

CTC

EVALUATION WORKBOOK

JUNE 2, 2020

Florida Commission for the



**Transportation
Disadvantaged**

CTC BEING REVIEWED: Sumter County Board of County Commissioners

COUNTY (IES): Sumter

ADDRESS: 7375 Powell Road, Wildwood, FL 34785

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REVIEW PERIOD: FY 18/19 AOR Data REVIEW DATES: June 2020

PERSON CONDUCTING THE REVIEW: Sumter County TDCB/CTC Evaluation
Subcommittee and Lake~Sumter MPO Staff

CONTACT INFORMATION: Michael Woods (352) 315-0170

EVALUATION INFORMATION

INTRODUCTION AND BRIEFING:

The evaluation of the Sumter County Community Transportation Coordinator (CTC) is conducted annually by the Transportation Disadvantaged Coordinating Board (TDCB) with the guidance of the Lake~Sumter Metropolitan Planning Organization (MPO) staff.

The Sumter County Board of County Commissioners is the designated CTC for Sumter County. On March 7, 2013 the Florida Commission for the Transportation Disadvantaged extended Sumter County's CTC designation effective July 1, 2018 through June 30, 2023. On October 1, 2016 the Sumter County BOCC entered into an agreement with Ride-Right, LLC to be its transportation provider. The agreement is in effect until September 30, 2021.

The mission of the Sumter County CTC is:

To ensure all citizens of Sumter County professional, efficient, and cost-effective transportation services. Sumter County will provide safe, clean, comfortable, and economical transportation; and be alert to citizen needs and prepare for those needs in a timely manner.

The purpose of the annual review is to evaluate the CTC's performance. The evaluation ensures quality of service is being obtained and that it is being provided in the most cost effective, efficient, and unduplicated manner. The evaluation also ensures that all requirements are met in providing provision of any services by operators and coordination contractors in the coordinated system.

The evaluation was conducted utilizing the Commission for the Transportation Disadvantaged CTC Evaluation Workbook. The workbook outlines the formal process for evaluation of the CTC. The evaluation addresses the following areas:

- Entrance Interview Questions
- **Chapter 427, Rules 41-2 and 14-90, CTD Standards and Local Standards**
- Ombudsman Program
- Monitoring of contractors
- Surveys: Riders, Contractors and Purchasing Agencies
- On site observation and bus rides
- Driver files and TD eligibility applications
- Recommendations/Commendations

The evaluation report and recommendations to the CTC were presented by the CTC Evaluation Subcommittee at the June 8, 2020 TDCB meeting. The final workbook with the recommendations/commendations were transmitted to the Florida Commission for the Transportation Disadvantaged and the Sumter County CTC by MPO staff. The CTC will forward a status report to the TDCB within 30 working days. The TDCB will continue utilizing the use of quarterly surveys and on site observations to assist with evaluating the CTC's performance.

ENTRANCE INTERVIEW QUESTIONS

Using the APR, Compile this information:

1. OPERATING ENVIRONMENT: **X** RURAL ▪ 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:
MTM, INC

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

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

Name of Agency	% of Trips	Name of Contact	Telephone Number
<i>Sumter County Youth Ctr.</i>	<i>32.3%</i>	<i>Della Baushley, Director</i>	<i>352-568-8722</i>
<i>Mid Florida Community Services</i>	<i>3.3%</i>	<i>Mat Kline</i>	<i>352-793-5711</i>
<i>Commission for Transportation Disadvantaged</i>	<i>27.1%</i>	<i>Kyle Mills</i>	<i>850-410-5713</i>
<i>FDOT</i>	<i>20.1%</i>	<i>Jo Santiago</i>	<i>407-482-7875</i>
<i>Local Government</i>	<i>17.2%</i>	<i>Bradley Arnold, County Administrator</i>	<i>352-689-4400</i>

7. REVIEW AND DISCUSS TD HELPLINE CALLS:

	Number of calls	Closed Cases	Unsolved Cases
Cost			
Medicaid			
Quality of Service			
Service Availability			
Toll Permit			
Other-Looking for information only			0

GENERAL QUESTIONS

Findings: None

Recommendations: None

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? ***Reviews are conducted annually. Ride Right, LLC/MTM, INC was reviewed by Sumter County November 5, 2019***

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

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

A meeting was held with Ride Right, LLC/MTM, INC general manager.

WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS COORDINATION CONTRACTORS AND HOW OFTEN IS IT CONDUCTED? *N/A. No Coordination Contractors at this time.*

Is a written report issued? Yes No

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

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

A follow-up inspection will be given in 6 months and a deadline of compliance on unfavorable issues that were identified during the annual inspection.

