

CTC
EVALUATION WORKBOOK

Florida Commission for the



**Transportation
Disadvantaged**

CTC BEING REVIEWED: _____

COUNTY (IES): _____

ADDRESS: _____

CONTACT: _____ **PHONE:** _____

REVIEW PERIOD: _____ **REVIEW DATES:** _____

PERSON CONDUCTING THE REVIEW: _____

CONTACT INFORMATION: _____

LCB EVALUATION WORKBOOK

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REVIEW CHECKLIST & SCHEDULE

COLLECT FOR REVIEW:

- APR Data Pages
- QA Section of TDSP
- Last Review (Date: _____)
- N/A List of Omb. Calls
- QA Evaluation
- Status Report (from last review)
- AOR Submittal Date
- TD Clients to Verify
- TDTF Invoices
- Audit Report Submittal Date

ITEMS TO REVIEW ON-SITE:

- SSPP
- Policy/Procedure Manual
- Complaint Procedure
- Drug & Alcohol Policy (see certification)
- Grievance Procedure
- Driver Training Records (see certification)
- Contracts
- N/A Other Agency Review Reports
- Budget
- Performance Standards
- N/A Medicaid Documents

ITEMS TO REQUEST:

- REQUEST INFORMATION FOR RIDER/BENEFICIARY SURVEY** (Rider/Beneficiary Name, Agency who paid for the trip [sorted by agency and totaled], and Phone Number)
- N/A **REQUEST INFORMATION FOR CONTRACTOR SURVEY** (Contractor Name, Phone Number, Address and Contact Name)
- N/A **REQUEST INFORMATION FOR PURCHASING AGENCY SURVEY** (Purchasing Agency Name, Phone Number, Address and Contact Name)
- REQUEST ANNUAL QA SELF CERTIFICATION** (Due to CTD annually by January 15th).
- MAKE ARRANGEMENTS FOR VEHICLES TO BE INSPECTED** (Only if purchased after 1992 and privately funded).

INFORMATION OR MATERIAL TO TAKE WITH YOU:

- Measuring Tape
- Stop Watch

EVALUATION INFORMATION

An LCB review will consist of, but is not limited to the following pages:

1	Cover Page
5 - 6	Entrance Interview Questions
12	Chapter 427.0155 (3) Review the CTC monitoring of contracted operators
13	Chapter 427.0155 (4) Review TDSP to determine utilization of school buses and public transportation services
19	Insurance
23	Rule 41-2.011 (2) Evaluation of cost-effectiveness of Coordination Contractors and Transportation Alternatives
25 - 29	Commission Standards and Local Standards
39	On-Site Observation
40 – 43	Surveys
44	Level of Cost - Worksheet 1
45- 46	Level of Competition – Worksheet 2
47 - 48	Level of Coordination – Worksheet 3

Notes to remember:

- **The CTC should not conduct the evaluation or surveys. If the CTC is also the PA, the PA should contract with an outside source to assist the LCB during the review process.**
- **Attach a copy of the Annual QA Self Certification.**

[See Appendix A](#)

ENTRANCE INTERVIEW QUESTIONS

INTRODUCTION AND BRIEFING:

- Describe the evaluation process (LCB evaluates the CTC and forwards a copy of the evaluation to the CTD).
- The LCB reviews the CTC once every year to evaluate the operations and the performance of the local coordinator.

The LCB will be reviewing the following areas:

- Chapter 427, Rules 41-2 and 14-90, CTD Standards, and Local Standards
- Following up on the Status Report from last year and calls received from the Ombudsman program.
- Monitoring of contractors.
- Surveying riders/beneficiaries, purchasers of service, and contractors
- The LCB will issue a Review Report with the findings and recommendations to the CTC no later than 30 working days after the review has concluded.
- Once the CTC has received the Review Report, the CTC will submit a Status Report to the LCB within 30 working days.
- Give an update of Commission level activities (last meeting update and next meeting date), if needed.

USING THE APR, COMPILER THIS INFORMATION:

1. OPERATING ENVIRONMENT:

- RURAL URBAN

2. ORGANIZATION TYPE:

- PRIVATE-FOR-PROFIT
- PRIVATE NON-PROFIT
- GOVERNMENT
- TRANSPORTATION AGENCY

3. NETWORK TYPE:

- SOLE PROVIDER
- PARTIAL BROKERAGE
- COMPLETE BROKERAGE

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

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

There are none

Coordination Contract Agencies				
Name of Agency	Address	City, State, Zip	Telephone Number	Contact

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

7. REVIEW AND DISCUSS TD HELPLINE CALLS:

	Number of calls	Closed Cases	Unsolved Cases
Cost			
Medicaid			
Quality of Service			
Service Availability			
Toll Permit			
Other			

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:
 2. WHAT IS THE COMPLAINT PROCESS? [See Appendix B for full text](#)

IS THIS PROCESS IN WRITTEN FORM? Yes No
(Make a copy and include in folder) [See Appendix C](#)
Is the process being used? 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?
 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?

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?
Please see Appendix B

Please Verify These Passengers Have an Eligibility Application on File:

TD Eligibility Verification			
Name of Client	Address of client	Date of Ride	Application on File?

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

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

15. WHAT BARRIERS ARE THERE TO THE COORDINATED SYSTEM?

16. ARE THERE ANY AREAS THAT YOU FEEL THE COMMISSION SHOULD BE AWARE OF OR CAN ASSIST WITH?

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

18. HOW ARE YOU MARKETING THE VOLUNTARY DOLLAR?

GENERAL QUESTIONS

Findings:

Recommendations:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the CTC contracts for compliance with 427.0155(1), F.S.
“Execute uniform contracts for service using a standard contract, which includes performance standards for operators.”

ARE YOUR CONTRACTS UNIFORM? Yes No

IS THE CTD’S STANDARD CONTRACT UTILIZED? Yes No

DO THE CONTRACTS INCLUDE PERFORMANCE STANDARDS FOR THE TRANSPORTATION OPERATORS AND COORDINATION CONTRACTORS?
 Yes No

DO THE CONTRACTS INCLUDE THE PROPER LANGUAGE CONCERNING PAYMENT TO SUBCONTRACTORS? (Section 21.20: Payment to Subcontractors, T&E Grant, and FY)
 Yes No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Operator Name	Exp. Date	SSPP	AOR Reporting	Insurance

COMPLIANCE WITH CHAPTER 427, F.S.

**Review the CTC last AOR submittal for compliance with 427. 0155(2)
“Collect Annual Operating Data for submittal to the Commission.”**

REPORTING TIMELINESS

Were the following items submitted on time?

- a. Annual Operating Report Yes No
- Any issues that need clarification? Yes No

Any problem areas on AOR that have been re-occurring?

List:

- b. Memorandum of Agreement Yes No
- c. Transportation Disadvantaged Service Plan Yes No
- d. Grant Applications to TD Trust Fund Yes No
- e. All other grant application (____%) Yes No

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

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?

Is a written report issued to the operator? Yes No

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

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

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?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

ASK TO SEE DOCUMENTATION OF MONITORING REPORTS.

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?

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?

N/A

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? Yes No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review of local government, federal and state transportation applications for TD funds (all local, state or federal funding for TD services) for compliance with 427.0155(5).

“Review all applications for local government, federal, and state transportation disadvantaged funds, and develop cost-effective coordination strategies.”

IS THE CTC INVOLVED WITH THE REVIEW OF APPLICATIONS FOR TD FUNDS, IN CONJUNCTION WITH THE LCB? (TD Funds include all funding for transportation disadvantaged services, i.e. Section 5310 [formerly Sec.16] applications for FDOT funding to buy vehicles granted to agencies who are/are not coordinated)

Yes No

If Yes, describe the application review process.

If no, is the LCB currently reviewing applications for TD funds (any federal, state, and local funding)? Yes No N/A

If no, is the planning agency currently reviewing applications for TD funds?
 Yes No N/A

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

**Review priorities listed in the TDSP, according to Chapter 427.0155(7).
*“Establish priorities with regard to the recipients of non-sponsored transportation disadvantaged services that are purchased with Transportation Disadvantaged Trust monies.”***

REVIEW THE QA SECTION OF THE TDSP (ask CTC to explain):

WHAT ARE THE PRIORITIES FOR THE TDTF TRIPS?

HOW ARE THESE PRIORITIES CARRIED OUT?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Ensure CTC compliance with the delivery of transportation services, 427.0155(8).

“Have full responsibility for the delivery of transportation services for the transportation disadvantaged as outlined in s. 427.015(2).”

Review the Operational section of the TDSP

[See Appendix B for Overflow Text](#)

1. Hours of Service:
2. Hours of Intake:
3. Provisions for After Hours Reservations/Cancellations?
4. What is the minimum required notice for reservations?
5. How far in advance can reservations be place (number of days)?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

COMPLIANCE WITH CHAPTER 427, F.S.

Review the cooperative agreement with the local WAGES coalitions according to Chapter 427.0155(9).

“Work cooperatively with local WAGES coalitions established in Chapter 414 to provide assistance in the development of innovative transportation services for WAGES participants.”

WHAT TYPE OF ARRANGEMENT DO YOU HAVE WITH THE LOCAL WAGES COALITION?

HAVE ANY INNOVATIVE WAGES TRANSPORTATION SERVICES BEEN DEVELOPED?

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

CHAPTER 427

Findings:

Recommendations:

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?

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

HOW MUCH DOES THE INSURANCE COST (per operator)?

Operator	Insurance Cost

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

Yes No

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

N/A

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

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 _____, 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

**Background
Check Level II**

DRIVER REQUIREMENT CHART

Driver Last Name	Driver License	Last Physical	CPR/1st Aid	Def. Driving	ADA Training	Other-

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

Driver Last Name	Driver License	Last Physical	CPR/1st Aid	Def. Driving	ADA Training	Other-

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

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

Compliance with 41-2.006(3), Drug and Alcohol Testing

“...shall assure the purchaser of their continuing compliance with the applicable state or federal laws relating to drug testing...”

With which of the following does the CTC (and its contracted operators) Drug and Alcohol Policy comply?

- FTA (Receive Sect. 5307, 5309, or 5311 funding)
- FHWA (Drivers required to hold a CDL)
- Neither

REQUEST A COPY OF THE DRUG & ALCOHOL POLICY AND LATEST COMPLIANCE REVIEW.

DATE OF LAST DRUG & ALCOHOL POLICY REVIEW: _____

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

Comments:

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)					
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)					
Special or unique considerations that influence costs?					
Explanation:					

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)

Cost [CTC and Transportation Alternative (Alt.)]

	CTC	Alt. #1	Alt. #2	Alt. #3	Alt. #4
Flat contract rate (s) (\$ amount / unit)					
Detail other rates as needed: (e.g. ambulatory, wheelchair, stretcher, out-of-county, group)					
Special or unique considerations that influence costs?					
Explanation:					

IS THE CTC IN COMPLIANCE WITH THIS SECTION? Yes No

RULE 41-2

Findings:

Recommendations:

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.	
Vehicle Cleanliness	
Passenger/Trip Database	

Adequate seating	
Driver Identification	
Passenger Assistance See Appendix B	
Smoking, Eating and Drinking	

Two-way Communications	
Air Conditioning/Heating	
Billing Requirements	

COMMISSION STANDARDS

Findings:

Recommendations:

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

Compliance with Local Standards

“...shall adhere to Commission approved standards...”

Review the TDSP for the Local standards.

[See Appendix B](#)

Local Standards	Comments
Transport of Escorts and dependent children policy	
Use, Responsibility, and cost of child restraint devices	
Out-of-Service Area trips	
CPR/1st Aid	
Driver Criminal Background Screening	
Rider Personal Property	
Advance reservation requirements	
Pick-up Window	

<i>Measurable Standards/Goals</i>	<i>Standard/Goal</i>	<i>Latest Figures</i>	<i>Is the CTC/Operator meeting the Standard?</i>
Public Transit Ridership	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
On-time performance	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Passenger No-shows	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Accidents	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Roadcalls <i>Average age of fleet:</i>	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Complaints <i>Number filed:</i>	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	
Call-Hold Time	CTC	CTC	
	Operator A	Operator A	
	Operator B	Operator B	
	Operator C	Operator C	

[*Please see Executive Summary](#)

LOCAL STANDARDS

Findings:

Recommendations:

COMPLIANCE WITH AMERICANS WITH DISABILITIES ACT

REVIEW COPIES OF THE PUBLIC INFORMATION PROVIDED.

DOES PUBLIC INFORMATION STATE THAT ACCESSIBLE FORMATS ARE AVAILABLE UPON REQUEST? Yes No

ARE ACCESSIBLE FORMATS ON THE SHELF? Yes No

IF NOT, WHAT ARRANGEMENTS ARE IN PLACE TO HAVE MATERIAL PRODUCED IN A TIMELY FASHION UPON REQUEST?

