid with a combination of FTA and Board funds, Route 20 with FTA funds, while the three tourism routes are to be paid using FDOT corridor funds which can only be used on the US 98 corridor with no local match required. Paratransit services will remain in place, though it is anticipated that demand will increase due to the loss of fixed routes, and it is extremely likely that non-essential trips will be denied. The continued reduction of the general fund contribution will result in a faster drawdown of the other revenue (including most importantly FTA funds) which will affect transit planning in future years, beginning in Fiscal Year 2013."

On September 18, 2012, the Okaloosa Board of County Commissioners voted to add extra funds to keep all routes with the understanding that all routes could be cut next fiscal year.

City of Crestview decided to end their financial support to Routes 11 & 12. There is no other funding source to support these routes so Routes 11 & 12 were cancelled as of January 31, 2014.

The Transit Coordinator & Grant Manager for Okaloosa County, Lani Birchett, resigned effective March 13, 2014. We will miss Lani and the many contributions she had made to public transportation.

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.

Crestview (2010)
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 West Florida Regional Planning Council (WFRPC), 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.

Destin (2010)
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 West Florida Regional Planning 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 Northwest 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

The Okaloosa County Transit Development Plan (TDP) Major Update (2012-2021) was adopted by the Okaloosa County Board of County Commissioners on September 6, 2011 and was approved by the Florida Department of Transportation (FDOT) on January 12, 2012. Updates from the TDP are incorporated in this Major Update of the Okaloosa County Transportation Disadvantaged Service Plan (TDSP) as applicable.

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 at least a 20 year plan for transportation improvements (roads, public transportation, and bicycle/pedestrian) within the urbanized area. The current plan, which includes a planning timeframe through 2030, was adopted in 2007 and amended on July 30, 2010. The Cost Feasible Plan identifies funding for transit system enhancements.

The 2030 Long Range Transportation Plan is in the process of being updated and includes a planning timeframe through the year 2035. The 2035 Cost Feasible Plan includes transit funding for operations and maintenance of existing transit services and routes. The 2035 Cost Feasible Plan also identifies three express transit routes for: (1) DeFuniak Springs to South Walton County; (2) Niceville to Destin; and (3) Fort Walton Beach to Destin. However, funding for the express routes does not include operation or maintenance.

Transportation Improvement Program
The purpose of the Transportation Improvement Program (TIP) is to provide a project listing that reflect the needs and desires of the Transportation Planning Organization (TPO) Study Area. The TIP is also developed to reflect the financial restraints within the various funding sources and programs. The TIP is a five-year plan for transportation improvements within the TPO Study Area. It contains information about the type of work to be completed, project phasing, estimated costs, and funding sources. The Code of Federal Regulations defines the TIP as a “prioritized listing/program of transportation projects covering a period of four years that is developed and formally adopted by a MPO (metropolitan planning organization) as part of the metropolitan planning process, consistent with the metropolitan transportation plan, and required for projects to be eligible for funding under Title 23 U.S.C. and Title 49 U.S.C. Chapter 53” [23 C.F.R. 450.104]. Florida Statutes requires the addition of a fifth year to the TIP [339.175(8)(c)(1)]. The TIP is also required to include all regionally significant projects, regardless of funding [23 C.F.R. 450.324(d)].

The TIP is developed by the Okaloosa-Walton TPO in cooperation with the Florida Department of Transportation (FDOT) and Okaloosa County Transit. These cooperating agencies provide the Okaloosa-Walton 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 and ALDOT Final Work Programs and locally dedicated transportation revenues.

Transit projects are drawn from the Five Year Transit Development Plan and priorities are provided to the TPO by the local transit operator. Projects for the Transportation Disadvantaged Program are provided by social service agencies and the designated Community Transportation Coordinator (CTC). Funding comes from FTA, FDOT, CTD, local governments, and social services agencies.

The current Okaloosa-Walton TPO Transportation Improvement Program (TIP) for FY 2013–2017 was adopted on June 21, 2012 and amended on July 12, 2012. This TDSP is consistent with the Transportation Improvement Program.

Public Participation

Public participation activities include participation in the Annual National Dump the Pump Day with promotions through local available venues. Okaloosa County Transit (OCT) was promoted on the local television program "Focus on Okaloosa" again in 2011. Transit service available to the public was promoted on this program. OCT continues to work with local military family service agencies by promoting the service via distribution of the Ride Guide and other public transit material.

OCT also works with the local Headstart organization to promote public transit at the annual "World's Largest Baby Shower," this event typically takes place in March. OCT promotes fixed route transit by free pass give-a-ways when opportunities arise.

Okaloosa County staff participated in the Salsa Festival on June 25, 2011 as a marketing outreach effort as well as to obtain transit survey information from festival goers.

The Okaloosa County Transportation Disadvantaged Coordinating Board meeting held on May 23, 2012.

Okaloosa County staff, as well as Floyd Webb from the Florida Commission for the Transportation Disadvantaged, attended the 5th Annual Northwest Florida Regional Transit Roundtable held in Milton, Florida on June 28, 2012. The Roundtable was hosted by Santa Rosa Transit, which is provided by Santa Rosa County and operated by Pensacola Bay Transportation. Pensacola Bay Transportation is also the Community Transportation Coordinator (CTC) for Escambia and Santa Rosa Counties.

A public hearing was held on May 27, 2015 to offer an opportunity for anyone with comments or questions to address the Local Coordinating Board.

*The Okaloosa-Walton Transportation Planning Organization (O-W TPO) kicked off a public transportation campaign in 2013 in order to promote, educate, and garner support for public transportation in the area. The campaign will continue through 2015.

SERVICE AREA PROFILE/DEMOGRAPHICS

The majority of the information contained in this section, Service Area Profile/Demographics, has been obtained from the Okaloosa County Transit Development Plan (TDP) Major Update 2012-2021 prepared by the Center for Urban Transportation Research (CUTR) and adopted by the Okaloosa County Board of County Commissioners on September 6, 2011 and approved by the Florida Department of Transportation (FDOT) on January 12, 2012.

Service Area Description

Okaloosa County has a total area of 1,082 square miles (935.63 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

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: total population, population breakdown by age groups, population densities and growth, income information, employer status, housing classifications and patterns, and government and institutional descriptions.

Total population
From 2000 to 2010, Okaloosa County's total population has increased to over 180,000 or a total of 6.1%. The county has grown considerably slower over the last decade compared to the state as a whole, which has grown 17.6% as shown in Table 1 below. Much of that growth occurred over the first half of the 2000's, with the last several years bringing only minimal increases and in some cases, stagnant population counts. Neighboring Walton County in that same time period has grown over 35%. Increased population is forecast to take place in: Destin, Fort Walton Beach, Shalimar, and Mary Esther. Decreases in total population are projected in the area surrounding Crestview.

TABLE 1
General Populations, Growth Rates 2000-2010

Area	2000 Population	2010 Population	% Change
Okaloosa County	170,498	180,822	6.1%
Florida	15,982,378	18,801,310	17.6%

Source: U.S. Census 2000/2010

Age groups
The aging population should be considered a major factor in the strategic planning process and continuing development of public transit in the region. The age groups of persons less than 20 years and over 60 years are of particular interest in Transit Development Plan. Those under the age of 18 are either too young to drive or do not have access to an automobile. Similarly, the elderly often do not drive or do not have adequate access to automobiles and due to limitations, sometimes resulting from the aging process, are no longer able and/or willing to drive. Therefore, persons in these two age groups typically rely more on public transportation for mobility.

The population age distribution, illustrated in Table 2, shows an under 18 population in 2009 greater than of the rest of Florida. Okaloosa County has a higher percentage of the workforce age population compared to the rest of the state. Okaloosa County's population aged 65 and over is 2 percentage points lower than the rest of Florida. Concentrations of population under 20 years of age are found in the suburban areas. Persons aged over 65 are found in high numbers in the coastal areas such as Destin.

TABLE 2
2009 Okaloosa County Population Age Distribution

Area	Age						Total
	0 – 17	18 – 34	35 – 54	55 – 64	65 – 79	80 & over	
Okaloosa County	46,239	45,507	56,138	23,047	20,091	6,575	197,597
(% of total population)	23.40%	23.03%	28.41%	11.66%	10.17%	3.33%	100%
Florida	4,189,734	3,975,488	5,166,927	2,218,206	2,239,765	1,017,099	18,807,219
(% of total population)	22.28%	21.14%	27.47%	11.79%	11.91%	5.41%	100%

Florida Statistical Abstract – 2009

Population densities and growth

The average family size for Okaloosa County in 2010 is just below three persons per family at 2.96. To compare, this value is exactly the same as that of Orlando (2.97) and less than the national average family size of 3.14. The average family size for the state of Florida is 2.98. There are not significant changes in this value across the geography of Okaloosa County by the year 2015. Larger families are found in the suburban Fort Walton Beach census blocks, whereas areas along the coast are found to have smaller family sizes.

As shown in Table 3 below, the area that experienced the largest amount of population growth from 2000 to 2010 was Miramar Beach with a 152.4% increase. Freeport experienced the second largest growth with Crestview being third. The area that experienced the greatest loss of population was Valparaiso (-21.4%) with Mary Esther having the second greatest loss (-5%).

TABLE 3
Population Growth for Cities, Towns, and Census Designated Places

Area	2000 Population	2010 Population	% Change
Fort Walton Beach	19,973	19,507	-2.3%
Mary Esther	4,055	3,851	-5.0%
Destin	11,119	12,305	+10.7%
Niceville	11,684	12,749	+9.1%
Valparaiso	6,408	5,036	-21.4%
Crestview	14,766	20,978	+42.1%
DeFuniak Springs	5,089	5,177	+1.7%
Freeport	1,190	1,787	+50.2%
Miramar Beach	2,435	6,146	+152.4%

Sources: U.S. Census 2000/2010

Income information

Okaloosa County has a lower percentage of households with income below the poverty line relative to the rest of the state as shown in Table 4 below. These areas are some of the most reliant on public transit as a means of transportation of any due to the high cost of personal transportation. The annual cost of a vehicle, insurance and fuel is prohibitive to those low income households. The number of lowest income residents in Okaloosa County is proportionally smaller when compared to the rest of the State of Florida.

TABLE 4
2009 Household Income Distribution

Area	$0 – $9,999	$10,000 – $14,999	$15,000 – $24,999	$25,000 – $34,999	$35,000 – $49,999	$50,000 & Over
Okaloosa County	5.9%	3.9%	10.6%	10.7%	16.6%	52.2%
Florida	7.3%	5.8%	12.0%	11.9%	15.8%	47.2%

American Community Survey – 2009

The lower end of income is projected to change from $10,653 in 2010 to $11,947 by 2015, a 12% increase. The upper average by block group is projected to increase by more than $6,000. The highest per capita income portions of the County are along the waterfront areas while the lowest are found in pockets of Crestview and Fort Walton Beach. Census blocks with lower per capita income will have a higher reliance on transit use.

Employer status
Employer density per square mile is highest in Fort Walton Beach to the south and along the major corridors of Eglin Parkway, Beal Parkway and Hollywood Boulevard. Destin also has a high concentration of employers in the leisure and tourist driven areas.

Housing classifications & patterns
Where the unit of value "households" refers to the number of people living in a home, the term "housing units" refers to the structures in which people live. According to the census, "A *housing unit* is a house, an apartment, a mobile home or trailer, a group of rooms, or a single room occupied as a separate living quarters, or if vacant, intended for occupancy as separate living quarters. Separate living quarters are those in which the occupants live separately from any other individuals in the building and which have direct access from outside the building or through a common hall."

The measure of housing units per square mile demonstrates the potential for population density through increased unit occupancy. A high density of housing units can be found in Destin, adjacent to Hurlburt Field and to the south of Crestview. The concentration of housing units per square mile, coupled with a look at housing unit occupancy found in Table 5, can provide insight into which geographic areas of the County could become more populated through better utilization of existing housing. The unusually high vacancy rates in Destin and Miramar Beach are better understood through the definition of a vacant unit. A vacant unit may be one, which is entirely occupied by persons who have a usual residence elsewhere.

TABLE 5
Housing Unit Occupancy

Area	Total Housing Units	Housing Units Occupied	Housing Units Vacant
Fort Walton Beach	9,592	8,401	1,191
Mary Esther	1,779	1,616	163
Destin	13,672	5,294	8,378
Niceville	5,695	5,241	454
Valparaiso	1,939	1,712	227
Crestview	9,153	7,654	1,499
DeFuniak Springs	2,713	2,160	553
Freeport	919	702	217
Miramar Beach	12,385	3,002	9,383

Source: 2010 Census

According to the U.S. Census bureau, the average size of American households has been declining for decades. A reverse in that decline has been found in recent years due to the growth in multi-generational households. There have also been notable trends found in the state with increasing household size potentially due to higher unemployment leading to adult children moving back in with parents.

Government and institutional descriptions
The military presence is the foundation of Okaloosa County's economy. The County is home to three military installations, Eglin Air Force Base, Hurlburt Field, and Duke Field. It is estimated that the military accounts for approximately 50% of the total value of goods and services produced by the County's economy. Tourism is the second largest contributor to Okaloosa County's economy, employing an estimated 35,000 local residents and generating approximately 45% of the County's sales tax collections.

Employment
This section will address employment, how employment relates to the generation of trips for the service area, and unemployment.

The two major employers in Okaloosa County are Eglin Air Force Base and Hurlburt Field. Of the 142,346 people working in Okaloosa County, 59% or three in five originate in Okaloosa. These workers make up the candidate population for potential Okaloosa County work trips. The 2009 commute patterns in, out and within Okaloosa County on an average weekday can be summarized as follows:

- 58,713 people commute from outside to work in Okaloosa County.
- 30,614 people live in Okaloosa County and drive to work outside of it.
- 83,633 people live in Okaloosa County and commute to work within the County.

