

**Lee County Board Of County Commissioners
Agenda Item Summary**

Blue Sheet No. 20020740

1. REQUESTED MOTION:

ACTION REQUESTED: Adopt the FY02 annual update to the Five Year Lee County Transit Development Plan.

WHY ACTION IS NECESSARY: F. S. 341.052 requires the Transit Development Plan be updated annually in order to receive the Florida Public Transit Block Grant Program.

WHAT ACTION ACCOMPLISHES: Provides an update of the progress toward goals and initiatives for the second year of the major plan update adopted by the BoCC on May 29, 2001.

2. DEPARTMENTAL CATEGORY:
COMMISSION DISTRICT # ALL

C6H

3. MEETING DATE:

07-09-2002

4 AGENDA:

CONSENT
ADMINISTRATIVE
APPEALS

PUBLIC
WALK ON

TIME REQUIRED:

5. REQUIREMENT/PURPOSE:
(Specify)

STATUTE 341.052
 ORDINANCE
 ADMIN.
CODE
 OTHER

6. REQUESTOR OF INFORMATION:

A. COMMISSIONER
B. DEPARTMENT INDEPENDENT
C. DIVISION

TRANSIT

BY: STEVE MYERS

Steven L Myers

7. BACKGROUND:

LeeTran is required by Florida Statute to develop and maintain a long-range operational and financial plan with a five-year outlook. The Transit Development Plan requires annual updates towards the progress of the goals and initiatives, additional of a new fifth year financial estimate and past performance indicators. It is required to have this plan adopted and submitted to the Florida Department of Transportation to remain eligible for state funding assistance.

8. MANAGEMENT RECOMMENDATIONS:

9. RECOMMENDED APPROVAL:

A Department Director	B Purchasing or Contracts	C Human Resources	D Other	E County Attorney	F Budget Services			G County Manager
<i>Steven L Myers</i> 6/25/02	N/A	N/A	N/A	<i>S. Myers</i> 6/26/02	OA <i>R. Myers</i> 6/26/02	JOM <i>J. Myers</i> 6/26/02	Risk <i>J.P.</i> 6/27	GC <i>R.S.</i> 6/26/02

10. COMMISSION ACTION:

_____ APPROVED
_____ DENIED
_____ DEFERRED
_____ OTHER

Rec. by CoAtty
Date: *6/26/02*
Time: *8:50am*
Forwarded To:
6/26/02
11:30am

RECEIVED BY
COUNTY ADMIN. *DD*
6/25 11:30
COUNTY ADMIN.
FORWARDED TO:
6/27/02 *BL*
1pm

TRANSIT DEVELOPMENT PLAN

2002 ANNUAL UPDATE

Submitted by:

Steve L. Myers
Lee County Transit

June, 2002

SECTION I

UPDATE OF GOALS

The Comprehensive Operational Analysis (COA) conducted for Lee County Transit was used to develop a five-year transit services plan. The purpose of a COA is to provide an independent analysis of the transit system that includes recommendations concerning service modifications and/or expansions. The analysis covers those aspects of service that generally are not visible to the riding public, such as master route schedules, operator work assignments, route productivity in terms of ridership and revenue, and network-level routing.

CUTR performed a “ride-check” of all routes and all corresponding trips in the system. A ridecheck consists of placing an individual on board each vehicle to count passenger boardings and deboardings for each bus stop of a route, as well as collect other operational data.

Prior to conducting the COA, and as part of the TDP process, CUTR met with Lee County Transit staff and members of the public. A majority of the concerns expressed by each of the groups were addressed in the final recommendations. Analyses of existing conditions of Lee County Transit’s fixed route services identified service deficiencies that are impacting operational performance and growth opportunities, including:

- Current routings are circuitous and do not foster direct origin/destination travel;
- Running times for routes have too much recovery time, increasing operating costs and reducing frequency;
- The seven transit transfer centers are not being utilized to maximum capacity and are not providing maximum mobility options for customers;
- Segments of many routes are unproductive and generate minimal to no riders;
- Frequency on U.S. 41 needs to be increased.

The Five-Year Transit Services Plan consists of a Recommended Mobility Network with new, modified, and existing routes for Lee County to achieve all of the initiatives outlined in the Goals and Initiatives and the issues identified under the COA. This redesigned route network is more aggressive in serving the mobility needs of residents and visitors to Lee County, calls for higher service levels in terms of buses and annual revenue hours operated, and creates a rational and connective system. The following is a narrative description of the route changes.

- Route 10 – Route 10 now utilizes the primary north-south corridors of Fowler and Palmetto, and the primary east-west corridors of Winkler and Edison. This route also now services the Intermodal Transfer Center for additional passenger connections with the rest of the system, and HRS which is no longer serviced by route 80.
- Route 15 – This new route utilizes the primary north-south corridors of Broadway, Nuna, and Ortiz, and the primary east-west corridors of Martin Luther King, Michigan, and Ballard. Route 15 offers connections to other routes at Edison Mall and the Intermodal Transfer Center.

- Route 20 – Route 20 now utilizes the primary north-south corridor of Marsh, and the primary east-west corridor of Martin Luther King. This route services the Intermodal Transfer Center and the core downtown Fort Myers business district.
- Route 30 – No changes were recommended or implemented on this route.
- Route 40 – Route 40 continues to service Santa Barbara and Del Prado, however it now also services the Cape Coral City Hall and Coralwood Mall by utilizing Country Club and Veterans Parkway. Service to Kismet Parkway is no longer available.
- Route 50 – Route 50 was redesigned to cover much of the service area from route 85, which was eliminated. It now utilizes the primary north-south corridor of Winkler, and the primary east-west corridors of Summerlin and Daniels Parkway. Service is provided from Summerlin Square to the Southwest Florida International Airport with transfers at the Bell Tower Shopping Center.
- Route 60 – Route 60 continues to service the San Carlos neighborhoods, however service was added on Three Oaks Parkway. Service on Ben Hill Griffin north of FGCU is provided only on AM commuter runs.
- Route 70 – No changes were recommended or implemented on this route.
- Route 80 – Route 80 has been extended to service the neighborhoods just north of Edison Mall and now terminates at the South Trail Publix. This route south of Winkler remains the same.
- Route 85 – Route 85 has been eliminated. The areas this route serviced have been absorbed into routes 50 and 130.
- Route 90 – Route 90 continues to provide service to North Fort Myers and the Suncoast area. No changes have been made to this route other than the elimination of service on Littleton Road.
- Route 100 – Route 100 utilizes the primary north-south corridor of Cleveland and the primary east-west corridor of Palm Beach. The Nuna and Ortiz deviation has been eliminated and the route has been extended south of the Intermodal Transfer Center to the Bell Tower Shopping Center.
- Route 110 – Route 110 has absorbed the route 115 and now provides continuous service between Edison Mall and Lehigh Acres.
- Route 115 – Route 115 has been eliminated as recommended. This service area is now part of the route 110.