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

COMPLIANCE WITH CHAPTER 427, F.S.

Review the TDSP to determine the utilization of school buses and public transportation services [Chapter 427.0155(4)]

"Approve and coordinate the utilization of school bus and public transportation services in accordance with the TDSP."

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

The CTC currently does not use school buses in the Coordinated System.

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

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

The public transit in Sumter County is the deviated fixed routes that traverse the County from Wildwood to Webster, providing stops at medical facilities including Langley Health Services. SCT encourages the use of public transit for riders who can ride the shuttle system. In order to accommodate the public, the shuttles are allowed to deviate off the route up to $\frac{3}{4}$ of a mile with a prior reservation.

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

- Yes No

If YES, what is the goal?

Is the CTC accomplishing the goal? ▪ Yes ▪ No

IS THE CTC IN COMPLIANCE WITH THIS REQUIREMENT? N/A

Comments: The shuttle routes provided 2.5% of the trips for Sumter County.

GENERAL QUESTIONS

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

1. DESIGNATION DATE OF CTC: ***Last signed MOA is effective from 07/01/2018 – 6/30/2023***

2. WHAT IS THE COMPLAINT PROCESS? The complaint process is included in the TDSP pages 64-65

The CTC and TDCB are responsible for developing and implementing service complaint and grievance procedures. Service complaints are handled by the CTC. If the complaint cannot be resolved by the CTC, the complaint will become a grievance. A grievance is defined as an unresolved service complaint regarding the operation or administration of services. The TDCB has established policy and procedures to deal with grievances. It is the intent of the CTC to encourage the resolution of service complaints before it escalates to a grievance.

Service complaints can be defined as customer incidents or concerns normally involving some operational aspect of daily service. These include, but are not limited to:

- *Late pickup and drop off*
- *No show by transportation operator*
- *No show by client*
- *Client behavior*
- *Driver behavior*
- *Passenger discomfort*
- *Service denial*

Service complaints are telephoned or mailed in a letter to the CTC. Each vehicle has a poster, prominently displayed, which advertises the appropriate phone number for patrons to call with concerns. Once a complaint is received, a complaint/response form (Appendix B) is filled out by the CTC with an appropriate cover letter. The completed complaint form with cover letter is given to the applicable transportation provider. A copy is retained by the CTC for follow up.

The transportation provider will immediately investigate the complaint to determine the appropriate response. The provider is responsible for responding, in writing to the CTC, to the complainant within 72 hours from receipt of notification. The provider must ensure the response clearly addresses the complaint. Complaints which are found to be invalid or baseless must still be responded to.

Following receipt of the response, the CTC will review and complete the applicable portion of the complaint/response form. If a service complaint evolves into an unresolved complaint (grievance), the complainant should be requested to demonstrate their concern in writing as clearly as possible. Grievances are then heard by the TDCB.

Local Coordinating Board Grievance Procedures - See Appendix B

IS THIS PROCESS IN WRITTEN FORM? (Make a copy and include in folder)	X	Yes	▪	No
Is the process being used?	X	Yes	▪	No

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

4. DOES THE COMPLAINT FORM INCORPORATE ALL ELEMENTS OF THE CTD'S UNIFORM SERVICE REPORTING GUIDEBOOK?
 Yes No

5. DOES THE FORM HAVE A SECTION FOR RESOLUTION OF THE COMPLAINT?
 Yes No

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

6. IS A SUMMARY OF COMPLAINTS GIVEN TO THE LCB ON A REGULAR BASIS?
 Yes No

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

The dissatisfied party is sent to the TD Helpline once the complaint cannot be resolved between the CTC and the dissatisfied party.

8. WHEN A COMPLAINT IS FORWARDED TO YOUR OFFICE FROM THE OMBUDSMAN PROGRAM, IS THE COMPLAINT ENTERED INTO THE LOCAL COMPLAINT FILE/PROCESS?
 Yes No

If no, what is done with the complaint?