As shown in Table 6 below, Okaloosa County average commute times have increased from under 20 minutes to more than 20 minutes from 2000 to 2009. Fewer commuters tend to drive single occupancy vehicles (a 2% decrease) and carpools have remained unchanged. However, public transportation use has increased 0.1% share of all work trips. This number is relatively small and represents a much lesser share than the state of Florida average of 2.3% of all work trips being taken by mass transit.

TABLE 6
2009 Average Commute & Journey-to-Work Mode Split

Area	Average Commute	Travel Mode				Total
		Drive Alone	Carpool	Public Transit	Other	
Okaloosa County Year 2000	Under 20 minutes	82.8%	11.7%	0.3%	5.2%	100%
Okaloosa County Year 2009	22.4 minutes	80.7%	11.7%	0.4%	7.4%	100%

Source: U.S. Census 2000 & American Community Survey 2009

Unemployment
The median 2010 unemployment rate average of 9.95% is most closely represented in Shalimar and north Fort Walton Beach. High unemployment "hotspots" are found within block as high as 19% in the south Fort Walton Beach, approaching the coast. Unemployment is relatively low surrounding Niceville, Mary Esther, and Eglin Air Force Base. Year 2015 concentration of unemployment remains geographically consistent but with the hardest hit areas of unemployment gaining jobs on the order of 4 to 5 percent.

SERVICE ANALYSIS
The majority of the information contained in this section, Service Analysis, has been obtained from the Okaloosa County Transit Development Plan (TDP) Major Update 2012-2021 prepared by the Center for Urban Transportation Research (CUTR) and adopted by the Okaloosa County Board of County Commissioners on September 6, 2011 and approved by the Florida Department of Transportation (FDOT) on January 12, 2012.

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

Chapter 427.011(1) of the Florida Statutes defines Transportation Disadvantaged (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 and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or children who are handicapped or high-risk or at risk as defined in s. 411.202."*

Table 7 shows forecasts of both types of TD population. There are two categories of TD population in the State of Florida. The difference between the two categories is specifically related to funding arrangements. The first group is the "potential TD population" (also known as TD Category I). This potential TD population includes disabled, elderly, low-income persons, and children who are "high-risk" or "at-risk."

The second group of TD population (also known as TD Category II), includes those persons who are unable to transport themselves or to purchase transportation. These persons are eligible to receive the same subsidies as those in Category I, plus they are eligible to receive TD Trust Fund monies for non-sponsored general trips. Thus, this population group is actually a subset of the potential TD population.

TABLE 7
Forecasts of TD Populations in Okaloosa County

TD Population	Year				
	2011	2012	2013	2014	2015
Category I	59,392	60,814	62,277	63,783	65,334
Category II	14,437	14,755	15,081	15,416	15,761

Source: Transportation Disadvantaged Population Estimates, Center for Urban Transportation Research, College of Engineering, University of South Florida.

Tables 8 and 9 break down the Potential TD Population groups in Okaloosa County (Categories I and II). Persons in either of these population groups may be heavily dependent on some form of public transportation.

TABLE 8
Okaloosa County Potential Transportation Disadvantaged Population (Category I)

Segments	2011 Population Estimates	% of Total Potential TD
Disabled, Non-Elderly, Low Income	850	1.4%
Disabled, Non-Elderly, Non-Low Income	7,319	12.3%
Disabled, Elderly, Low Income	904	1.5%
Disabled, Elderly, Non-Low Income	9,030	15.2%
Non-Disabled, Elderly, Low Income	2,224	3.7%
Non-Disabled, Elderly, Non-Low Income	22,216	37.4%
Non-Disabled, Non-Elderly, Low Income	16,849	28.4%
Total Potential TD Population	59,392	100%

Source: Transportation Disadvantaged Population Estimates, Center for Urban Transportation Research, College of Engineering, University of South Florida.

TABLE 9
Okaloosa County Transportation
Disadvantaged Population (Category II)

Segments	2011 Population Estimates	% of Total TD Category II
TD, Non-Elderly, Low Income	319	2.2%
TD, Non-Elderly, Non-Low Income	2,744	19.0%
TD, Elderly, Low Income	616	4.3%
TD, Elderly, Non-Low Income	6,156	42.6%
Non-TD, Low Income, No Auto, No Fixed-Route Transit	4,602	31.9%
Total Transportation Disadvantaged (TD) Population	14,437	100%

Source: Transportation Disadvantaged Population Estimates, Center for Urban Transportation Research, College of Engineering, University of South Florida.

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 in the table below.

Projects	County	Estimated Cost	Funding Source
Purchase replacement paratransit 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
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	$ 464,919 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. Some wording has been updated to include specific dates and proposed JARC and New Freedom Projects. 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 Paratransit 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.	a. Pursue educational and marketing opportunities for the paratransit 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 paratransit 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	June 2013
Endorse Okaloosa County Transit Bus Stop Assessment Plan	O-W TPO	Aug 2013
Approve Transit Development Plan (TDP) Annual Progress Report.	FDOT	Oct 2013
Endorse TDP Annual Progress Report.	TPO	Dec 2013
Adopt TDSP Major Update (every 5 years).	LCB	Oct 2017
4 minivans received July 2012, 4 cutaways received Aug 2012, and 7 additional cutaways received Oct 2012 for replacement of aged and/or high mileage vehicles.	CTC	2012
Public Transportation marketing campaign kickoff.	TPO	Nov 2012
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 paratransit vehicles.

OKALOOSA COUNTY
Paratransit Vehicle Replacement Plan
FY 2013 - 2022

Model Year	Replacement Year (w/Approval from BCC)	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
2012	2018	Chevrolet	Cutaway	9	9	9	9	9	9	R				
2012	2017	Dodge	Minivan	4	4	4	4	4	R					
2006	2011	Ford	Sedans	3	3	R								
2007	2012	Ford	Cutaway	2	R									
2007	2012	Ford	Sedans	4	4	R								
2008	2014	Ford	Cutaway	5	5	R								
2008	2014	Ford	Cutaway	2	2	R								
2010	2016	Ford	Cutaway	6	6	6	6	R						
2012	2019	Replacement	Cutaway		2	2	2	2	2	R				
2014	2019	Replacement	Sedans			3	3	3	3	3	R			
2018	2024	Replacement	Cutaway							9	9	9	9	9
2014	2020	Replacement	Cutaway			2	2	2	2	2	2	R		
2014	2020	Replacement	Cutaway			5	5	5	5	5	5	R		
2016	2022	Replacement	Cutaway					6	6	6	6	6	6	6
2013	2019	Replacement	Sedans			4	4	4	4	4	R			
2017	2022	Replacement	Minivan						4	4	4	4	4	4
2018	2024	Replacement	Cutaway							2	2	2	2	2
2019	2026	Replacement	Cutaway								3	3	3	3
2020	2026	Replacement	Cutaway									2	2	2
2020	2026	Replacement	Cutaway									5	5	5
2019	2024	Replacement	Sedans								4	4	4	4
TOTALS (Paratransit)				35	35	35	35	35	35	35	35	35	35	35

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.

Para transit 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 7:00 A.M. to 7:00 P.M.

Service is available 7 days a week/24 hours per day. After 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, and 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.

Accessing Services

Trips may be reserved up to 7 days in advance.

Reservations must be made by 1:00 P.M. the day prior to the requested ride. Reservations must be received by close of business (1:00 P.M.) the last working day prior to weekend and holiday transportation.

Reservations may be made by calling 833-9168 (South County) or 689-7809 (North County), 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. Three no shows within a 30 day period will result in suspension of service for 30 days. The transportation contractor will issue a warning letter after the second no show advising the client of possible suspension of service.

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, availability of other transportation, and the ability to use the deviated fixed route system.

Trip prioritization, when necessary, is given to Health Care Services, Pharmacy, Employment, School, Social Services, Day Care, Shopping, and all others in that order. Pharmacy appointments are limited to one hour.

Employment transportation is available from your home or pick-up point to your job. Employment transportation is subject to change based on the availability of resources (funding, vehicles, and drivers). Exceptions may be approved, in writing, by the Program Manager or CTC on a case-by-case basis.

Shopping and all other transportation 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. Exceptions for employment transportation may be approved, in writing, by the Program Manager or CTC on a case-by-case basis.

Transportation Operators and Coordination Contractors

Transportation operators and coordination contractors are selected through the Okaloosa County RFP 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.

Yellow Cab / Tucker Black & White Taxi – Transportation Operators
Karen Locklear 850-315-1515
After Hours & Weekend Transportation

Head Start of Okaloosa County – Coordination Contractors
Patrice Grimes 850-651-0645
Children to Head Start Center

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

Public Transit Utilization

Continued efforts to shift Paratransit users to the fixed-route system will continue. The existing service, 9 routes, with year round service should facilitate this effort. Additionally, in conjunction with the recently formed Transportation 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 West Florida Regional Planning 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.

Escorts and children. Okaloosa County children under the age of twelve (12) require an escort. The requirement may also be imposed if the child has special needs or exhibits behavior problems. The minimum age of escorts 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 paratransit services shall be provided to each rider and escort, child, or personal care attendant, and no more passengers than the registered passenger seating capacity shall be scheduled or transported in a vehicle at any time. For transit services provided by transit vehicles, adequate seating or standing space will be provided to each rider and escort, child, or personal care attendant, and no more passengers than the registered passenger seating or standing capacity shall be scheduled or transported in a vehicle at any time.

Driver Identification. Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific 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 paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or utilization of wheel chair securement devices, storage of mobility assistive devices, and closing the vehicle door. 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.

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 before the driver is dispatched to begin the run on which you are scheduled to ride or 1 hour prior to the scheduled pick up time. Cancellations at the door or after the driver has been dispatched will be considered a no show, and if frequent, may result in temporary suspension from the program. Cancellations should be called into the transportation coordinator offices at 833-9168 for Fort Walton Beach and the South County or 689-7807 for Crestview and the North County.

If a client fails to notify the appropriate office, and an expense is incurred due to a vehicle being dispatched for that client, and that client is not available or has decided not to go, then that client is classified as a no show.

If the client responds to any no show notification and provides acceptable, verifiable evidence that the no show was due to unforeseen and unavoidable circumstances, the missed trip will not be counted as a no show.

> ***Second No Show*** – A letter of warning will be sent from the CTC or transportation operator.
>
> ***Third No Show*** – within 30 consecutive days of the first no show listed in the Warning Letter, a letter notifying the client that they have been suspended from service for a thirty-day period will be sent by the CTC or transportation operator.
>
> ***After reinstatement*** – When the client is reinstated and 3 infractions occur within 60 days, the suspension will be 60 days.
>
> ***Suspension Removal*** – Suspension will only be removed by the sponsoring agency and the CTC or transportation operator.
>
> 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 and Heating Equipment. All vehicles providing service within the coordinated system, shall have working air conditioners and heaters in each vehicle. Vehicles that do not have a working air conditioner or heater will be scheduled for repair or replacement as soon as possible.

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

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

Pick-Up Window. For scheduled pick-up, clients are expected to be picked up 15 minutes before or after the scheduled pick up. For scheduled returns, clients are expected to be dropped off 15 minutes before or after the scheduled drop off.

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 pratransit trips must be made by 1:00 p.m. CT the day prior to the requested ride. Additionally, reservations must be received by 1:00 p.m. CT the last working day prior to weekend and 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 paratransit 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.

Road Calls. There should be no less than 10,000 miles between each road call.

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:

CTC • Community Transportation Coordinator

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 Coordinator and Grants Manager
1804 Lewis Turner Blvd, Suite 200
Ft. Walton Beach, FL 32547
Phone: 850-609-7003

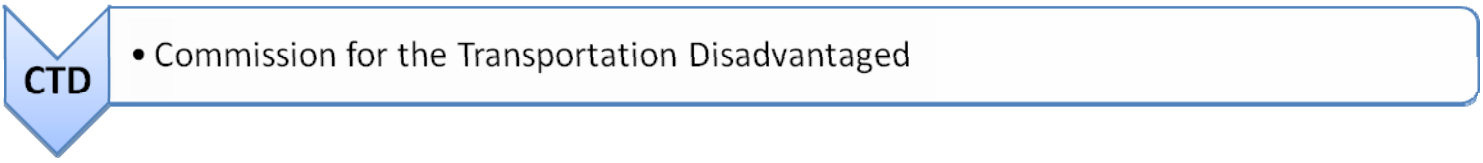
Step 2:

LCB • 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:



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.

New Rate Model Worksheets have not been provided for FY 2015/16. Therefore, it is being recommended that the CTC use the existing, passenger mile rate from the approved FY 2014/15 Rate Model Worksheets, per the CTD. The Rate Model Worksheets from the previous year, which were approved in August 2014, are included in the appendices. The rates below will also be included in the executed Trip and Equipment (T&E) Grant for FY 2015/16 until new rates are approved by the Local Coordinating Board (LCB).

Okaloosa County
Service Rates Summary

Type of Service Provided	Unit	FY 2014/15 Combination Rates	FY 2015/16 Passenger Mile Rate Only
Ambulatory	Passenger Mile	$ 1.33	$ 1.46
Wheelchair	Passenger Mile	$ 1.73	$ 2.50
Stretcher	Passenger Mile	$ 4.53	$ 5.20
Ambulatory Pick Up	Trip	$ 1.00	N/A
Wheelchair Pick Up	Trip	$ 5.00	N/A
Stretcher Pick Up	Trip	$ 25.00	N/A

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 two years are included in the appendices along with the comments that were submitted.

The survey results indicate that 49% of the trips were for medical/dental purposes and 21% were for school/work.

It should be noted that 42% use community transportation 11 or more days a month and 32% use it 5-10 days a month.

If community transportation was not provided, 48% indicated that they would not be able to make the trip while 27% indicated they would ride with someone else.

