



CTC EVALUATION
REVIEW PERIOD: FY 16-17
CALHOUN COUNTY

CTC BEING REVIEWED: CALHOUN CO. SR. CITIZENS ASSN., INC.

D.B.A. CALHOUN TRANSIT

ADDRESS: 16859 NE CAYSON STREET, BLOUNTSTOWN, FL 32424

CONTACT: MARILYN RUSSELL **PHONE:** 850-674-4163

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REVIEW DATE: JANUARY 23, 2018

PERSON CONDUCTING THE REVIEW: KWENTIN EASTBERG, ARPC

CONTACT INFORMATION: 850-488-6211 x105

EVALUATION INFORMATION

Page	An LCB review will consist of, but is not limited to the following pages:
1	Cover Page
2	Entrance Interview Questions
3	Chapter 427.0155 (3) Review the CTC monitoring of contracted operators Chapter 427.0155 (4) Review TDSP to determine utilization of school buses and public transportation services
4	Rule 41-2.006(1) Minimum Insurance Compliance Rule 41-2.011 (2) Evaluation of cost-effectiveness of Coordination Contractors and Transportation Alternatives
5	Commission Standards and Local Standards
7	On-Site Observation
8	Surveys – Rider/Beneficiary, Contractors, Purchasing Agencies
11	Level of Cost - Worksheet 1
12	Level of Competition – Worksheet 2
13	Level of Coordination – Worksheet 3
14	Status Report Follow-Up From Last Review
15	Review of Transportation Disadvantaged Service Plan – Barriers, Goals, Objectives and Strategies, Section II. Service Plan, Service Standards, Service Rates
16	Findings and Recommendations

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 CTD NET Safety Compliance & Emergency Management Self Certification (replaces the CTD Annual QA Self Certification).

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.

USING THE APR, COMPILE THIS INFORMATION

Operating Environment	Rural
Organization Type	Private Non-Profit
Network Type	Sole Provider
Name the operators that your company has contract with	None
Name the groups that your company has coordination contracts with	None

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
APD	10%	Lynne Daw	487-1992
CTD – TDTF	21%	Cecile Del Moral	410-5702
AHCA – Medicaid	57%	Access 2 Care/Jason Britton MTM/Jason Berger Logisticare/Jennifer McQueeney Veyo/Abby & Alyssa	720-450-3271 681-245-8303x6303 800-698-8457 877-239-0981
Calhoun Co. Sr. Citizens Assn., Inc.	12%	Marilyn Russell	674-4163
Miscellaneous Others	<1		

REVIEW AND DISCUSS TD HELPLINE CALLS:

	Number of calls	Closed Cases	Unsolved Cases
TD & Medicaid	0	0	0

COMPLIANCE WITH CHAPTER 427, F.S.

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

WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS OPERATOR(S) AND HOW OFTEN IS IT CONDUCTED? Is a written report issued to the operator? If NO, how are the contractors notified of the results of the monitoring?	Not applicable
WHAT TYPE OF MONITORING DOES THE CTC PERFORM ON ITS COORDINATION CONTRACTORS AND HOW OFTEN IS IT CONDUCTED? Is a written report issued? If NO, how are the contractors notified of the results of the monitoring?	Not applicable
WHAT ACTION IS TAKEN IF A CONTRACTOR RECEIVES AN UNFAVORABLE REPORT?	Not applicable
IS THE CTC IN COMPLIANCE WITH THIS SECTION?	Yes
ASK TO SEE DOCUMENTATION OF MONITORING REPORTS.	Not applicable

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

HOW IS THE CTC USING SCHOOL BUSES IN THE COORDINATED SYSTEM?	Not applicable
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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?	Not applicable
IS THERE A GOAL FOR TRANSFERRING PASSENGERS FROM PARATRANSIT TO TRANSIT? If yes, what is the goal?? Is the CTC accomplishing the goal?	Not applicable
IS THE CTC IN COMPLIANCE WITH THIS REQUIREMENT?	Yes