9. DOES THE CTC PROVIDE WRITTEN RIDER/BENEFICIARY INFORMATION OR BROCHURES TO INFORM RIDERS/ BENEFICIARIES ABOUT TD SERVICES?
 Yes No If yes, what type? *Passenger Guide and Brochure*

10. DOES THE RIDER/ BENEFICIARY INFORMATION OR BROCHURE LIST THE OMBUDSMAN NUMBER?
 Yes No

11. DOES THE RIDER/ BENEFICIARY INFORMATION OR BROCHURE LIST THE COMPLAINT PROCEDURE?
 Yes No

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

All TD riders are required to complete a Transportation Disadvantaged Eligibility Application. Once the application is received, the application is approved or denied within 7 days. Eligibility Requirements for Transportation Disadvantaged are as follows:

Customer has a physical or mental disability, as specified in the Americans with Disabilities Act (ADA); or

Sumter County residents under age 19 and over the age of 60; or

Individuals and households with income status of less than 200% of the Federal poverty level as indicated in the chart below; or

No other funding agency is responsible for a passenger's transportation; or

The customer is unable to provide their own transportation.

The applicant will have to complete the Sumter County Transit Transportation Disadvantaged Eligibility Assessment. All Transportation Disadvantaged Eligibility Assessments must have one the following support documentation attached with no self-declarations accepted:

- *Age Verification*
- *Income Verification*
- *Disability Certification*
- *Proof of the inability to provide own transportation*

Sumter County Transit staff and MPO staff met at Ride Right/MTM on October 28, 2019. The following passengers were tested at random:

First Name	Last Name	Mailing Street Number	Mailing Street	Last Rode	TD Application
DOROTHY	WOFFORD	309	Mill St	4/24/2019 8:30	Yes
DONNA	PRINGLE	401	N wall st	3/17/2014 12:42	Yes
ELIZABETH	CUMBIE	11575	Co Rd 675W	9/27/2018 10:45	Yes
MARIA	IBARRA	48	S Florida Ave	10/21/2019 11:30	Yes
NANCY	ELDER	2085	Co Rd 740	2/16/2017 11:15	Yes
GLADYS	GARNER	8213	Co Rd 109	7/26/2018 10:35	Yes
ELEANOR	HAGAN	1436	PRIVATEER WAY	9/20/2018 11:01	Yes
ROBIN	HORSEY	4809	SW 118 AVE	9/1/2017 11:35	Yes
LULA	WILLIAMS	200	Jumper Dr S	1/29/2014 8:11	Yes
CHARLES	SHEPPARD	3849	Co Rd 230	10/17/2019 9:20	Yes
BETTY	WEBB	4859	CO RD 656	12/7/2017 12:00	Yes
ERNESTINE	HODRICK	605	Moss St	10/17/2019 12:45	Yes
DANYA	ORR	2610	Co Rd 405b	1/25/2019 17:00	Yes
VINCENT	JIMENEZ	2324	Co Rd 453	9/20/2019 11:00	Yes
ALICIA	GREEN	3918	Pine Ave	5/17/2018 14:00	Yes
TONI	DERRICO	14419	Co Rd 751	10/21/2019 7:30	Yes

FREDERICK	DIETZ	109	N Florida St	7/23/2019 12:45	Yes
VIRGINIA	WILLIAMS	4325	Lime St	9/10/2019 10:50	Yes
JOSITA	WATTS	806	Peel St	10/10/2019 12:33	Yes
VALORIE	DIXON	1000	Lee St	9/21/2017 6:39	Yes
MARI JOSE	WESTORT	2227	HOPESPRING LOOP	10/17/2019 12:46	Yes
JOY	PENDERGRAPH	988	Co Rd 482b	7/27/2018 11:30	Yes
CHIQUITA	MCCUTCHEN	273	E SR 44	6/23/2016 10:55	Yes
DELORES	CUMMINGS	2312	Clark Ave	5/31/2019 10:29	Yes
KAREN	LAFFLER	775	Huey St	8/29/2019 13:30	Yes
CANDIS	MACK	1080	Co Rd 479	4/16/2019 13:02	Yes
ROSEMARIE	CAPONEGRRO	640	Devonshire Way	7/2/2018 11:00	Yes
JULIANA	FLYNN	3277	Riverton Rd	10/16/2019 12:16	Yes
SKIEY	BENNETT	10347	SW 60TH TERR	5/10/2018 14:30	Yes
RONALD	JIMENEZ	2324	Co Rd 453	4/13/2018 14:20	Yes
MIRACLE	MARTIN	9964	Co Rd 231	7/27/2017 11:45	Yes

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

None

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

Medicaid Trips

15. WHAT BARRIERS ARE THERE TO THE COORDINATED SYSTEM?

Passengers with Medicaid are having to use two different systems for their transportation.

16. ARE THERE ANY AREAS THAT YOU FEEL THE COMMISSION SHOULD BE AWARE OF OR CAN ASSIST WITH? ***None***

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

Florida Department of Transportation

18. HOW ARE YOU MARKETING THE VOLUNTARY DOLLAR?

No marketing is being done for the Voluntary Dollar.