DO YOU HAVE TTY EQUIPMENT OR UTILIZE THE FLORIDA RELAY SYSTEM?
 Yes No

IS THE TTY NUMBER OR THE FLORIDA RELAY SYSTEM NUMBERS LISTED WITH THE OFFICE PHONE NUMBER? Yes No

Florida Relay System:
Voice- 1-800-955-8770
TTY- 1-800-955-8771

EXAMINE OPERATOR MANUALS AND RIDER INFORMATION. DO CURRENT POLICIES COMPLY WITH ADA PROVISION OF SERVICE REQUIREMENTS REGARDING THE FOLLOWING:

Provision of Service	Training Provided	Written Policy	Neither
Accommodating Mobility Aids			
Accommodating Life Support Systems (O ₂ Tanks, IV's...)			
Passenger Restraint Policies			
Standee Policies (persons standing on the lift)			
Driver Assistance Requirements			
Personal Care Attendant Policies			
Service Animal Policies			
Transfer Policies (From mobility device to a seat)			
Equipment Operation (Lift and securement procedures)			
Passenger Sensitivity/Disability Awareness Training for Drivers			

RANDOMLY SELECT ONE OR TWO VEHICLES PER CONTRACTOR (DEPENDING ON SYSTEM SIZE) THAT ARE IDENTIFIED BY THE CTC AS BEING ADA ACCESSIBLE AND PURCHASED WITH PRIVATE FUNDING, AFTER 1992. CONDUCT AN INSPECTION USING THE ADA VEHICLE SPECIFICATION CHECKLIST.

[See below in Appendix F](#)

INSPECT FACILITIES WHERE SERVICES ARE PROVIDED TO THE PUBLIC (ELIGIBILITY DETERMINATION, TICKET/COUPON SALES, ETC...).

IS A RAMP PROVIDED? Yes No

ARE THE BATHROOMS ACCESSIBLE? Yes No

[See below in Appendix F](#)

Bus and Van Specification Checklist

Name of Provider:

Vehicle Number (either VIN or provider fleet number):

Type of Vehicle: Minivan Van Bus (>22')
 Minibus (<= 22') Minibus (>22')

Person Conducting Review:

Date:

Review the owner's manual, check the stickers, or ask the driver the following:

- The lift must have a weight limit of at least 600 pounds.
- The lift must be equipped with an emergency back-up system (in case of loss of power to vehicle). Is the pole present?
- The lift must be "interlocked" with the brakes, transmission, or the door, so the lift will not move unless the interlock is engaged. Ensure the interlock is working correctly.

Have the driver lower the lift to the ground:

- Controls to operate the lift must require constant pressure.
- Controls must allow the up/down cycle to be reversed without causing the platform to "stow" while occupied.
- Sufficient lighting shall be provided in the step well or doorway next to the driver, and illuminate the street surface around the lift, the lighting should activate when the door/lift is in motion. Turn light switch on, to ensure lighting is working properly.

Once the lift is on the ground, review the following:

- Must have an inner barrier to prevent the mobility aid from rolling off the side closest to the vehicle until the platform is fully raised.
- Side barriers must be at least 1 ½ inches high.
- The outer barrier must be sufficient to prevent a wheelchair from riding over it.
- The platform must be slip-resistant.
- Gaps between the platform and any barrier must be no more than 5/8 of an inch.
- The lift must have two handrails.
- The handrails must be 30-38 inches above the platform surface.
- The handrails must have a useable grasping area of 8 inches, and must be at least 1 ½ inches wide and have sufficient knuckle clearance.
- The platform must be at least 28 1/2 inches wide measured at the platform surface, and 30 inches wide and 48 inches long measured 2 inches above the platform surface.

- If the ramp is not flush with the ground, for each inch off the ground the ramp must be 8 inches long.
- Lifts may be marked to identify the preferred standing position (suggested, not required)

Have the driver bring the lift up to the fully raised position (but not stowed):

- When in the fully raised position, the platform surface must be horizontally within 5/8 inch of the floor of the vehicle.
- The platform must not deflect more than 3 degrees in any direction. To test this, stand on the edge of the platform and carefully jump up and down to see how far the lift sways.
- The lift must be designed to allow boarding in either direction.

While inside the vehicle:

- Each securement system must have a clear floor area of 30 inches wide by 48 inches long.
- The securement system must accommodate all common wheelchairs and mobility aids.
- The securement system must keep mobility aids from moving no more than 2 inches in any direction.
- A seat belt and shoulder harness must be provided for each securement position, and must be separate from the security system of the mobility aid.

Vehicles under 22 feet must have:

- One securement system that can be either forward or rear-facing.
- Overhead clearance must be at least 56 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.

Vehicles over 22 feet must have:

- Must have 2 securement systems, and one must be forward-facing, the other can be either forward or rear-facing.
- Overhead clearance must be at least 68 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.
- Aisles, steps, and floor areas must be slip resistant.
- Steps or boarding edges of lift platforms must have a band of color which contrasts with the step/floor surface.

COMPLIANCE WITH AMERICANS WITH DISABILITIES ACT

Table 1. ADA Compliance Review - Provider/Contractor Level of Service Chart

Name of Service Provider/ Contractor	Total # of Vehicles Available for CTC Service	# of ADA Accessible Vehicles	Areas/Sub areas Served by Provider/Contractor

BASED ON THE INFORMATION IN TABLE 1, DOES IT APPEAR THAT INDIVIDUALS REQUIRING THE USE OF ACCESSIBLE VEHICLES HAVE EQUAL SERVICE?

Yes No

ADA COMPLIANCE

Findings:

Recommendations:

FY ____ / ____ GRANT QUESTIONS

**The following questions relate to items specifically addressed in the FY _
/ ____ Trip and Equipment Grant.**

DO YOU KEEP ALL RECORDS PERTAINING TO THE SPENDING OF TDTF DOLLARS FOR FIVE YEARS? (Section 7.10: Establishment and Maintenance of Accounting Records, T&E Grant, and FY _____)

Yes No

ARE ALL ACCIDENTS THAT HAVE RESULTED IN A FATALITY REPORTED TO THE COMMISSION WITHIN 24 HOURS AFTER YOU HAVE RECEIVED NOTICE? (Section 14.80: Accidents, T/E Grant, and FY _____)

Yes No

ARE ALL ACCIDENTS THAT HAVE RESULTED IN \$1,000 WORTH OF DAMAGE REPORTED TO THE COMMISSION WITHIN 72 HOURS AFTER YOU HAVE RECEIVED NOTICE OF THE ACCIDENT? (Section 14.80: Accidents, T/E Grant, and FY _____)

Yes No

STATUS REPORT FOLLOW-UP FROM LAST REVIEW(S)

DATE OF LAST REVIEW: _____

STATUS REPORT DATED: _____

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

CTD RECOMMENDATION:

CTC Response:

Current Status:

ON-SITE OBSERVATION OF THE SYSTEM

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

Date of Observation:

Please list any special guests that were present:

Location:

Number of Passengers picked up/dropped off:

Ambulatory

Non-Ambulatory

Was the driver on time? Yes No - How many minutes late/early?

Did the driver provide any passenger assistance? Yes No

Was the driver wearing any identification? Yes: Uniform Name Tag
 ID Badge No

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

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

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

Is there a sign posted on the interior of the vehicle with both a local phone number and the TD Helpline for comments/complaints/commendations?
 Yes No

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

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

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

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

Did the driver properly use the lift and secure the passenger? Yes No

If No, please explain:

CTC: _____ County: _____

Date of Ride: _____

Funding Source	No. of Trips	No. of Riders/Beneficiaries	No. of Calls to Make	No. of Calls Made
CTD				
Medicaid				
Other				
Other				
Other)				
Other				
Totals				

Number of Round Trips	Number of Riders/Beneficiaries to Survey
0 – 200	30%
201 – 1200	10%
1201 +	5%

Note: Attach the manifest

Due to the success of previous year's online surveys, the TPA chose to use the Survey123 platform to supplement phone calls. With both the phone calls and online survey, we were able to reach 175 riders in total.

RIDER/BENEFICIARY SURVEY

Staff making call: _____

County: _____

Date of Call: / /

Funding Source: _____

1) Did you receive transportation service on _____? Yes or No

2) Where you charged an amount in addition to the co-payment? Yes or No

If so, how much?

3) How often do you normally obtain transportation?

Daily 7 Days/Week Other 1-2 Times/Week 3-5Times/Week

4) Have you ever been denied transportation services?

Yes

No. If no, skip to question # 4

A. How many times in the last 6 months have you been refused transportation services?

None 3-5 Times

1-2 Times 6-10 Times

If none, skip to question # 4.

B. What was the reason given for refusing you transportation services?

Ineligible Space not available

Lack of funds Destination outside service area

Other _____

5) What do you normally use the service for?

Medical Education/Training/Day Care

Employment Life-Sustaining/Other

Nutritional

6) Did you have a problem with your trip on _____?

Yes. If yes, please state or choose problem from below

No. If no, skip to question # 6

What type of problem did you have with your trip?

Advance notice Cost

Pick up times not convenient Late pick up-specify time of wait

Assistance Accessibility

Service Area Limits Late return pick up - length of wait

Drivers - specify

Reservations - specify length of wait

Vehicle condition

Other

7) On a scale of 1 to 10 (10 being most satisfied) rate the transportation you have been receiving.

8) What does transportation mean to you? (Permission granted by _____ for use in publications.)

Additional Comments:

Contractor Survey

_____ County

Contractor name (optional)

1. Do the riders/beneficiaries call your facility directly to cancel a trip?

Yes No

2. Do the riders/beneficiaries call your facility directly to issue a complaint?

Yes No

3. Do you have a toll-free phone number for a rider/beneficiary to issue commendations and/or complaints posted on the interior of all vehicles that are used to transport TD riders?

Yes No

If yes, is the phone number posted the CTC's?

Yes No

4. Are the invoices you send to the CTC paid in a timely manner?

Yes No

5. Does the CTC give your facility adequate time to report statistics?

Yes No

6. Have you experienced any problems with the CTC?

Yes No

If yes, what type of problems?

Comments:

PURCHASING AGENCY SURVEY

Staff making call: _____

Purchasing Agency name: _____

Representative of Purchasing Agency: _____

1) Do you purchase transportation from the coordinated system?

YES

NO If no, why?

2) Which transportation operator provides services to your clients?

3) What is the primary purpose of purchasing transportation for your clients?

Medical

Employment

Education/Training/Day Care

Nutritional

Life Sustaining/Other

4) On average, how often do your clients use the transportation system?

7 Days/Week

1-3 Times/Month

1-2 Times/Week

Less than 1 Time/Month

3-5 Times/Week

5) Have you had any unresolved problems with the coordinated transportation system?

- Yes
- No If no, skip to question 7

6) What type of problems have you had with the coordinated system?

- Advance notice requirement [specify operator (s)]
- Cost [specify operator (s)]
- Service area limits [specify operator (s)]
- Pick up times not convenient [specify operator (s)]
- Vehicle condition [specify operator (s)]
- Lack of passenger assistance [specify operator (s)]
- Accessibility concerns [specify operator (s)]
- Complaints about drivers [specify operator (s)]
- Complaints about timeliness [specify operator (s)]
- Length of wait for reservations [specify operator (s)]
- Other [specify operator (s)] _____

7) Overall, are you satisfied with the transportation you have purchased for your clients?

- Yes
- No If no, why? _____

Level of Cost Worksheet 1

Insert Cost page from the AOR.



CTC Expense Sources

County: Palm Beach **CTC Status:** Submitted **CTC Organization:** Palm Beach County
Fiscal Year: 07/01/2022 - 06/30/2023 **CTD Status:** Under Review

Expense Sources	Selected Reporting Period			Previous Reporting Period		
	CTC & Transportation Operators	Coordination Contractors	Total	CTC & Transportation Operators	Coordination Contractors	Total
Labor	\$ 4,313,083	\$ 0	\$ 4,313,083	\$ 3,206,712	\$ 0	\$ 3,206,712
Fringe Benefits	\$ 1,719,293	\$ 0	\$ 1,719,293	\$ 1,691,520	\$ 0	\$ 1,691,520
Services	\$ 11,100	\$ 0	\$ 11,100	\$ 0	\$ 0	\$ 0
Materials & Supplies Consumed	\$ 269,010	\$ 0	\$ 269,010	\$ 9,447	\$ 0	\$ 9,447
Utilities	\$ 0	\$ 0	\$ 0	\$ 207,202	\$ 0	\$ 207,202
Casualty & Liability	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Taxes	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Miscellaneous	\$ 0	\$ 0	\$ 0	\$ 343,406	\$ 0	\$ 343,406
Interest	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Leases & Rentals	\$ 1,975	\$ 0	\$ 1,975	\$ 0	\$ 0	\$ 0
Capital Purchases	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Contributed Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Allocated Indirect Expenses	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Purchased Transportation Services						
Bus Pass	\$ 0	N/A	\$ 0	\$ 408,217	N/A	\$ 408,217
School Board (School Bus)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Transportation Network Companies (TNC)	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Taxi	\$ 0	N/A	\$ 0	\$ 0	N/A	\$ 0
Contracted Operator	\$ 40,866,291	N/A	\$ 40,866,291	\$ 27,597,576	N/A	\$ 27,597,576
Total - Expense Sources	\$ 47,180,752	\$ 0	\$ 47,180,752	\$ 33,464,080	\$ 0	\$ 33,464,080

Level of Competition Worksheet 2

1. Inventory of Transportation Operators in the Service Area

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

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

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

Does the CTC have the ability to expand? _____

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

5. Does the CTC have a competitive procurement process? _____

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
	Negotiation only

	Requests for proposals
	Requests for interested parties

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
Age of company
Previous experience
Management
Qualifications of staff
Resources
Economies of Scale
Contract Monitoring
Reporting Capabilities
Financial Strength
Performance Bond
Responsiveness to Solicitation

Scope of Work
Safety Program
Capacity
Training Program
Insurance
Accident History
Quality
Community Knowledge
Cost of the Contracting Process
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? For all to see/as posted on the county's website. no bids have been complete for the time period (FY July 1, 2022 through June 30, 2023).