- Route 120 – Route 120 continues to provide service between the Cape Coral transfer Center and Edison Mall via the Midpoint Bridge, Veterans Parkway and Country Club. However, it no longer provides service to the Cape Coral Hospital.
- Route 130 – Route 130 now provides service from Summerlin Square to Edison Mall. This route has absorbed part of the old route 85 and has eliminated service on McGregor.
- Route 140 – No changes were recommended or implemented on this route.
- Route 150 – Linehaul service on route 150 has been eliminated as recommended. Service to this area is now provided as a Dial-A-Ride.

Goal #1: Make transit a catalyst for community livability, economic development and accessibility with transit products and services that respond to mobility needs of residents and visitors.

Initiatives

- A. *Make network-level bus routing changes to improve system connectivity based on the Comprehensive Operations Analysis (COA).*

Strategic Initiative

Continue vehicle replacement program and purchase new expansion vehicles. For LeeTran's fixed-route service, a total of 34 transit coaches are needed for replacement and expansion. The proposed five-year budget in the following section assumes bus replacement on an ongoing basis. In addition, six trolleys, 18 support vehicles and 45 minivans will be purchased to support the beach trolleys, road supervision, maintenance road calls, paratransit, and commuter assistance. *(Years One through Six, implementing Goal 1)*

Action Taken:

Completed year two of replacement vehicles. Seven 35' low floor Gillig buses were put into service in June of 2002. Seven support vehicles consisting of five vans, one service truck and one sedan were put into service in June and July of 2001. Finally, six vans for the van pool program were purchased and made available in FY '02.

- B. *Increase frequency on heaviest customer use routes.*

Strategic Initiative

Apply for additional FDOT Corridor Funds – This initiative, if funded by FDOT, will create greater frequencies on the U.S. 41 corridor based on the extension of the Route 100 from the Downtown Intermodal Center to Bell Tower. This will provide the FDOT with greater means to manage congestion on the corridor with even more intensive bus services. *(Years One through Six, implementing Goal 1, Initiative B)*

Action Taken:

The FDOT Corridor Funds grant was accepted and approved for FY 2002 – 2006. Implementation of route changes went in effect on December 13, 2001 which included the extension of route 100 from the Intermodal Transfer Center in downtown Fort Myers, down U.S. 41 to the Bell Tower Shopping Center.

- C. *Increase service levels for the seasonal demands of the tourist market and employment opportunities during high season.*

Action Taken:

Service improvements in the form of one additional beach trolley on Fort Myers Beach are proposed as year two enhancements in the FY '03 budget.

- D. *Develop alternative services for residents of the southeast and northeast urban areas.*

Strategic Initiative

Implement Alternative Services for residents of the southeast and northeast urban areas. Since LeeTran's ADA responsibility extends to the southeast area with the Bonita Springs Trolley and to Lehigh Acres with the revised Route 110, the agency is well positioned to offer general public dial-a-ride to those residents. General public dial-a-ride should have strict eligibility requirements and should be directly related to service reductions or eliminations based on the recommended mobility network. The service should only provide connections to one of the seven major regional transit centers as well as San Carlos Plaza where the Routes 140 and 60 terminate in south Lee County. Other alternatives to be considered include ridesharing, vanpooling, subscription van service in special cases, and a voucher program for taxis. This project is a candidate FDOT Service Development project. *(Years One through Six, implementing Goal 1, Initiative D)*

Action Taken:

Bonita Springs Dial-A-Ride service was implemented in December of 2001. This DAR provides service anywhere within the city limits of Bonita Springs and connects to the linehaul service via Route 140 in San Carlos Park. In addition, the Hyatt vanpool program began in September of 2001.

During the FY '02 process DAR service to Pine Island, which was recommended for elimination in the Comprehensive Operations Analysis, was retained as the sole service to rural Pine Island.

E. Focus on partnerships to fund transit service improvements.

Strategic Initiatives

Develop one partnership annually with a private sector or public sector entity. As indicated earlier, conditions on Estero Boulevard are a regional issue and not just a county issue. Therefore, LeeTran's partnership with Ft. Myers Beach should be expanded to stage increases in trolley service levels on the beaches in order to accommodate growth in tourism and vehicular traffic. Potential partnerships also include the hospitality industry, which has a vital interest in continuing to attract visitors to the area during the high season.

Correspondingly, the Recommended Mobility Network greatly enhances service provided in Ft. Myers and Cape Coral, the two major cities in the region. Lee County, through LeeTran, should stress to the City governments the benefits that residents of their communities are receiving from the enhanced service and should work with them to increase investment in transit over the five year period.

Finally, LeeTran should expand its own definition of the term "partnership" to include the private sector and other community resources. Efforts should be geared toward promoting the interests of the community and having those interests in turn promote transit. Great flexibility exists for building partnerships and seizing opportunities for the purposes of funding transit service improvements, generating new revenues from bus advertising, media trades, placing passenger amenities, expanding retail outlets for bus passes and other fare media, conducting a joint sponsorship or promotional event, and developing new markets and/or new products. *(Years One through Five, implementing Goal 1, Initiative E and Goal 3, Initiative F)*

Establish LeeTran in the wayfinding system at the Ft. Myers International Airport – In an airport, wayfinding directs incoming passengers to rental cars and other ground transportation locations within the airport. Work with the airport management to establish LeeTran in the wayfinding system to direct incoming passengers to the Route 50, which connects to the beaches via Summerlin Square. *(Year One, implementing Goal 1, Initiative E and Goal 4, Initiative A)*

Action Taken:

Lee Tran has worked together with the Florida DOT, Lee County, and the town of Fort Myers Beach to locate eleven bus pull-off lanes on Estero Blvd in Fort Myers Beach. The completion of construction is estimated for June of 2002. These lanes will help the congested conditions on Estero Blvd and in turn help to accommodate growth in tourism on the beach.

