

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

Blue Sheet No. 20041622

1. REQUESTED MOTION:

ACTION REQUESTED: Adopt the 2004 annual update to the Lee County Transit Development Plan, originally adopted by the BoCC on December 16, 2003.

WHY ACTION IS NECESSARY: A Transit Development Plan is required by the State of Florida Department of Transportation (FDOT) for continued funding assistance for the operation of mass transit in Lee County. This plan is required to be updated on an annual basis.

WHAT ACTION ACCOMPLISHES: Satisfies the FDOT planning requirement, and provides a moderate growth plan for LeeTran which is consistent with the Lee County Metropolitan Planning Organization (MPO) 2020 Transportation Plan.

**2. DEPARTMENTAL CATEGORY: 06
COMMISSION DISTRICT # ALL**

CLF

3. MEETING DATE:

12-14-2004

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

7. BACKGROUND:

Transit properties that receive funding assistance from the FDOT are required to develop and maintain a long-range operational and financial plan with a five-year outlook called a Transit Development Plan (TDP). A major update of the TDP is required every three years, with a minor update on progress towards the goals and initiatives required annually. The Plan must be adopted by the County and submitted to FDOT in order to remain eligible for continued state funding assistance. This is a minor update with the next update due in June 2005.

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>Steve Myers 11/29/04</i>				<i>S. Powell 11/30/04</i>	<i>OA 12/1/04</i>	<i>yes / a all 12/1/04</i>	<i>Risk 12/1/04</i>	<i>GC 12/1/04</i>

10. COMMISSION ACTION:

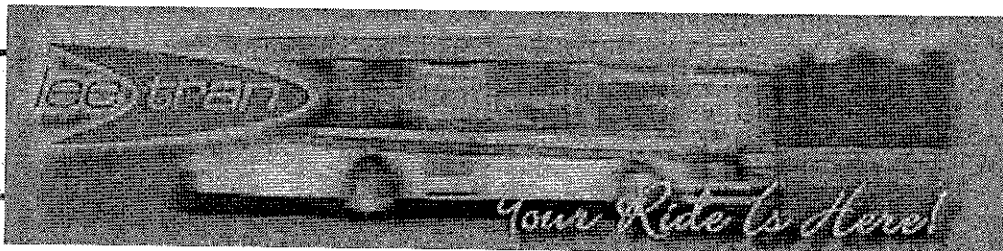
- APPROVED
- DENIED
- DEFERRED
- OTHER

Rec. by CoAtty
Date: <i>11/30/04</i>
Time: <i>1:00</i>
Forwarded To: <i>Co. Admin 11/30/04</i>

RECEIVED BY COUNTY ADMIN: <i>PM</i>
<i>11/30/04</i>
<i>4:11 pm SLT</i>
COUNTY ADMIN FORWARDED TO: <i>✓</i>
<i>12/1/04</i>
<i>4:30 pm</i>

2004 Minor Update

**Lee County
Five-Year
Transit Development Plan
2005-2009**



Submitted by:

**Steven L. Myers - Director
Lee County Transit**

November 2004

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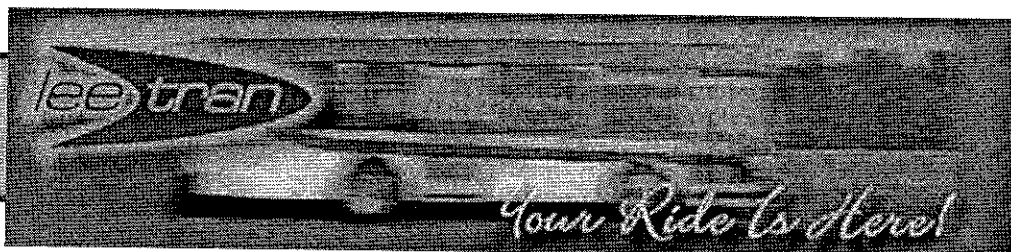
Section II Financial Plans

Section III Performance Measures



Section I

Update of Goals



GOALS AND INITIATIVES

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

Initiatives

A. *Develop a Vision Statement for Transit*

Lee County government has for many years been both a source and a catalyst for community excellence. The County pursues initiatives in municipal services, transportation, the arts, history, the environment, and tourism that in their own rights create a special environment in which to live, work and visit. These initiatives are periodically reported to the public in publications that demonstrate a total commitment to sharing the relationship that the County has with its citizens. LeeTran is very much a part of the County's vision and has, in its own right, created an outstanding transit system relative to other communities of similar size.

In the community leader interviews, each county commissioner was asked a question of significant importance to this TDP Update: Do you believe that transit can appeal to a broader segment of the community than the segment to which it currently appeals? Answers to this question form the fundamental belief system that guide decisions related to investments in transit. Therefore, the time has arrived for LeeTran to develop a distinct vision statement that can be incorporated into the overall vision of the County but also creates a unifying force to inspire LeeTran employees, interest groups, the business community, social services and the county commissioners.