Appendices

Memorandum of Agreement between CTD and CTC

Transportation Disadvantaged Program Concept Chart

Organization Charts

Vehicle Inventory

Safety System Program Plan (SSPP) Certifications

Previous (June & Aug 2014) TDSP Roll Call Voting Sheets - *not yet signed by CTD*

Previous (June 2013) TDSP Roll Call Voting Sheet - *not yet signed by CTD*

Previous (2014) TPO Signed Resolution

Glossary of Terms

Rider Survey Comments

Survey Results & Comparisons

CTC Evaluation

Rate Model Worksheets - from FY 2014/15

Florida Commission for the
Transportation Disadvantaged

Rick Scott
Governor

David Darm
Chairperson

Mike Willingham
Vice Chairman

Steven Holmes
Executive Director

May 30, 2012

Ms. Lani Birchett
Okaloosa County BOCC
600 Transit Way
Ft. Walton Beach, Florida 32547

Subject: Okaloosa County Community Transportation Coordinator Designation, Memorandum of Agreement (MOA) # TD1257

Dear Ms. Birchett:

Attached is our executed MOA for your records. As you know, the Commission for the Transportation Disadvantaged (Commission) approved Okaloosa County to serve as the Community Transportation Coordinator for Okaloosa County. This designation is effective July 1, 2012 through June 30, 2017.

Pursuant to the MOA, a new 2012-17 Transportation Disadvantaged Service Plan (TDSP) shall be submitted to the Commission no later than 120 calendar days from July 1, 2012 (October 28, 2012). This TDSP must be approved by the Local Coordinating Board prior to submission to us for approval. Please coordinate this effort with the Okaloosa County Designated Planning Organization. As a reference, the Instruction Manual for the MOA and TDSP is located on our website at: http://www.dot.state.fl.us/ctd/programinfo/programdevelopmentsection.

On behalf of the Commission for the Transportation Disadvantaged and all the staff, I thank you for your continued support and participation in the coordinated transportation system of Okaloosa County. If you have any questions or need any additional information, please contact me at (850) 410-5702.

Sincerely,

Floyd Webb
Area 1 Project Manager

Enclosure: Executed Memorandum of Agreement

Suwannee Street, MS-49 ∞ Tallahassee, FL 32399-0450
Phone: (850) 410-5700 ∞ Toll Free: (800) 983-2435 ∞ Fax: (850) 410-5752
www.dot.state.fl.us/ctd

Contract # TD-1257

Effective: July 1, 2012 to June 30, 2017

STATE OF FLORIDA
COMMISSION FOR THE TRANSPORTATION DISADVANTAGED

MEMORANDUM OF AGREEMENT

This Memorandum of Agreement is between the COMMISSION FOR THE TRANSPORTATION DISADVANTAGED, hereby referred to as the "Commission," and Okaloosa County Board of County Commissioners, 1804 Lewis Turner Blvd, Suite 100, Fort Walton Beach, Florida 32547 the COMMUNITY TRANSPORTATION COORDINATOR, designated pursuant to Chapter 427, F.S., to serve the transportation disadvantaged for the community that includes the entire area of Okaloosa county(ies), and hereafter referred to as the "Coordinator."

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

The Parties Agree:

I. The Coordinator Shall:

A. Become and remain totally apprised of all of the Transportation Disadvantaged resources available or planned in their designated service area. This knowledge will be used to plan, coordinate, and implement the most cost effective transportation disadvantaged transit system possible under the economic and other conditions that exist in the designated service area.

B. Plan and work with Community Transportation Coordinators in adjacent and other areas of the state to coordinate the provision of community trips that might be handled at a lower overall cost to the community by another Coordinator. This includes honoring any Commission-approved statewide certification program that allows for intercounty transportation opportunities.

C. Arrange for all services in accordance with Chapter 427, Florida Statutes, and Rule 41-2, FAC, and as further required by the Commission and the local Coordinating Board approved Transportation Disadvantaged Service Plan.

D. Return any acquired profits or surplus funds originating through the course of business as the Coordinator that are beyond the amounts(s) specifically identified and approved in the accompanying Transportation Disadvantaged Service Plan. Such profits or funds shall be returned to the Coordinator's transportation system or to any subsequent Coordinator, as a total transportation system subsidy, to be applied to the immediate following operational year. The Coordinator will include similar language in all coordination contracts to assure that transportation disadvantaged related revenues are put back into transportation disadvantaged services.

CONTRACT # C08-1589-GM
COMMISSION FOR TRANSPORTATION DISADVANTAGED
COMMUNITY TRANSPORTATION COORDINATION
EXPIRES: 06/30/2017

Rev. 04/02/2012

E. Accomplish this Project by:

1. Developing a Transportation Disadvantaged Service Plan for approval by the local Coordinating Board and the Commission. Coordinators who are newly designated to a particular service area shall submit a local Coordinating Board approved Transportation Disadvantaged Service Plan, within 120 calendar days following the execution of the Coordinator's initial memorandum of agreement with the Commission, for approval by the Commission. All subsequent Transportation Disadvantaged Service Plans shall be submitted and approved with the corresponding memorandum of agreement. The approved Transportation Disadvantaged Service Plan will be implemented and monitored to provide for community-wide transportation services for purchase by non-sponsored transportation disadvantaged persons, contracting social service agencies, and other entities that use local, state, or federal government funds for the purchase of transportation for the transportation disadvantaged.

2. Maximizing the use of available public school transportation resources and public fixed route or fixed schedule transit services and assuring that private or public transit, paratransit operators, and school boards have been afforded a fair opportunity to participate to the maximum extent feasible in the planning process and in the development of the provisions of the Transportation Disadvantaged Service Plan for the transportation disadvantaged.

3. Providing or arranging 24-hour, 7-day per week transportation disadvantaged service as required in the designated service area by any Federal, State or Local Government agency sponsoring such services. The provision of said services shall be furnished in accordance with the prior notification requirements identified in the local Coordinating Board and Commission approved Transportation Disadvantaged Service Plan.

4. Complying with all local, state, and federal laws and regulations that apply to the provision of transportation disadvantaged services.

5. Submitting to the Commission an Annual Operating Report detailing demographic, operational, and financial data regarding coordination activities in the designated service area. The report shall be prepared on forms provided by the Commission and according to the instructions of said forms.

F. Comply with Audit and Record Keeping Requirements by:

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

2. Assuming the responsibility of invoicing for any transportation services arranged, unless otherwise stipulated by a purchase of service contract or coordination contract.

3. Maintaining and filing with the Commission, local Coordinating Board, and all purchasing agencies/entities such progress, fiscal, inventory, and other reports as those entities may require during the period of this Agreement.

4. Providing copies of finance and compliance audits to the Commission and local Coordinating Board as requested by the Commission or local Coordinating Board.

G. Retain all financial records, supporting documents, statistical records, and any other documents pertinent to this Agreement for a period of five (5) years after termination of this Agreement. If an audit has been initiated and audit findings have not been resolved at the end of five (5) years, the records shall be retained until resolution of the audit findings. The Coordinator shall assure that these records shall be subject to inspection, review, or audit at all reasonable times by persons duly authorized by the Commission or this Agreement. They shall have full access to and the right to examine any of the said records and documents during the retention period.

H. Comply with Safety Requirements by:

1. Complying with Section 341.061, F.S., and Rule 14-90, FAC, concerning System Safety; or complying with Chapter 234.051, F.S., regarding school bus safety requirements for those services provided through a school board; and

2. Assuring compliance with local, state, and federal laws, and Commission policies relating to drug testing. Conduct drug and alcohol testing for safety sensitive job positions within the coordinated system regarding pre-employment, randomization, post-accident, and reasonable suspicion as required by the Federal Highway Administration and the Federal Transit Administration.

I. Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of $200,000 for any one person and $300,000 per occurrence at all times during the existence of this Agreement for all transportation services purchased or provided for the transportation disadvantaged through the Community Transportation Coordinator. Upon the execution of this Agreement, the Coordinator shall add the Commission as an additional **named insured** to all insurance policies covering vehicles transporting the transportation disadvantaged. In the event of any cancellation or changes in the limits of liability in the insurance policy, the insurance agent or broker shall notify the Commission. The Coordinator shall insure that contracting transportation operators and coordination contractors also maintain the same minimum liability insurance, or an equal governmental insurance program. Insurance coverage in excess of $l million per occurrence must be approved by the Commission and the local Coordinating Board before inclusion in the Transportation Disadvantaged Service Plan or in the justification of rates and fare structures. Such coverage may be provided by a self-insurance program established and operating under the laws of the State of Florida and written verification of insurance protection in accordance with Section 768.28, Florida Statutes, shall be provided to the Commission upon request.

J. Safeguard information by not using or disclosing any information concerning a user of services under this Agreement for any purpose not in conformity with the local, state and federal regulations (45 CFR, Part 205.50), except upon order of a court, written consent of the recipient, or his/her responsible parent or guardian when authorized by law.

K. Protect Civil Rights by:

1. Complying with state and federal laws including but not limited to laws regarding discrimination on the basis of sex, race, religion, age, disability, sexual orientation, or national origin. The Coordinator gives this assurance in consideration of and for the purpose of obtaining federal grants, loans, contracts (except contracts of insurance or guaranty), property, discounts, or other federal financial assistance to programs or activities receiving or benefiting from federal financial assistance and agreeing to complete a Civil Rights Compliance Questionnaire if so requested by the Commission.

2. Agreeing that compliance with this assurance constitutes a condition of continued receipt of or benefit from federal financial assistance, and that it is binding upon the Coordinator, its successors, subcontractors, transferee, and assignees for the period during which such assistance is provided. Assure that all operators, subcontractors, subgrantee, or others with whom the Coordinator arranges to provide services or benefits to participants or employees in connection with any of its programs and activities are not discriminating against those participants or employees in violation of the above statutes, regulations, guidelines, and standards. In the event of failure to comply, the Coordinator agrees that the Commission may, at its discretion, seek a court order requiring compliance with the terms of this assurance or seek other appropriate judicial or administrative relief, to include assistance being terminated and further assistance being denied.

L. To the extent allowed by Section 768.28, Florida Statutes, and only to the monetary and other limitations contained therein, indemnify and hold harmless the Commission and all of the Commission's members, officers, agents, and employees; purchasing agency/entity officers, agents, and employees; and the local, state, and federal governments from any claim, loss, damage, cost, charge or expense arising out of any act, action, neglect or omission by the Coordinator during the performance of this Agreement, whether direct or indirect, and whether to any person or property to which the Commission or said parties may be subject, except that neither the Coordinator nor any of its sub-contractors will be liable under this section for damages arising out of injury or damage to persons or property directly caused or resulting from the sole negligence of the Commission or any of its members, officers, agents or employees; purchasing agency/entity, officers, agents, and employees; and local, state, or federal governments. Nothing herein is intended to serve as a waiver of sovereign immunity by any agency/entity or Coordinator to which sovereign immunity may be applicable. Nothing herein shall be construed as consent by a state agency/entity or political subdivision of the State of Florida or the federal government to be sued by third parties in any matter arising out of any Agreement or contract. Notwithstanding the foregoing, pursuant to Section 768.28, Florida Statutes, no agency or subdivision of the state shall be required to indemnify, insure, or assume any liability for the Commission's negligence.

M. Comply with standards and performance requirements of the Commission, the local Coordinating Board approved Transportation Disadvantaged Service Plan, and any purchase of service contracting agencies/entities. Failure to meet the requirements or obligations set forth in this MOA, and performance requirements established and monitored by the local Coordinating Board in the approved Transportation Disadvantaged Service Plan, shall be due cause for non-payment of reimbursement invoices until such deficiencies have been addressed or corrected to the satisfaction of the Commission.

N. Comply with subcontracting requirements by executing or negotiating contracts for transportation services with Transportation Operators and Coordination Contractors, and assuring that the conditions of such contracts are maintained. The requirements of Part 1, Paragraph E.5. through M are to be included in all contracts, subcontracts, coordination contracts, and assignments made by the Coordinator for services under this Agreement. Said contracts, subcontracts, coordination contracts, and assignments will be reviewed and approved annually by the Coordinator and local Coordinating Board for conformance with the requirements of this Agreement.

O. Comply with the following requirements concerning drivers and vehicles:

1. Drivers for paratransit services, including coordination contractors, shall be required to announce and identify themselves by name and company in a manner that is conducive to communications with the specific passenger, upon pickup of each rider, group of riders, or representative, guardian, or associate of the rider, except in situations where the driver regularly transports the rider on a recurring basis. Each driver must have photo identification that is in view of the passenger. Name patches, inscriptions or badges that affix to driver clothing are acceptable. For transit services, the driver photo identification shall be in a conspicuous location in the vehicle.

2. The paratransit driver shall provide the passenger with boarding assistance, if necessary or requested, to the seating portion of the vehicle. The boarding assistance shall include opening the vehicle door, fastening the seat belt or utilization of wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. In certain paratransit service categories, the driver may also be required to open and close doors to buildings, except in situations in which assistance in opening/closing building doors would not be safe for passengers remaining on the vehicle. Assisted access must be in a dignified manner. Drivers may not assist wheelchair up or down more than one step, unless it can be performed safely as determined by the passenger, guardian, and driver.

3. All vehicles shall be equipped with two-way communications in good working order and be audible to the driver at all times to the base.

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

P. Comply with other requirements as follows:

1. Transport an escort of a passenger and dependent children as locally negotiated and identified in the local Transportation Disadvantaged Service Plan.

2. Determine locally in the Transportation Disadvantaged Service Plan, the use, responsibility, and cost of child restraint devices.

3. Transport with the passenger at no additional charge, passenger property that can be carried by the passenger and/or driver in one trip and can be safely stowed on the vehicle. Additional requirements may be negotiated for carrying and loading rider property beyond this amount. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.

4. Provide shelter, security, and safety of passengers at vehicle transfer points.

5. Post a local or other toll-free number for complaints or grievances inside each vehicle. The local complaint process shall be outlined as a section in the local Transportation Disadvantaged Service Plan including advising the dissatisfied person about the Commission's Ombudsman Program as a step within the process as approved by the local Coordinating Board.