GENERAL QUESTIONS

Findings: None

Recommendations: None

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

Compliance with 41-2.006(1), Minimum Insurance Compliance

"...ensure compliance with the minimum liability insurance requirement of \$100,000 per person and \$200,000 per incident..."

WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS?

\$100,000 per person and \$200,000 per incident

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

\$1,000,000 per person and \$2,000,000 per incident (Ride Right)

\$100,000 per person and \$200,000 per incident (SCARC)

HOW MUCH DOES THE INSURANCE COST (per operator)?

Operator	Insurance Cost
<i>MTM, INC</i>	<i>\$78,240.51</i>
<i>Sumter County BOCC (Liability Coverage Only)</i>	<i>\$8,812.00</i>

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

Yes No

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

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

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

Compliance with 41-2.006(2), Safety Standards.

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

Date of last SSPP Compliance Review February 2016, Obtain a copy of this review.

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

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

ARE THE CTC CONTRACTED OPERATORS IN COMPLIANCE WITH THIS SECTION?

Yes No

DRIVER REQUIREMENT CHART – 13 active drivers

(CTC staff reviewed 6/3/20)

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

Driver Last Name	Driver License Expiration	Last Physical (1 or 2 year physicals)	CPR/1 st Aid (2 years)	Defensive Driving/Road test (Annually)	ADA Training (Annually)	Other Safety Meetings
L Wiestner	10/7/20	1/7/2021	9/2021	2/2020	1/2020	Monthly
D Smith	1/6/25	5/7/2021	9/2021	2/2020	1/2020	Monthly
M Presley	2/25/2027	6/27/2020	9/2021	2/2020	1/2020	Monthly
J Mullan	1/28/25	2/27/2021	9/2021	2/2020	1/2020	Monthly
D Hoeffle	9/3/20	1/30/2021	9/2021	2/2020	1/2020	Monthly
D Edwards	5/2/2025	12/10/2020	9/2021	2/2020	1/2020	Monthly
J Brown	2/25/20	2/18/2022	9/2021	2/2020	1/2020	Monthly

MPO Staff comments from phone interview:

Sumter County Transit Operator holds monthly safety meetings and brings in safety experts on varying topics.

Sumter County Transit Operator provides defensive driving training (road test) annually.

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

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

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

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

Cost [CTC and Coordination Contractor (CC)]

	CTC	CC #1	CC #2	CC #3	CC #4
Flat contract rate (s) (\$ amount / unit)	N/A	APD			
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)			27.83=AMB 37.18=WHL 48.29=GRP		
Special or unique considerations that influence costs?					
Explanation: <i>CC #1 Bills directly to APD</i>					

2. DO YOU HAVE TRANSPORTATION ALTERNATIVES? Yes No

(Those specific transportation services approved by rule or the Commission as a service not normally arranged by the Community Transportation Coordinator, but provided by the purchasing agency. Example: a neighbor providing the trip)

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

RULE 41-2

Findings: None

Recommendations: None

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

Compliance with Commission Standards

"...shall adhere to Commission approved standards..."

Review the TDSP for the Commission standards.

Commission Standards	Comments
Local toll free phone number must be posted in all vehicles.	<p><i>All vehicles of the CTC shall have the local toll free phone number for complaints or grievances as well as the TD Helpline number clearly posted inside all vehicles.</i></p> <p><i>These phone numbers are included in the brochures and customer information packets provided by the CTC.</i></p>
Vehicle Cleanliness	<p><i>The interiors of CTC vehicles shall be cleaned as needed as transportation services are being provided and after each day's service to ensure they remain free of dirt, grime, oil or trash and free of damage such as torn upholstery or hazards such as broken seats that might cause discomfort or injury to a passenger. Also, the exteriors of CTC vehicles shall be cleaned at least weekly or as needed.</i></p>
Passenger/Trip Database	<p><i>The CTC shall maintain a computer data record on each passenger it provides or arranges transportation services for within the coordinated system including, at a minimum, the following information: name, address, phone number (if available), funding source eligibility, any special requirements and trip history. The computer data records shall be backed up with paper records held for a period of five (5) years. Also, the CTC shall maintain access to subcontractor data on passengers through contract requirements.</i></p>
Adequate seating	<p><i>Adequate seating will be provided for each passenger and no more passengers than the registered passenger seating capacity shall be scheduled or transported in a CTC or subcontractor vehicle at any time.</i></p>
Driver Identification	<p><i>All drivers shall have a photo identification and shall announce and identify themselves by name and agency in a manner conducive to effective communication, except in situations where the driver regularly transports the rider on a recurring basis.</i></p>
Passenger Assistance	<p><i>All drivers of the CTC shall provide passengers with boarding</i></p>