How does transit inspire the community? Does LeeTran aspire to be one of the best in the country, recognized by its peers and the industry? Is transit vibrant, fun and exciting? Does LeeTran dazzle citizens with its buses, shelters and transit centers? Do LeeTran's customers have positive memorable travel experiences? These are the questions that a vision statement will address, a marketing and communications program can instigate, and the agency can utilize to ultimately become the choice for more citizens and visitors.

Action Taken

In year one Lee Tran conducted a telephone survey of non-transit users in Lee County. Results strongly indicated that improvements to the public transportation system have become more important in the last five years and that Lee County needs more and better public transportation services. Also, respondents indicated a desire for increased funding for public transportation, resulting in a strengthened economy, a reduction in automobile emissions and lessened congestion on county roads.

Strategic Initiative

Develop a Vision Statement for transit. Develop at least five potential vision statements to share with Lee Tran staff and county commissioners. Once the vision statement is finalized, give every employee a special card with the vision statement and post it in buses, the Lee Tran facility and at transit centers.

Action Taken

An employee team has been formed that will be working on creation of the vision statement during FY 2005.

- B. *Continue implementing service improvements to the LeeTran regional network based on annual revenue hour recommendations from the previous TDP update.*

The 2000 TDP update called for a program of service modifications to existing services and a staged expansion of those services for the five-year period. Once new and modified services were implemented, the plan called for revenue hour expansions to modified routes to increase frequencies of service to the seven LeeTran transit centers over the five-year period. Since adoption of the previous TDP update, many of the recommendations for modifications to existing services were made. However, the County has had to continually increase funding levels to LeeTran to cover the cost of maintaining annual revenue hours at the 2000 level. In fact, annual revenue hours of service peaked at 182,060 in 2000 and declined slightly to 175,830 in 2001 (a 3.4 percent decrease in annual revenue hours). In the previous TDP update, annual revenue hours were scheduled to be at 267,330 by FY 2006, which is a 47 percent increase over 2000 annual revenue hours. These improvements would bring many routes up to 20-, 30-, 45- and 60-minute frequencies.

The impact of maintaining existing service levels is seen in the on-board survey results. More than 50 percent of customers transfer at one of LeeTran's seven transit centers. Based on service modifications, customers have more travel options at those transit centers and show high levels of satisfaction with the ease of transferring (average rating of 4.05 out of 5.0 in the on-board survey). However, customers continue to display less satisfaction with frequency of service (3.60 rating) and the number of transfers between buses (3.68 rating). Programmed increases in service levels over the five-year period were designed to address those customer needs and ultimately broaden the appeal of transit to larger segments of the Lee County community.

This initiative calls for continuing to improve services to LeeTran's realigned route network by expanding revenue hour growth for the core regional network over a 10-year period with gradual increases in annual revenue hours, service levels and peak bus requirements.

Action Taken

In year one Lee Tran implemented one of the three recommended service enhancements of the plan, route 150 in Bonita Springs, by shifting the hours utilized for Dial A Ride service to fixed route service hours and by receiving assistance from the city, which contributed 50% of the operating costs. We included the additional recommended service enhancements with the increase in annual revenue hours in our 2005 budget request from the county but due to budget constraints we were not granted the operating dollars needed to implement the additional enhancements. Lee Tran was again forced to cut annual revenue hours for this budget cycle. We will submit another request for increased annual service revenue hours in year two.

- C. *Create a system of timed transfers for specific hours of the day at transfer centers.*

Although the seven transfer centers create more travel options for LeeTran customers, lower frequency of service on many routes can create long, inconvenient wait times when transferring. LeeTran currently prepares matrices called "Meet Sheets" for each of the seven transfer centers to determine bus routes that cycle through each transit center. No timed-transfer system is ever perfect; however, based on information from the on-board survey, there are specific times of the day when activity is more intensive based on work start and end times. Therefore, it is possible to create specific hours (such as 6:30 a.m., 7:30 a.m., 4:30 p.m. and 5:30 p.m.) where most routes serving a transfer center converge for the purpose of creating timed transfers.

Strategic Initiative

Refine “Meet Sheets” to create as many timed transfers as possible at 6:30 and 7:30 a.m. and 4:30 and 5:30 p.m. As service improvements are made to individual routes over the 10-year timeframe, it will be easier to create timed transfers when a route serves more than one transit center. Therefore, Lee Tran should strive to meet customer demand for more timely transfers in the a.m. and p.m. peak periods of the day.

Action Taken

In year one Lee Tran set up a system to collect timing and travel time data during on-board surveys of the entire fixed route system. This data will be collected through out year two and will be used to adjust the schedules of the system and in turn, create a better system of timed transfers.

- D. *Develop community level services to supplement access to the regional fixed-route network.*

Recently, using the MPO as the primary instrument of communication, the County and the municipalities have engaged in discussions regarding the formalization of an independent transit authority (see Goal 4, Initiative A below).