Lee Tran has also partnered with the city of Bonita Springs to begin the Bonita Springs Dial-A-Ride service that began in December of 2001. This DAR provides service anywhere within the city limits of Bonita Springs and connects to the linehaul service via Route 140 in San Carlos Park.

Establishing Lee Tran in the wayfinding system at the Southwest Florida International Airport is scheduled for year three.

- F. *Establish a continuous service performance assessment based on relevant performance measures and standards for all fixed-routes.*

Action Taken:

Mileage and hours have been updated in the database and the database is now updated on a monthly basis.

Planning has begun for the distribution of performance measures on a monthly basis via the Lee Tran website and and internal postings for staff.

- G. *Establish a service planning process consisting of Lee Tran staff and bus operators.*

Action Taken:

Following the Organizational Improvement Process that took place in year one, Lee Tran is in the process of identifying a Mission Statement and establishing a Strategic Business Plan in year two. This new business plan will assist in the

continuity in direction of the organization. Facilitator training, supervisor training, and committee selection have been completed this year. Final preparation of the Strategic Business Plan will be completed in year three.

Goal #2: *Communicate the Role of Transit in the Lee County Community*

Initiatives

A. *Implement a Communications Program.*

Strategic Initiative

Apply for a three-year Service Development Grant with FDOT for a “Marketing and Communications Program” for LeeTran. In the transit industry, marketing has two fundamental roles: the first is to position the transit system and its products in the marketplace and the second is to sell those products and services. A solid marketing program that targets multiple audiences with different messages utilizing a variety of media is necessary to build a positive transit image, establish community support, increase ridership, and increase customer satisfaction. It is recommended that LeeTran increase investments in the marketing of services and develop a communications program designed to improve image and build public support for continued expansion of mobility services. As the programs recommended in the TDP are implemented, progress should be communicated to the public to demonstrate action and build support. Similarly, a higher level of marketing of community transportation options should occur that targets the community-at-large, potential business partners, customers, potential customers, and public officials. At a minimum, the marketing and communications program should address the following elements:

- Potential business to business relationships
- Target markets (seniors, one-vehicle households, tourist market)
- Promotions (e.g., tourists, frequent rider program, targeted mail-out information)
- Event sponsorship
- School education program
- Transit logos and packaging
- Corporate Communications
- Community Relations
- Transit Alliances
- Marketing
- Media/Advertising

(Years Two through Five, implementing Goal 2, Initiatives A, D, F, G)

Action Taken:

Lee Tran has implemented an overall communications program utilizing a unified theme of logos and slogans. We have actively sought good press coverage through contacts at Print and TV media, and utilized Print, Radio, and direct mail advertising. We have also conducted special promotions including “Free Ride Days” when implementing our new route system, and sought out alliances with libraries and other private companies through our Commuter Assistance Program.

B. Create a unified theme for transit.

Strategic Initiative

Create a Unified Transit Theme. In conjunction with the above, LeeTran should engage a firm to create a unified theme, including a logo, color scheme and slogan that is continuous on buses, printed materials, bus stop signs, shelters, support vehicles, trolleys, and advertisements. A consistent, unified transit theme that includes the logo and system name on all public materials will contribute to greater visibility and recognition for the transit service. *(Year Two, implementing Goal 2, Initiative B)*

Action Taken:

Lee Tran has implemented a unified theme. Our system colors are blue, yellow, and white, and we have one logo and slogan. (You’re Ride is Here.) We are in the process of converting all buses, support vehicles and trolleys to the system colors. This process should be completed in the first half of year three. To go along with the new colors and logo, a bus stop sign replacement program was initiated in this year and will be completed in year three. Design for a new paint scheme for the trolleys to also include the new colors has begun.

A new logo for our ADA service was implemented this year and the design process is also underway for a new paint scheme.

C. Establish a Community Relations and Outreach Program.

Strategic Initiative

Conduct 30 Community Outreach presentations annually. LeeTran staff should proactively seek community groups and organizations to conduct speaking engagements about the vision, improvements, and needs for transit in the Lee County community. *(Years One through Five, implementing Goal 2, Initiative C)*

Action Taken:

Lee Tran conducts about 15 – 20 presentations annually to various community groups and organizations. With the additional marketing staff slated for October 2002, we will double the amount of public presentations per year.

D. Intensify marketing efforts to seniors.

Strategic Initiative

Apply for a three-year Service Development Grant with FDOT for a “Marketing and Communications Program” for LeeTran. In the transit industry, marketing has two fundamental roles: the first is to position the transit system and its products in the marketplace and the second is to sell those products and services. A solid marketing program that targets multiple audiences with different messages utilizing a variety of media is necessary to build a positive transit image, establish community support, increase ridership, and increase customer satisfaction. It is recommended that LeeTran increase investments in the marketing of services and develop a communications program designed to improve image and build public support for continued expansion of mobility services. As the programs recommended in the TDP are implemented, progress should be communicated to the public to demonstrate action and build support. Similarly, a higher level of marketing of community transportation options should occur that targets the community-at-large, potential business partners, customers, potential customers, and public officials. At a minimum, the marketing and communications program should address the following elements:

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- Target markets (seniors, one-vehicle households, tourist market)
- Promotions (e.g., tourists, frequent rider program, targeted mail-out information)
- Event sponsorship
- School education program
- Transit logos and packaging
- Corporate Communications
- Community Relations
- Transit Alliances
- Marketing
- Media/Advertising

(Years Two through Five, implementing Goal 2, Initiatives A, D, F, G)

Action Taken:

Lee Tran has not been able to apply for the service development grant yet due to time constraints on staff. However, we would like to apply in the near future.

We have not specifically targeted seniors in the marketing/advertising of Lee Tran. We have been concentrating on getting a unified image based campaign out to the general market. We anticipate focusing on marketing to seniors in year three or four of the TDP.