Commission Standards	Comments
	<p><i>assistance, if necessary or requested, to the seating portion of the vehicle. That assistance shall include opening the vehicle door, fastening safety belts or wheelchair securement devices, storage of mobility assistive devices, and closing the vehicle door. If necessary and the safety of other passengers will not be endangered, drivers shall open building doors for passengers. Assisted access must be in a dignified manner.</i></p> <p><i>Drivers may not assist passengers in wheelchairs up or down more than one step unless that assistance can be performed safely as determined by the passenger, guardian (if applicable) and driver.</i></p>
Smoking, Eating and Drinking	<p><i>Smoking is prohibited on all vehicles used within the coordinated system. Eating and drinking on CTC vehicles are not permitted but exceptions are made for passengers who need to eat or drink during their trips for medical reasons.</i></p>
Two-way Communications	<p><i>All CTC and subcontractor vehicles used to provide transportation services within the coordinated system shall be equipped with working two-way communication devices that provide audible communications between the driver and base at all times.</i></p>
Air Conditioning/Heating	<p><i>All CTC and subcontractor vehicles used to provide transportation services within the coordinated system shall have working air conditioners and heaters. If an air conditioner or heater fails, the vehicle will be scheduled for repair or replacement as soon as possible.</i></p>
Billing Requirements	<p><i>Billed amounts owed to subcontractors for services rendered shall be paid by the CTC within seven (7) calendar days of the CTC's receipt of payment from the purchasing agency.</i></p>

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

Compliance with Local Standards

"...shall adhere to Commission approved standards..."

Review the TDSP for the Local standards.

Local Standards	Comments
Transport of Escorts and dependent children policy	<i>Passengers who because of age or disability require an escort to ensure their well being, or the well being of others, shall be charged the regular fare for their trips but shall be allowed an escort at no additional charge. Dependent children, defined here as children under fifteen (15) years of age, shall be charged the regular fare for their trips and shall be accompanied by an escort, individually or as a family group, at no additional charge.</i>
Use, Responsibility, and cost of child restraint devices	<i>The CTC and its subcontractors shall comply with all state laws concerning the use of child restraint devices, particularly Section 316.613, F.S., Child Restraint Requirements, covering children five (5) years of age or younger. An appropriate child restraint device shall be provided at no additional charge by the CTC or a subcontractor when one is not provided by a child's caretaker. The appropriate child restraint device can include a convertible seat in vehicles equipped with such seats.</i>
Out-of-Service Area trips	<i>Out-of-service-area trips include all trips outside of Sumter County and are limited to the CTC's general service area (see Appendix H, Map 1-16), with medical trips having priority. Out-of-service-area trips are available on a 24-hour/7-day basis subject to trip priorities, advance notification requirements/prior scheduling and any purchasing agency restrictions.</i>
CPR/1st Aid	<i>All CTC employees/operator/contracted services as applicable are required to qualify in CPR/1st Aid within three (3) months of employment and remain qualified in CPR thereafter.</i>
Driver Criminal Background Screening	<i>The CTC shall require a criminal history background check, through the Florida Department of Law Enforcement, and E-Verify on all of its employees and require its subcontractors to do the same for their drivers.</i>
Rider Personal Property	<i>Passenger property that can be carried by the passenger</i>

	<i>and/or driver (maximum of thirty (30) pounds) and can be safely stowed on a vehicle shall be allowed at no additional charge. The amount of passenger property allowed is subject to the following conditions due to limited space: (a) no more than five (5) plastic grocery bags or three (3) paper grocery bags per passenger, and (b) no more than one (1) laundry bag per passenger (plastic bag or enclosed in plastic bag).</i>
Advance reservation requirements	<i>As indicated on page 63 of TDSP reservation trips shall require at least 24 hours advance notification, however, a three day advance reservation is recommended. Also, demand response (same day) trips shall not have a prior notice requirement but shall be provided only if they can be added to the previously arranged schedule for the day.</i>
Pick-up Window	<i>As indicated on page 63 of TDSP the pickup windows for passengers traveling to appointments shall be as follows: To destinations within the county -- one and one-half (1 & 1/2) hours prior to their appointment time. To destinations in counties contiguous to Sumter County -- two (2) hours prior to their appointment time. To destinations in counties not contiguous to Sumter County -- three (3) hours prior to their appointment time.</i>