The Community Leader interviews revealed a great deal of confusion about the implications and impacts of a transit authority. County commissioners are proud of their accomplishments with transit but frustrated with rising costs and therefore expressed a willingness to listen to new ideas. Many elected representatives from the municipalities expressed deference to the county commissioners regarding transit service decisions because they view Lee County and LeeTran as being in charge of transit. Some representatives in Fort Myers said that an authority might be harmful because its residents receive more service relative to Fort Myers' overall percentage of the population whereas representatives of Cape Coral expressed the opposite view that the city would be hurt because it has a proportionally higher percentage of the County's population and less service than other areas of the county. Finally, the municipalities expressed that their citizens are contributing to the transit system through local option gas and ad valorem taxes. All of these statements are fair in reflecting the current understanding of transit policy; however, they all indicate that an interim step is needed between LeeTran as a county department and LeeTran as an independent transit authority.

This initiative entails LeeTran working with municipalities to develop new services and/or refine and expand existing transit services to meet the specific needs of local jurisdictions. The County could provide portions of the funding based on Federal and State allocations for transit with the municipalities funding the difference. Fort Myers has expressed interest in a downtown circulator system as part of its overall redevelopment initiatives; Cape Coral has expressed interest in neighborhood feeder systems that could connect residents with activity centers in Cape Coral and the regional route network. Bonita Springs has no problems with its participation in funding local transit services but wishes for those services to be more utilized.

Action Taken

In year one Lee Tran worked with the city of Bonita Springs to improve transit service in their city. This partnership resulted in a change of service from a Dial-A-Ride format to fixed route bus service. The county and the city continue to each contribute 50% of the operating costs for this service. Also in year one initial discussions were made with the city of Cape Coral, the town of Fort Myers Beach and the city of Fort Myers' Department of Downtown Redevelopment for enhanced services and these efforts will continue into year two. The Lee County MPO transit funding study will also move forward in year two.

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

This initiative was in the 2000 TDP update and has significant potential for increasing ridership for LeeTran. The City of Ft. Myers Beach commissioned a congestion mitigation study that is examining alternative modes of transportation, including ferries, trolleys and aerial alternatives. One proposal is to create a park-and-ride near the Summerlin Square shopping center and provide 10-minute trolley service over the bridge to the beach. Although this is a worthwhile alternative to pursue for day-trippers, the clear and convincing fact is that the current peak season service levels dedicated to Estero Boulevard need to be expanded beyond the four trolleys that are currently in operation. Also, printed materials should be revamped to depict a colorful and fun trolley system. These printed materials should be placed in every hotel room and in visitor inquiry packets issued by the Tourist Development Council (TDC).

Action Taken

In year one a portion of the congestion mitigation study results were implemented. Where as recent as two years ago only one vehicle on the

Summerlin Square Park-and-Ride provided 40-minute service, in year one of the TDP the service increased to every 15 minutes with three vehicles on the route. Lee Tran submitted a proposal to the town to expand the four-trolley service on Estero Boulevard during year one with possible implementation during year two. Also during year one and as a part of the congestion mitigation study results, the county entered into a contract with NextBus Information Systems Inc. to provide real-time trolley arrival prediction at a number of stops along the Park-and-Ride route. Finally printed brochures were completely revamped with colorful photographs of beach scenery and placed in every hotel in the beach area as well as at various businesses located along Estero Boulevard and the Fort Myers Beach Chamber of Commerce.

Additional Goal #1 Strategic Initiatives:

Explore partnering opportunities with the Lee County School Board. As part of the Smart Growth initiative, there may be opportunities for Lee Tran to develop joint facilities with the School Board to maintain transit and school buses. There also may be opportunities for Lee Tran to generate more student ridership and reduce the demand for school bus service. The two agencies could also advocate for shared priorities such as pedestrian facilities, bus stops and shelters. Finally, the two agencies could work together to further some of Lee County's other services such as emergency evacuation, parks and recreation and human services.

Action Taken

During year one Lee County Transit held two meetings with the Lee County School Board to discuss opportunities for Lee Tran to generate more student ridership, thus reducing the demand for school bus service. The School Board staff has at this point decided not to take advantage of such an opportunity however we will continue the discussion in year two. Also in year one Lee Tran partnered with the Lee County Human Services division to place shelters at approximately 15 bus stops that will serve both school children and transit passengers waiting for their bus. Finally Lee Tran also finalized its new Emergency Evacuation Routes in association with the county's Emergency Operations Center. Exploration of additional evacuation resources provided by the school board will occur in year two.

Goal # 2: Increase market share for transit

In order for transit to grow in Lee County, LeeTran needs to increase ridership on existing transit services in the region to justify further expansion. There are business strategies that LeeTran can undertake to cultivate ridership bases. However, these business strategies require investments in the area of Marketing. In the peer analysis, Charleston, South Carolina (CARTA) had a very similar profile to LeeTran except that the transit agency's annual ridership is double that of LeeTran. When speaking to a representative of CARTA, the single greatest contributing factor to its success was an annual investment of \$250,000 in marketing that is used for creative work conducted by an advertising agency. While there may be funding sources available to supplement the initiatives outlined below, there must also be local funding committed to the effort in order to expand market share in the future and gain public support for and community acceptance of expanded transit services.