How many responded? _____

The request for bids/proposals was distributed:

_____ Locally _____ Statewide _____ Nationally

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

Level of Availability (Coordination)
Worksheet 3

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

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

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

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

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

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

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

Scheduling – How is the trip assignment to vehicles coordinated?

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

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

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

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

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

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

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

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

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

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

**Appendix A:
QA Exit Conference Document**

CTC Name: Palm Beach County Board of County Commissioners

Exit Conference Document

Monitoring Period: July 1, 2020 – June 30, 2021

Date of Exit Conference: 1/26/2023 Location: Virtual

Begin time of Exit Conference: 4:30pm End time of Exit Conference: 4:45pm

Individuals present at the meeting included the following:

1. Lou Ferri, Senior Manager of Paratransit, Palm Beach County
2. Yili Affonso, Operations Manager, Palm Beach County
3. Sheri Powers, FCTD
4. John Irvine, FCTD
5. Nathan Harmon, THF Monitor
6. Katie Newsome, THF Monitor

I. Introduction

- a. Greetings
- b. Recap/Review Purpose of engagement

II. Prior Year Review Monitoring Results

No Findings in Prior Year

III. Review Monitoring Results

- a. **Suggestion:** While testing the AOR and Rate Model Calculation, monitor noted that the CTC has both AOR and Rate Model procedures but they could be more detailed in a few areas. The AOR procedures do not address the allocation of bus pass trips and the Rate Model is not as detailed as it could be.

IV. Extension Required for any Open Items? X Yes No

Due to contractual requirements between the monitors and FCTD regarding monitoring engagement deliverables, the information listed below must be provided by CTC management within the next five (5) business days (by 2/2/2023): *(Note that any extensions granted will be considered as ongoing monitoring and will extend the deliverable dates below).*

1. Four of the forty applications are still outstanding. Three of these four riders also have support for the eligibility criteria outstanding.
2. AOR revenues and expense support.
3. TD Rate Model expense support.

V. Deliverables

- a. We anticipate issuing the draft of the monitoring report by 2/17/2023 (15 calendar days after the end of fieldwork or end of extension period). *(Note: If the 15th day falls on a weekend, the draft will be issued that following Monday).*
- b. Draft reports will be provided electronically and released to the CTC/STP and FCTD at the same time. Comments and feedback on the draft report are due **within 7 calendar days after the draft is issued.**
- c. The draft report will include the findings/suggestions described here. **All findings and suggestions discussed in this exit conference are tentative and subject to further review by the monitoring team, our firm management, and FCTD.**
 - This review may identify additional findings and/or suggestions.
 - This review may determine the current findings and/or suggestions should be modified, re-classed or removed.

CTC Name: Palm Beach County Board of County Commissioners

Exit Conference Document

Monitoring Period: July 1, 2020 – June 30, 2021

- d. **Before report revisions identified during this review process are finalized, your management team will receive a revised report draft.** You will be given additional time (as needed on a case-by-case basis) to review and comment on these changes.
- e. Upon FCTD's acceptance of the draft report, the **final report will be issued within 22 calendar days** from the date of the exit conference.


VI. Other Items/Conclusion

- a. If your entity's monitoring report contains report findings, your management team must submit a **Corrective Action Plan (CAP)** response to FCTD Project Manager **within 30 calendar days after the final report is released to you.** This response, and any related questions about this process should be sent by e-mail to FCTD Project Manager.
- b. Copy of Exit Conference memo provide to CTC and FCTD.
- c. Closing/Thank you.

VII. Questions?

Follow-up:

We will be available as needed for follow up meetings or phone conferences to address questions on the report findings/recommendations and/or observations.

Acknowledged by:  Lou Ferri 1/30/2023
(CTC/STP Management member) *(Date)*

Acknowledged by:  Nathan Harmon 1/26/2023
(THF Monitor) *(Date)*

Appendix B: Overflow Text

General Questions, Page 9 and 10

2. WHAT IS THE COMPLAINT PROCESS?

Palm Tran Connection records all complaints that come through email, phone calls, and social media, and determines to whom the complaint should be directed to for research and resolution via the Customer Complaint Department. When a Transportation Operator receives a complaint from Palm Tran Connection, they are required to service complaints within five business days or 24 hours if it is a complaint regarding safety or serious misconduct. Palm Tran Connection reviews all responses to complaints and is the final arbiter as to whether complaints have been adequately resolved by the Operator. The party logging the complaint is then notified of the resolution via postcard when the complaint has been received and a written response when the complaint has been resolved. Clients can communicate with the CTD if they are still not happy after the resolution. Online feedback is also available through www.PalmTran.org. Palm Tran Connection service is available as part of the online scheduling website.

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

Palm Tran Connection determines eligibility for paratransit programs and enters eligibility information for each application (i.e. conditions, dates, etc.) into its paratransit database. Service will be provided the next service day after service eligibility has been determined and is in compliance with existing state and federal guidelines. Certification by the applicant must be submitted to Palm Tran Connection. Licensed medical verification or proof of income level may be required. Palm Tran Connection will determine eligibility within 21 days of receiving an application. Temporary eligibility may be given to those applying to allow them to complete their applications and can be for up to 21 days. For life-sustaining appointments a quick eligibility form may be processed until the full application is received. Once eligibility has been determined, Palm Tran Connection will mail a letter to the applicant explaining eligibility determination, authorized services available, eligibility expiration, re- application process and the appeals process. Applicants may request an application by calling (561) 649-9838, downloading an application from Palm Tran Connection's website (PalmTran.org) or requesting an application in person at Palm Tran Connection's office (Monday through Friday between 8:00 a.m. and 4:30 p.m.).

Compliance with Chapter 427, F.S. page 15, 16, 19

What type of monitoring does the CTC perform on its operator(s) and how often is it conducted?

The CTC has Service Coordinators (road supervisors) who perform both on-site annual inspections and random inspections as-needed. Inspections encompass all aspects of the contracts including vehicles, training, and drivers. In addition to the service coordinators, the CTC has a Drug and Alcohol Coordinator who ensures the transportation operators as well as Palm Tran employees are following the Federal Drug and Alcohol Guidelines. Additionally, the CTC has a Contract Manager and Financial Analyst who oversee the Operators' contracts legal and financial aspects. The CTC also monitors the quarterly AOR reports submitted by the Operators to ensure they are operating in the most effective manner. In addition to annual inspections, the CTC conducts semi-annually Motor Vehicle Reports (MVRs) and weekly safety-sensitive checks on contracted drivers per contract.

How is the CTC using School Buses in the Coordinated System?

At this time, there is no specific utilization of school buses by Palm Tran Connection. There have been discussions with the School Board of school bus usage, but with the size of Palm Beach County and the average one-way trip length being over 15 miles, school buses would not be conducive to the wear and tear of paratransit trips. School buses are currently not a viable cost-effective alternative.

Comments:

There is a need to unload charter and private school trips to another transportation service or get the rides subsidized by the schools, as the times of services to get the students to and from school overlap with Connection peak trip period, and the schools don't pay Connection for the trips. Connection should work with the School District of Palm Beach County to develop an agreement with charter and private schools to subsidize costs for paratransit services provided to the students if possible.

The CTC needs help to meet the ever-growing demand for paratransit services. They struggle with ADA, Paratransit, Senior, and Charter School demands. Neither the Senior Programs nor Charter Schools are contributing adequately to assist with their demands for service. To maintain the quality of service, the transportation system will have to increase its capacity, which will, in turn, increase the expenses.

Hours of Service:

Friday 4:50 a.m. to 11:00 p.m.

Saturday 6:00 a.m. to 10:45 p.m.

Sunday 7:45 a.m. to 8:00 p.m.

Provisions for After Hours Reservations/Cancellations?

The CTC provides an IVR (Interactive Voice Recognition System) after hours. The system calls clients the night before the trip and allows them to confirm or cancel a trip. Confirmation codes are provided to clients and displayed in the Trapeze Scheduling Software. Voicemails are left for clients who do not respond. Clients can also dial in and press option “5” to control their trips. After hours, they are able to confirm or cancel their reservations without an agent.

Compliance with Commission Standards, Page 30

Passenger Assistance

Both ambulatory and non-ambulatory paratransit service is provided according to ADA rules and guidelines. ADA paratransit services may include requiring riders to transfer from one paratransit vehicle to another or to a fixed route vehicle as part of the trip. Palm Tran Connection does not accept same day reservations.

Drivers must assist riders, upon request, in getting on and off of the vehicle. The assistance may include lending a supporting arm or guiding and assisting up or down stairs. Drivers may not assist riders in wheelchairs up or down more than one step. Drivers are required to carry packages weighing less than thirty-five (35) pounds in total. Drivers are prohibited from lifting or carrying passengers and/or their children.

Compliance with Local Standards, Page 33

Transport of Escorts and Dependent Children Policy:

Palm Tran Connection allows riders to travel with a Personal Care Attendant (PCA), service animal, children, and one (1) companion (or escort). Additional individuals beyond that first companion are carried only on a space available basis. Riders must reserve a space for the companion(s) when they reserve their trip.

PCA's and anyone else approved to accompany the rider must board the vehicle at the rider's scheduled location and time of pick-up. PCA's and escorts are subject to the same rules and regulations as a Palm Tran Connection rider. Riders may transport pets in a commercially available pet carrier which must fit under the rider's seat or on their lap. Newborns to five-years old must ride in a federally approved child safety seat provided by the parent.

A PCA is a person traveling as a necessary aid to facilitate travel by a person with disabilities who cannot travel alone or children age eight (8) and under. Riders are limited to one (1) PCA. Activities performed by a PCA may include but not limited to: mobility assistance, personal care, or communication (translation, interpretation, reading and assistance at the destination). Palm Tran Connection will not provide a PCA for a rider.

Use, Responsibility, and cost of child restraint devices:

Children who are between the ages of birth and four (4) years old inclusive and/or children who weigh less than forty (40) pounds must travel with a responsible guardian (PCA) and must ride in a child safety seat which complies with Section 316.613, Florida Statutes. It is Palm Tran Connection's policy that it is the individual customer's responsibility to provide the child safety seat.

Out-of-Service Area trips:

No service is provided beyond the County's borders without prior approval of Palm Tran Connection or LCB. No TD service is provided outside of the State of Florida. However, service is available to access Tri-Rail stations; therefore, it is possible to travel to any accessible station in Broward or Miami-Dade Counties. Paratransit service connects with Broward County Transit at a southern Palm Beach County transfer location.

CPR/1st Aid:

Palm Tran Connection does not require the drivers to be trained in CPR/First Aid. Drivers are directed to notify their dispatcher of any incident involving either the safety of a passenger or the injury of a passenger. The Dispatcher is required to contact 911 for the usage of CPR or First Aid.

Rider Personal Property:

Transportation Operators are required to transport packages belonging to riders if the rider is on board with his/her package and the package fits on the rider's lap or beneath his/her seat. Packages must be no larger than two (2) large paper grocery bags or four (4) smaller plastic handle bags and weigh no more than twenty-five (25) pounds combined.

Transportation Operators are prohibited from transporting illegal controlled substances (excluding prescription medication), hazardous materials, firearms, or explosive devices.

Pick-up Window:

Pickup Window: The scheduled vehicle is required to arrive at the rider's origin within a thirty (30) minute pickup window as shown on the vehicle's manifest. Riders must be ready and waiting to board the vehicle at all times during the thirty (30) minute pickup window. The pickup window occurs 15 minutes before to 15 minutes after the given pickup time.

Boarding Window: When the scheduled vehicle arrives within the scheduled pickup window, the rider has five (5) minutes to board the vehicle and to be seat-belted and/or properly secured. If the rider is unable to board within this "boarding window", the provider will be instructed to proceed with the route, and the rider will be charged with a "No Show". Riders who need additional time to board as a result of their disabilities may have additional time, based on prior approval from Palm Tran Connection on a case-by-case basis.

**Appendix C:
Written complaint process included in the FY24
Grievance Procedures**

Palm Beach County Transportation Disadvantaged Local Coordinating Board

FY 2024 Grievance Procedures

**Approved by the TDLCB
August 23, 2023**

Article 1: Preamble

Section A: Preamble

The following sets forth the grievance procedures that shall serve to guide the Palm Beach County Transportation Disadvantaged Local Coordinating Board (TD LCB), serving to assist Palm Tran Connection, the Community Transportation Coordinator. The intent is to provide procedures and policies for fulfilling the requirements of Chapter 427, Florida Statutes (F.S.), Rule 41-2, Florida Administrative Code (FAC), and subsequent laws setting forth requirements for the establishment of grievances or complaints from agencies, users, potential users, subcontractors, and other interested parties.

Article 2: Definitions, Name, Legal Status and Purpose

Section A: General Definitions

- A. Commission for the Transportation Disadvantaged (also known as the "Commission"): an independent state agency created to accomplish the coordination of transportation services provided to the transportation disadvantaged population.
- B. Community Transportation Coordinator (also known as the "CTC" or "Coordinator"): a transportation entity recommended by the appropriate planning agency as provided for in Section 427.015(1), F.S., and approved by the Commission, to ensure that coordinated transportation services are provided to serve the transportation disadvantaged population in a designated service area.
- C. Designated Official Planning Agency (also known as the "DOPA"): the official body or agency designated by the Commission to fulfill the functions of transportation disadvantaged planning in areas not covered by a Metropolitan Planning Organization (MPO). The Metropolitan Planning Organization shall serve as the planning agency in areas covered by such organizations.
- D. Local Coordinating Board (also known as the "LCB"): advisory entity in each designated service area composed of representatives appointed by the Metropolitan Planning Organization or DOPA, to provide assistance to the community transportation coordinator relative to the coordination of transportation services.
- E. Metropolitan Planning Organization (also known as the "MPO"): organization responsible for carrying out transportation planning and programming in accordance with the provisions of 23 U.S.C. s. 134, as provided in 23 U.S.C. s. 104(f)(3). In Palm Beach County the MPO is the Palm Beach Metropolitan Planning Organization (MPO) doing business as the Palm Beach Transportation Planning Agency (TPA).
- F. Transportation Disadvantaged (also known as "TD"): those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are disabled or high-risk or at-risk as defined in Section 411.202, F.S.
- G. Transportation Operator: one or more public, private for profit, or private non-profit entities contracted by the Community Transportation Coordinator to provide service to transportation disadvantaged persons pursuant to a coordinated transportation service plan.