6. Provide out-of-service-area trips, when determined locally and approved by the local Coordinating Board, except in instances where local ordinances prohibit such trips.

7. Keep interior of all vehicles free from dirt, grime, oil, trash, torn upholstery, damaged or broken seats, protruding metal or other objects or materials which could soil items placed in the vehicle or provide discomfort for the passenger.

8. Determine locally by the local Coordinating Board and provide in the local Transportation Disadvantaged Service Plan the billing requirements of the Community Transportation Coordinator. All bills shall be paid to subcontractors within 7 calendar days after receipt of said payment by the Coordinator, in accordance with Section 287.0585, Florida Statutes.

9. Maintain or have access to a passenger/trip database on each rider being transported within the system.

10. Provide each rider and escort, child, or personal care attendant adequate seating for paratransit services. No more passengers than the registered passenger seating capacity shall be scheduled or transported in a vehicle at any time. For transit services provided by transit vehicles, adequate seating or standing space will be provided to each rider and escort, child, or personal care attendant, and no more passengers than the registered passenger seating or standing capacity shall be scheduled or transported in a vehicle at any time.

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

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

II. The Commission Shall:

A. Recognize the Coordinator as the entity described in Section 427.011(5), Florida Statutes, and Rule 41-2.002(4), F.A.C.

B. Attempt to insure that all entities with transportation disadvantaged funds will purchase transportation disadvantaged services through the Coordinator's system.

III. The Coordinator and the Commission Further Agree:

A. Nothing in this Agreement shall require the Commission to observe or enforce compliance with any provision thereof, perform any other act or do any other thing in contravention of any applicable state law. If any of the provisions of this Agreement is found by a court of law to violate any applicable state law, the purchasing agency/entity will at once notify the Commission in writing in order that appropriate changes and modifications may be made by the Commission and the Coordinator to the end that the Coordinator may proceed as soon as possible with the provision of transportation services.

B. If any part or provision of this Agreement is held invalid, the remainder of this Agreement shall be binding on the parties hereto.

C. Termination Conditions:

1. Termination at Will - This Agreement may be terminated by either party upon no less than thirty (30) days notice, without cause. Said notice shall be delivered by certified mail, return receipt required, or in person with proof of delivery.

2. Termination for Breach - Unless the Coordinator's breach is waived by the Commission in writing, the Commission may, by written notice to the Coordinator, terminate this Agreement upon no less than twenty-four (24) hours notice. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery. Waiver by the Commission of breach of any provision of this Agreement shall not be deemed to be a waiver of any other breach and shall not be construed to be a modification of the terms of this Agreement, and shall not act as a waiver or estoppel to enforcement of any provision of this Agreement. The provisions herein do not limit the Commission's right to remedies at law or to damages.

D. This agreement will expire unless an extension is granted to the Coordinator in writing by the Commission, in accordance with Chapter 287, Florida Statutes.

E. Renegotiations or Modifications of this Agreement shall only be valid when they have been reduced to writing, duly approved by the Commission, and signed by both parties hereto.

F. Notice and Contact:

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

Lani Birchett, Transit Coordinator & Grants Manager
600 Transit Way, Ft Walton Beach, Fl. 32547

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

This document has been reviewed in its entirety and approved by the local Coordinating Board at its official meeting held on OCTOBER 26, 2011

, BEATRICE LOVE-MOORE
Coordinating Board Chairperson

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

COMMUNITY TRANSPORTATION COORDINATOR:

Okaloosa County Board of County Commissioners
Agency Name

DON R. AMUNDS
Printed Name of Authorized Individual

Signature: SEAL

Title: CHAIRMAN

May 15, 2012

STATE OF FLORIDA, COMMISSION FOR THE TRANSPORTATION DISADVANTAGED:

Steve Holmes
Printed Name of Authorized Individual

Signature:

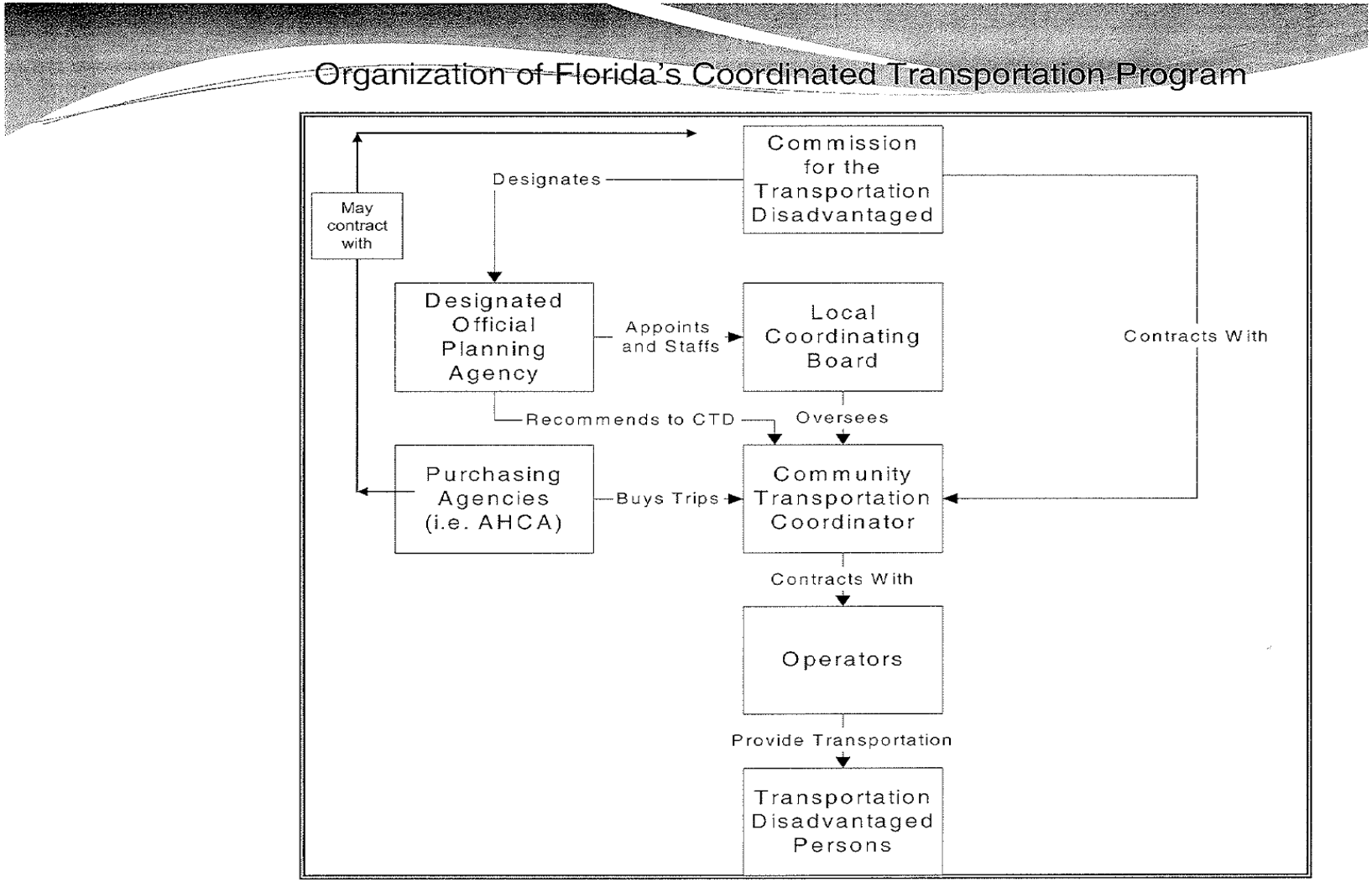
Title: Executive Director

Rev. 04/02/2012

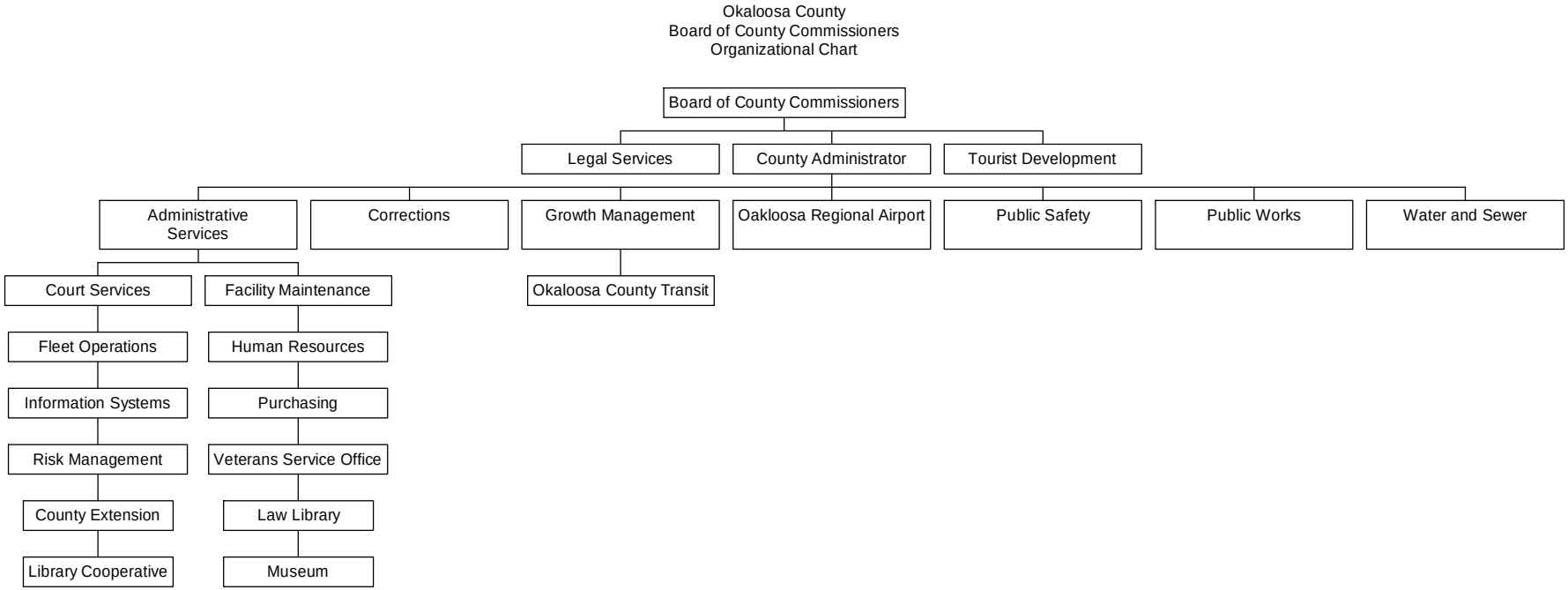
8

Transportation Disadvantaged Program Concept Chart

Figure 1

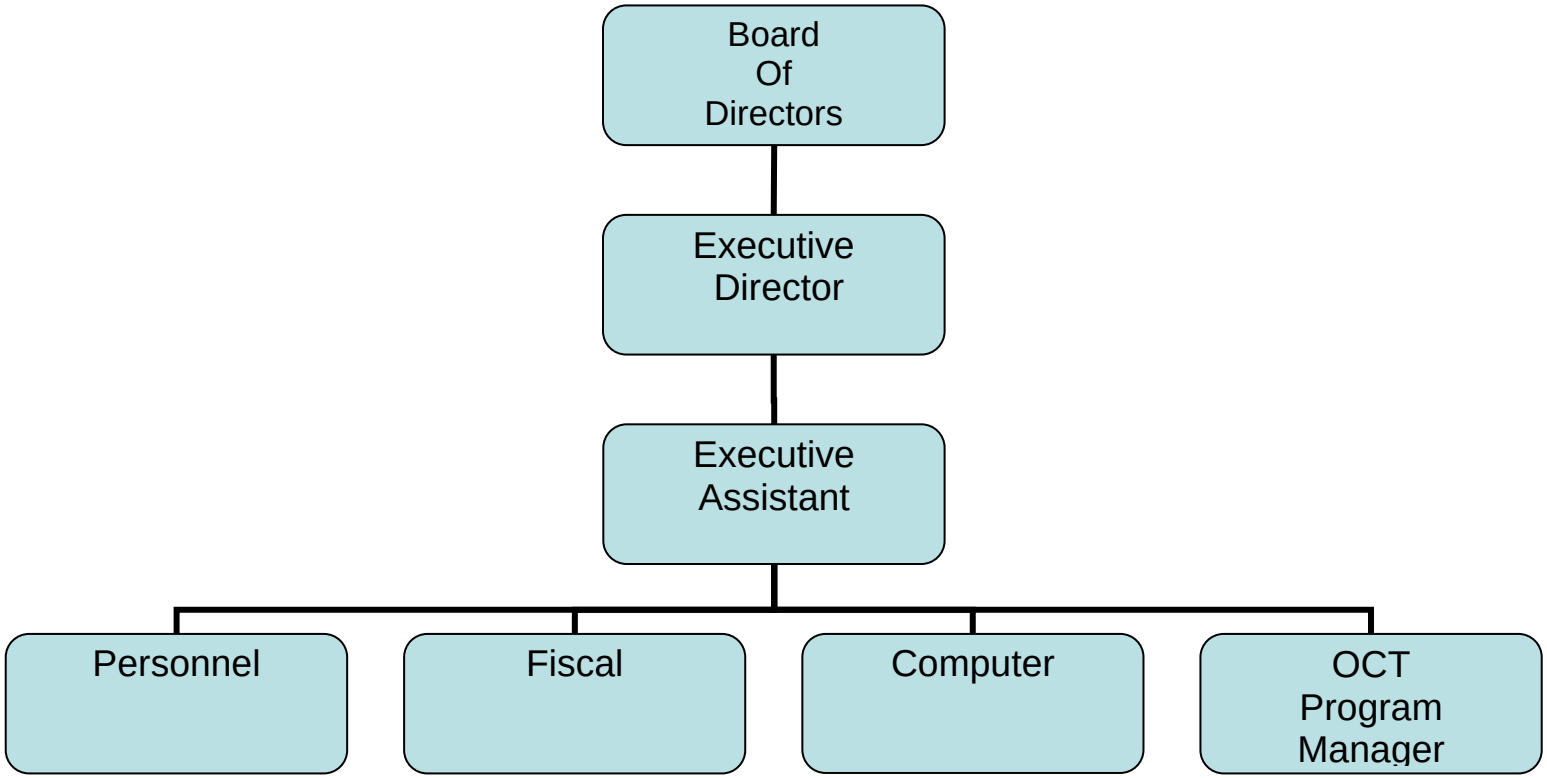


ORGANIZATION CHART
Figure 2



OKALOOSA COUNTY TRANSIT
ORGANIZATION CHART

Figure 3



OKALOOSA COUNTY TRANSIT
ORGANIZATION CHART

Figure 4

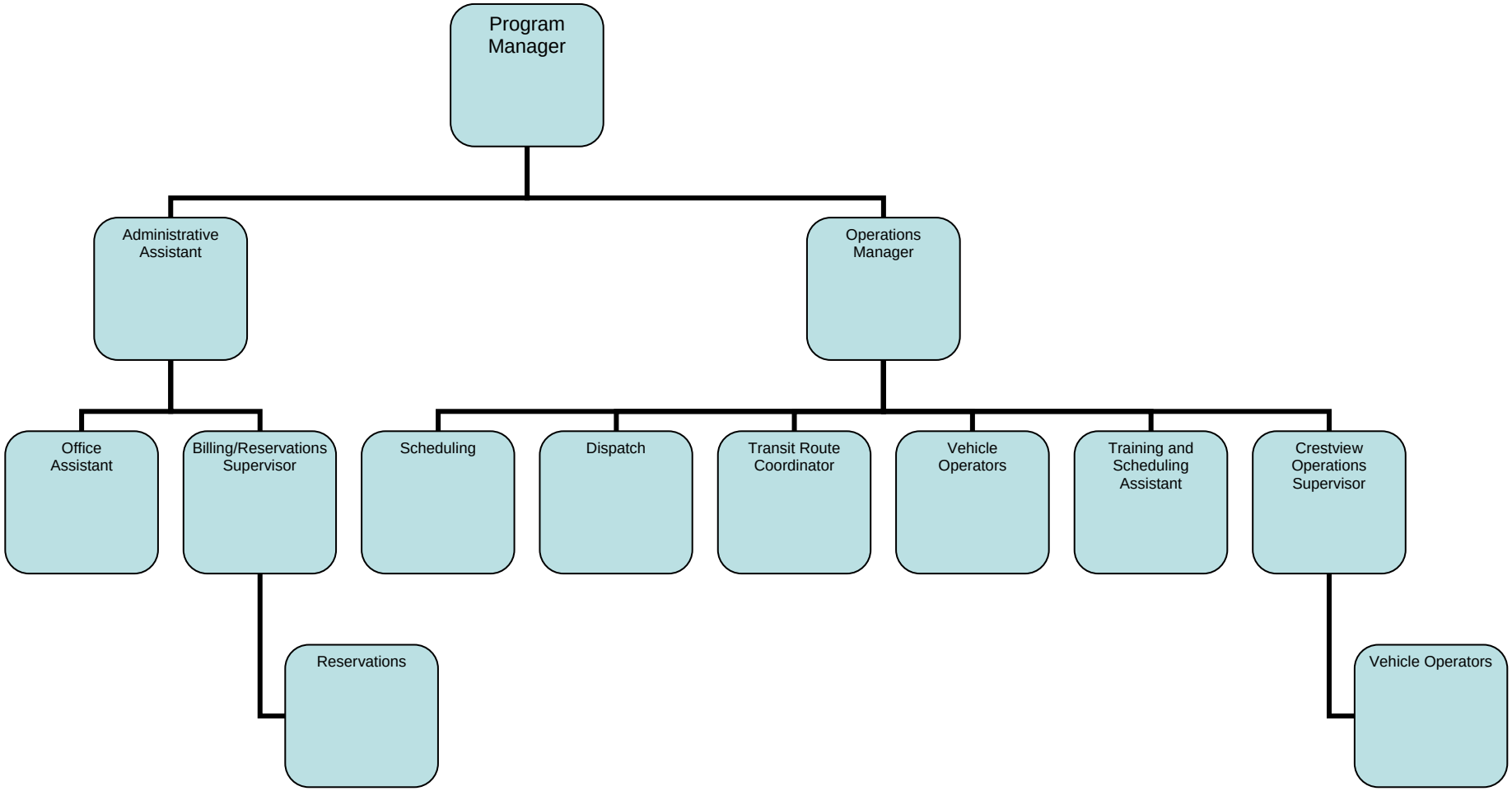


Figure 5

West Florida Regional Planning Council

EXECUTIVE DIRECTOR
Terry Joseph

ADMINISTRATION

Finance Director
Dawn Schwartz

Accountant
Kathy Scott

Accounting Clerk
Deb Brown

Administrative Professional
Cindy Sheffield (Manpower)

Information Systems Specialist
TO BE FILLED

Human Resources Coordinator
Renee Quick (Manpower)

COMPREHENSIVE PLANNING

Regional Planner
Kathleen Ahlen
Caitlin Cerame
Traci Goodhart

Planning Technician
Cindy McIlwain

Accounting Clerk
Tamie Mahan

Administrative Professional
Susan Bell (Manpower)

TRANSPORTATION PLANNING

Transportation Director
Mary Robinson

Senior Planner
Gary Kramer
Rob Mahan
Mary Beth Washnock

Planning Technician
Gina Watson

Administrative Professional
Brittany Ellers
Dorothy McKenzie
Dottie Turner (Manpower)

Regional Planner
Jenny Cook
Kate Daniel
Dan Deanda
Vikki Garrett
Jill Lavender
Howard Vanselow
Brandi Whitehurst
Brian Youpatoff

GIS Coordinator
Jessica Paul

OKALOOSA COUNTY
Public Transportation
Vehicle Inventory

Vehicle #	Year	Type	AMB	W/C	Manf	VIN	Cost
1	2007	Sedan	4	0	Ford	3FAHP07137R209181	$15,100.00
2	2011	Pick up	2	0	Ford	1FTM1CM7BKD35493	$14,925.00
3	2014	Cutaway	12	2	Chevrolet	1GB6G5BGXE1198685	$74,882.00
4	2014	Cutaway	12	2	Chevrolet	1GB6G5BG1E1195495	$119,777.00
5	2014	Cutaway	12	2	Chevrolet	1GB6G5BG5E1198531	$74,882.00
6	2014	Cutaway	12	2	Chevrolet	1GB6G5BG8E1199348	$74,882.00
7	2015	Cutaway	20	2	Ford	1FDGF5GY4EA554365	$95,503.00
8	2012	Cutaway	8	2	Chevrolet	1GB3G2BG0B1176918	$67,613.00
9	2015	Cutaway	12	2	Chevrolet	1GB6G5BG4E1198309	$74,882.00
10	2007	Cutaway	12	2	Chevrolet	1GBE4V1217F404217	$84,662.00
11	2014	Cutaway	12	2	Chevrolet	1GB6G5BG1E1195836	$74,882.00
30	2012	Mini Van	6	0	Dodge	2C4RDGCG5CR353759	$23,082.00
32	2012	Mini Van	6	0	Dodge	2C4RDGCG3CR353761	$23,082.00
33	2012	Mini Van	6	0	Dodge	2C4RDGCG5CR353762	$23,082.00
41	2007	Sedan	4	0	Ford	3FAHP07187R204915	$16,100.00
42	2006	Sedan	4	0	Ford	1FAFP53U37A112822	$15,300.00
43	2006	Sedan	4	0	Ford	1FAFP53U07A112812	$15,300.00
44	2007	Sedan	4	0	Ford	3FAHP07147R204913	$16,100.00
45	2007	Sedan	4	0	Ford	3FAHP07127R204912	$16,100.00
47	2007	Sedan	4	0	Ford	3FAHP07167R204914	$15,100.00
60	2012	Cutaway	8	2	Chevrolet	1GB3G2BG5B1175702	$67,613.00
61	2012	Cutaway	12	2	Chevrolet	1GB6G5BG0B1177226	$72,158.00
62	2012	Cutaway	10	3	Chevrolet	1GB6G5BG0B1177596	$71,383.00
63	2012	Cutaway	10	3	Chevrolet	1GB6G5BG5B1177710	$71,383.00
64	2012	Cutaway	8	2	Chevrolet	1GB6G5BG5B1176573	$72,158.00
70	2009	Cutaway	8	2	Chevrolet	1GBJG31K191162328	$73,163.00
71	2009	Cutaway	8	2	Chevrolet	1GBJG31K191160899	$73,163.00
72	2009	Cutaway	8	2	Chevrolet	1GBJG31K391161262	$73,163.00
73	2009	Cutaway	8	2	Chevrolet	1GBJG31K191160529	$73,163.00
74	2009	Cutaway	8	2	Chevrolet	1GBJG31K191160109	$73,163.00
75	2009	Cutaway	8	2	Chevrolet	1GBJG31K591161232	$73,163.00
76	2007	Cutaway	12	2	Chevrolet	1GBE4V1247F404115	$84,662.00
79	2012	Cutaway	10	3	Chevrolet	1GB6G5BG7B1177952	$71,383.00
80	2012	Cutaway	8	2	Chevrolet	1GB3G2BG3B1176847	$67,613.00
81	2012	Cutaway	8	2	Chevrolet	1GB3G2BG9C1199034	$67,613.00
82	2012	Cutaway	8	2	Chevrolet	1GB3G2BG6B1175126	$67,613.00
83	2012	Cutaway	8	2	Chevrolet	1GB3G2BG6B1176308	$67,613.00
84	2009	Cutaway	12	2	Chevrolet	1GBE4V1958F415574	$108,150.00
85	2009	Cutaway	12	2	Chevrolet	1GBE4V19X8F415473	$108,150.00
86	2014	Cutaway	12	2	Chevrolet	1GB6G5BG7E1198353	$74,882.00
87	2014	Cutaway	12	2	Chevrolet	1GB6G5BG5E1199369	$74,882.00
88	2008	Cutaway	12	2	Chevrolet	1GBE4V1918F413482	$91,513.00
89	2014	Cutaway	12	2	Chevrolet	1GB6G5BG6E1198117	$74,882.00
90	2014	Cutaway	12	2	Chevrolet	1GB6G5BG7E1198580	$74,882.00
91	2015	Cutaway	12	2	Chevrolet	1GB6G5BG4E1198245	$74,882.00

Public Transportation
Vehicle Inventory
continued

92	2014	Cutaway	12	2	Chevrolet	1GB6G5BG5E1198173	$74,882.00
93	2015	Cutaway	12	2	Chevrolet	1GB6G5BG3E1199130	$74,882.00
94	2015	Cutaway	12	2	Chevrolet	1GB6G5BG9E1199410	$74,882.00
95	2014	Cutaway	12	2	Chevrolet	1GB6G5BG7E1195470	$71,922.00
96	2008	Cutaway	12	2	Chevrolet	1GBE4V1958F413419	$91,513.00
97	2014	Cutaway	12	2	Chevrolet	1GB6G5BG8E1195865	$71,922.00
98	2014	Cutaway	12	2	Chevrolet	1GB6G5BG1E1195142	$71,922.00
99	2015	Cutaway	20	2	Ford	1FDGF5GY6FEA54366	$95,503.00
100	2007	Trolley	30	2	Freight	4UZAB9BV55CU61711	$139,939.00
101	2007	Trolley	30	2	Freight	4UZAB9BV27CZ21068	$139,939.00

Vehicles in the Coordinated System

Caring Hearts
2005 Dodge Van
2006 Dodge Sprinter
2006 Dodge Sprinter

STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION

CERTIFICATION OF COMPLIANCE

for

PUBLIC-SECTOR BUS TRANSIT SYSTEMS

(Certifying compliance with F.S. 341.061 & RULE14-90 F.A.C.)

to

Florida Department of Transportation

This Certifies year 2012

DATE: January 10, 2013

TRANSIT SYSTEM: Okaloosa County Transit

ADDRESS: 600 Transit Way, Fort Walton Beach , FL 32547

In accordance with Florida Statue 341.061, the Bus Transit System named above and Private Contract Bus Transit System(s) (listed below), hereby certifies to the following:

1. The adoption of a System Safety Program Plan (SSPP) & Security Program Plan (SPP) pursuant to Florida Department of Transportation safety standards set forth in Rule Chapter 14-90, Florida Administrative Code.

2. Compliance with adopted safety standards in the SSPP & SPP.

3. Performance of annual safety inspections on all operational buses in accordance with Rule 14-90.009, FAC.

Signature: Lani A. Birchett

Name: Lani A. Birchett (Type or Print) Title: Transit Coordinator & Grants Manager

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

Name/Company: Okaloosa County BCC Fleet Maintenance

Address: 2798 Goodwin Avenue, Crestview, FL 32539

Attachment: (Applicable Contractor(s) - Name, Address, Phone#, Contact Person)

N/A

STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION

CERTIFICATION OF COMPLIANCE

for

PUBLIC-SECTOR BUS TRANSIT SYSTEMS

(Certifying compliance with F.S. 341.061 & RULE14-90 F.A.C.)

to

Florida Department of Transportation

This Certifies year 2012

DATE: 1-25-13

TRANSIT SYSTEM: Caring Hearts Pediatric Extended Care

ADDRESS: 380 Medcrest Drive, Crestview, Florida 32536

In accordance with Florida Statue 341.061, the Bus Transit System named above and Private Contract Bus Transit System(s) (listed below), hereby certifies to the following:

1. The adoption of a System Safety Program Plan (SSPP) & Security Program Plan (SPP) pursuant to Florida Department of Transportation safety standards set forth in Rule Chapter 14-90, Florida Administrative Code.