Initiatives

A. Intensify marketing efforts to youth

The youth market is one example of how targeted, focused marketing campaigns can expand ridership bases. In the 2000 on-board survey, youth accounted for 14 percent of overall ridership; in 2003 that figure dropped to 8.3 percent. In 2000, LeeTran had entered a joint promotion with the Library District to allow all youth who received a library card to ride the transit system for free. The library had the benefit of increasing patronage while Lee Tran increased ridership until the program was discontinued in 2001. LeeTran should strongly consider resurrecting this program, or one similar to it, to cultivate this market.

Action Taken

Lee Tran has established contacts at the Lee County School District, and identified possible avenues for education opportunities within the schools. We have also implemented ID cards and special discount fares for students/youth. The first stage of a marketing campaign geared toward youth/school age kids has been implemented. Additional elements of the campaign will be added throughout year two. Assessment of the campaign will also be ongoing in year two.

B. Intensify marketing efforts to seniors

The data from the Base Data Compilation section and the on-board survey indicate that while the percentage of seniors is greater in Lee County than the Florida average, the proportion of seniors in terms of overall ridership is not

increasing at a healthy pace. As transit customers, seniors have different needs than other market segments. Seniors have issues with safety and security as well as consistency in the services they use.

There are several tactics that LeeTran can use to develop the senior market, including speaking engagements at senior centers and other events, packaging a pass program designed specifically for seniors, providing community service to move large groups of seniors during special events, and sponsoring booths at events that are targeted to seniors. When developing the senior market, it is important to provide them with appropriate information and a positive experience on a bus in order to create a comfortable environment for them to ride.

Action Taken

The first element of a marketing campaign geared toward seniors has been implemented, and additional elements will be executed along with ongoing evaluation during year two.

C. *Intensify marketing efforts to employers and employees*

The scope of services of the commuter assistance program, funded by the FDOT with LeeTran as the responsible agency, calls for a number of activities to sell the benefits of transit and transportation demand management techniques to employers. Taking this process to the next level would entail developing a comprehensive package of products that taken together make these measures more attractive to employers and employees. Packaging services could include:

- Vanpools;
- Ridesharing (carpool matching);
- Guaranteed Ride Home;
- Employer-subsidized bus passes (tax incentives);
- Employee mobility programs (subsidize parking for alternative travel);
- Employer advertising in exchange for participation; and
- Joint promotions offering discounts at restaurants, etc. for employees participating in alternative transportation.

Strategic Initiatives

Expand Commuter Assistance Program. When conducting employer outreach for TDM activities, Lee Tran 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.

Conduct 30 Community Outreach presentations annually. Lee Tran 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.

Action Taken

The commuter assistance program, now in the second year of a three-year agreement with FDOT, is a congestion mitigation project. The program has intensified marketing efforts beginning in the last quarter of year one. These efforts include direct mail pieces to the largest 100 employers in Lee County, radio advertisements, bench advertisements and print advertisements. Also during year two approximately 20 Community Outreach presentations were made. During year two we will continue the marketing efforts and create a guaranteed ride home program, and form a ridesharing database.

D. Intensify marketing efforts to one-vehicle households

The data from the Base Data Compilation section reveals that almost half of the households in Lee County are one-car households; customers from one-car households account for just under 30 percent of LeeTran's ridership. This market segment is attractive because often households with two working adults and one vehicle must coordinate transportation with the car when one of the adults could be utilizing public transit.

Since people from one-vehicle households do not congregate like seniors and youth, developing this market could be as simple as a radio advertising campaign that conveys the benefits of transit to people who have only one vehicle available in the household and/or a direct mail campaign within those census tracts that have the highest percentage of one-vehicle households.

Action Taken

Staff is assessing the amount of the marketing budget that will be available to use for this market, and will devise a campaign in accordance with funds available to reach one-vehicle households in year two.

E. *Intensify marketing efforts to the tourist market*

The trolley services on the beaches are not complicated, are convenient to use and are fun for tourists. They also have a distinct identity in terms of the replica trolleys that are used to provide the service. However, the trolley services could use some “dressing up” in terms of information and identity. This initiative entails LeeTran developing a color brochure for the trolley that is distributed in hotel rooms and as part of visitor inquiry packets sent out by the TDC.

Action Taken

In year one, marketing efforts were increased to reach the tourist market. The brand name “The TrolLee” was initiated, and all of the stop signs along this route were changed to read “TrolLee Stop” instead of “Bus Stop”. Four-color time schedules were printed for the first time and were distributed to hotels/motels in and around the Beach Trolley service area. In year two staff will attempt to get an agreement with the Visitor and Convention Bureau to get the Trollee map/time schedule included with visitor inquiry packets sent out by the VCB.