Section B: Definition of Service Complaint and Formal Grievance

- A. Service Complaint: Service complaints are routine incidents that occur on a daily basis. They are reported to the driver, dispatcher, or to other individuals involved with the daily operations of the CTC, and are resolved within the course of a reasonable time period. Service complaints may

include but are not limited to: late trips, no-show by transportation operator, no-show by client, client behavior, driver behavior, passenger discomfort, and service denial.

- B. Formal Grievance: A formal grievance is a written complaint by the grievant documenting any concerns or an unresolved service complaint regarding the operation or administration of TD services by a transportation operator, CTC, DOPA or LCB. A grievance may include but is not limited to: chronic, recurring, or unsolved service complaints, violations of specific laws governing TD services, contract disputes, coordination disputes, agency compliance, conflicts of interest, supplanting of funds, and billing or accounting procedures.

Section C: Name

The name of the subcommittee to hear grievances or complaints for the Palm Beach County TDLCB shall be the "Grievance Subcommittee".

Section D: Legal Status of Subcommittee

The LCB is an advisory body. It is established in section 427.157, FS, to advise the Commission and the CTC about local concerns and issues. Florida Statutes define an advisory body as: a body created by specific statutory enactment and appointed to function on a continuing basis for the study of the problems arising in a specified functional or program area of state government and to provide recommendations and policy alternatives. The Grievance Subcommittee may make recommendations to the LCB regarding Formal Grievances.

Section E: Purpose

The purpose of the Grievance Subcommittee is to process and investigate unresolved grievances from agencies, users, transportation operators, potential users of the system and the CTC, and make recommendations to the LCB or to the Commission for improvement of service. The Grievance Subcommittee does not possess adjudicative or determinative powers.

Article 3: Membership, Appointment, Terms of Membership

Section A: Membership

The Grievance Subcommittee shall be comprised of a minimum of three (3) voting members of the LCB. The Subcommittee shall elect a Chair.

Section B: Appointment

Members shall be appointed to the Grievance Subcommittee by the LCB Chair. The LCB Chair reserves the right to make reappointments to the Subcommittee should any conflicts of interest arise. Planning staff serve as facilitators to the grievance process but do not serve on the Grievance Subcommittee.

Section C: Terms of Members

Members of the Grievance Subcommittee shall serve at the pleasure of the LCB Chair for the duration of the grievance for which they are appointed. Members of the Subcommittee may be removed for cause by the LCB Chair.

Quorum shall be a simple majority. Meetings shall be held at such times as the Subcommittee may determine and/or as necessitated by the grievance procedure.

Article 4: Resolution Process

Section A: Complaint Procedure

1. The CTC records all complaints that come from agencies, users, transportation operators, and potential users of the system, through email, phone calls, social media, letter, and in-person and determines to whom the complaint should be directed for research and resolution via the Customer Complaint Department.
2. When a complaint is received, the person filing the complaint is interviewed and the information collected is recorded in the CTC's customer service system.
3. If the complaint is safety related, it is forwarded to the Contract Compliance Supervisor who must respond within 24 hours.
4. If the complaint is not safety-related, the applicable Contractor must respond with 48 hours.
5. On-time performance complaints are reviewed by the Service Supervisor for scheduling or a dispatch error.
6. CTC staff investigates complaints by reviewing on-board recorded videos, interviewing other riders that were also on-board the vehicle during the incident, reviewing software system notes, reviewing the driver's manifest, and interviewing the driver.
7. Following the investigation, complaints are ruled as valid, not valid, documented, excused, or LQD (liquidated damages). All complaints remain on the Driver's record regardless of resolution.
8. The CTC reviews all Contractor responses to complaints and is the final arbiter as to whether or not complaints have been adequately resolved by the Operator.
9. The party is notified of the resolution of the complaint via postcard or by letter, as applicable.
10. If the CTC is unsuccessful at resolving the complaint through the process outlined in Section A or the party is not satisfied with the resolution, the party may follow the Formal Grievance procedure outlined in Section B.

Section B: Formal Grievance Procedure

The LCB Formal Grievance procedures are:

1. The party shall have ten (10) working days from the date on the CTC's resolution of the complaint to decide if the proposed resolution is agreeable.
2. If the party is not satisfied with the outcome, they may submit a written request for a Formal Grievance. The grievance shall be sent to:

Palm Beach Transportation Planning Agency
Local Coordinating Board Grievance Subcommittee
301 Datura Street
West Palm Beach, FL 33401

The written grievance must contain the following:

- a. Name and address of the grievant;
- b. Statement of the grounds for the grievance supplemented by supporting documentation, made in a clear and concise manner; and
- c. Explanation by the grievant of the improvements needed to address the complaint.

3. Upon receipt of a Formal Grievance, the DOPA shall have ten (10) working days to contact the grievant via telephone, mail, or e-mail to indicate that the Formal Grievance is sufficient and that it has been filed or additional information is necessary to file the grievance.
4. The DOPA shall arrange a meeting between the involved parties in an attempt to assist them in reaching a desirable solution. The meeting shall take place within fifteen (15) working days of the filed date of the Formal Grievance. The DOPA shall prepare a report regarding the meeting outcome which shall be sent to the Grievant and the Grievance Subcommittee Chair within ten (10) working days of the meeting.
5. If the Grievant is not satisfied with the proposed resolution outlined in Step 4, the Grievant may request a hearing by the Grievance Subcommittee.
6. The DOPA shall have ten (10) working days to contact the Grievance Subcommittee members and set a future grievance hearing date and location. The Grievant and all involved parties shall be notified of the hearing date and location at least five (5) working days prior to the hearing date. All Grievance proceedings shall be held at a publicly noticed meeting. The Grievance Subcommittee will follow a meeting agenda in accordance with the procedures herein set forth:
 - a. Call to Order;
 - b. Presentation of Grievance
 - i. Shall also include witnesses if applicable, and
 - ii. Response of concerned parties, which shall include witnesses, if applicable;
 - c. Discussion of Grievance;
 - d. Recommendation to the LCB; and
 - e. Adjournment
7. Upon conclusion of the hearing, the Grievance Subcommittee shall submit a written report of the hearing proceedings to the Chair of the LCB within ten (10) working days. The report must outline the grievance and the Grievance Subcommittee's findings/recommendations. The report shall be forwarded to all LCB members.
8. The CTC may avail itself of the Formal Grievance Procedures as outlined in Section B.2. through B.7.

Section C: CTD Ombudsman Program

If the Grievant is not satisfied with the resolution by the Grievance Subcommittee, they may file a formal complaint with the State's Commission for the Transportation Disadvantaged Ombudsman Program via the contact information below:

By telephone:
(800) 983-2435 (toll-free) or (850) 410-5700
Hearing or speech impaired: 711 (Florida Relay System)

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

By e-mail:
CTDOmbudsman@dot.state.fl.us

The DOPA will maintain copies of their Grievance Procedures and reports will be made available to the Commission Ombudsman Program, upon request.

Section D: Document Accessibility

A copy of the Grievance Procedures shall be available to anyone upon request.

All documents pertaining to the Grievance Procedures will be made available, upon request, in a format accessible to persons with disabilities.

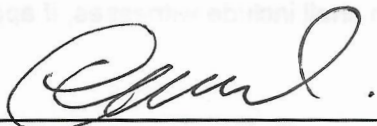
Article 5: Amendments

Section A: General

The Grievance Procedures may be amended by a majority vote of members present, if a quorum exists, providing the proposed change(s) is/are provided to all members at least seven (7) days in advance of the meeting.

Article 6: Certification

The undersigned hereby certifies that they are the Chair of the Local Coordinating Board and that the foregoing is a full, true and correct copy of the Grievance Procedures of this Local Coordinating Board as adopted on the 23rd day of August 2023.

Approved: 
Chelsea Reed, Chair
Palm Beach County Local Coordinating Board

**Appendix D:
Observation Rides of the System**

Observational Ride

Ride a vehicle within the coordinated system. Please request a copy of the manifest page that contains this trip.

1. Date of Observation:

2. Were others present with you on this ride?

3. Where did you travel from and where did you go?

From: _____

To: _____

4. Number of passengers picked up/dropped off:

a. How many were ambulatory (using a mobility device)? _____

b. How many were non-ambulatory? _____

5. Did the driver provide passenger assistance?

a. Yes

b. No

6. What kind of identification did the driver have? (checkboxes)

a. Uniform

b. Name tag/ID badge

c. None

7. Did the driver ensure the passengers were properly secured?

a. Yes

b. No

8. Does the vehicle have working heat and air conditioning?

a. Yes

b. No

9. If the lift was used, is it in good working order?
 - a. Yes
 - b. No
 - c. Lift was not used

10. If Palm Tran Connection Riders were present, did they take a CTC Evaluation Survey?
 - a. Yes
 - b. No

11. Please provide any other comments about the ride below.

CTC Observation Ride - For Publish

Were others present with you on this ride? If so, please list those name below. *

The word cloud requires at least 20 answers to show.

Response	Count
No	2
Yes there were 1 other person on the ride. Was not able to get her name.	1
Two other passengers	1
Three gentlemen. I didn't get their names.	1
No, for both legs there were no other riders.	1
NA	1

Answered: 7 Skipped: 0

Where did you travel to? *

The word cloud requires at least 20 answers to show.

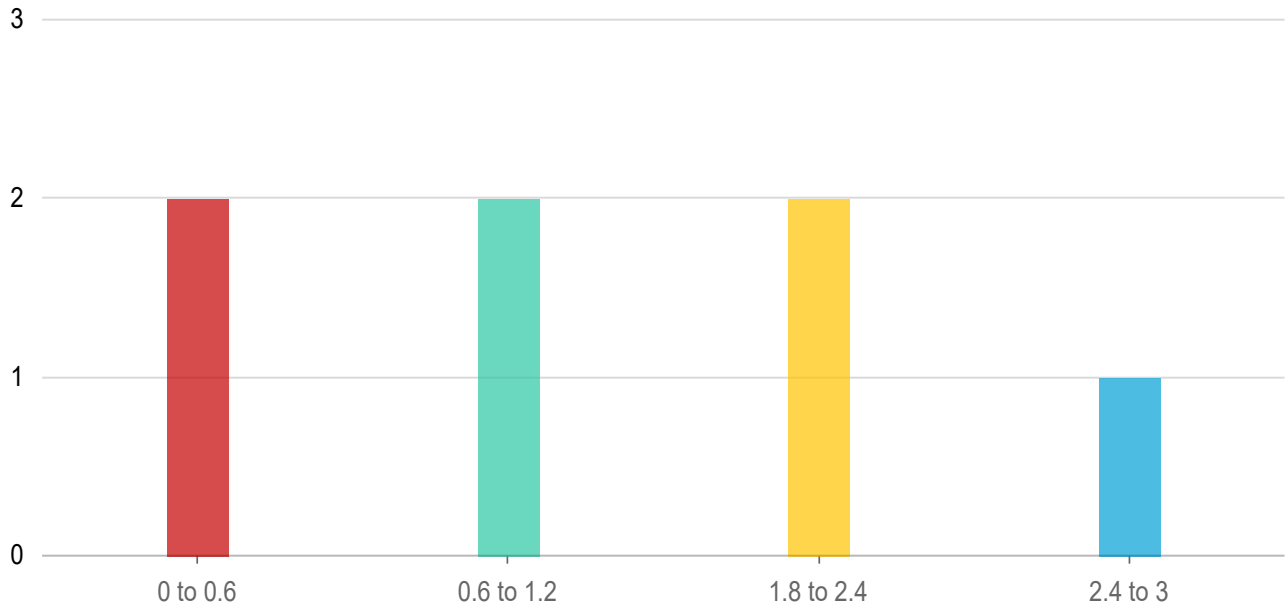
Response	Count
VA Medical Center, 7305 N. Military Trail, West Palm Beach, FL	1
Publix at Village Commons	1
Palm Beach TPA	1
Palm Beach Gardens	1
Mall at Wellington Green	1
Gardens Mall	1