COMMISSION STANDARDS

Findings: None

Recommendations: None

Measurable Standards/Goals

Measurable Standards/Goals	Standard/Goal	Latest Figures	Is the CTC/Operator meeting the Standard?
Public Transit Ridership	CTC/RR N/A	CTC/RR 53,535	N/A
	SCARC	SCARC 12,969	N/A
On-time performance <i>The CTC uses the minimum standard of 92% for on time performance</i>	CTC/RR 92%	CTC/RR 93%	Yes
	SCARC	SCARC N/A	
Passenger No-shows <i>The goal of the CTC is to have less than 2 percent no-shows.</i>	CTC/RR <2%	CTC/RR $986/55,535 = 1.8\%$	Yes
	SCARC	SCARC N/A	
Accidents <i>Accidents should not exceed 1.4 accidents per 100,000 vehicle miles.</i>	CTC/RR 1.4/100,000 or .0014%	CTC/RR $1/495,033$ or 0.0002%	Yes
	SCARC	SCARC 0	Yes
Road calls <i>Road calls should not exceed 4/100,000 vehicle miles Average age of fleet: 4 years</i>	CTC/RR 4/100,000 or .004%	CTC/RR $1/495,033 =$ 0.0002%	Yes
	SCARC	SCARC 0	Yes
Complaints <i>Complaints should not exceed 1 percent of total passenger trips. Number filed: 2</i>	CTC/RR < 1%	CTC/RR $2/55,535 =$ 0.0035%	Yes
	SCARC	SCARC 0	Yes
Call-Hold Time <i>Call hold time should not exceed 2 minutes</i>	CTC/RR < 2 minutes	CTC/RR .01 minutes	Yes
	SCARC	SCARC N/A	

LOCAL Standards

Findings: None

Recommendations: None

Cost - Worksheet 1

TYPE OF SERVICE TO BE PROVIDED	UNIT (Passenger Mile or Type)	COST PER UNIT
Ambulatory	Trip	\$ 27.83
Wheelchair	Trip	\$ 37.18
Escort	Trip	\$ 27.83

	Current Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total
Expense Sources			
Labor	9028.9	31073	
Fringe Benefits	3274	3803	
Services	0	13652	
Materials & supplies	52563.35	6980	
Utilities	0	1105	
Casualty & liability	13494	20727	
Taxes	0	40	
Misc	0	145	
Interest	0	0	
Leases & rentals	0	2816	
Capital Purchases	21325	0	
Contributed services	0	63083	
Allocated Indirect Expenses	0	0	
Purchased Transportation Services		143424	
Bus Pass	0	0	
School Board	0	0	
Transportation Network Companies	0	0	
Taxi	0	0	
Contracted Operator	\$ 1,001,652.48	0	
Total - Expense Sources	1101337.732	286848	1388185.732

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	1	1		
Private For-Profit	1	1		
Government	0	0		
Public Transit Agency	0	0		
Total	2	2		

2. How many of the operators are coordination contractors? 1

3. Of the operators included in the local coordinated system, how many have the capability of expanding capacity? 2

Does the CTC have the ability to expand? *The CTC is a full brokerage.*

4. Indicate the date the latest transportation operator was brought into the system.
October 1, 2016

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?

	Low bid
	Requests for qualifications
3	Negotiation only

1	Requests for proposals
	Requests for interested parties

Which of the methods listed on the previous page was used to select the current operators? *Request for proposals.*

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

X	Capabilities of operator
X	Age of company
X	Previous experience
X	Management
X	Qualifications of staff
	Resources

X	Scope of Work
X	Safety Program
	Capacity
X	Training Program
X	Insurance
	Accident History

	Economies of Scale
	Contract Monitoring
X	Reporting Capabilities
X	Financial Strength
X	Performance Bond
X	Responsiveness to Solicitation

X	Quality
	Community Knowledge
	Cost of the Contracting Process
X	Price
	Distribution of Costs
	Other: (list)

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

The RFP was posted to DEMAND STAR through the Internet.

How many responded? 2

The request for bids/proposals was distributed:

Distributed via the web on DEMAND STAR.

_____ Locally _____ Statewide X Nationally

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

Vehicle maintenance has been contracted since October 2017.

LEVEL OF AVAILABILITY (COORDINATION) - WORKSHEET 3

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

Work with the coordination contractors to discover ways to reduce costs.