Additional Goal #1 Strategic Initiatives:

Apply for a three-year Service Development Grant with FDOT for a “Marketing and Communications Program” for Lee Tran. Lee Tran must increase investments in the marketing of services to increase ridership, improve image and build public support for a transit authority. As the programs recommended in the TDP are implemented, progress should be communicated to the public to demonstrate action and build support. The marketing program should address the following elements that specifically address growth in Lee Tran ridership:

- Target markets (seniors, youth, one-vehicle households, tourist market)
- Promotions (e.g., tourists, frequent rider program, targeted mail-out information)
- Event sponsorship
- School education program
- Media/Advertising

Action Taken

In year one a Commuter Assistance Program grant was submitted to the Florida Department of Transportation for \$150,000 to fund software to support marketing efforts in the area of the Commuter Assistance Program.

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

Initiatives

A. *Collect performance data from the Telephone Information Unit*

A telephone information unit was established with the opening of the Downtown Intermodal Center. This initiative entails collecting data from the center and analyzing call volumes, caller purposes, complaints and commendations, and requests for travel information beyond services provided by transit.

Strategic Initiative

Collect data from the telephone information unit on service requests and complaints. Telephone information, as a formal customer service, has been in place at Lee Tran for nearly two years. Lee Tran should collect data on call volumes, call types, customer types (existing, potential and general public), travel information requests beyond fixed-route bus service, and familiarity with Lee Tran's www.rideleetrans.com web site.

Action Taken

In year one Lee Tran implemented phase one of this initiative by establishing a monthly reporting process for service requests from the Telephone Information Unit. Requests for service are reported to the Transit Planner each month and are kept in a database by location. In year two we will begin geocoding these requests to be used in a Geographic Information System (GIS) and we will be researching software brands for reporting on complaints and commendations.

Additionally, Lee Tran has started posting documents on the web such as our Transit Development Plan, our DBE program and the SW Florida Regional Planning Council's Transportation Vision Survey to better inform the public and solicit more public input. Staff is also researching and evaluating trip matching software that will provide the public the ability to register online in a county, and possibly regional, database of people interested in ridesharing via carpool or vanpool.

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

The comprehensive plan incorporates two policies that require public transit service to be considered in land use map amendments and future urban areas as

designated in the land use element of the comprehensive plan (policies 28.1.6 and 28.1.7). It is critical to the TDP to be in compliance with adopted local plans but also to shape the future of those plans by developing language that will re-orient both comprehensive plans and development regulations to achieve this initiative, as is currently the case in Lee County (Land Development Code, Section 34-411) but also in the municipalities. This will require that development regulations provide thresholds for transit improvements as part of the rezoning and the development review processes throughout Lee County.

Lee Tran should become more active in the development processes of local governments in the region, especially in monthly rezoning requests where transit improvements can be incorporated as a condition for rezoning approval. Working with local government planners, Lee Tran should develop standard language that planners can use to instruct developers to consult with the local transit agency regarding transit-oriented design (including amenities), pedestrian and bicycle access improvements to proposed commercial, residential and major office developments.

Strategic Initiative

Establish Lee Tran 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, Lee Tran 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. Lee Tran 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 Lee Tran during the development proposal stage as well as establish standards for new development when building permits are issued.

Action Taken

In year one Lee Tran provided minimal review for local planners in the city of Bonita Springs. Year two will focus on a strategy to open these discussions with the planners of local municipalities.

C. *Incorporate transit design and amenities into road improvements.*

The comprehensive plan incorporates two policies that require LeeTran to maintain efforts to provide for the construction of bus shelters and bus turn-off lanes on adjacent arterials and collector roadways (policy 28.1.2) and to coordinate mass transit activities with the MPO (policy 28.4.1). Whenever road improvements are funded at the MPO level, LeeTran should begin working with the implementing jurisdiction to determine whether transit improvements are to be incorporated as part of the road construction process. FDOT has developed guidelines for engineers to use in making transit and pedestrian improvements in the design of road improvements, and Lee Tran should work with FDOT District 1 office to ensure that transit improvements are made in future construction projects.

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. Lee Tran should review the annual TIP to determine opportunities for physical improvements when road projects in the service area are scheduled for design and construction.

Action Taken

Lee Tran continues to work actively with the Lee County MPO and is an active member of the Technical Advisory Group, the Bicycle Pedestrian Coordinating Committee and the Intelligent Transportation Systems Stakeholders Committee. In year one we reviewed several state, county and local road projects, providing comments and input to transit movement and pedestrian access to transit stops. Additionally, we were involved with the Lee County Comprehensive Plan update and the update to the transit element of the Lee County MPO Long Range Transportation Plan.

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

Passenger amenities include passenger shelters, information kiosks at bus stops, street furniture, trash cans, etc. The 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. Also, the program should address the replacement of existing passenger shelters to become more aesthetically pleasing and incorporate bus stop kiosks with schedule information.

The first target for a passenger amenities program is to make improvements to the seven transfer centers in the service area. With the opening of the downtown intermodal operations facility and the Cape Transfer Center, LeeTran is raising the bar in terms of customer expectations for the aesthetics and comfort of transit facilities.

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, trashcans, 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 Lee Tran 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 seven transit centers in the region that experience heavy daily traffic of customers.