2. Compliance with adopted safety standards in the SSPP & SPP.

3. Performance of annual safety inspections on all operational buses in accordance with Rule 14- 90.009, FAC.

Signature: Christel Funk

Name: Christel Funk Title: Administrator

(Type or Print)

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

Company: OC's Auto & Truck Services

Address: 436 E. James Lee Blvd.

Crestview, FL. 32539

850-682-5130 MV 80359

Attachment: (Applicable Contractor(s) - Name, Address, Phone#, Contact Person)

STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION

CERTIFICATION OF COMPLIANCE

for

PUBLIC-SECTOR BUS TRANSIT SYSTEMS

(Certifying compliance with F.S. 341.061 & RULE14-90 F.A.C.)

to

Florida Department of Transportation

This Certifies year 2011.

DATE: January 20, 2012

TRANSIT SYSTEM: Bridgeway Center, Inc.

ADDRESS: 137 Hospital Drive NE, Fort Walton Beach, FL 32548-5063

In accordance with Florida Statue 341.061, the Bus Transit System named above and Private Contract Bus Transit System(s) (listed below), hereby certifies to the following:

1. The adoption of a System Safety Program Plan (SSPP) & Security Program Plan (SPP) pursuant to Florida Department of Transportation safety standards set forth in Rule Chapter 14-90, Florida Administrative Code.

2. Compliance with adopted safety standards in the SSPP & SPP.

3. Performance of annual safety inspections on all operational buses in accordance with Rule 14- 90.009, FAC.

Signature: 1/23/12

Name: Daniel Cobbs, MPA,FACHE Title: Chief Executive Officer
(Type or Print)

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

Company: Okaloosa County Fleet Maintenance

Address: 84 Ready Ave, Ft. Walton Bch, FL 32548

Attachment: (Applicable Contractor(s) - Name, Address, Phone#, Contact Person)

Local Coordinating Board – Roll Call Vote

The Local Coordinating Board for **Okaloosa County** hereby certifies that an annual evaluation of the Community Transportation Coordinator, **Okaloosa County**, was conducted consistent with the policies of the Commission for the Transportation Disadvantaged and all recommendations of that evaluation have been incorporated in this Service Plan. This **Okaloosa County Transportation Disadvantaged Service Plan** annual update was reviewed and approved by this Board at an official meeting held on ***June 20, 2014.*** The ***Rate Model*** was approved by the Local Coordinating Board at an official meeting held on ***August 27, 2014.***

August 27, 2014
Date

Beatrice Love-Moore
Local Coordinating Board Chairperson

Approved by the Commission for the Transportation Disadvantaged:

Date

Executive Director

Okaloosa County Rate Model
Local Coordinating Board for Okaloosa County – Roll Call Vote

Representation	Member	Meeting Attendance		Approval Vote		
		Present	Absent	Yes	No	Abstain
Elected Official - Chair	Don Amunds		X			
Elderly	Vacant		--			
Disabled	William Collette		X			
Citizen Advocate	Vacant		--			
Citizen Advocate/User	Ted Schlieper		X			
Veteran Services	Beatrice Love-Moore	X		X		
Community Action (Econ Disadv)	Patriece Grimes		X			
Local Public Education	Jay McInnis	X		X		
FDOT	Vanessa Strickland		X			
FL Dept of Children & Families	Susan King	X		X		
FL Dept of Education	Cyndy Walker	X		X		
FL Dept of Elder Affairs	Gwendolyn Rhodes	X		X		
FL AHCA (Medicaid)	John Maraldo		X			
Children At Risk	Vacant		--			
Private Trans Industry	C. R. Pooler	X		X		
Workforce Dev Board	Susan Sublim		X			
Local Medical Community	Vacant		--			

Local Coordinating Board – Roll Call Vote

The Local Coordinating Board for **Okaloosa County** hereby certifies that an annual evaluation of the Community Transportation Coordinator, **Okaloosa County**, was conducted consistent with the policies of the Commission for the Transportation Disadvantaged and all recommendations of that evaluation have been incorporated in this Service Plan. This **Okaloosa County Transportation Disadvantaged Service Plan** annual update was reviewed and approved by this Board at an official meeting held on ***June 20, 2014.***

06/24/2014
Date

Beatrice Love-Moore
Local Coordinating Board Chairperson

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
Elected Official - Chair	Don Amunds		X			
Elderly	Vacant		--			
Disabled	William Collette	X		X		
Citizen Advocate	Vacant		--			
Citizen Advocate/User	Ted Schlieper		X			
Veteran Services	Beatrice Love-Moore	X		X		
Community Action (Econ Disadv)	Patriece Grimes		X			
Local Public Education	Jay McInnis		X			
FDOT	Vanessa Strickland		X			
FL Dept of Children & Families	Susan King	X		X		
FL Dept of Education	Cyndy Walker		X			
FL Dept of Elder Affairs	Gwendolyn Rhodes	X		X		
FL AHCA (Medicaid)	John Maraldo		X			
Children At Risk	Vacant		--			
Private Trans Industry	C. R. Pooler	X				X
Workforce Dev Board	Will Miles	X		X		
Local Medical Community	Vacant		--			

Local Coordinating Board – Roll Call Vote

The Local Coordinating Board for **Okaloosa County** hereby certifies that an annual evaluation of the Community Transportation Coordinator, **Okaloosa County**, was conducted consistent with the policies of the Commission for the Transportation Disadvantaged and all recommendations of that evaluation have been incorporated in this Service Plan. We further certify that the rates contained herein have been thoroughly reviewed, evaluated, and approved. This **Okaloosa County Transportation Disadvantaged Service Plan** was reviewed and approved by this Board at an official meeting held on ***June 10, 2013.***

6/24/13
Date

Kelly Windes
Local Coordinating Board Chairperson

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
Elected Official - Chair	Kelly Windes	X		X		
Elderly	Nancy Baughman		X			
Disabled	William Collette	X		X		
Citizen Advocate	Laura Creighton	X		X		
Citizen Advocate/User	Mae Wilcher		X			
Veteran Services	Beatrice Love-Moore	X		X		
Community Action (Econ Disadv)	Patriece Grimes		X			
Local Public Education	Jay McInnis	X		X		
FDOT	Vanessa Strickland		X			
FL Dept of Children & Families	Randy Fleming		X			
FL Dept of Education	Cyndy Walker	X		X		
FL Dept of Elder Affairs	Linda Torres		X			
FL AHCA (Medicaid)	John Maraldo	X		X		
Children At Risk	Evie Fox		X			
Private Trans Industry	C. R. Pooler		X			
Workforce Dev Board	Linda Sumblin		X			
Local Medical Community	Vacant		---			

RESOLUTION O-W 14-24

A RESOLUTION OF THE OKALOOSA-WALTON TRANSPORTATION PLANNING ORGANIZATION ENDORSING THE 2014 AMENDMENT OF THE TRANSPORTATION DISADVANTAGED SERVICE PLAN FOR OKALOOSA COUNTY

WHEREAS, the Okaloosa-Walton Transportation Planning Organization (TPO) is the metropolitan planning organization designated by the Governor of Florida as being responsible for carrying out a continuing, cooperative, and comprehensive transportation planning process for the Okaloosa-Walton Metropolitan Planning Area; and

WHEREAS, Rule 41-2.009 paragraph (4) of the Florida Administrative Code reads, "the Metropolitan Planning Organization (MPO) shall develop and annually update a Transportation Disadvantaged Service Plan (TDSP) in consultation with the Community Transportation Coordinator (CTC) and Local Coordinating Board"; and

WHEREAS, the TDSP is a five year implementation plan with annual updates and a major update every fifth year, which contains the provisions of service delivery in the coordinated transportation system; and

WHEREAS, the TDSP is also used as the Coordinated Public Transit-Human Services Transportation Plan for Federal Transit Administration Grant Programs; and

WHEREAS, the Okaloosa County Transportation Disadvantaged Coordinating Board is the advisory board that is composed of representatives who provide assistance to the CTC relative to the coordination of transportation disadvantaged services; and

WHEREAS, the annual update and amendment of the Okaloosa County TDSP was reviewed and adopted on June 20, 2014 and August 27, 2014 respectively by the Okaloosa County Transportation Disadvantaged Coordinating Board;

NOW, THEREFORE, BE IT RESOLVED BY THE OKALOOSA-WALTON TRANSPORTATION PLANNING ORGANIZATION THAT:

The TPO endorses the Okaloosa County TDSP 2014 Amendment, which fulfills the requirements of Rule 41-2.009 paragraph (4) and contains the necessary provisions for service delivery in the Okaloosa County coordinated transportation system.

Passed and duly adopted by the Okaloosa-Walton Transportation Planning Organization on this 4th day of December 2014.

OKALOOSA-WALTON TRANSPORTATION PLANNING ORGANIZATION

BY: _____
James T. Wood Jr., Chairman

ATTEST: _____

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 or 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, little, 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 of density.

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

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

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

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

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

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

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

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

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

OKALOOSA COUNTY COMMUNITY TRANSPORTATION
2015 RIDER SURVEY COMMENTS

1. Love all of the drives we've had. Only late once due to "add-ons."
2. This particular driver, VERY courteous, professional.
3. I like to ride with Miss Jan because she got me where I needed on time and she is polite.
4. Thank you for your service!
5. You guys and women are doing a great job.
6. I do wish when these drivers past dialysis they would let me off there instead of dragging me to 2 or 3 other places first. I've been here more than 50 years. No scenic routes for me.
7. I love all of your drivers, extremely friendly, courteous, and helpful. I also love Cynthia (don't know her last name).
8. Truly a blessing to have this service available.
9. The dispatcher needs to be courteous.
10. The bus should be on time.
11. Good, very
12. I really enjoyed the driver, she was a good driver and great to be attentive to my needs.
13. Some drivers are not suited to this type of job. No people skills most are great.
14. Greatly appreciate having your transportation system to help people that don't have. It's a blessing. BIG THANK YOU!
15. Excellent service you all provide! God Bless!
16. Thank you OCT - Love you all!
17. Good!
18. Well I believe extra buses and drivers could be very helpful for everyone around the whole town.
19. I wish we had more buses. Doctor often have other things for exams when one is disabled.
20. Very nice.
21. Thank you for being so kind.
22. Joan is helpful and reliable woman.
23. Thanks, very nice service.
24. Great drivers :). Only 1 late arrival for appointment due to add-ons.
25. Some of office people are very rude.
26. Scheduling better. Have been late several times, picked up late on a bus at times.
27. Wait time. I pray the things would be better.
28. I need more space for my wheelchair.

OKALOOSA COUNTY RIDER SURVEY RESULTS & COMPARISONS

QUESTION	#	RESPONSE	2013	2014	2015	2013	2014	2015
DEPENDABILITY - Schedule a trip for the time period I need?	1	A - Very Good	41	30	46	59%	65%	67%
		B - Good	22	12	17	31%	26%	24%
		C - Neutral	5	4	2	7%	9%	3%
		D - Poor	2	0	4	3%	0%	6%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	70	46	69	100%	100%	100%
SERVICE RUNS WHEN I NEED IT?	2	A - Very Good	38	27	44	55%	57%	64%
		B - Good	18	13	17	26%	28%	24%
		C - Neutral	9	3	6	13%	6%	9%
		D - Poor	3	4	0	4%	9%	0%
		E - Very Poor	1	0	2	1%	0%	3%
		Total	69	47	69	100%	100%	100%
EASY TO ARRANGE TRIPS?	3	A - Very Good	43	33	48	65%	72%	70%
		B - Good	17	8	18	26%	17%	26%
		C - Neutral	5	3	1	8%	7%	1%
		D - Poor	1	2	2	2%	4%	3%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	66	46	69	100%	100%	100%
IT IS CONVENIENT TO CHANGE SCHEDULED TRIPS WHEN NECESSARY?	4	A - Very Good	38	24	42	55%	52%	60%
		B - Good	20	13	18	29%	28%	26%
		C - Neutral	9	3	9	13%	7%	13%
		D - Poor	2	5	0	3%	11%	0%
		E - Very Poor	0	1	1	0%	2%	1%
		Total	69	46	70	100%	100%	100%
COMFORT / CLEANLINESS The vehicles are clean and maintained?	5	A - Very Good	51	24	47	73%	52%	67%
		B - Good	13	15	19	19%	33%	27%
		C - Neutral	4	6	3	6%	13%	4%
		D - Poor	2	1	1	3%	2%	2%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	70	46	70	100%	100%	100%
THE DRIVER PROVIDES A SAFE AND COMFORTABLE RIDE?	6	A - Very Good	50	28	52	74%	61%	75%
		B - Good	10	14	12	15%	30%	18%
		C - Neutral	7	4	3	10%	9%	4%
		D - Poor	1	0	0	1%	0%	0%
		E - Very Poor	0	0	2	0%	0%	3%
		Total	68	46	69	100%	100%	100%
WAITING TIME - The vehicle picks me up within 30 minutes of my scheduled time?	7	A - Very Good	31	21	35	45%	46%	52%
		B - Good	23	12	23	33%	26%	34%
		C - Neutral	11	7	5	16%	15%	7%
		D - Poor	1	4	2	1%	9%	3%
		E - Very Poor	3	2	3	4%	4%	4%
		Total	69	46	68	100%	100%	100%
I ARRIVED AT MY DESTINATION AT THE SCHEDULED TIME?	8	A - Very Good	36	24	39	52%	52%	57%
		B - Good	22	10	24	32%	22%	35%
		C - Neutral	7	9	4	10%	20%	6%
		D - Poor	1	2	1	1%	4%	1%
		E - Very Poor	3	1	1	4%	2%	1%
		Total	69	46	69	100%	100%	100%