Downtown West Palm Beach

1

Answered: 7 Skipped: 0

Number of Passengers picked up/dropped off *



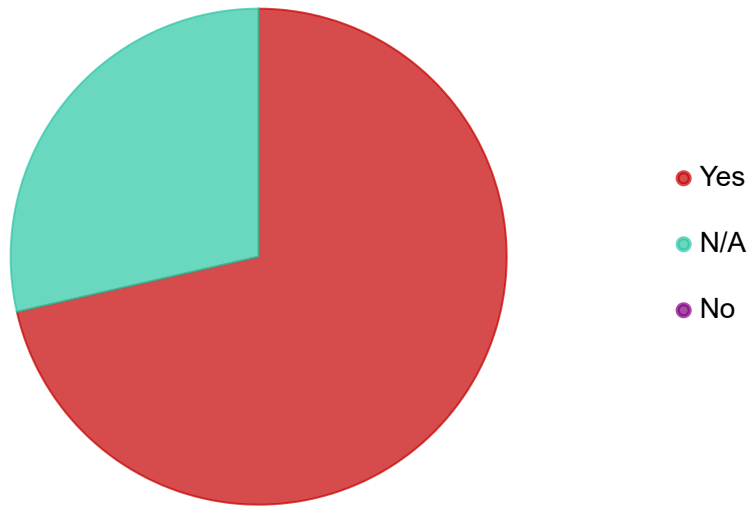
Stats

Value

Min.	0
Max.	3
Avg.	1.28571428571429
Sum.	9

Answered: 7 Skipped: 0

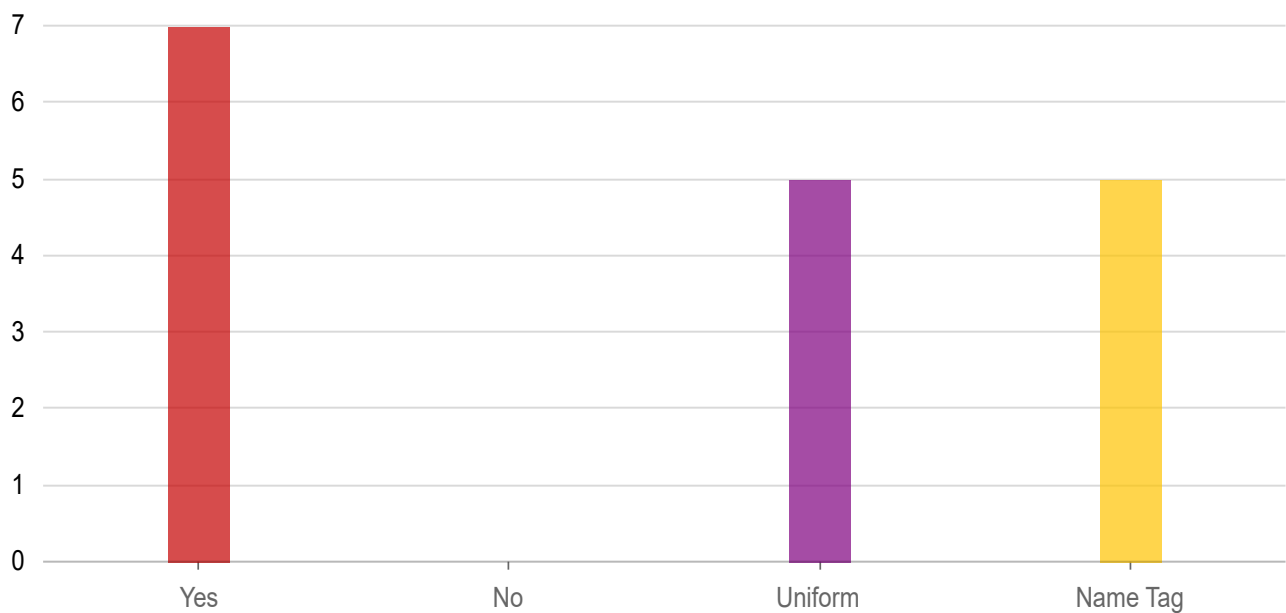
Did the driver provide any passenger assistance? *



Answers	Count	Percentage
Yes	5	71.43%
N/A	2	28.57%
No	0	0%

Answered: 7 Skipped: 0

Was the driver wearing any identification? (please select what type of identification if y... *



Answers

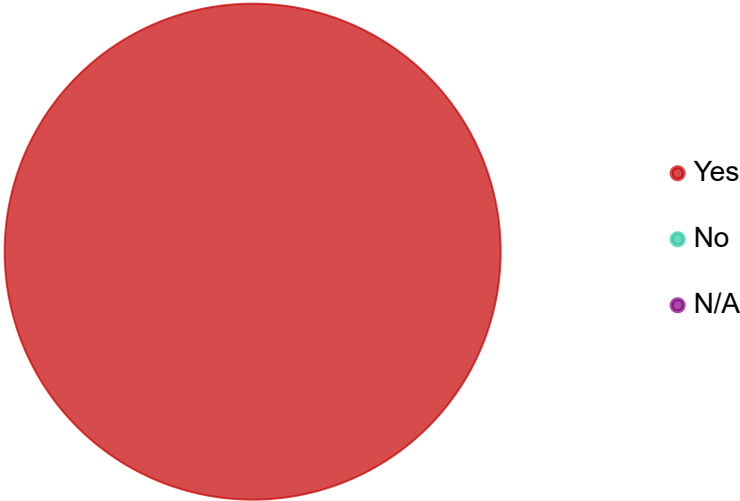
Count

Percentage

Yes	7	100%
No	0	0%
Uniform	5	71.43%
Name Tag	5	71.43%

Answered: 7 Skipped: 0

Did the driver ensure the passengers were properly secured? *



Answers

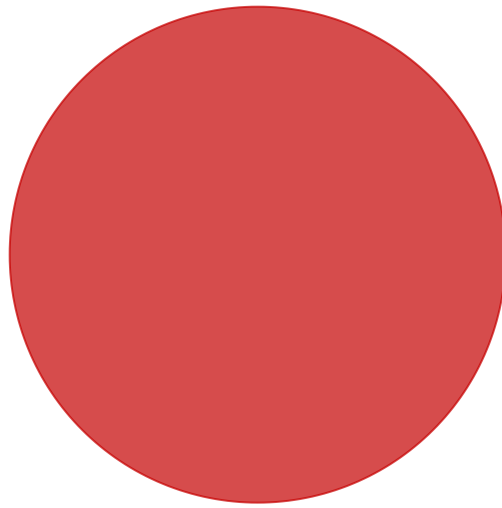
Count

Percentage

Yes	7	100%
No	0	0%
N/A	0	0%

Answered: 7 Skipped: 0

Does the vehicle have working heat and air conditioning? *



● Yes

● No

Answers

Count

Percentage

Yes

7

100%

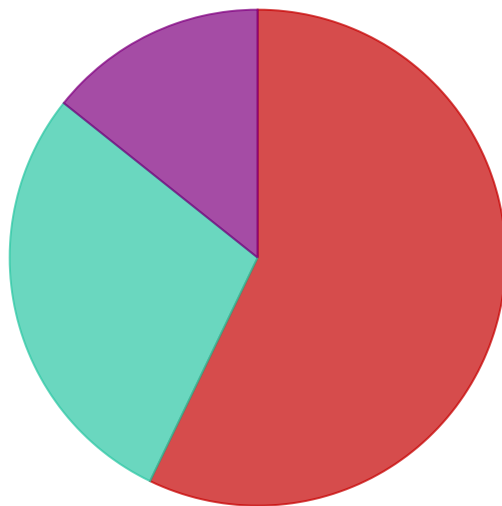
No

0

0%

Answered: 7 Skipped: 0

If the lift was used, was it in good working order? *



● Yes

● Lift was not used

● No

Answers

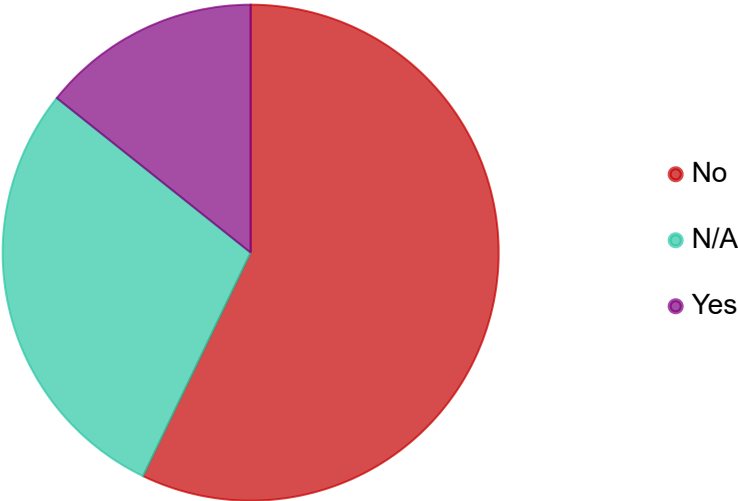
Count

Percentage

Yes	4	57.14%
Lift was not used	2	28.57%
No	1	14.29%

Answered: 7 Skipped: 0

If Palm Tran Connection Riders were present, did they take a CTC Evaluatio... *



Answers

Count

Percentage

No	4	57.14%
N/A	2	28.57%
Yes	1	14.29%

Answered: 7 Skipped: 0

Please provide any other comments about the ride below. *

The word cloud requires at least 20 answers to show.

Response**Count**

Very efficient and on time. Thank you.

1

The ride went well. I rode Palm Tran from my apartment to the Publix at Village Commons. For each leg, the driver was very courteous and ensured I was buckled in my seat. While waiting for my departure ride from Publix to my apartment, I watched other Palm Tran vehicles assist non-ambulatory riders with the lift and being safely seated in the bus. While waiting, the drivers asked if I was waiting for a Palm Tran ride as well and asked if I needed assistance finding the next vehicle. When I arrived at the apartment, I was able to see how the Palm Tran vehicles is able to enter the gated entryway with ease. During each leg of my rides, the lift was not utilized, and I was the only person in the vehicle apart from the driver.

1

The Palm Tran connect driver provided compassionate, safe and professional care to each rider. One of the riders required extensive assistance, which was accomplished with a smile, respect and sincere concern for their comfort. At once point, the rider was being pushed in their wheelchair off the ramp and onto the sidewalk by our driver, and when the sun shone on his head he looked up and the driver noticed and asked him if it felt good to feel the sun on his face. It was a kind and caring moment that is not typical in transit, but is deeply appreciated. This service takes care of the ones who need it most in our community.

1

The other rider on the ride was using this service as a means to get to work. She also mentioned that she drives on the weekend, which mean she has access to a vehicle but chose not to use it. From her uniform, she works at Homegoods coming from Delray Beach. I concluded that it is the Homegoods of Linton and is adjacent to a PalmTran route. The driver was professional and was very attentive to passengers. My only concern was the reservation came early to pick up. I was able to accommodate this change on my trip to Downtown West Palm Beach. On the way back, the driver was late and I had a scheduled appointment, therefore I had requested a car pool ride back to my office. The driver did give me a call but it was already 15 minutes after the scheduled time. Overall, it was a great experience to understand the needs of service.

1

The morning trip went well, no issues. On the return trip, I had to call the center due to late pick up. The representative contacted the driver that was on location at the time and instructed him to pick me up. Before leaving, we had to wait about 10 minutes on another passenger that was running late. Overall ride was excellent.

1

Service was early/on time.

1

Both drivers to and from my destination were cordial and polite. The ride went smoothly. Thank you.

1

Answered: 7 Skipped: 0

**Appendix E:
Rider Survey Results Summary**

Rider Survey Results Summary

During the months of April and May, LCB members were tasked with calling 257 Palm Tran Connections riders to conduct an over the phone survey. A total of 72 surveys were conducted by LCB members either in person at outreach events or via phone. TPA staff also provided the CTC Evaluation Survey of Palm Tran Connection's service to 672 users. These 672 individuals were emailed on three separate occasions to remind them to submit their feedback for the Palm Tran Connection service. Overall, with both emails, phone calls, and in-person outreach a total of 175 survey participants were reached.

Feedback recorded from the responses generated these recommendations for the CTC:

- **Timeliness:** Many customers noted trips are not as timely as scheduled and they often end up being late for their appointments, work, or school. Those customers suggested better location on drivers or a call to let individuals know how late a driver may be. Numerous survey takers expressed their frustration with inconsistencies with the app saying that the vehicle is arriving momentarily only for it to come far later than expected.
- **Update GPS Systems:** Throughout the survey results, Connection customers were concerned with the routing of their rides. It seems that GPS systems have not been updated and often do not account for the most efficient (time and fuel) ride. Some complained of having to look throughout the neighborhood to see where their bus is or calling the drivers to give them better directions.
- **Accommodation:** For individuals with ambulatory issues, please consider giving them a call upon arrival to prevent them standing and waiting outside for the bus. Customers would also like an option to schedule same day (especially for emergency doctor visits).
- **Technology Improvements:** Provide the ability to purchase tickets online. Customers would also like the option to pay electronically on the bus.
- **Route Systems:** Provide a better system for drivers to navigate with. The routing does not often account for the easiest way to arrive at a destination. At times it takes drivers to the wrong places and on a longer or more congested route.
- **More Drivers:** Hire more drivers to hopefully improve on timeliness.

The following pages summarize the results generated from the survey.