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

Information on transit services is distributed via public social services agencies, two (2) websites and various other public meetings.

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

Through the CTC via application process.

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

The CTC has an application process, which all potential riders must complete. Through the agencies that purchase trips, Chapter 427, Rule 41-2 definitions of transportation disadvantaged individuals.

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

Two reservationists and a scheduler/dispatcher are available for call intake. Call the transit office between 8:00AM and 1:00PM on weekdays. There is also a toll free number.

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

All staff is trained to take reservations and the software warns of duplication of trips prior to the scheduling process. Reservations are taken between 8 AM and 1PM, weekdays.

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

Ride Right receives and schedules all CTC trips based on prioritized order:

- 1. Medical*
- 2. Employment*
- 3. Education and training*
- 4. Nutritional*
- 5. Life-sustaining/other*

Scheduling – How is the trip assignment to vehicles coordinated?

Through computer software by time of appointment, location of pick-up and drop-off.

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

The CTC has 23 ambulatory vehicles, of which 21 are wheelchair lift equipped. Trips are scheduled by space, type of trip and funding availability.

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

All drivers call into a live dispatcher by two-way communication and drivers have a mobile data terminal that directs them to their pick-ups and drop-offs.

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

SCT in cooperation with LCB reviews the transportation operator contracts annually to determine whether their continuation is cost effective and efficient.

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

Two-way radio communication, mobile data terminal or via land line.

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

All trips are verified by the CTC staff.

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

Billing amounts owed to subcontractors are paid by the CTC within seven (7) days.

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

All reports are compiled using the scheduling software, reviewed by CTC staff and reported on a monthly basis to the Sumter County Board of County Commissioners and the Lake Sumter Metropolitan Planning Organization then on a quarterly basis to the Transportation Disadvantaged Coordinating Board.

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

Not Applicable, Fully Brokered System.

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

All first time riders are sent information packets. Information will also be shared via County fairs, government days, fliers, media, website, and marketing campaign.

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

Coordination and operator contracts.

Counties served: Sumter

Date(s) of Review: June 2020

PA Staff Assigned to Review: Michael Woods

I. RECORDS AND AREAS OF REVIEW

- A. General Information
- B. Chapter 427, F.S.
- C. Rule 41-2, F.A.C.
- D. Americans with Disabilities Act
- E. Bus/Van Ride
- F. Surveys
- G. Follow-up of previous QAPE Review
- H. Additional Observations
- I. Current Year Trip and Equipment Grant

II. FINDINGS AND RECOMMENDATIONS

A. General Information

The Commission for the Transportation Disadvantaged designated *Board of Sumter County Commissioners* as the CTC for Sumter County on *March 7, 2013, effective July 1, 2018 – June 30, 2023*. Sumter County BCC/Sumter County Transit is a local government entity.

Area of Noncompliance: None

Recommendation: NA

Timeline for Compliance: NA

B. Chapter 427, F.S.

To be in compliance with Chapter 427, F.S., Sumter County Transit (SCT) must meet the following requirements: 1) Execute uniform contracts for service using a standard contract, which includes performance standards for operators; (2) Collect annual operating data for submittal to the commission; (3) Review all transportation operator contracts annually; (4) Approve and coordinate the utilization of school bus and public transportation services in accordance with the transportation disadvantaged service plan; (5) In cooperation with a functioning coordinating board, review all applications for local government, federal, and state transportation disadvantaged funds, and develop cost-effective coordination strategies; (6) In cooperation with, and approved by, the coordinating board, develop, negotiate, implement, and monitor a memorandum of agreement including a service plan, for submittal to the commission; (7) In cooperation with the coordinating board and pursuant to criteria developed by the Commission for the Transportation Disadvantaged, establish eligibility guidelines and priorities with regard to the recipients of non-sponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust Fund moneys; (8) Have full responsibility for the delivery of transportation services for the transportation disadvantaged as outlined in s. 427.015(2); (9) Work cooperatively with regional workforce boards established in chapter 445 to provide assistance in the development of innovative transportation services for participants in the welfare transition program. **SCT is in compliance in all areas.**

Area of Noncompliance: None

Recommendation: NA

Timeline for Compliance: NA

C. Rule 41-2, F.A.C.

To be in compliance with Rule 41-2, F.A.C. SCT must meet the following requirements: Ensure compliance with minimum liability insurance requirement; Ensure the purchaser that the SCT's operations and services are in compliance with safety requirements and continuing compliance with applicable state or federal laws relating to drug testing; Review, with the Coordinating Board, contracts on an annual basis to determine the effectiveness/efficiency of the Transportation Operator or renewal of Coordination Contracts; and adhere to locally developed and Commission approved standards.