E. Intensify marketing efforts to employers and employees.

Strategic Initiative

Expand Commuter Assistance Program. LeeTran should implement the recommendations of the "Evaluation of LeeTran Commuter Assistance Program" conducted by CUTR for FDOT. Included in the recommendations are expansion of carpools and vanpools, employer outreach, establishment of employee transportation coordinators, and target marketing. With the Recommended Mobility Network, there are opportunities to expand the use of the seven transit centers as meeting locations for ridesharing and vanpooling. Also, traffic conditions on the beaches are ripe for hotel/resort employees to form vanpools. When conducting employer outreach for TDM activities, LeeTran should also determine ways in which the business interests of the employer can be promoted, such as exterior and interior bus advertisements, advertisements on printed materials, shelter advertising, and joint promotions. *(Years One through Six, implementing Goal 2, Initiative E)*

Action Taken:

Lee Tran successfully implemented a new vanpool in September of 2001 with the Hyatt, and conducted print and radio advertising campaigns for the vanpool program. We are in the process of creating a new brand name and logo for the program and will intensify marketing efforts when these are completed.

F. Intensify marketing efforts to one-vehicle households.

Strategic Initiative

Apply for a three-year Service Development Grant with FDOT for a "Marketing and Communications Program" for LeeTran. In the transit industry, marketing has two fundamental roles: the first is to position the transit system and its products in the marketplace and the second is to sell those products and services. A solid marketing program that targets multiple audiences with different messages utilizing a variety of media is necessary to build a

positive transit image, establish community support, increase ridership, and increase customer satisfaction. It is recommended that LeeTran increase investments in the marketing of services and develop a communications program designed to improve image and build public support for continued expansion of mobility services. As the programs recommended in the TDP are implemented, progress should be communicated to the public to demonstrate action and build support. Similarly, a higher level of marketing of community transportation options should occur that targets the community-at-large, potential business partners, customers, potential customers, and public officials. At a minimum, the marketing and communications program should address the following elements:

- Potential business to business relationships
- Target markets (seniors, one-vehicle households, tourist market)
- Promotions (e.g., tourists, frequent rider program, targeted mail-out information)
- Event sponsorship
- School education program
- Transit logos and packaging
- Corporate Communications
- Community Relations
- Transit Alliances
- Marketing
- Media/Advertising

(Years Two through Five, implementing Goal 2, Initiatives A, D, F, G)

Action Taken:

Lee Tran has not been able to concentrate on this strategic initiative as of yet, but anticipates more target marketing in years three and four of the TDP. This target marketing will include one-vehicle households.

G. Intensify marketing efforts to the tourist market.

Strategic Initiative

Apply for a three-year Service Development Grant with FDOT for a “Marketing and Communications Program” for LeeTran. In the transit industry, marketing has two fundamental roles: the first is to position the transit system and its products in the marketplace and the second is to sell those products and services. A solid marketing program that targets multiple audiences with different messages utilizing a variety of media is necessary to build a positive transit image, establish community support, increase ridership, and increase customer satisfaction. It is recommended that LeeTran increase investments in the marketing of services and develop a communications program designed to improve image and build public support for continued expansion of mobility services. As the programs recommended in the TDP are implemented, progress should be communicated to the public to demonstrate action and build support. Similarly, a higher level of marketing of community transportation options should occur that targets the community-at-large, potential business partners, customers, potential customers,

and public officials. At a minimum, the marketing and communications program should address the following elements:

- Potential business to business relationships
- Target markets (seniors, one-vehicle households, tourist market)
- Promotions (e.g., tourists, frequent rider program, targeted mail-out information)
- Event sponsorship
- School education program
- Transit logos and packaging
- Corporate Communications
- Community Relations
- Transit Alliances
- Marketing
- Media/Advertising

(Years Two through Five, implementing Goal 2, Initiatives A, D, F, G)

Action Taken:

Lee Tran has not incorporated marketing specifically to tourists as of yet. We have implemented an advertising/marketing campaign focused on improving our image with a unified theme. We anticipate working closely with the Visitor and Convention Bureau and the Tourist Development Council in a strategic alliance to reach the tourist market in years three and four of the TDP.

H. Conduct Focus Groups.

Strategic Initiative

Conduct Focus Groups – In conjunction with the above, Lee Tran should develop different creative schemes for the unified theme. Focus groups provide reactions to creative schemes and give valuable feedback as to whether they have meaning, convey desired messages, and provide the level of continuity that Lee Tran desires. *(Year Two, implementing Goal 2, Initiative H)*

Action Taken:

Lee Tran incorporates input from non-marketing Lee Tran staff into its creative schemes and campaigns. A public art contest was conducted for a wrap design of the route 140, corridor buses. The judging panel was comprised of individuals inside and outside of Lee Tran.

Goal #3: Exceed Customer expectations with quality customer service, information and technology improvements.

Initiatives

A. *Revise printed bus schedules and system map.*

Strategic Initiative

Revise printed bus schedules and system map – In conjunction with the above, develop route schedules and a system map that incorporate the unified theme as well as provide for a more graphically pleasing appearance. Schedules should have maps that are geographically accurate and timetables that reflect the timepoints indicated on the route map. *(Year One, implementing Goal 3, Initiative A)*

Action Taken:

Redesigned route schedules with new maps and timetables were created for use with the route changes that took place in December of 2001. A new system map has also been completed since December 2001 and is available on the Lee Tran website. The kiosks that display the system maps have been painted to match our unified color theme.

B. *Initiate a Telephone Information Unit.*

Strategic Initiative

Initiate a telephone information unit and create a complaint processing and resolution process. Whereas a Marketing and Communications program facilitates *public* trust and confidence in the transit system, telephone information and complaint resolution play a major role in creating *customer* trust and confidence in the transit system. These two improvements should be the beginning of long-term commitments from LeeTran to improve its customer-orientation efforts by taking the telephone information function out of the hands of dispatchers and creating a separate unit devoted to this purpose. *(Year Two, implementing Goal 3, Initiative B and Goal 4, Initiative A)*

Action Taken:

In year one a new customer service group was created with the opening of the Intermodal Transfer Center in downtown Fort Myers. This new service unit handles telephone inquiries and face-to-face inquiries. Planning has begun to take over the customer complaint unit for our ADA service. This is anticipated for completion in year three.