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?	\$1,000,000 combined coverage
WHAT ARE THE MINIMUM LIABILITY INSURANCE REQUIREMENTS IN THE OPERATOR AND COORDINATION CONTRACTS?	Not applicable
HOW MUCH DOES THE INSURANCE COST (per operator)?	CCSCA/Calhoun Transit - \$20,478.54/14 vehicles
DOES THE MINIMUM LIABILITY INSURANCE REQUIREMENTS EXCEED \$1 MILLION PER INCIDENT? If yes, was this approved by the Commission?	No
IS THE CTC IN COMPLIANCE WITH THIS SECTION?	Yes

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.”*

IF THE CTC HAS COORDINATION CONTRACTORS, DETERMINE THE COST-EFFECTIVENESS OF THESE CONTRACTORS. Not applicable

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:					

DO YOU HAVE TRANSPORTATION ALTERNATIVES? 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

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

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

Review the TDSP for the Commission and Local standards.

Commission Standards	Comments
Local toll free phone number must be posted in all vehicles.	In Compliance
Vehicle Cleanliness	In Compliance
Passenger/Trip Database	In Compliance CTS. Tablets used in all vehicles.
Adequate seating	In Compliance
Driver Identification	In Compliance Company shirt. Badge.
Passenger Assistance	In Compliance
Smoking, Eating and Drinking	In Compliance
Two-way Communications	In Compliance Cellular telephones/Touch to Talk
Air Conditioning/Heating	In Compliance
Billing Requirements	Not Applicable
Local Standards	Comments
Transport of Escorts and dependent children policy	In Compliance
Use, Responsibility, and cost of child restraint devices	In Compliance
Out-of-Service Area trips	In Compliance 59% of total trips were outside of the service area
CPR/1st Aid	In Compliance 9 drivers
Driver Criminal Background Screening	In Compliance 9 drivers. Performs Level 2 screening. Electronic fingerprinting.
Rider Personal Property	In Compliance Unlimited
Advance reservation requirements	In Compliance
Pick-up Window	Standard – 93% Survey Results - 100% (12/13/17) In Compliance

<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	Not applicable	Not applicable
On-time performance	CTC 95%	100% (12/13/17)	YES
Passenger No-shows	CTC <1% requested trips	AOR: 12,401 trips + 0 unmet = 12,401 requested trips. 1% = 124 trips AOR: 82 NS	YES
Accidents (Chargeable)	CTC 1:100,000 vm	AOR: 0:252,166 vm	YES
Roadcalls	CTC >10,000 vm/rc	AOR: 3:235,770 vm	YES
<i>Average age of fleet:</i>			
Complaints	CTC 1:10,000 trips	AOR: 0:12,401 trips	YES
<i>Number filed:</i>			
Call-Hold Time	CTC 90% w/i 1 min	No Hold	YES

ON-SITE OBSERVATION OF THE SYSTEM

Ride a vehicle within the coordinated system. Request a copy of the Manifest page that contains this trip. Attach a copy of the Manifest.

Date of Observation	1/24/17
Please list any special guests that were present	
Location	Blountstown
Number of Passengers picked up/dropped off	8 ambulatory (4 on 1 st trip, 4 on 2 nd trip)
Was the driver on time? If no, how many minutes late/early?	Yes
Did the driver provide any passenger assistance?	Yes
Was the driver wearing any identification?	Yes – shirt, badge
Did the driver render an appropriate greeting? Driver regularly transports the rider, not necessary.	Yes
If CTC has a policy on seat belts, did the driver ensure the passengers were properly belted?	Yes
Was the vehicle neat and clean, and free from dirt, torn upholstery, damaged or broken seats, protruding metal or other objects?	Yes
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?	No – Corrected on Site
Does the vehicle have working heat and air conditioning?	Yes
Does the vehicle have two-way communications in good working order?	Yes – cellular phone/Touch to Talk
Was there safe and appropriate seating for all passengers?	Yes
If used, was the lift in good working order?	Not Applicable
Did the driver properly use the lift and secure the passenger? If no, please explain:	Not Applicable