QUESTION	#	RESPONSE	2013	2014	2015	2013	2014	2015
COST - Amount I pay for my trip is reasonable?	9	A - Very Good	55	39	57	81%	85%	83%
		B - Good	10	6	11	15%	13%	16%
		C - Neutral	2	1	0	3%	2%	0%
		D - Poor	1	0	0	1%	0%	0%
		E - Very Poor	0	0	1	0%	0%	1%
		Total	68	46	69	100%	100%	100%
THE RESERVATIONIST IS PLEASANT?	10	A - Very Good	47	33	51	69%	72%	73%
		B - Good	12	8	15	18%	17%	22%
		C - Neutral	7	2	3	10%	4%	4%
		D - Poor	2	3	1	3%	7%	1%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	68	46	70	100%	100%	100%
THE DRIVERS ARE COURTEOUS AND HELPFUL?	11	A - Very Good	53	33	58	78%	72%	83%
		B - Good	7	6	11	10%	13%	16%
		C - Neutral	7	5	1	10%	11%	1%
		D - Poor	1	1	0	1%	2%	0%
		E - Very Poor	0	1	0	0%	2%	0%
		Total	68	46	70	100%	100%	100%
OVERALL COURTESY OF EMPLOYEES?	12	A - Very Good	50	33	55	75%	72%	78%
		B - Good	11	8	11	16%	17%	16%
		C - Neutral	4	4	4	6%	9%	6%
		D - Poor	2	1	0	3%	2%	0%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	67	46	70	100%	100%	100%
OVERALL SATISFACTION OF SERVICES?	13	A - Very Good	49	26	49	72%	57%	69%
		B - Good	11	13	17	16%	28%	24%
		C - Neutral	6	6	4	9%	13%	6%
		D - Poor	2	1	1	3%	2%	1%
		E - Very Poor	0	0	0	0%	0%	0%
		Total	68	46	71	100%	100%	100%
WHERE ARE YOU GOING ON YOUR TRIP (FINAL DESTINATION)?	14	A. Med/Dent	39	25	37	57%	48%	49%
		B. Sch/Wrk	23	15	16	33%	29%	21%
		C. Groc/Shop	4	5	13	6%	10%	17%
		D. Rec/Errand	0	0	1	0%	0%	1%
		E. Other	3	7	9	4%	13%	12%
		Total	69	52	76	100%	100%	100%
ON AVERAGE, HOW OFTEN DO YOU USE COMMUNITY TRANSPORTATION A MONTH?	15	A. Rarely	5	1	0	7%	2%	0%
		B. 1-2 days	6	4	6	9%	9%	9%
		C. 3-4 days	12	11	12	17%	26%	17%
		D. 5-10 days	10	8	22	14%	19%	32%
		E. 11+ days	36	19	29	52%	44%	42%
		Total	69	43	69	100%	100%	100%
IF NOT BY COMMUNITY TRANSPORTATION, HOW WOULD YOU MAKE THIS TRIP?	16	A. Drive	5	0	4	7%	0%	6%
		B. Would not go	27	14	32	39%	33%	48%
		C. Carpool	22	14	18	32%	33%	27%
		D. Other	7	11	9	10%	26%	13%
		E. Bus Service	8	4	4	12%	9%	6%
		Total	69	43	67	100%	100%	100%

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: **JANET WILLIS** **PHONE: (850) 609-7003**

REVIEW PERIOD: **FY 2012-2013** REVIEW DATE: **JANUARY 29, 2015**

CONDUCTING THE REVIEW: HOWARD VANSELOW AND LCB

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

HOWARD.VANSELOW@WFRPC.ORG

JANUARY 2015

EVALUATION INFORMATION

USING THE AOR, COMPILE THIS INFORMATION:

1. OPERATING ENVIRONMENT: ☐ RURAL **X** SMALL URBAN

2. ORGANIZATION TYPE:
   - ☐ PRIVATE-FOR-PROFIT
   - ☐ PRIVATE NON-PROFIT
   - **X** GOVERNMENT
   - ☐ TRANSPORTATION AGENCY

3. NETWORK TYPE:
   - ☐ SOLE PROVIDER
   - PARTIAL BROKERAGE
   - **X** **COMPLETE BROKERAGE**

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

   - **Okaloosa County Transit (Primary)**
   - **Caring Heart Pediatric Extended Care Center**

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

   - **Head Start**
   - **Pyramid Inc.**

6. NAME THE ORGANIZATIONS AND AGENCIES THAT PURCHASE SERVICE FROM THE CTC AND THE PERCENTAGE OF TRIPS EACH REPRESENTS?

Name of Agency	% of Trips	Name of Contact	Telephone Number
CTD	30.45%		
AHCA	15.52%		
APD	2.76%		
DOEA	4.03%		
DOE	0.09%		
Other	47.14%		

7. **REVIEW AND DISCUSS TD HELPLINE CALLS:**

	Number of calls	Closed Cases	Unsolved Cases
Total Calls	15	15	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?

Annual onsite Monitoring is performed for all Operator Contracts at which time files are reviewed administrative staff is interviewed as required and vehicles are inspected for safety compliance. Reports are reviewed quarterly.

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?

Annual onsite Monitoring is performed for all Operator Contracts at which time files are reviewed administrative staff is interviewed as required and vehicles are inspected for safety compliance. Pyramid is monitored by APD. Reports are reviewed quarterly.

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

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

The Contractor is given the opportunity to correct the findings. A second onsite monitoring is conducted to verify that the necessary corrections are made for the contractor to be in 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 is book a trip, the software will recognize if the trip is near a fixed route bus stop. If the trip is located near a stop, the reservationist will supply this information to the client.**

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

X **Yes** ☐ No

If YES, what is the goal? **There is not a numeric or percentage goal**

Is the CTC accomplishing the goal? **X** **Yes** ☐ No

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

Comments:
The CTC should continue to look for funding for mobility management.

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?

Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of $200,000 for any one person and $300,000 per occurrence at all times during the existence of this Contract. Upon the execution of this Contract, the Agency/Operator shall add the Coordinator as an additional named insured to all insurance policies covering vehicles transporting the transportation disadvantaged. OCT has 1,000,000 liability insurance.

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

Comply with Commission insurance requirements by maintaining at least minimum liability insurance coverage in the amount of $200,000 for any one person and $300,000 per occurrence at all times during the existence of this Contract. Upon the execution of this Contract, the Agency/Operator shall add the Coordinator as an additional named insured to all insurance policies covering vehicles transporting the transportation disadvantaged.

HOW MUCH DOES THE INSURANCE COST (per operator)? **NA**

Operator	Insurance Cost

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

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

IS THE CTC IN COMPLIANCE WITH THIS SECTION? **X** **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.
   The effectiveness is reviewed with the board each November. The coordination contracts have lower cost per mile and lower cost per trip, due to ability to multi load riders from a small geographic area to one program site.

2. DO YOU HAVE TRANSPORTATION ALTERNATIVES? Yes **X** **No**

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

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

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

Commission Standards	Comments
Local toll free phone # must be posted in all vehicles.	**Observed**
Vehicle Cleanliness	**Observed** – Interior clean/Exterior raining
Passenger/Trip Database	**Observed at office**
Adequate seating	**Observed**
Driver Identification	**Observed**
Passenger Assistance	**Observed**
Smoking, Eating and Drinking	**Observed**
Two-way Communications	**Observed**
Air Conditioning/Heating	**Observed**
Billing Requirements	**In TDSP**

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 child has special needs or exhibits behavior problems.**
Use, Responsibility, and cost of Child restraint devices	**The Okaloosa county 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. All other passengers under 6 years old must be transported in a child restraint seat.**
Out-of-Service Area trips	**Shall be provided when determined locally and approved by the local Coordinating Board, except in instances where local ordinances prohibit such trips. Medicaid out of service area trips are provided when no local Medicaid provider is 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 3 years.**
Driver Criminal Background Screening	**All drivers in the coordinated system must have a favorable Level II Background screening which includes local law enforcement, Florida Department of Law Enforcement and FBI background screening.**
Rider Personal Property	**Passenger property that can be carried by the passenger and/or driver in one trip and can safely be stowed on the vehicle shall be allowed to be transported with the passenger at no additional charge. Additional requirements may be negotiated for carrying and loading rider property beyond this amount. Passenger property does not include wheelchairs, child seats, stretchers, secured oxygen, personal assistive devices, or intravenous devices.**
Advance reservation requirements	**Advance reservation requests to paratransit vehicles must be called in no later than 1:00 p.m. for transportation the next day. Demand response trips, which provide little advance notification, will be reviewed on a case-by-case basis and provided for Medicaid urgent care**
Pick-up Window	**For scheduled pick-up, clients are expected to be picked up 15 minutes before or after the scheduled pick up. For scheduled returns, clients are expected to be dropped off 15 minutes before or after the scheduled drop off.**

CTC: **Okaloosa County BOCC** County: **Okaloosa**

Measurable Standards/Goals	**Standard/Goal**	**Latest Figures**	**MET/NOT MET**
Public Transit Ridership	**NONE**		
On-time performance	CTC 90%	CTC **above 90%**	**MET**
Passenger No-shows 184	CTC **Policy**	CTC **Policy**	**MET**
Accidents **1** / 754,900 miles	CTC 1/100,000 miles	CTC **.13 / 100,000**	**MET**
Roadcalls **11** / 754,900 miles	CTC 1/10,000 miles	CTC **.15 / 10,000**	**MET**
Complaints **16** / 21,651 trips	CTC <.5% of trips	CTC < **.01%**	**MET**
Call-Hold Time	CTC Not Required	CTC Not Required	**NA**

CTD AND LOCAL STANDARDS

Findings: The CTC is meeting all CTD and Local standards.

Recommendations:

Trips

Funding Source	# TRIPS	% TRIPS
CTD	40,919	30.45%
AHCA	20,856	15.52%
APD	3,706	2.76%
DOEA	5,415	4.03%
DOE	125	0.09%
Other	63,345	47.14%
Totals	134,366	100.00%

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

Date of Rider Surveys: February 2014 – March 2014

OVERALL SATISFACTION OF SERVICE	A - Very Good	26	57%
	B - Good	13	28%
	C - Neutral	6	13%
	D - Poor	1	2%
	E - Very Poor	0	0%
	Total	46	100%

PURCHASING AGENCY SURVEY

NA – TD and Medicaid only significant purchasing agencies

ON-SITE OBSERVATION OF THE SYSTEM

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

Date of Observation: Jan 29, 2015

Please list any special guests that were present:

Location: Fort Walton Beach / Bluewater Bay

Number of Passengers picked up/dropped off: 6 and 1 No Show

Ambulatory: 4

Non-Ambulatory: 2

Was the driver on time? **X** **Yes** ☐ No, how many minutes late/early?

Did the driver provide any passenger assistance? **X** **Yes** ☐ No

Was the driver wearing any identification?
X **Yes** ☐ Uniform **X** **Name Tag** **X ID Badge**
☐ No

Did the driver render an appropriate greeting?
X **Yes** No ☐ Driver regularly transports the rider, not necessary

If CTC has a policy on seat belts, did the driver ensure the passengers were properly belted?
X **Yes** ☐ No

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

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

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

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

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

Did the driver properly use the lift and secure the passenger? **X** **Yes** ☐ No
If no, please explain:

Comments: Eric was very helpful and courteous to all the clients.

Level of Cost
Worksheet 1

COSTS BY EXPENSE CATEGORY

CTC EXPENSE CATEGORY BY ACCOUNT (500-599)	2011-2012 Trips:150,217		2012-2013 Trips:158,377		2013-2014 Trips:134,366	
	Expense	Cost/ Trip	Expense	Cost/ Trip	Expense	Cost/ Trip
Labor (501)	$694,740	$4.62	$707,386	$4.47	$743,092	$5.53
Fringe Benefits (502)	195,584	1.30	184,745	1.17	203,471	1.51
Services (503)	403,019	2.68	252,415	1.59	189,340	1.41
Materials & Supplies Consumed (504)	285,638	1.90	293,479	1.85	348,372	2.59
Utilities (505)	26,285	.17	24,974	0.16	27,166	0.20
Casualty and Liability Costs (506)	141,410	.94	80,098	0.51	132,547	0.99
Taxes (507)	0	0	0	0.00	0	0.00
Purchased Transportation Service (508)	58,916	.39	68,503	0.43	60,933	0.45
Miscellaneous Expenses (509)	5,949	.04	4,392	0.03	15,241	0.11
Interest Expense (511)	0	0	0	0.00	0	0.00
Leases & Rentals (512)	1,902	.01	0	0.00	2,452	0.02
Annual Depreciation & Amortization (513)	0	0	0	0.00	202	0.00
Contributed Service – Allowable Expenses (530)	1,500	.01	1,500	0.01	0	0.00
Allocated Indirect Expenses (if applicable)	0	0	0	0.00	0	0.00
SYSTEM TOTAL	**$1,814,943**	**$12.06**	**$1,617,492**	**$10.21**	**$1,722,816**	**$12.82**

1.	Which expenses are especially high? **None**
2.	Are these high expenses acceptable? Are they approved? **NA**
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	**3**	**3**		
Private For-Profit	**1**	**1**		
Government				
Public Transit Agency				
Total	**4**	**4**		

2. How many of the operators are coordination contractors? **(2) Head Start & Pyramid**

3. Of the operators included in the local coordinated system, how many have the capability of expanding capacity? **OCT has the capability to expand capacity.**

   Does the CTC have the ability to expand? **Yes, if funding is available.**

4. Indicate the date the latest transportation operator was brought into the system.
   January 2011

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?