- C. *Incorporate transit design and amenities into new residential and commercial developments.*

Strategic Initiative

Establish LeeTran as a partner in the Comprehensive Planning and Land Development Code updates of Ft. Myers, Cape Coral, Ft. Myers Beach and Bonita Springs. Although Lee County incorporates transit improvements as part of its land use and rezoning process, LeeTran should also seek to have transit improvements as part of the development process in all of the major jurisdictions in which it operates. This includes incorporating transit circulation, urban design, transit stops, shelters and other amenities into the new development process. LeeTran should review existing regulations, propose modifications to those regulations, and become a partner in the review of individual rezoning petitions. These actions establish a "jurisdictional" role for LeeTran during the development proposal stage as well as establish standards for new development when building permits are issued. *(Years Two through Five, implementing Goal 3, Initiative C)*

Action Taken:

Lee Tran has made an initial request with the city of Fort Myers to be involved in the early stages of plan review and zoning petitions. Further plan review and recommend implementation will take place in year three of the TDP. Lee Tran is currently a participant in the site plan approval process for new commercial development in the county.

D. Incorporate transit design and amenities into road improvements.

Strategic Initiative

Continue to work with the MPO to incorporate transit design and amenities when road improvements are made to state, county, and local road segments. When road improvements are considered in the TIP process, transit improvements should also be considered as part of an overall solution to traffic congestion in a particular project. LeeTran should review the annual TIP to determine opportunities for physical improvements when road projects in the service area are scheduled for design and construction. *(Years One through Six, implementing Goal 3, Initiative D)*

Action Taken:

Lee Tran worked with the FDOT this year in the redesign and rebuild of U.S.41, from Alico Road to San Carlos Blvd, specifically with the placement of new passenger shelters throughout this reconstructed section. We plan to continue working in the future with planned road improvements as spelled out in the TIP.

E. Establish a Passenger Amenities Program with design elements that promote community identity, accommodate new development, and incorporate public participation in the design process.

Strategic Initiative

Establish and implement an integrated passenger amenities program. A major piece of the transit experience is safe, accessible, attractive, and comfortable waiting areas for customers. This applies to bus stops, transfer centers, and at major points of origin/destination such as shopping malls. Passenger amenities include passenger shelters, information kiosks, street furniture, trash cans, telephones, water fountains, and in some cases, restrooms. In addition, amenities such as planted trees, bike racks, and bike lockers can be placed at bus stops. An amenities program has the objective of being flexible enough to incorporate different design features based on compatibility with surrounding land uses, customer demand, artistic and creative elements, and community values. Therefore, it is recommended that LeeTran establish and implement a passenger amenities program that seeks to create an aesthetically pleasant, convenient, safe and comfortable transit experience. First to be targeted for improvements are the six transit centers in the region that experience heavy daily traffic of customers (Downtown Intermodal Center is new). *(Years One through Six, implementing Goal 3, Initiative E)*

Action Taken:

In April of 2002, Lee Tran opened the new Cape Coral Transfer Center in downtown Cape Coral. The facility includes four outdoor bus bays with a covered waiting area. The waiting area has benches as well as information kiosks, bike racks, and trashcans. In addition, the transfer center includes a new parking lot adjacent to the waiting area with 57 spaces to be used for park-and-ride passengers. The area has been professionally landscaped, including a vintage style clock, and is well lit to maintain a secure location for waiting.

Amenities at the Bell Tower hub have also been updated with new shelters, new trashcans, and freshly painted kiosks to match our unified color scheme.

A new shelter was also installed in the Suncoast mobile home area at a stop with heavy passenger use.

F. Expand retail outlets for purchasing fare media.

Strategic Initiatives

Develop one partnership annually with a private sector or public sector entity. As indicated earlier, conditions on Estero Boulevard are a regional issue and not just a county issue. Therefore, LeeTran's partnership with Ft. Myers Beach should be expanded to stage increases in trolley service levels on the beaches in order to accommodate growth in tourism and vehicular traffic. Potential partnerships also include the hospitality industry which has a vital interest in continuing to attract visitors to the area during the high season.

Correspondingly, the Recommended Mobility Network greatly enhances service provided in Ft. Myers and Cape Coral, the two major cities in the region. Lee County, through LeeTran, should stress to the City governments the benefits that residents of their communities are receiving from the enhanced service and should work with them to increase investment in transit over the five year period.

Finally, LeeTran should expand its own definition of the term "partnership" to include the private sector and other community resources. Efforts should be geared toward promoting the interests of the community and having those interests in turn promote transit. Great flexibility exists for building partnerships and seizing opportunities for the purposes of funding transit service improvements, generating new revenues from bus advertising, media trades, placing passenger amenities, expanding retail outlets for bus passes and other fare media, conducting a joint sponsorship or promotional event, and developing new markets and/or new products. *(Years One through Five, implementing Goal 1, Initiative E and Goal 3, Initiative F)*

Action Taken:

The Downtown Intermodal Center that was opened in year one has a new customer service unit located inside the building. This unit does sell passenger tickets and passes, and also has vending and restroom amenities.

- G. *Utilize technology/intelligent transportation systems (ITS) to improve LeeTran operations and customer services.*

Strategic Initiatives

Complete an ITS/APTS Master Plan and implement plan with technological improvements –
The Master Plan will assess LeeTran's current operations and services to determine those areas where improvements can be made to increase customer satisfaction and improve operational functions. LeeTran should implement improvements as federal capital funds are available. (Years Two through Six, implementing Goal 3, Initiative G).

Action Taken:

New farebox ticket and magnetic reading units were implemented on all Lee Tran buses in April of 2002. These units automate the process of passengers paying fare with passes and transfers, as well as the issuing of transfers from the bus operators.

Also, a study has been conducted in Fort Myers Beach that Lee Tran participated in. The study addressed how to curb congestion and improve traffic circulation in the town. One suggestion was to use "Nextbus" technology on the Lee Tran trolleys that service the area. Nextbus uses GPS units on each vehicle to determine the vehicle's location and expected time of arrival at stops equipped with information posts that display the real-time data to waiting passengers.

Goal #4: Improve the Organizational Culture of LeeTran.