Action Taken

Staff is assessing the passenger amenities program as we begin the process of bringing the shelter advertising program in-house during FY 2005. For the last ten years, the program has been contracted with Lamar Advertising. During this transition in FY 2005, we will be evaluating our existing needs and putting together an overall plan for the program. Although the first target identified in the TDP is the seven transfer facilities, capital costs to make these improvements exceed the funds available. Therefore, we will be making these improvements as funds are available.

E. *Expand retail outlets for purchasing fare media*

LeeTran currently has four retail outlets, the LeeTran office, Cape Coral City Hall, Edison Community College, and the LeeTran administrative offices. Most transit agencies that have been successful at expanding the number of retail outlets for transit fare media have formed a partnership with a chain retailer such as a drug store or grocery store that has multiple locations throughout the agencies service area. Lee Tran should continue to work toward establishing such a partnership by offering advertising on buses and printed materials in exchange for selling transit passes.

Strategic Initiative

Expand retail outlets for purchasing fare media. Lee Tran has made attempts to work with local retailers to sell Lee Tran bus passes with limited success, even with offering to initiate full-wrap advertising for the retailer in exchange for selling passes. This is the primary hook that has been successful in expanding retail efforts in other transit communities. If continuing outreach efforts do not yield a successful relationship, Lee Tran should continue to expand outlets at publicly available sources such as libraries, county and city offices and social service agencies.

Action Taken

Staff approached the Publix supermarket chain, one of the area's largest employers, with a proposal, but was unable to secure a commitment. We are now evaluating the pros and cons of a few different companies with which Lee Tran could form a partnership. After this assessment, Lee Tran will narrow the search to two companies to which proposals will be presented.

Goal #4: *Secure long-term growth of the transit system to implement the moderate growth scenario adopted in the 2020 Long Range Transportation Plan.*

Initiatives

A. *Examine alternative governing structures for Lee Tran.*

As discussions continue at the MPO level between all of the jurisdictions in Lee County, there is agreement that ownership of the regional transit system among all communities served is a necessary step for transit to achieve greater levels of meaning for residents of and visitors to Lee County. This TDP update must be synchronous with previous studies and discussions at the MPO level and therefore establishes the following objectives:

- Create a stable, long term, dedicated funding source for transit;
- Foster ownership of the transit system by the County and all of the cities and towns in Lee County;
- Share the costs of new service between governmental entities; and
- Take a new, more business-like approach to transit service decisions and investments based on the needs of the entire community.

There are a number of options currently being reviewed to address the above objectives. One option is to create an independent transit authority with a Board of Directors comprised of the jurisdictions within the County. Another option is to create a Municipal Services Taxing Unit (MSTU) that would be assessed to property owners in urbanized areas to support transit services within those communities. A third option is for the Lee County Board of County Commissioners to design a transit governing structure that is somewhat autonomous from the County Commission but Lee County would continue to own the assets and be the primary operator of transit services.

While there is agreement that alternatives should be examined, there is also lack of understanding regarding the impacts of the options, especially when discussion turns to a fully independent transit authority. To this degree, representatives of the jurisdictions, including the County Commissioners, have indicated a need for much more information before consideration of the option is viable.

This initiative entails the following:

- A complete list of the conditions that each individual jurisdiction would place on supporting a regional transit initiative;
- An inventory of funding mechanisms, including a dedicated revenue source, taxing authority and any necessary referenda that would be required to create a dedicated funding source;

- A series of commitments that would be strongly communicated to the public regarding service improvements that would be implemented with dedicated funding;
- Creation of a steering group made up of influential members of the community to advocate for a regional transit initiative; and
- Creation of an advisory board that would mirror as closely as possible the likely configuration of a governing board for transit if an alternative governing structure is pursued.

Strategic Initiative

Pursue alternative governing structures for Lee Tran. This initiative continues the important discussions and work that have been conducted at the MPO level to secure the long-term viability of transit services provided to the Lee County community. The importance of the initiative is to establish ownership, partnerships and funding of transit services to stabilize transit's growth, enable the transit agency to fulfill transit's mission, and plan for and implement future service improvements for the community. Lee Tran staff should continue to work with all of the options listed in the Goal 4, Initiative A to give decision makers the best possible tools to develop a governing structure most suited to the needs of Lee County residents and visitors.

Action Taken

In year one, at the March 4, 2004 Technical Advisory Committee meeting the committee made a motion to award a consultant work order for a study to build consensus for establishing a transit authority. The scope of work reads facilitating the development of consensus among local government officials on proceeding with the establishment of a transit authority. The study will be fully underway in year two.

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

Initiatives

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

Community event transportation constitutes an opportunity to give residents experience with transit that they might not otherwise have. LeeTran should look

for opportunities to provide community event transportation based on available resources.

B. Provide community service transportation services.

Similar to community event transportation, community service is transportation that is provided to a group of people for special purposes, such as field trips for students or other activities wherein a group of people needs to be transported from one location to another. The purpose of this initiative is to seek and create opportunities for citizens of Lee County to experience transit. Lee Tran should target community service to market segments that it is attempting to develop for the fixed-route system.