   N/A -- more than 5 years since last selection

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

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

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

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

8. If a competitive bid or request for proposals has been used to select the transportation operators, to how many potential operators was the request distributed in the most recently completed process? **2**

How many responded? **2**

The request for bids/proposals was distributed:

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

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

Level of Availability (Coordination) Worksheet 3

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

Public Information – How is public information distributed about transportation services in the community? **Advertising in local paper, brochures at agencies, ride guides, online, through the LCB, radio, and public service announcements.**

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

Eligibility Records – What system is used to coordinate which individuals are eligible for special transportation services in the community? **Eligibility is maintained through the transportation software and on file.**

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 the supervisor and 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 assigns trips to the drivers and assigns 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 is 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.**

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.**

Trip Reconciliation – How is the confirmation of official trips coordinated? **Through the driver manifests.**

Billing – How is the process for requesting and processing fares, payments, and reimbursements coordinated? **Through the OCT – monthly invoices, fares and co-pays 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.**

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

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 and center meetings.**

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

Preliminary Information Worksheet

Version 1.4

CTC Name:	Okaloosa County Board of Commissioners
County (Service Area):	Okaloosa County
Contact Person:	Abra McGill
Phone #	850.609.7004

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 Commissioners
County: Okaloosa County

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

	Prior Year's ACTUALS from Oct 1st of 2012 to Sept 30th of 2013	Current Year's APPROVED Budget, as amended from Oct 1st of 2013 to Sept 30th of 2014	Upcoming Year's PROPOSED Budget from Oct 1st of 2014 to Sept 30th of 2015	% 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	$ 107,545	$ 44,235	$ 108,000	-58.9%	144.2%	% of change is not an actual change. It is a differeence in the way the calulations were compiled in past years versus the actual numbers being used this year.
Medicaid Co-Pay Received		$ 7,500			-100.0%	
Donations/ Contributions						
In-Kind, Contributed Services						
Other						
Bus Pass Program Revenue						
Local Government						
District School Board						
Compl. ADA Services						
County Cash						
County In-Kind, Contributed Services						
City Cash						
City In-kind, Contributed Services						
Other Cash						
Other In-Kind, Contributed Services						
Bus Pass Program Revenue						
CTD						
Non-Spons. Trip Program	$ 339,548	$ 465,612	$ 464,919	37.1%	-0.1%	
Non-Spons. Capital Equipment						
Rural Capital Equipment						
Other TD (specify in explanation)						
Bus Pass Program Revenue						
USDOT & FDOT						
49 USC 5307	$ 369,535	$ 400,000	$ 400,000	8.2%	0.0%	Paratransit services are increasing in the rural area
49 USC 5310						
49 USC 5311 (Operating)	$ 84,517	$ 62,000	$ 94,000	-26.6%	51.6%	
49 USC 5311(Capital)						
Block Grant	$ 419,210	$ 400,000	$ 440,269	-4.6%	10.1%	
Service Development						
Commuter Assistance						
Other DOT (specify in explanation)						
Bus Pass Program Revenue						
AHCA						
Medicaid	$ 261,482	$ 248,712	$ 280,000	-4.9%	12.6%	
Other AHCA (specify in explanation)						
Bus Pass Program Revenue						
DCF						
Alcoh, 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						
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						
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						

Comprehensive Budget Worksheet

Version 1.4

CTC: Okaloosa County Board of Commissioners
County: Okaloosa County

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

	Prior Year's ACTUALS from Oct 1st of 2012 to Sept 30th of 2013	Current Year's APPROVED Budget, as amended from Oct 1st of 2013 to Sept 30th of 2014	Upcoming Year's PROPOSED Budget from Oct 1st of 2014 to Sept 30th of 2015	% Change from Prior Year to Current Year	Proposed % Change from Current Year to Upcoming Year	Confirm whether revenues are collected as a system subsidy VS a purchase of service at a unit price. Explain Changes in Column 6 That Are > ± 10% and Also > ± $50,000
1	2	3	4	5	6	7
APD						
Office of Disability Determination						
Developmental Services						
Other APD (specify in explanation)						
Bus Pass Program Revenue						
DJJ						
(specify in explanation)						
Bus Pass Program Revenue						
Other Fed or State						
xxx						
xxx						
xxx						
Bus Pass Program Revenue						
Other Revenues						
Interest Earnings						
xxxx						
xxxx						
Bus Pass Program Revenue						
Balancing Revenue to Prevent Deficit						
Actual or Planned Use of Cash Reserve						
Balancing Revenue is Short By =			None			
Total Revenues =	$1,581,836	$1,628,059	$1,787,188	2.9%	9.8%	

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

Operating Expenditures					
Labor	$ 14,462	$ 25,000	$ 25,000	72.9%	0.0%
Fringe Benefits	$ 3,616	$ 9,500	$ 9,500	162.7%	0.0%
Services	$ 117	$ 350	$ 350	199.5%	0.0%
Materials and Supplies	$ 1,008	$ 1,500	$ 1,500	48.8%	0.0%
Utilities					
Casualty and Liability					
Taxes					
Purchased Transportation:					
Purchased Bus Pass Expenses					
School Bus Utilization Expenses					
Contracted Transportation Services	$ 1,499,290	$ 1,591,710	$ 1,750,838	6.2%	10.0%
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					
ACTUAL YEAR GAIN	$63,344				
Total Expenditures =	$1,518,493	$1,628,060	$1,787,188	7.2%	9.8%

See NOTES Below.

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

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

Budgeted Rate Base Worksheet

Version 1.4

CTC: Okaloosa County Board of 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 from Oct 1st of 2014 to Sept 30th of 2016	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?	Budgeted Rate Subsidy Revenue EXcluded from the Rate Base	What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?	local match req.
1	2	3	4	5	
REVENUES (CTC/Operators ONLY)					
Local Non-Govt					
Farebox	$ 108,000	$ 108,000	$ -		
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	$ -		$ -		
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	$ 464,919	$ 464,919	$ -	$ -	$ 51,658
Non-Spons. Capital Equipment	$ -	$ -	$ -	$ -	$ -
Rural Capital Equipment	$ -	$ -	$ -	$ -	$ -
Other TD	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
USDOT & FDOT					
49 USC 5307	$ 400,000	$ -	$ 400,000		
49 USC 5310	$ -	$ -	$ -	$ -	$ -
49 USC 5311 (Operating)	$ 94,000	$ 94,000	$ -		
49 USC 5311(Capital)	$ -	$ -	$ -	$ -	$ -
Block Grant	$ 440,269	$ -	$ 440,269		
Service Development	$ -	$ -	$ -		
Commuter Assistance	$ -	$ -	$ -		
Other DOT	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
AHCA					
Medicaid	$ 280,000	$ 280,000	$ -		
Other AHCA	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
DCF					
Alcoh, Drug & Mental Health	$ -	$ -	$ -		
Family Safety & Preservation	$ -	$ -	$ -		
Comm. Care Dis./Aging & Adult Serv.	$ -	$ -	$ -		
Other DCF	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
DOH					
Children Medical Services	$ -	$ -	$ -		
County Public Health	$ -	$ -	$ -		
Other DOH	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
DOE (state)					
Carl Perkins	$ -	$ -	$ -		
Div of Blind Services	$ -	$ -	$ -		
Vocational Rehabilitation	$ -	$ -	$ -		
Day Care Programs	$ -	$ -	$ -		
Other DOE	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
AWI					
WAGES/Workforce Board	$ -	$ -	$ -		
AWI	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
DOEA					
Older Americans Act	$ -	$ -	$ -		
Community Care for Elderly	$ -	$ -	$ -		
Other DOEA	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		
DCA					
Community Services	$ -	$ -	$ -		
Other DCA	$ -		$ -		
Bus Pass Program Revenue	$ -	$ -	$ -		

YELLOW cells
are NEVER Generated by Applying Authorized Rates

BLUE cells
Should be funds generated by rates in this spreadsheet

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

Fill in that portion of budgeted revenue in Column 2 that will be GENERATED through the application of authorized per mile, per trip, or combination per trip plus per mile rates. Also, include the amount of funds that are Earmarked as local match for Transportation Services and NOT Capital Equipment purchases.

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

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

GOLD cells

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

Budgeted Rate Base Worksheet

Version 1.4

CTC: Okaloosa County Board of 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 from Oct 1st of 2014 to Sept 30th of 2015	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?	Budgeted Rate Subsidy Revenue EXcluded from the Rate Base	What amount of the Subsidy Revenue in col. 4 will come from funds to purchase equipment, OR will be used as match for the purchase of equipment?
1	2	3	4	5
APD				
Office of Disability Determination	$ -	$ -	$ -	
Developmental Services	$ -	$ -	$ -	
Other APD	$ -		$ -	
Bus Pass Program Revenue	$ -	$ -	$ -	
DJJ				
DJJ	$ -		$ -	
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 =	$ 1,787,188	$ 946,919	$ 840,269	$ -

EXPENDITURES (CTC/Operators ONLY)	
Operating Expenditures	
Labor	$ 25,000
Fringe Benefits	$ 9,500
Services	$ 350
Materials and Supplies	$ 1,500
Utilities	$ -
Casualty and Liability	$ -
Taxes	$ -
Purchased Transportation:	
Purchased Bus Pass Expenses	$ -
School Bus Utilization Expenses	$ -
Contracted Transportation Services	$ 1,750,838
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 =	$ 1,787,188
minus EXCLUDED Subsidy Revenue =	$ 840,269
Budgeted Total Expenditures INCLUDED in Rate Base =	$ 946,919
Rate Base Adjustment[1] =	
Adjusted Expenditures Included in Rate Base =	$ 946,919

$ 840,269

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: 2012 - 2013

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 =	562,250
Rate Per Passenger Mile = $	**1.68**
Total Projected Passenger Trips =	75,000
Rate Per Passenger Trip = $	**12.63**

Fiscal Year

2014 - 2015

Avg. Passenger Trip Length = 7.5 Miles

Rates If No Revenue Funds Were Identified As Subsidy Funds

Rate Per Passenger Mile = $	**3.18**
Rate Per Passenger Trip = $	**23.83**

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

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

CTC: Okaloosa Coun Version 1.4
County: Okaloosa County

SECTION I: Services Provided

	Ambulatory	Wheelchair	Stretcher	Group
1. Will the CTC be providing any of these Services to transportation disadvantaged passengers in the upcoming budget year?.....	● Yes ○ No	● Yes ○ No	● Yes ○ No	○ Yes ● No
	Go to Section II for Ambulatory Service	Go to Section II for Wheelchair Service	Go to Section II for Stretcher Service	STOP! Do NOT Complete Sections II - V for Group Service

SECTION II: Contracted Services

	Ambulatory	Wheelchair	Stretcher	Group
1. Will the CTC be contracting out any of these Services TOTALLY in the upcoming budget year?....	● Yes ○ No	● Yes ○ No	● Yes ○ No	○ Yes ● No
	Answer # 2 for Ambulatory Service	Answer # 2 for Wheelchair Service	Answer # 2 for Stretcher Service	Do Not Complete Section II for Group Service
2. If you answered YES to #1 above, do you want to arrive at the billing rate by simply dividing the proposed contract amount by the projected Passenger Miles / passenger trips?.....	○ Yes ● No	○ Yes ● No	○ Yes ● No	○ Yes ● No
	Leave Blank	Leave Blank	Leave Blank	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?				
Effective Rate for **Contracted Services**:	Ambulatory	Wheelchair	Stretcher	Group
per **Passenger Mile** =				
per **Passenger Trip** =				
	Go to Section III for Ambulatory Service	Go to Section III for Wheelchair Service	Go to Section III for Stretcher Service	Do NOT Complete Section II for Group Service
4. If you answered # 3 & want a Combined Rate per Trip PLUS a per Mile add-on for 1 or more services, INPUT the Desired per Trip Rate (but must be less than per trip rate in #3 above =	**Combination Trip and Mile Rate**			
Rate per Passenger Mile for Balance =				
	Leave Blank and Go to Section III for Ambulatory Service	Leave Blank and Go to Section III for Wheelchair Service	Leave Blank and Go to Section III for Stretcher Service	Do NOT Complete Section II for Group Service

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 III: Escort Service

1. Do you want to charge all escorts a fee?..... o Yes ● No — Skip #2 - 4 and Section IV and Go to Section V
2. If you answered Yes to #1, do you want to charge the fee per passenger trip OR ..... ● Pass. Trip o Pass. Mile — Leave Blank
   per passenger mile?.....
3. If you answered Yes to # 1 and completed # 2, for how many of the projected Passenger Trips / Passenger Miles will a passenger be accompanied by an escort? — Leave Blank
4. How much will you charge each escort?..... — Leave Blank

SECTION IV: Group Service Loading

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

SECTION V: Rate Calculations for Mulitple Services:

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

RATES FOR FY: 2014 - 2015

		Ambul	Wheel Chair	Stretcher	Group (Leave Blank)	
Projected Passenger Miles (excluding totally contracted services addressed in Section II) =	562,250 =	439,125 +	123,050 +	75 +	0	
Rate per Passenger Mile =		$1.46	$2.50	$5.20	$0.00 per passenger	$0.00 per group
		Ambul	Wheel Chair	Stretcher	Group (Leave Blank)	
Projected Passenger Trips (excluding totally contracted services addressed in Section II) =	75,000 =	56,250 +	18,748 +	2 +		
Rate per Passenger Trip =		$10.71	$18.36	$38.26	$0.00 per passenger	$0.00 per group

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

Combination Trip and Mile Rate

	Ambul	Wheel Chair	Stretcher	Group (Leave Blank)	
...INPUT the Desired Rate per Trip (but must be less than per trip rate above) =	$1.00	$5.00	$25.00		$0.00
Rate per Passenger Mile for Balance =	$1.33	$1.73	$4.53	$0.00 per passenger	$0.00 per group

Rates If No Revenue Funds Were Identified As Subsidy Funds

	Ambul	Wheel Chair	Stretcher	Group	
Rate per Passenger Mile =	$2.75	$4.71	$9.81	$0.00 per passenger	$0.00 per group
	Ambul	Wheel Chair	Stretcher	Group	
Rate per Passenger Trip =	$20.22	$34.66	$72.21	$0.00 per passenger	$0.00 per group

Program These Rates Into Your Medicaid Encounter Data