Initiatives

- A. *Develop a customer-orientation approach to transit by becoming more customer-friendly in printed transit information materials, customer relations, customer complaints, employee courtesy, and service reliability.*

Strategic Initiatives

Initiate a telephone information unit and create a complaint processing and resolution process. Whereas a Marketing and Communications program facilitates *public* trust and confidence in the transit system, telephone information and complaint resolution play a major role in creating *customer* trust and confidence in the transit system. These two improvements should be the beginning of long-term commitments from LeeTran to improve its customer-orientation efforts by taking the telephone information function out of the hands of dispatchers and creating a separate unit devoted to this purpose. *(Year Two, implementing Goal 3, Initiative B and Goal 4, Initiative A)*

Establish LeeTran in the wayfinding system at the Ft. Myers International Airport – In an airport, wayfinding directs incoming passengers to rental cars and other ground transportation locations within the airport. Work with the airport management to establish LeeTran in the wayfinding system to direct incoming passengers to the Route 85, which connects to the beaches via Summerlin Square. *(Year One, implementing Goal 1, Initiative E and Goal 4, Initiative A)*

Action Taken:

Our newly redesigned schedules are easier to read and are more customer friendly. Ride-checks are performed quarterly to evaluate operator efficiency, customer service and attitude. Annual training for the operators incorporates customer focus training as well as customer service skill training. We have begun exploring web-based technology to better communicate with employees.

- B. *Create mechanisms for employee communications to promote buy-in to the vision and mission for public transit.*

Action Taken:

Following the Organizational Improvement Process that took place in year one, Lee Tran is in the process of identifying a Mission Statement and establishing a Strategic Business Plan in year two. This new business plan will assist in the continuity in direction of the organization. Facilitator training, supervisor training, and committee selection have been completed this year. Final preparation of the Strategic Business Plan will be completed in year three.

Planning has begun to develop an internal message board for posting communications to employees.

- C. *Acquire land for operations base expansion and rehabilitate the existing maintenance/administration center.*

Action Taken:

The fact finding process and facility assessment has been completed based on the five year TDP. Growth needed could not be accommodated with the expansion of Lee Tran's existing site by purchasing land currently under ownership with the Lee County Port Authority. The search for a new site for expansion of Lee Tran facilities continues.

Goal #5: Add value to the community beyond core mission.

Initiatives

- A. *Provide transportation services to community events.*

Strategic Initiative

Provide community service and community event service at least 12 times per year. LeeTran should target specific events that are heavily attended by the public such as arts festivals and boat

shows. Also, community service activities should be targeted towards those groups LeeTran is seeking to increase ridership, such as seniors or youth. *(Years One through Six, implementing Goal 5, Initiatives A and B)*

Action Taken:

Lee Tran has provided shuttle service for the Lee County Reading Festival, minor league hockey team games, Boston Red Sox spring training, and other community events.

B. Provide community service transportation services.

Action Taken:

Lee Tran has provided shuttle service for the Lee County Reading Festival, minor league hockey team games, Boston Red Sox spring training at the City of Palms Park, events at the TECO Arena, and other community events.

C. Coordinate with adjacent counties to provide linkages between Lee County and new start systems in Collier and Charlotte Counties.

Strategic Initiatives

Provide community service and community event service at least 12 times per year. LeeTran should target specific events that are heavily attended by the public such as arts festivals and boat shows. Also, community service activities should be targeted towards those groups LeeTran is seeking to increase ridership, such as seniors or youth. *(Years One through Six, implementing Goal 5, Initiatives A and B)*

Establish connections between LeeTran and the new start systems in Collier and Charlotte County Dial-a-Ride system. Charlotte County is in the planning stage of the development of a general public dial-a-ride (DAR) service operating in the urban service areas of the county. Collier County is also conducting a Transit Operations Plan to implement services in Naples. It is

recommended that LeeTran work with Charlotte and Collier Counties to establish an arrangement to establish connecting points between LeeTran fixed-route bus service or paratransit service at the north and south ends of Lee County. Connections could be made on a pre-arranged schedule to provide short wait times on the part of passengers and allow for greater efficiencies. The costs associated with this program should be shared between both counties. *(Initiative to be implemented as other systems commence, implementing Goal 5, Initiative B)*

Action Taken:

In year one, a transfer was established with the new transit system to our south in Collier County. The transfer was at Bonita Beach Road and US 41, and began in February of 2001. This connection service proved not to be very productive and was discontinued by Collier County in early 2002.

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Section I	Update of Goals
Section II	Financial Plans
Section III	Performance Measures

**Lee County Transit
Five Year Plan FY02 - 07
TDP Service Enhancements**

	FY 02 Budget	FY 03 Proposed	FY04 Estimated	FY05 Estimated	FY06 Estimated	FY07 Estimated
Operating Expenses						
Personnel	6,353,439	7,449,465	8,193,936	8,997,015	10,166,233	11,432,143
Workers Comp	69,429	271,735	312,495	359,370	413,275	475,266
Total Personnel	6,422,868	7,721,200	8,506,431	9,356,385	10,579,508	11,907,409
Total IGS & Indirect Costs	527,987	616,389	687,411	766,943	856,046	955,922
ADA	794,907	975,252	1,121,540	1,289,771	1,483,236	1,705,722
Operating	2,053,251	2,626,702	2,999,126	3,420,377	4,483,452	5,713,561
Total Program Budget	9,799,013	11,939,543	13,314,508	14,833,475	17,402,243	20,282,614
Annual Service Hours		221,560	231,997	242,296	267,338	267,338
Operating Revenue						
Mass Transit-Federal Grant	\$ (2,196,197)	\$ (2,039,914)	\$ (2,042,543)	\$ (2,096,618)	\$ (2,152,315)	\$ (2,209,683)
Mass Transit-State Grants	\$ (2,800,853)	\$ (2,672,637)	\$ (2,694,915)	\$ (2,694,915)	\$ (2,736,624)	\$ (2,736,624)
Contribution-Cities, FGCU	\$ -	\$ (335,000)	\$ (341,900)	\$ (349,007)	\$ (356,327)	\$ (363,867)
Fares, Advertising, Interest, misc	\$ (1,653,295)	\$ (1,682,039)	\$ (1,637,433)	\$ (1,666,120)	\$ (1,695,453)	\$ (1,725,451)
General Fund	\$ (2,597,902)	\$ (4,658,953)	\$ (6,046,717)	\$ (7,475,815)	\$ (9,910,524)	\$ (12,695,989)
Gas Tax	\$ (551,000)	\$ (551,000)	\$ (551,000)	\$ (551,000)	\$ (551,000)	\$ (551,000)
Total	\$ (3,148,902)	\$ (5,209,953)	\$ (6,597,717)	\$ (8,026,815)	\$ (10,461,524)	\$ (13,246,989)
Total Revenue	\$ (9,799,247)	\$ (11,939,543)	\$ (13,314,508)	\$ (14,833,475)	\$ (17,402,243)	\$ (20,282,614)
Changes to General Fund	-	(2,061,051)	(1,387,764)	(1,429,098)	(2,434,709)	(2,785,465)