Strategic Initiative

Provide community service and community event service at least 12 times per year. Lee Tran 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 Lee Tran is seeking to increase ridership, such as seniors or youth.

Action Taken

In year one Lee Tran continued to provide transportation to a number of community events, including, but not limited to, the Red Sox spring training, Library Reading Festival and two events in Fort Myers Beach, the Sand Sculpting Event and the New Year's Eve celebration. Staff continues to look for opportunities to provide such transportation, and expansion of the number of events in which we participate is ongoing.

Lee Tran receives requests for community service transportation very frequently. Staff evaluates each request on an individual basis and recognizes the importance of providing community service trips. All trip requests are carefully screened and reviewed to assure compliance with FTA regulations.

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

Both Collier and Charlotte Counties have prepared five-year transit development plans and have completed operations plan for fixed-route systems in their respective communities. LeeTran should coordinate with these new systems as they commence operations to provide linkages across county lines where

possible. Alternatives to fixed-route bus service should be explored in order to provide connections, such as paratransit feeder services to designated connecting points across county lines.

Strategic Initiative

Establish connections between Lee Tran and the Collier Area Transit (CAT) and the Charlotte County Dial-a-Ride system. Lee Tran should continue to work with Charlotte and Collier Counties to establish an arrangement for connecting points between Lee Tran 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 the counties.

Action Taken

In year one Lee Tran staff has held informal discussions with Collier County Transportation staff regarding desires to provide transportation linkages between the two counties. Both county staffs have agreed to meet quarterly in year two to discuss coordination issues, including opportunities for connecting their fixed route and paratransit services, expanding Lee Tran's commuter assistance program to serve the intercounty commuter market, and coordinating their emergency preparedness planning.

Goal #6: Construct a New Operations and Administrative Center for Lee Tran and utilize new technologies for the provision of transit services.

- A. *Acquire land and construct a new operations and administrative center for Lee Tran.*

Lee Tran has outgrown its current operating base and requires additional space for bus storage, additional maintenance bays, and additional space for an administration facility to accommodate new staff and a larger bus operator's room. Although federal and state funds will fund portions of the cost of a new operating base, the fact is that local funds will be necessary to fully fund construction. STP funds, which are also called flex funds, should be fully pursued to the maximum extent possible as well as contributions from local governments.

Action Taken

In year one Lee Tran secured a Joint Participation Agreement with the Florida Department of Transportation in the amount of \$129,459. A competitive bid for professional services has been initiated and is pending award. The bid secures the services of an engineering design firm to assist with the initial planning, design and engineering as well as site acquisition.

B. *Utilize technology/intelligent transportation systems (ITS) to improve Lee Tran operations and customer services*

Intelligent Transportation Systems (ITS) were originally designed for enhancing the functions of the nation's highways and have been adapted to public transportation. Applications include electronic fare payment (SMART cards), automatic vehicle location (AVL) systems, real time passenger information, traffic signal pre-emption, computerized information kiosks, on-board camera surveillance, and bus rapid transit. In the course of the five-year period, Lee Tran will develop a plan for improvements and make capital acquisitions based on those systems that best improve operations and fulfill the goals and initiatives of this TDP.

Strategic Initiative

Purchase bus arrival display technology for the seven Lee Tran transit centers. This technology uses satellites and advanced computer modeling to track vehicles along their routes and uses a transmitter to send arrival information to a customer waiting point. A pilot project should be pursued at the Downtown Intermodal Center and then expanded to include the other six transit centers, as well as satellite transit centers, throughout the system.

Action Taken

Although this is an initiative for years two and three there has been significant activity to report in the first year. Lee County has partnered with the town of Fort Myers Beach to sign a contract with NextBus Information Systems, Inc. who will provide trolley arrival technology on the Summerlin Square Park and Ride route to Fort Myers Beach. The LED displays will be initially placed at four trolley stops along this route with possible future expansion to other stops or routes. Year two will involve the purchase, installation and testing of the system and finally, full implementation.

Additionally, in year one Lee Tran has submitted grant proposals to the Florida Department of Transportation to fund various other ITS initiatives including ADA scheduling software and trip planning software.

- D. *Explore the possibility of adding alternative fuel infrastructure and buses to the Lee Tran Fleet.*

In constructing the new operations facility, Lee Tran should explore alternative fuel technologies such as compressed natural gas (CNG), liquid natural gas (LNG), bio-diesel, electric and hybrid-electric vehicles. Each type of alternative fuel vehicle carries limitations, such as range, daily miles traveled, and special fueling requirements. Therefore, it is typical to devote a portion of the fleet to alternative fuels to be used for specialized purposes. Some alternative fuel vehicles require special fueling stations and other facilities.