Palm Tran Connection Evaluation Survey

Today's Date:

Demographic Information

1. What is your age?
 - a. Under 18
 - b. 18-24
 - c. 25-34
 - d. 35-44
 - e. 45-54
 - f. 55-64
 - g. 65+

2. Which of the following best describes your race/ethnicity? (check all that apply)
 - a. American Indian / Alaska Native
 - b. Asian
 - c. Black / African American
 - d. Hispanic / Latino
 - e. Native Hawaiian / Pacific Islander
 - f. White / Caucasian
 - g. Other

3. What is your gender?
 - a. Female
 - b. Male
 - c. Prefer not to answer
 - d. Other

4. Which of the following best describes your TOTAL ANNUAL HOUSEHOLD INCOME in 2023 before taxes? (Everyone in your household)
 - a. Less than \$10,000
 - b. \$10,000 - \$19,999
 - c. \$20,000 - \$29,999
 - d. \$30,000 - \$39,999
 - e. \$40,000 - \$49,999
 - f. \$50,000 - \$59,999
 - g. \$60,000 - \$99,999
 - h. \$100,000 or more

Palm Tran Connection Evaluation Survey

General Ridership Questions

5. How often do you use Palm Tran Connection? (only select one)
- a. Daily (7 days per week)
 - b. 1-2 times per week
 - c. 3-5 times per week
 - d. Other

6. What do you normally use the service for? (only select one)
- a. Work
 - b. Business related trip
 - c. College / University (students only)
 - d. School K-12
 - e. Medical Service / Hospital (non-work)
 - f. Shopping / Errands
 - g. Recreational / Sightseeing / Restaurant
 - h. Church / Religious
 - i. Visit Friends
 - j. Airport (passengers only)
 - k. Other

7. Was the Vehicle neat, clean and free from dirt, torn upholstery, damaged, or broken seats?

Yes

No

8. Do you purchase discounted fixed route service passes?

Yes

No

9. Describe your experience using the fixed route service below. **(Only answer if you answered yes to question 8)**

Palm Tran Connection Evaluation Survey

10. Have you used the Lyft and/or UZURV services?

Yes

No

11. Describe your experience using Lyft and/or UZURV below. **(Only answer if you answered yes to question 10)**

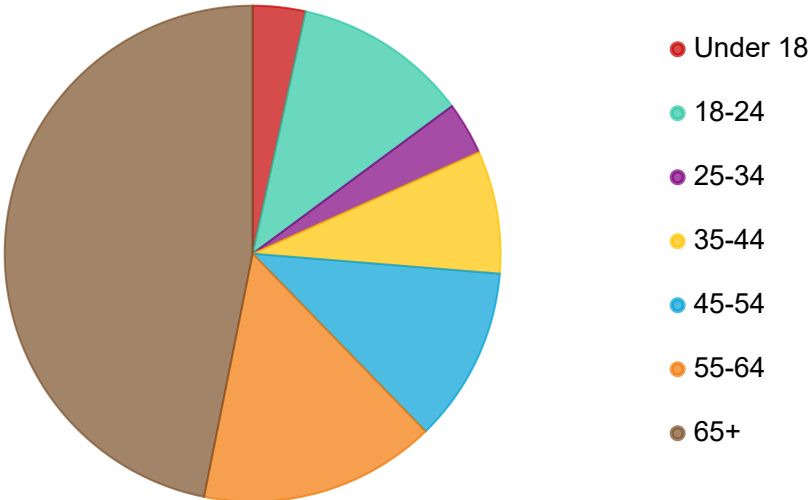
12. What is the best part of your trip while using the service? What can Palm Tran do to improve its service?

12. In one word, share your overall feelings about the Palm Tran Connection Service.

Check here if you are completing as part of a(n) interview, Local Coordinating Board Member survey, phone call, or other ridership engagement.

Palm Tran Connection Rider/Beneficiary Survey (CTC)

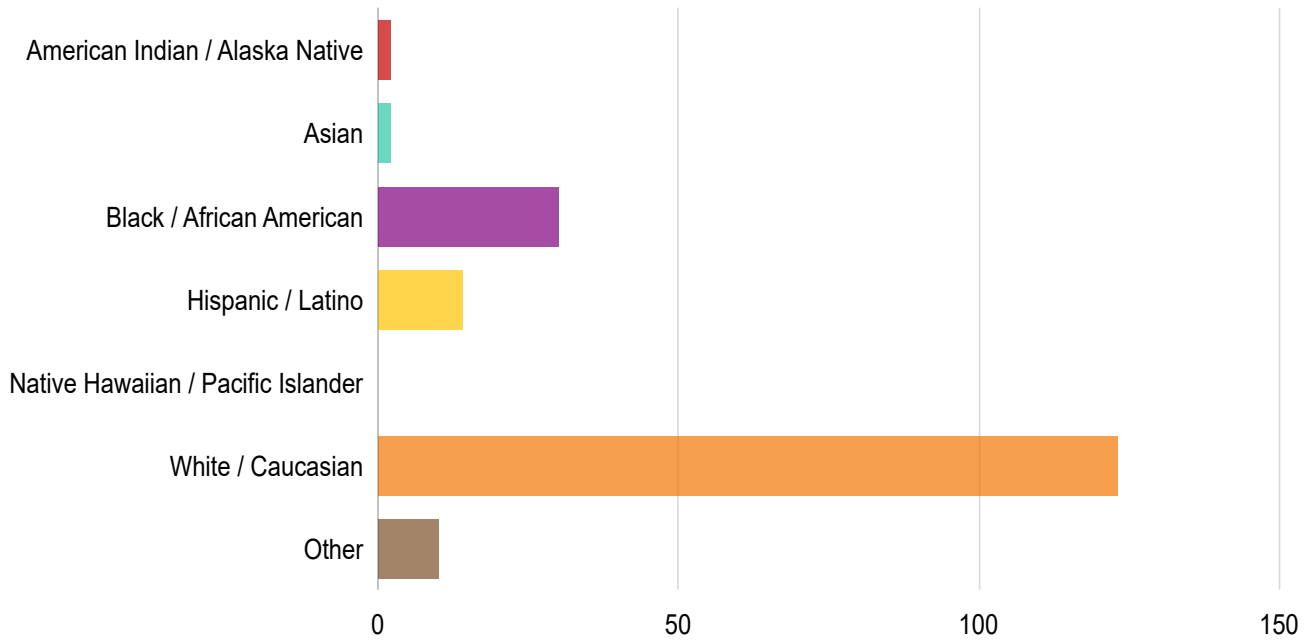
What is your age? *



Answers	Count	Percentage
Under 18	6	3.43%
18-24	20	11.43%
25-34	6	3.43%
35-44	14	8%
45-54	20	11.43%
55-64	27	15.43%
65+	82	46.86%

Answered: 175 Skipped: 0

Which of the following best describes your race/ethnicity? *



Answers

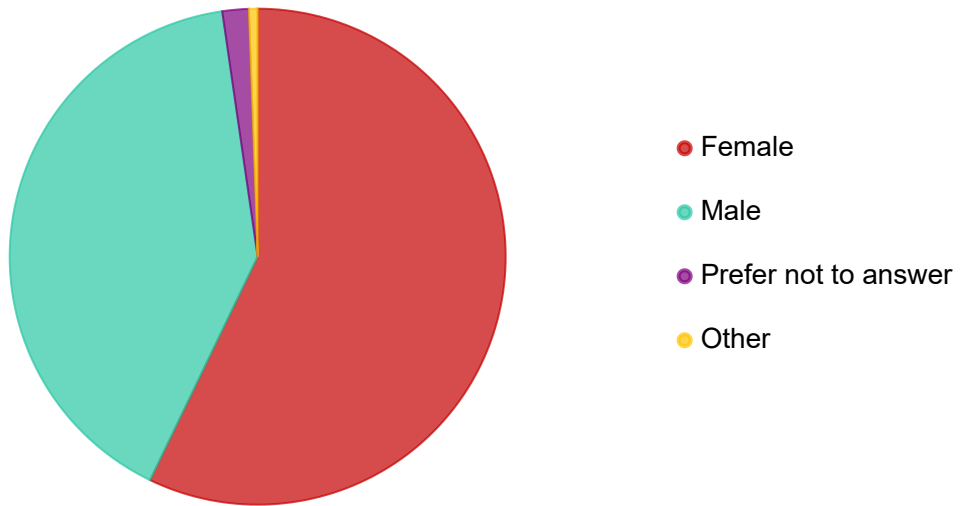
Count

Percentage

American Indian / Alaska Native	2	1.14%
Asian	2	1.14%
Black / African American	30	17.14%
Hispanic / Latino	14	8%
Native Hawaiian / Pacific Islander	0	0%
White / Caucasian	123	70.29%
Other	10	5.71%

Answered: 175 Skipped: 0

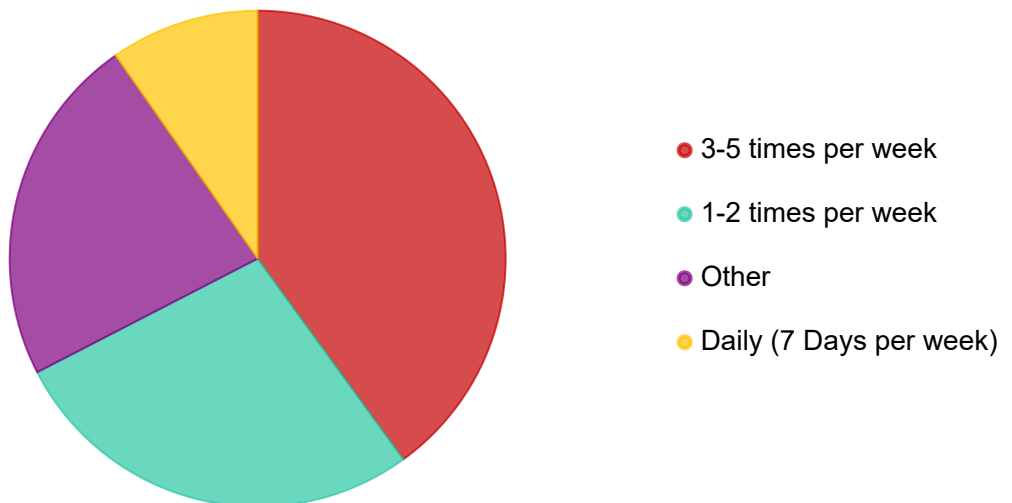
What is your gender? *



Answers	Count	Percentage
Female	100	57.14%
Male	71	40.57%
Prefer not to answer	3	1.71%
Other	1	0.57%

Answered: 175 Skipped: 0

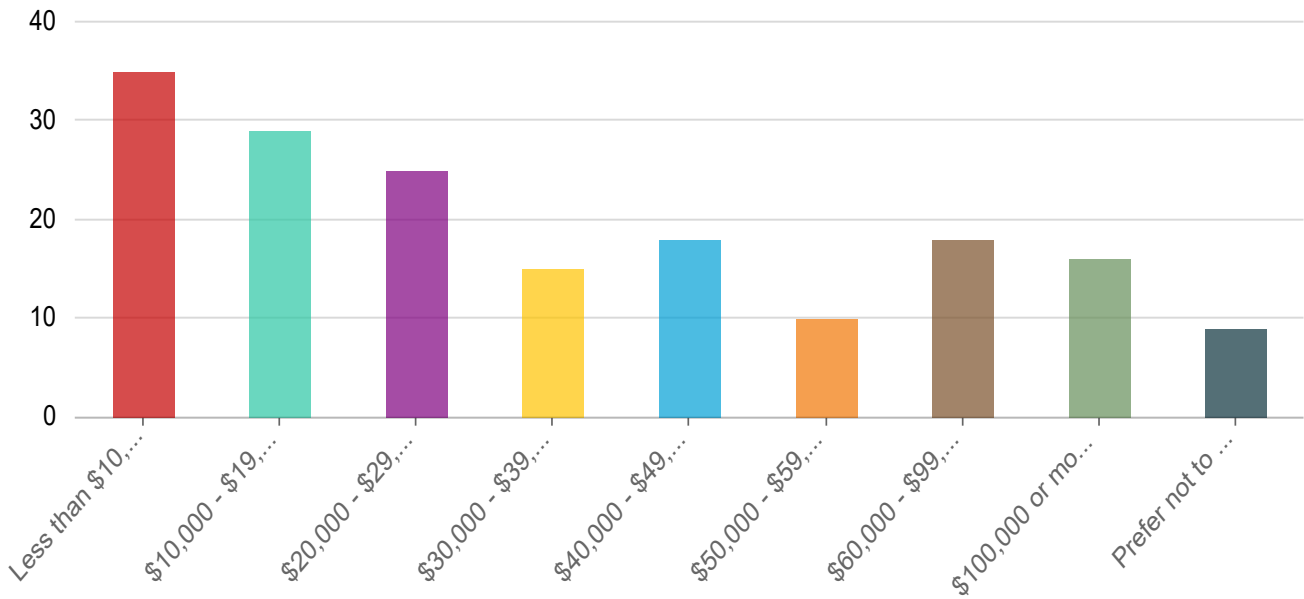
How often do you normally use Palm Tran Connection? *



Answers**Count****Percentage**

3-5 times per week	70	40%
1-2 times per week	48	27.43%
Other	40	22.86%
Daily (7 Days per week)	17	9.71%