Area of Noncompliance: None

Recommendation: NA

Timeline for Compliance: NA

D. Americans with Disabilities Act

Sumter County Transit (SCT) ensures all new vehicles, regardless of size, must be accessible and meets the system accessibility requirements. SCT also mandates service information be made available in accessible formats for visually and hearing impaired individuals. SCT provides schedules and reservation capabilities in alternative formats such as Braille or audio for the blind and use of a TDD or relay service for the deaf. SCT requires that both public and private transit providers adequately maintain accessible equipment. Out-of-order equipment is repaired promptly, and reasonable steps are taken to continue serving persons with disabilities while repairs are being made.

Area of Noncompliance: None

Recommendation: NA

Timeline for Compliance: NA

E. Bus/Van Ride

MPO and CTC staff along with TDCB members took part the bus/van ride observation process of the Sumter County Transit system. Details of the FY 2016/2017 rides are included in workbook.

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: NA

F. Surveys Results

Area of Noncompliance: None

Recommendation: None

Timeline for Compliance: NA

G. Follow-up of previous QAPE Review (if applicable)

Previous Area of Noncompliance: None

Status: Sumter County is in compliance with the 2015/16 recommendations.

H. Additional Observations

None

I. Current Year Trip and Equipment Grant (if applicable)

The Trip and Equipment Grant for Sumter County currently runs from *July 1, 2019* through June 30, 2020.

Area of Noncompliance: None

Recommendation: NA

Timeline for Compliance: NA

Recommendation: NA

Timeline for Compliance: NA

III. CONCLUSION:

Status Update of the 2016 Recommendations :

Recommendations to the Sumter County CTC:

1. Continue to provide efficient, cost-effective and quality transportation services for transportation disadvantaged persons in Sumter County.
Update: Ongoing. SCT continues to provide efficient, cost-effective and quality transportation services.
2. Review Measureable Goals at each Transportation Disadvantaged Coordinating Board meeting and continue to meet or exceed each of the goals.
Update: Ongoing. Reports provided at quarterly meetings.
3. Review rider surveys collected from the County, Operator and Planning Agency for customer satisfaction.
Update: Ongoing. Surveys are sent by CTC staff and MPO staff on a continuing basis and reviewed for customer satisfaction.
4. Continue to provide the monthly safety meetings with safety experts for drivers and staff.
Update: Ongoing. Monthly safety meetings are provided.

Commendations to the Sumter County CTC:

1. Travel training initiative (Exceptional Student Education students).
2. Branding of all buses in uniformity (interior and exterior).
3. Monthly safety meetings with safety experts provided for drivers and staff.

Approved – June 6, 2017

2017 Recommendations and Commendations of the CTC Evaluation Subcommittee:

Recommendations to the Sumter County CTC:

1. Improve and utilize the Mystery Rider Program to observe bus operator performance and to use reported results to identify trends or conditions requiring corrective action. Recruit mystery riders for participation, as an example include language on the rider surveys provided by the Lake~Sumter MPO and the Sumter County CTC:

“Are you interested in serving as a volunteer Mystery Rider?” If a rider is interested in this volunteer opportunity CTC staff will contact them to discuss the Mystery Rider Program.

2. Review Measureable Goals at each Transportation Disadvantaged Coordinating Board meeting (reports provided in agenda packet) and continue to meet or exceed each of the goals.

Measurable Goals:

- On Time Performance: delivery of all trips to the scheduled arrival time of 96%.
- Call Hold Time: should not exceed 2 minutes.
- Accidents: should not exceed 1.4 accidents per 100,000 vehicle miles.
- No Shows: achieve less than two (2) percent no shows by passenger education and imposing a fee of \$2 for no shows.

3. Research the need for a Travel Training Program in Sumter County.

Commendations to the Sumter County CTC:

1. Continued monthly safety meetings with safety experts provided for drivers and staff. The 2020 Safety/Meeting schedule is attached.

2020 Safety & Training Meeting Schedule

Our monthly safety and training meetings will be on the following dates:

January 16th 2020

February 20th 2020

March 19th 2020

April 16th 2020

May 21st 2020

June 18th 2020

July 16th 2020

August 20th 2020

September 17th 2020

October 15th 2020

November 19th 2020

December 17th 2020

All meetings will be held at 6:30 pm to 8:00 pm at the MTM Transit office.

All meeting are mandatory unless you have scheduled or excused absence.