12/13/17 Trips

Funding Source	No. of Round Trips	No. of Riders/Beneficiaries	No. of Calls to Make	No. of Calls Made
CTD				
Medicaid				
Other: OAA				
Other: APD				
Other				
Totals				

Number of Round Trips

0 – 200

201 – 1200

1201 +

Number of Riders/Beneficiaries to Survey

30%

10%

5%

RIDER/BENEFICIARY SURVEY SUMMARY

Staff making call: Kwentin Eastberg
Date of Call: n/a

Selected Date of Service: 12/13/17
Funding Source: Various

1. Did you receive transportation service on the selected date?	-
2. Where you charged an amount in addition to the co-payment? If so, how much?	-
3. How often do you normally obtain transportation?	11- 3+ times a week, 1- 1-2 Times week, 15- few times a month, 4- every other month
4. Have you ever been denied transportation services? If no, skip to question #5. a. How many times in the last 6 months have you been refused transportation services? b. What was the reason given for refusing you transportation services?	-
5. For what reasons do you normally use the service?	27 Medical, 1 school/work, 1 grocery/shopping, 5 other
6. Did you have a problem with your trip on the selected date? If yes, please state/choose the problem.	-
7. On a scale of 1 to 5, with 5 being most satisfied, rate the transportation you have been receiving.	4.9
8. What does transportation mean to you? Do we have permission to use your comments in publications?	-

	Very Good	Good	Neutral	Poor	Very Poor	Avg Score
Dependability - Able to schedule a trip for the time period I need.	5	4	3	2	1	4.9
Service runs the times when I need it.	5	4	3	2	1	4.7
Easy to arrange trips.	5	4	3	2	1	4.6
It is convenient to change scheduled trips when necessary.	5	4	3	2	1	4.6
Comfort/Cleanliness - The vehicles are clean and well maintained.	5	4	3	2	1	4.9
The driver provides a safe and comfortable ride.	5	4	3	2	1	4.7
Waiting Time - The vehicle picks me up within 30 minutes of my scheduled time.	5	4	3	2	1	4.7
I arrived at my destination at the scheduled time.	5	4	3	2	1	4.8
Cost - Amount I pay for my trip is reasonable.	5	4	3	2	1	4.6
The reservationist is pleasant.	5	4	3	2	1	4.8
The drivers are courteous and helpful.	5	4	3	2	1	4.9
Overall Courtesy of Employees	5	4	3	2	1	4.9
Overall Satisfaction of Service	5	4	3	2	1	4.9

Comments:

- Good
- I love you all! Keep up the good work.
- Very Pleased with my service
- Transit does a wonderful job providing a very much needed service to our community. The drivers become like family to us. Lynne is my Favorite!
- Most of time I use transit
- I love transit. They pick me up and get me to my appointment on time! I love all my transit drivers.

CONTRACTOR SURVEY SUMMARY

Contractor's Name (optional):

NO CONTRACTORS TO CONTACT

1. Do the riders/beneficiaries call your facility directly to cancel a trip?	
2. Do the riders/beneficiaries call your facility directly to issue a complaint?	
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? If yes, is the phone number posted the CTC's?	
4. Are the invoices you send to the CTC paid in a timely manner?	
5. Does the CTC give your facility adequate time to report statistics?	
6. Have you experienced any problems with the CTC? If yes, what type of problems?	
Comments	

PURCHASING AGENCY SURVEY SUMMARY

Staff making call: Kwentin Eastberg
Date: 1/31/17

1. Do you purchase transportation from the coordinated system? If no, why?	Yes – 1
2. Which transportation operator provides services to your clients?	Calhoun Transit
3. What is the primary purpose of purchasing transportation for your clients?	Medical - 1
4. On average, how often do your clients use the transportation system?	Daily
5. Have you had any unresolved problems with the coordinated transportation system? If no, skip to question 7.	No
6. What type of problems have you had with the coordinated system?	None
7. Overall, are you satisfied with the transportation you have purchased for your clients? If no, why?	Yes – 1

Responding to Survey:

Access2Care

Other Purchasers:

APD

Commission for the Transportation Disadvantaged

**LEVEL OF COST
WORKSHEET 1**

Insert Cost page from the AOR.