Answered: 175 Skipped: 0

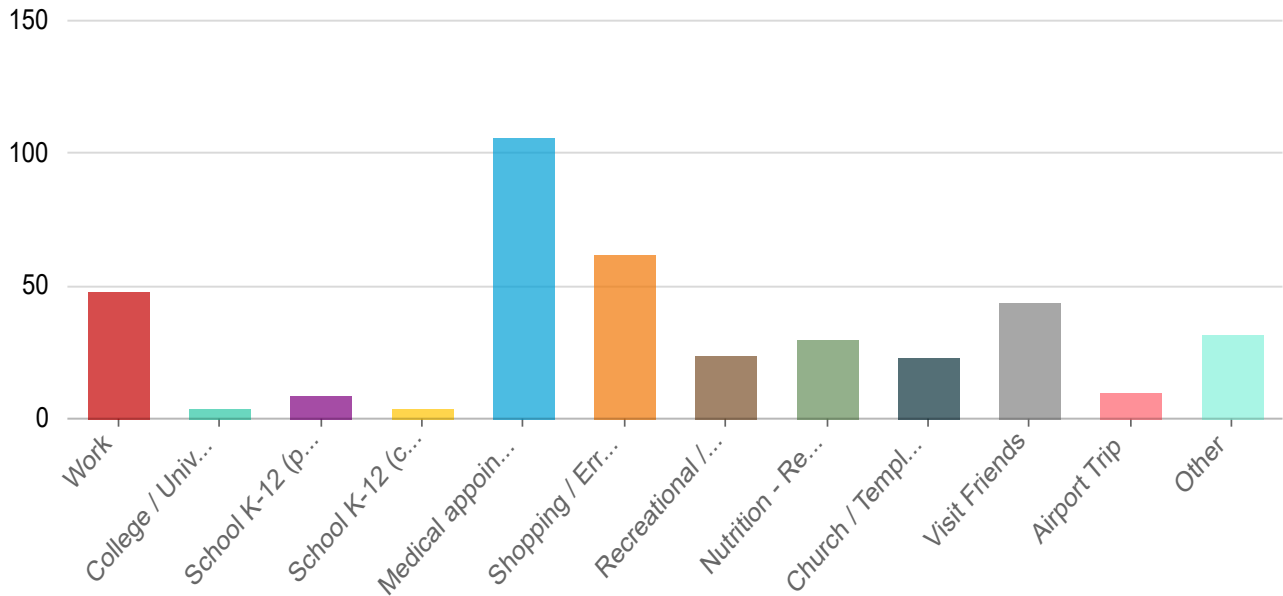
Which of the following best describes your TOTAL ANNUAL HOUSEHOLD... ***Answers****Count****Percentage**

Less than \$10,000	35	20%
\$10,000 - \$19,999	29	16.57%
\$20,000 - \$29,999	25	14.29%
\$30,000 - \$39,999	15	8.57%
\$40,000 - \$49,999	18	10.29%
\$50,000 - \$59,999	10	5.71%

\$60,000 - \$99,999	18	10.29%
\$100,000 or more	16	9.14%
Prefer not to say	9	5.14%

Answered: 175 Skipped: 0

What do you normally use the service for? *



Answers

Count

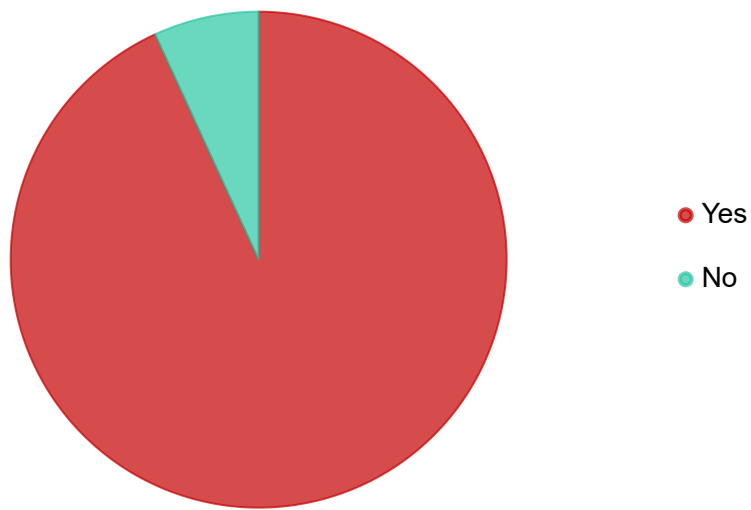
Percentage

Answers	Count	Percentage
Work	48	27.43%
College / University (students only)	4	2.29%
School K-12 (public or private)	9	5.14%
School K-12 (charter)	4	2.29%
Medical appointment / Hospital (non-work)	106	60.57%
Shopping / Errands	62	35.43%
Recreational / Sightseeing	24	13.71%
Nutrition - Restuarant / Grocery Shopping	30	17.14%

Church / Temple / Religious	23	13.14%
Visit Friends	44	25.14%
Airport Trip	10	5.71%
Other	32	18.29%

Answered: 175 Skipped: 0

When using the service, would you describe the vehicle as neat, clean, and... *



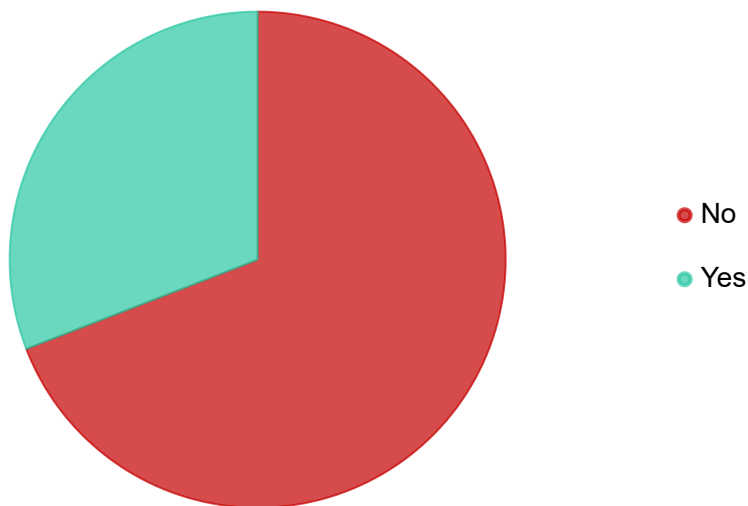
Answers **Count** **Percentage**

Yes	163	93.14%
No	12	6.86%

Answered: 175 Skipped: 0

Do you purchase discounted fixed route service passes? *

Have you used the Lyft and/or UZURV services? *



Answers	Count	Percentage
No	121	69.14%
Yes	54	30.86%

Answered: 175 Skipped: 0

Describe your experience using Lyft and/or UZURV below. *



**Appendix F:
Bus and Van Specification
Checklists**

Bus and Van Specification Checklist

Name of Provider: **MV**

Vehicle Number (either VIN or provider fleet number): **22346 6**

Type of Vehicle: Minivan Van Bus (>22')
 Minibus (<= 22') Minibus (>22')

Person Conducting Review: **Margie Tamblyn**

Date: **5/8/2024**

Review the owner's manual, check the stickers, or ask the driver the following:

- The lift must have a weight limit of at least 600 pounds.
- The lift must be equipped with an emergency back-up system (in case of loss of power to vehicle). Is the pole present?
- The lift must be "interlocked" with the brakes, transmission, or the door, so the lift will not move unless the interlock is engaged. Ensure the interlock is working correctly.

Have the driver lower the lift to the ground:

- Controls to operate the lift must require constant pressure.
- Controls must allow the up/down cycle to be reversed without causing the platform to "stow" while occupied.
- Sufficient lighting shall be provided in the step well or doorway next to the driver, and illuminate the street surface around the lift, the lighting should activate when the door/lift is in motion. Turn light switch on, to ensure lighting is working properly.

Once the lift is on the ground, review the following:

- Must have an inner barrier to prevent the mobility aid from rolling off the side closest to the vehicle until the platform is fully raised.
- Side barriers must be at least 1 ½ inches high.
- The outer barrier must be sufficient to prevent a wheelchair from riding over it.
- The platform must be slip-resistant.
- Gaps between the platform and any barrier must be no more than 5/8 of an inch.
- The lift must have two handrails.
- The handrails must be 30-38 inches above the platform surface.
- The handrails must have a useable grasping area of 8 inches, and must be at least 1 ½ inches wide and have sufficient knuckle clearance.
- The platform must be at least 28 1/2 inches wide measured at the platform surface, and 30 inches wide and 48 inches long measured 2 inches above the platform surface.

- If the ramp is not flush with the ground, for each inch off the ground the ramp must be 8 inches long.
- Lifts may be marked to identify the preferred standing position (suggested, not required)

Have the driver bring the lift up to the fully raised position (but not stowed):

- When in the fully raised position, the platform surface must be horizontally within 5/8 inch of the floor of the vehicle.
- The platform must not deflect more than 3 degrees in any direction. To test this, stand on the edge of the platform and carefully jump up and down to see how far the lift sways.
- The lift must be designed to allow boarding in either direction.

While inside the vehicle:

- Each securement system must have a clear floor area of 30 inches wide by 48 inches long.
- The securement system must accommodate all common wheelchairs and mobility aids.
- The securement system must keep mobility aids from moving no more than 2 inches in any direction.
- A seat belt and shoulder harness must be provided for each securement position, and must be separate from the security system of the mobility aid.

Vehicles under 22 feet must have:

- One securement system that can be either forward or rear-facing.
- Overhead clearance must be at least 56 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.

Vehicles over 22 feet must have:

- Must have 2 securement systems, and one must be forward-facing, the other can be either forward or rear-facing.
- Overhead clearance must be at least 68 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.
- Aisles, steps, and floor areas must be slip resistant.
- Steps or boarding edges of lift platforms must have a band of color which contrasts with the step/floor surface.

Bus and Van Specification Checklist

Name of Provider: FT

Vehicle Number (either VIN or provider fleet number): 2806

Type of Vehicle: Minivan Van Bus (>22')
 Minibus (<= 22') Minibus (>22')

Person Conducting Review: Margie Tamblyn

Date: 5/8/2024

Review the owner's manual, check the stickers, or ask the driver the following:

- The lift must have a weight limit of at least 600 pounds.
- The lift must be equipped with an emergency back-up system (in case of loss of power to vehicle). Is the pole present?
- The lift must be "interlocked" with the brakes, transmission, or the door, so the lift will not move unless the interlock is engaged. Ensure the interlock is working correctly.

Have the driver lower the lift to the ground:

- Controls to operate the lift must require constant pressure.
- Controls must allow the up/down cycle to be reversed without causing the platform to "stow" while occupied.
- Sufficient lighting shall be provided in the step well or doorway next to the driver, and illuminate the street surface around the lift, the lighting should activate when the door/lift is in motion. Turn light switch on, to ensure lighting is working properly.

Once the lift is on the ground, review the following:

- Must have an inner barrier to prevent the mobility aid from rolling off the side closest to the vehicle until the platform is fully raised.
- Side barriers must be at least 1 1/2 inches high.
- The outer barrier must be sufficient to prevent a wheelchair from riding over it.
- The platform must be slip-resistant.
- Gaps between the platform and any barrier must be no more than 5/8 of an inch.
- The lift must have two handrails.
- The handrails must be 30-38 inches above the platform surface.
- The handrails must have a useable grasping area of 8 inches, and must be at least 1 1/2 inches wide and have sufficient knuckle clearance.
- The platform must be at least 28 1/2 inches wide measured at the platform surface, and 30 inches wide and 48 inches long measured 2 inches above the platform surface.

- If the ramp is not flush with the ground, for each inch off the ground the ramp must be 8 inches long.
- Lifts may be marked to identify the preferred standing position (suggested, not required)

Have the driver bring the lift up to the fully raised position (but not stowed):

- When in the fully raised position, the platform surface must be horizontally within 5/8 inch of the floor of the vehicle.
- The platform must not deflect more than 3 degrees in any direction. To test this, stand on the edge of the platform and carefully jump up and down to see how far the lift sways.
- The lift must be designed to allow boarding in either direction.

While inside the vehicle:

- Each securement system must have a clear floor area of 30 inches wide by 48 inches long.
- The securement system must accommodate all common wheelchairs and mobility aids.
- The securement system must keep mobility aids from moving no more than 2 inches in any direction.
- A seat belt and shoulder harness must be provided for each securement position, and must be separate from the security system of the mobility aid.

Vehicles under 22 feet must have:

- One securement system that can be either forward or rear-facing.
- Overhead clearance must be at least 56 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.

Vehicles over 22 feet must have:

- Must have 2 securement systems, and one must be forward-facing, the other can be either forward or rear-facing.
- Overhead clearance must be at least 68 inches. This includes the height of doors, the interior height along the path of travel, and the platform of the lift to the top of the door.
- Aisles, steps, and floor areas must be slip resistant.
- Steps or boarding edges of lift platforms must have a band of color which contrasts with the step/floor surface.

Appendix G:
TPA Day and the General Ridership Survey

At the request of our Chair, we conducted TPA LCB Days on April 8th and April 15th to survey riders on site at Palm Tran Connection's office. We asked individuals in office if they were willing to take our survey and collected data on riders who were mostly purchasing for the discounted fixed-route fares. You can see those surveys on the following page. Local Coordinating Board members took a tour of the office to better understand the behind the scenes of Palm Tran Connections workers and the faces of those who engage our TD riders. We spoke with over 60 people, getting 22 individuals to take our survey on our two mornings of outreach.

Please see the Survey Report below for general riders collected in person at the Palm Tran Connection office on April 8th and April 15th.