5 Year TDP Capital Revenue
 TDP Service Enhancements
 Capital Program

	FY02 Budget	FY 03 Proposed	FY 04 Proposed	FY 05 Proposed	FY 06 Proposed	FY 07 Proposed
Capital Revenue						
Federal Grants						
Total Object Account 331420						
State Grants						
Capital Expense						
Operating Expenses						
Vehicle & Rolling Stock						
Total Object Account 506430						
Professional Services						
Total Object Account 506510						
Permits, Licsn& Other Fee						
Total Object Account 506511						
Building Construction						
Total Object Account 506530						
Improvement Construction						
Total Object Account 506540						
Principal						
Total Object Account 507110						
Total Capital						

WILL PROVIDE INFO
 PRIOR TO BOCC MEETING

**Lee County Transit
Five Year Plan FY02 - 07
No Service Enhancements**

	FY 02 Budget	FY 03 Proposed	FY04 Estimated	FY05 Estimated	FY06 Estimated	FY07 Estimated
Operating Expenses						
Personnel	6,353,439	7,158,643	7,659,748	8,195,930	8,769,645	9,383,521
Workers Comp	69,429	271,735	312,495	359,370	413,275	475,266
Total Personnel	6,422,868	7,430,378	7,972,243	8,555,300	9,182,920	9,858,787
Total IGS & Indirect Costs	527,987	616,389	687,411	766,943	856,046	955,922
ADA	794,907	975,252	1,121,540	1,289,771	1,483,236	1,705,722
Operating	2,053,251	2,020,393	2,081,005	2,143,435	2,207,738	2,273,970
Total Program Budget	9,799,013	11,042,412	11,862,199	12,755,449	13,729,941	14,794,401
Operating Revenue						
Mass Transit-Federal Grant	\$ (2,196,197)	\$ (2,039,914)	\$ (2,042,543)	\$ (2,096,618)	\$ (2,152,315)	\$ (2,209,683)
Mass Transit-State Grants	\$ (2,800,853)	\$ (2,672,637)	\$ (2,694,915)	\$ (2,694,915)	\$ (2,736,624)	\$ (2,736,624)
Contribution-Cities, FGCU	\$ -	\$ (335,000)	\$ (341,900)	\$ (349,007)	\$ (356,327)	\$ (363,867)
Fares, Advertising, Interest, misc	\$ (1,653,295)	\$ (1,609,043)	\$ (1,637,433)	\$ (1,666,120)	\$ (1,695,453)	\$ (1,725,451)
General Fund	\$ (2,597,902)	\$ (3,834,818)	\$ (4,594,408)	\$ (5,397,788)	\$ (6,238,222)	\$ (7,207,776)
Gas Tax	\$ (551,000)	\$ (551,000)	\$ (551,000)	\$ (551,000)	\$ (551,000)	\$ (551,000)
Total	\$ (3,148,902)	\$ (4,385,818)	\$ (5,145,408)	\$ (5,948,788)	\$ (6,789,222)	\$ (7,758,776)
Total Revenue	\$ (9,799,247)	\$ (11,042,412)	\$ (11,862,199)	\$ (12,755,448)	\$ (13,729,941)	\$ (14,794,401)
Changes to General Fund	-	(1,236,916)	(759,590)	(803,380)	(840,434)	(969,554)

Lee County Transit
Capital Plan FY02-FY07
No Service Enhancements

<u>Federal Projections</u>		<u>FY02</u>	<u>FY03</u>	<u>FY04</u>	<u>FY05</u>	<u>FY06</u>	<u>FY07</u>
TEA-21 Gauranteed Authorization	\$	2,456,350	\$ 2,628,215	\$ 2,628,215	\$ 2,628,215	\$ 2,628,215	\$ 2,628,215
Add. General Fund Authorization	\$	114,405	\$ 114,405	\$ 114,405	\$ 114,405	\$ 114,405	\$ 114,405
STP Flexible Funding	\$	-	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL AUTHORIZED	\$	2,570,755	\$ 2,742,620	\$ 2,742,620	\$ 2,742,620	\$ 2,742,620	\$ 2,742,620
ACTUAL APPORTIONMENT	\$	2,883,143	\$ 3,022,620	\$ 3,022,620	\$ 3,022,620	\$ 3,022,620	\$ 3,022,620
VARIANCE	\$	312,388	\$ 280,000	\$ 280,000	\$ 280,000	\$ 280,000	\$ 280,000

Vehicle Replacement

		Current					
Buses		7	0	0	7	12	9
Trolleys		0	3	3	0	0	0
Vans		0	8	7	7	7	7
Support		0	0	2	2	2	2
Total		97					
Vehicle Replacement Cost	\$	1,764,966	\$ 900,000	\$ 891,000	\$ 1,996,000	\$ 3,171,000	\$ 2,466,000
Repay SIB Loan	\$	689,389					
Equipment	\$	200,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000
Facility/Land	\$	125,000	\$ 30,000	\$ 1,750,000	\$ 500,000	\$ 30,000	\$ 30,000
Total Capital	\$	2,779,355	\$ 1,130,000	\$ 2,841,000	\$ 2,696,000	\$ 3,401,000	\$ 2,696,000
 <u>Revenue</u>							
Federal		1,518,665	1,130,000	2,841,000	2,696,000	3,401,000	2,461,000
State		650,000	-	-	-	-	-
Lee County		650,000	222,603	222,603	222,603	222,603	222,603
		<u>2,818,665</u>	<u>1,352,603</u>	<u>3,063,603</u>	<u>2,918,603</u>	<u>3,623,603</u>	<u>2,683,603</u>
Capital Grant Surplus/(Deficit)		4,025,918	4,245,533	2,582,283	1,064,033	(1,159,217)	(2,677,467)
Less Applied to Operating		<u>1,895,608</u>	<u>2,067,473</u>	<u>2,067,473</u>	<u>2,067,473</u>	<u>2,067,473</u>	<u>2,209,683</u>
Grant Balance		2,130,310	2,178,060	514,810	(1,003,440)	(3,226,690)	(4,887,150)