Revenues	\$642,947
Expenditures	\$645,633
Difference	\$ -2,686

LEVEL OF COMPETITION WORKSHEET 2

Inventory of Transportation Operators in the Service Area

	Operators Available	Operators Contracted in the System.	Include Trips	% of all Trips
Private Non-Profit	1	1	12,401	100
Private For-Profit				
Government	1 (school)			
Public Transit Agency				
Total	2	1	12,401	100

How many of the operators are coordination contractors?	0
Of the operators included in the local coordinated system, how many have the capability of expanding capacity?	0
Does the CTC have the ability to expand?	Yes
Indicate the date the latest transportation operator was brought into the system.	Not Applicable
Does the CTC have a competitive procurement process?	Yes
In the past five (5) years, how many times have the following methods been used in selection of the transportation operators? Request for Qualifications, Request for Proposals, Requests for Interested Parties, Low Bid, Negotiation Only	Not Applicable
Which of the methods listed above were used to select the current operators?	Not applicable

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

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

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?	Not Applicable
How many responded?	Not applicable
The request for bids/proposals was distributed:	Not applicable
Has the CTC reviewed the possibilities of competitively contracting any services other than transportation provision (such as fuel, maintenance, etc...)?	Yes - Fuel, maintenance supplies, vehicle parts, office supplies, furniture, computers, Buy America

**LEVEL OF AVAILABILITY (COORDINATION)
WORKSHEET 3**

Planning – What are the coordinated plans for transporting the TD population?	There are no other operators. All transportation is provided by the CTC.
Public Information – How is public information distributed about transportation services in the community?	Newspaper, radio, agency newsletter
Certification – How are individual certifications and registrations coordinated for local TD transportation services?	Uniform eligibility form used by CTC staff
Eligibility Records – What system is used to coordinate which individuals are eligible for special transportation services in the community?	Eligibility form completed by CTC staff
Call Intake – To what extent is transportation coordinated to ensure that a user can reach a Reservationist on the first call?	Multiple lines
Reservations – What is the reservation process? How is the duplication of a reservation prevented?	All reservations are documented when rider calls to make reservation. Staff verifies reservation the day prior to trip.
Trip Allocation – How is the allocation of trip requests to providers coordinated?	CTC provides 100% of all trips.
Scheduling – How is the trip assignment to vehicles coordinated?	CTC staff schedules and dispatches all vehicles.
Transport – How are the actual transportation services and modes of transportation coordinated?	CTC staff coordinates all trips.
Dispatching – How is the real time communication and direction of drivers coordinated?	CTC dispatches all drivers.
General Service Monitoring – How is the overseeing of transportation operators coordinated?	NA
Daily Service Monitoring – How are real-time resolutions to trip problems coordinated?	Complaints are dealt with by using the LCB complaint and grievance procedures. Dispatcher is responsible for resolving most problems.
Trip Reconciliation – How is the confirmation of official trips coordinated?	CTC staff reconciles all driver manifests to billing records.
Billing – How is the process for requesting and processing fares, payments, and reimbursements coordinated?	CTC staff lists on driver’s manifest all required fees to be collected from riders.
Reporting – How is operating information reported, compiled, and examined?	CTC staff: dispatcher, finance officer, director
Cost Resources – How are costs shared between the coordinator and the operators (s) in order to reduce the overall costs of the coordinated program?	NA
Information Resources – How is information shared with other organizations to ensure smooth service provision and increased service provision?	Email and letter when changes occur
Overall – What type of formal agreement does the CTC have with organizations, which provide transportation in the community?	NA

STATUS REPORT FOLLOW-UP FROM LAST REVIEW
DATE OF REVIEW: 1/31/17

There were no findings or recommendations in the last review.