General Ridership Survey – Palm Beach TPA Day

1. How often do you use fixed route service?
 - a. Daily (7 days a week)
 - b. 1-2 times per week
 - c. 3-5 times per week
 - d. Other

2. What do you typically use the service for? (select one)
 - a. Work
 - b. College / University
 - c. School K-12
 - d. Medical Service / Hospital (non-work)
 - e. Shopping / Errands
 - f. Recreational / Sightseeing / Restaurant
 - g. Church / Temple / Religious
 - h. Visiting Friends
 - i. Airport
 - j. Other

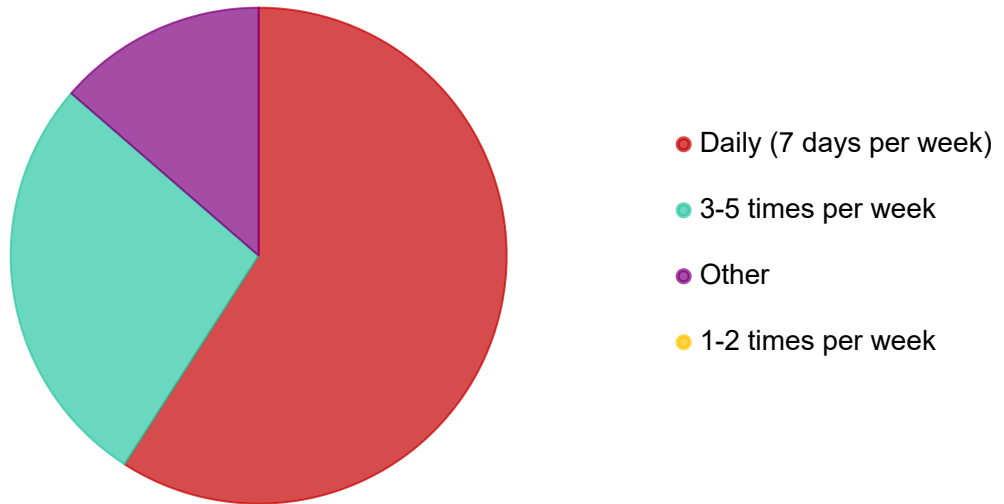
3. What is the best part of your trip using the fixed route service?

4. What can Palm Tran do to improve its service?

5. Please sure any other comments you may have below.

General Ridership Survey

How often do you use the fixed route service? *



Answers

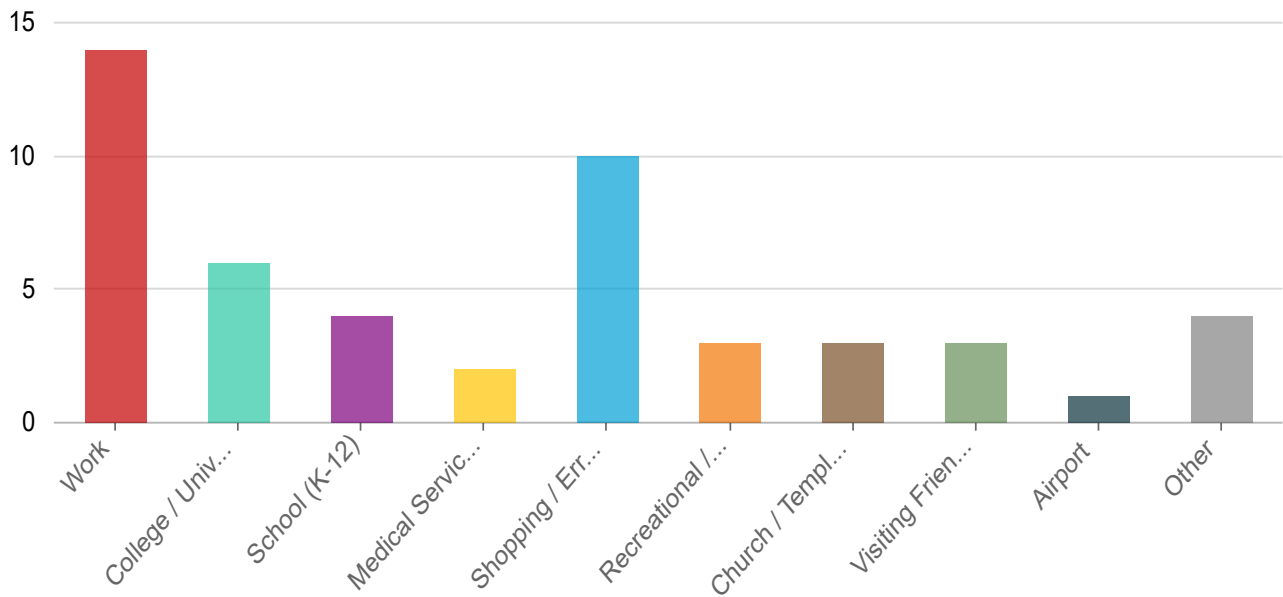
Count

Percentage

Daily (7 days per week)	13	59.09%
3-5 times per week	6	27.27%
Other	3	13.64%
1-2 times per week	0	0%

Answered: 22 Skipped: 0

What do you typically use the fixed route service for? *



Answers

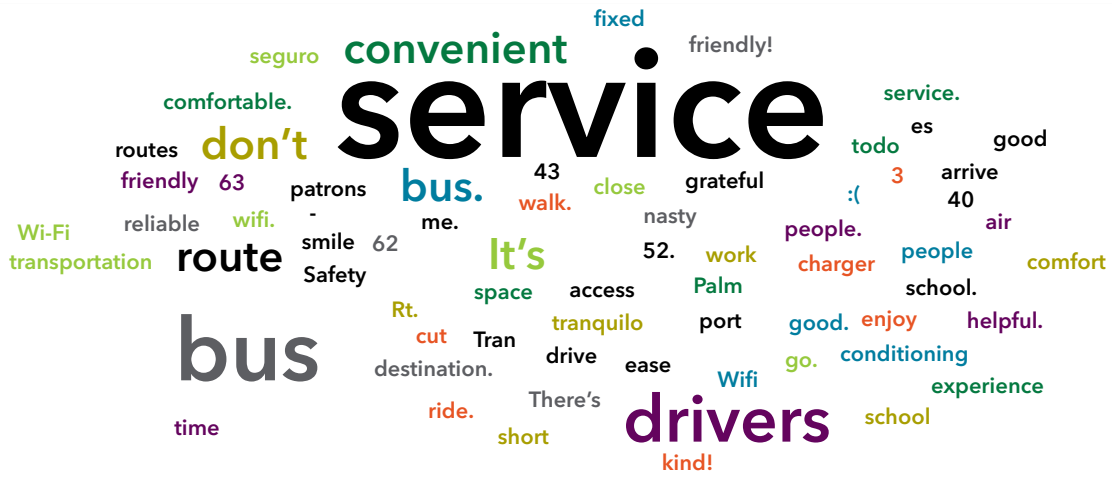
Count

Percentage

Answers	Count	Percentage
Work	14	63.64%
College / University	6	27.27%
School (K-12)	4	18.18%
Medical Service / Hospital (non-work)	2	9.09%
Shopping / Errands	10	45.45%
Recreational / Sightseeing / Restaurant	3	13.64%
Church / Temple / Religious	3	13.64%
Visiting Friends	3	13.64%
Airport	1	4.55%
Other	4	18.18%

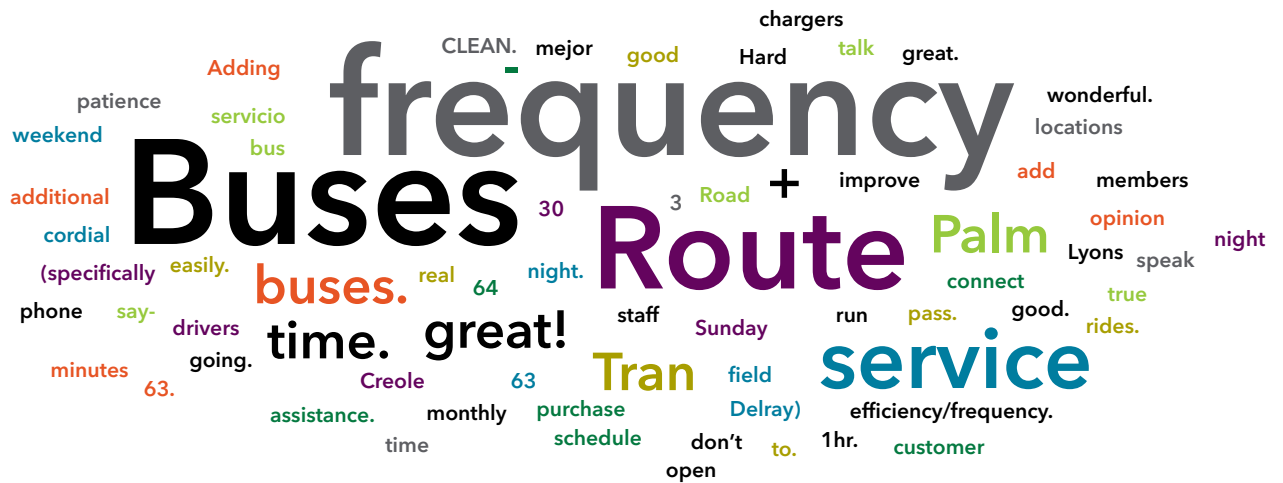
Answered: 22 Skipped: 0

What is the best part of your trip using the fixed route service? *



Answered: 22 Skipped: 0

What can Palm Tran do to improve its service? *



Answered: 22 Skipped: 0

Workbook Executive Summary

Palm Beach CTC Evaluation Executive Summary

In Palm Beach County, the Palm Beach Transportation Planning Agency (TPA) serves as the Designated Official Planning Agency (DOPA), which facilitates an annual evaluation of Palm Tran Connection, the Community Transportation Coordinator (CTC). The CTC evaluation process is dictated by the Florida Commission for the Transportation Disadvantaged (CTD) and includes the following:

- General Questions
- Chapter 427, F.S.
- Insurance
- Rule 41-2.011, F.C.
- Commission Standards and Local Standards
- American with Disabilities Act Compliance
- On-Site Observation and surveying the system's users
- Level of Cost, competition, and coordination

Below are the key findings and recommendations from the FY 2023 - 2024 CTC Evaluation that was conducted between February and May 2024:

General Observations and Passenger Survey Feedback		
Key Findings	Recommendation	Reserved for CTC Response
The cost of paratransit and TD services continues to escalate in Palm Beach County. ADA trips far exceeds the required ¾ of a mile for service area and service hours which impact on-time performance and productivity.	The CTC should consider the implications of the growing service population in conjunction with the potential scaling of operations to better fit budgetary constraints. Further, analyze the suburban area profile of Palm Beach County to facilitate a transit feeder service to a fixed route to replace suburban non-ADA trips. Continue to seek out new services and provide education on new systems such as TNCs, voucher programs, etc. Not knowing how to use a service is a barrier to one's access.	
A travel trainer is not employed on CTC staff to capture potential fixed route riders before they become paratransit users on the CTC Service.	The CTC should consider employing a Travel Trainer to train users to take advantage of the fixed route system.	
Survey responses indicate concerns with on-time performance; late pick up or return pick up was an issue. Riders have also requested late-hour service and improvements to the fixed route system.	CTC should consider evaluating rider's origin and destination trips; implement route optimization; Better technology that is integrated with intelligent transportation solutions should be considered to facilitate real time trip information.	

General Observations and Passenger Survey Feedback		
Key Findings	Recommendation	Reserved for CTC Response
Most trips are employment and medical related, survey respondents indicated trip planning tools are limited in nature and should be updated to reflect trip lengths and critical trip information.		
Recently welcomed technological improvements with the EZ Wallet, new service implementation with UZERV and the Rider Choice Program are all promising improvements. The technology and service provided to CTC Riders could be improved to provide more accurate trip information.	Continue evaluating resource availability to deliver on-time performance, service improvements through technology, and build upon existing service successes through recent programs.	
Customers expressed frustration with cash payment system and asked for improving the payment process.	CTC should consider implementing digital payment/ digital cash to increase efficiency. Incorporate payment hardware like Software like Square, Clover Stripe, and ShopKeep.	
Customers expressed concerns about trip lengths; it can take 2-3 hours to travel 10 miles; vehicles being overbooked, exacerbating delays. There are inconsistent instructions between drivers, customers, and guard gate officers.	CTC should consider upgrading systems to include intelligent transportation services and software to provide real time trip planning.	

Florida Statute (F.S.) Compliance		
Key Findings	Recommendation	Reserved for CTC Response
<p>The School Board of Palm Beach County and Palm Tran have an agreement to purchase 31-day discounted fares for students in public schools. In 2021-2022, 700 passes were purchased, but this program is dwarfed by the transportation need for school aged children. Sometimes, the CTC is utilized as a stopgap for these transportation services. Charter and private school students sometimes have relied on paratransit services for school trips.</p> <p><i>F.S. 1002.33 - Transportation of charter school students shall be provided by the charter school consistent with the requirements of subpart I.E. of chapter 1006 and s. 1012.45. The governing body of the charter school may provide transportation through an agreement or contract with the district school board, a private provider, or parents.</i></p>	<p>Analyze origin and destination data to better understand trips that should be accommodated through other means as required by Florida Statute.</p> <p>CTC should analyze this trip pattern and coordinate with these entities to follow the Florida Statutes related to student transportation.</p>	
Local Standards		
Key Findings (Pending update from CTC)	Recommendation	Reserved for CTC Response
<p>The CTC is <u>meeting</u> the following goals:</p> <ul style="list-style-type: none"> • Passenger no shows of <5%. • Call hold time is < two minutes per call. <p>The CTC is <u>not meeting</u> the following goals:</p> <ul style="list-style-type: none"> • Shift 25% of TD and Paratransit potential users to the fixed route systems • On time performance goal of 90%. • Road calls of ≤1 per 10,000 miles. • Complaint ratio goal of ≤3 per 10,000 trips performed. • At-fault crash goal of ≤1 per 100,000 miles traveled. 	<p>The CTC’s Office of Performance Management (OPM) should continue to evaluate current measurable goals and develop a strategic plan to achieve them (i.e., increasing the average on time performance standards, decreasing the number of complaints, and get able-bodied users of Connection to transition to the fixed route, if their abilities allow.)</p>	