SECTION III

PERFORMANCE MEASURES

LEE COUNTY TRANSIT
 PERFORMANCE MEASURES
 FIXED ROUTE

PERFORMANCE INDICATOR	FY1999/00	FY2000/01
COUNTY POPULATION	426,463	440,888
PASSENGER TRIPS	2,356,501	2,426,824
PASSENGER MILES	13,279,315	13,733,001
VEHICLES AVAILABLE FOR MAX. SERVICE	77	85
VEHICLES OPERATED IN MAX. SERVICE	59	65
SPARE RATIO	30.51%	30.77%
VEHICLE MILES	3,769,061	3,772,068
REVENUE MILES	3,529,590	3,481,855
VEHICLE HOURS	240,554	238,505
REVENUE HOURS	225,324	220,139
ROUTE MILES (FIXED ROUTE ONLY)	437	427
TOTAL OPERATING EXPENSE	8,123,469	9,138,432
TOTAL MAINTENANCE EXPENSE	1,287,061	1,374,028
TOTAL CAPITAL EXPENSE	3,132,667	3,205,648
TOTAL LOCAL REVENUE	3,465,733	4,661,988
OPERATING REVENUE	1,600,339	1,786,279
PASSENGER FARE REVENUE	1,370,373	1,443,930
TOTAL EMPLOYEES	128.9	134.2
TRANSPORTATION OPERATING EMPLOYEES	106.4	111.7
MAINTENANCE EMPLOYEES	14.3	14.4
ADMINISTRATION EMPLOYEES	7.1	8.1
GALLONS OF DIESEL CONSUMED	663,099	690,154
GALLONS OF GASOLINE CONSUMED	0	0

**LEE COUNTY TRANSIT
 PERFORMANCE MEASURES
 FIXED ROUTE**

PERFORMANCE INDICATOR	FY1999/00	FY2000/01
EFFECTIVENESS MEASURES		
VEHICLE MILES PER CAPITA	8.84	8.56
REVENUE MILES PER ROUTE MILE	8,076.86	8,154.23
Fixed Route Bus Service		
MONDAY - FRIDAY	5:30AM - 10:00PM	5:30AM - 10:00PM
SATURDAY	5:30AM - 10:00PM	5:30AM - 10:00PM
Fixed Route Trolley Service - Beaches		
MONDAY - FRIDAY	6:05AM - 9:30PM	6:05AM - 9:30PM
MONDAY - FRIDAY (DEC - APR)	6:10AM - 9:45PM	6:10AM - 9:45PM
SATURDAY	6:05AM - 9:30PM	6:05AM - 9:30PM
SATURDAY (DEC - APR)	6:10AM - 9:45PM	6:10AM - 9:45PM
SUNDAY	6:05AM - 9:30PM	6:05AM - 9:30PM
SUNDAY (DEC-APR)	6:10AM - 9:45PM	6:10AM - 9:45PM
PASSENGER TRIPS PER REVENUE MILE	0.67	0.70
PASSENGER TRIPS PER REVENUE HOUR	10.46	11.02
PASSENGER TRIPS PER CAPITA	5.53	5.50
AVERAGE SPEED	15.66	15.82
AVERAGE AGE OF FLEET	5.60	3.99
NUMBER OF SAFETY INCIDENTS	37	34
TOTAL NUMBER OF REVENUE VEHICLE SYSTEM FAILURES	982	609
REVENUE MILES BETWEEN SAFETY INCIDENTS	95,394	102,408
REVENUE MILES BETWEEN VEHICLE SYSTEM FAILURES	3,594	5,717

LEE COUNTY TRANSIT
 PERFORMANCE MEASURES
 FIXED ROUTE

PERFORMANCE INDICATOR	FY1999/00	FY2000/01
EFFICIENCY MEASURES		
AVERAGE FARE	\$0.58153	\$0.59499
VEHICLE MILES PER GALLON	5.68	5.47
FAREBOX RECOVERY	16.87%	15.80%
LOCAL REVENUE PER OPERATING EXPENSE	42.66%	51.02%
OPERATING REVENUE PER OPERATING EXPENSE	19.70%	19.55%
OPERATING EXPENSE PER CAPITA	\$19.05	\$20.73
MAINTENANCE EXPENSE PER OPERATING EXPENSE	15.84%	15.04%
OPERATING EXPENSE PER PEAK VEHICLE	\$137,685.92	\$140,591.26
OPERATING EXPENSE PER PASSENGER TRIP	\$3.45	\$3.77
OPERATING EXPENSE PER PASSENGER MILE	\$0.61	\$0.67
OPERATING EXPENSE PER REVENUE MILE	\$2.30	\$2.62
OPERATING EXPENSE PER ACTUAL VEHICLE MILE	\$2.16	\$2.42
OPERATING EXPENSE PER REVENUE HOUR	\$36.05	\$41.51
OPERATING EXPENSE PER ACTUAL HOUR	\$33.77	\$38.32
MAINTENANCE EXPENSE PER REVENUE MILE	\$0.36	\$0.39
VEHICLE MILES PER PEAK VEHICLE	63,882.39	58,031.82
VEHICLE HOUR PER PEAK VEHICLE	4,077.19	3,669.31
REVENUE MILES PER VEHICLE MILES	0.93646	0.92306
REVENUE MILES PER TOTAL VEHICLES	45,838.83	40,963.00
REVENUE HOURS PER TOTAL VEHICLES	2,926.29	2,589.87
REVENUE HOURS PER EMPLOYEE	1,748.30	1,640.96
REVENUE HOURS PER OPERATING EMPLOYEE	2,118.48	1,970.06
REVENUE HOURS PER MAINTENANCE EMPLOYEE	15,727.84	15,338.64
REVENUE HOURS PER ADMINISTRATIVE EMPLOYEE	31,737.92	27,318.72
VEHICLE MILES PER MAINTENANCE EMPLOYEE	263,084.23	262,826.66
PASSENGER TRIPS PER EMPLOYEE	18,284.21	18,090.05
TOTAL VEHICLES PER MAINTENANCE EMPLOYEE	5.37	5.92