Strategic Initiative

Continue vehicle replacement program and purchase new expansion vehicles. For Lee Tran's fixed-route service, a total of 38 transit coaches are needed for replacement and expansion over the 10-year period. The proposed ten-year budget in the following section assumes bus replacement on an ongoing basis. In addition, nine trolleys, 42 support vehicles and 84 paratransit vans, and 38 commuter assistance vans will be purchased to support the beach trolleys, road supervision, maintenance road calls, paratransit, and commuter assistance. This initiative also entails exploring alternative vehicle types and necessary fueling infrastructure to add alternative fuel vehicles to the fleet.

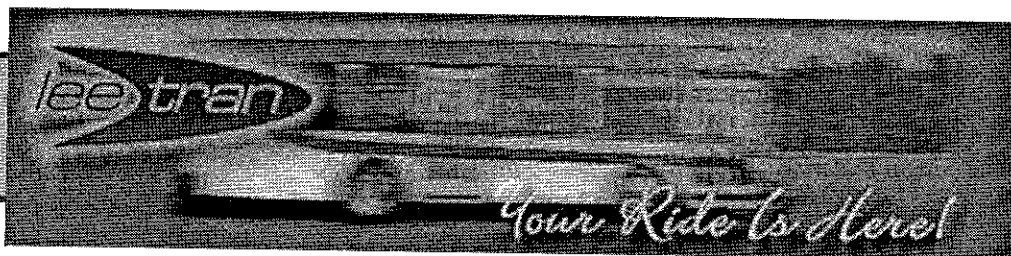
Action Taken

Lee Tran has contacted the MPO in year one regarding funding of capital bus purchases through the STP grant program. These bus purchases include the possibility of alternative fuel vehicles.

Also the MPO is undergoing long range transportation planning and a consultant will be selected to develop the transit element of the 2030 plan where some of these issues will be addressed.

Section II

Financial Plans

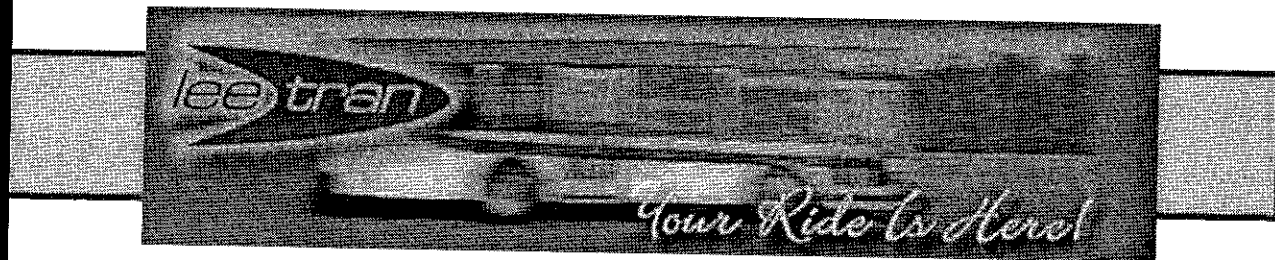


**Lee County Operating and Capital Financial Summary
FY 04 through FY 09**

Item	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009
Operating Expenses & Revenues	Actual	Budget	Estimate	Estimate	Estimate	Estimate
Expenses						
Existing Operating Costs - Fixed Route	\$10,857,297	\$12,294,942	\$14,053,305	\$16,058,246	\$18,343,318	\$20,946,418
Existing Operating Costs - ADA	1,490,340	1,717,570	2,061,084	2,473,301	2,967,961	3,561,553
Total Operating Expenses	\$12,347,637	\$14,012,512	\$16,114,389	\$18,531,547	\$21,311,279	\$24,507,971
Revenues						
FTA Section 5303	\$86,642	\$100,369	\$45,243	\$45,243	\$45,243	\$45,243
FTA Section 5307	\$297,904	\$1,829,155	\$1,629,155	\$1,629,155	\$1,629,155	\$1,629,155
FTA Section 5311	\$287,556	\$100,000	\$194,800	\$194,800	\$194,800	\$194,800
FDOT Section 5303	\$10,831	\$12,546	\$12,546	\$12,546	\$12,546	\$12,546
FDOT Block Grant	\$1,290,648	\$1,290,648	\$1,290,648	\$1,290,648	\$1,290,648	\$1,290,648
FDOT Corridor Funds	\$1,324,049	\$1,479,702	\$1,500,000	\$1,400,000	\$1,400,000	\$1,400,000
FDOT Commuter Ast.	\$46,341	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
FDOT Service Development	\$0	\$0	\$0	\$0	\$0	\$0
Lee County - General	\$5,035,028	\$5,771,708	\$5,771,708	\$5,771,708	\$5,771,708	\$5,771,708
Local Opt. Gas Tax	\$638,761	\$785,712	\$647,318	\$657,028	\$666,883	\$676,887
Other Local	\$2,393,773	\$2,538,451	\$2,665,374	\$2,798,642	\$2,938,574	\$3,085,503
Total Revenues	\$11,411,533	\$13,983,291	\$13,831,792	\$13,874,770	\$14,024,557	\$14,181,490
Current Unfunded Operating	\$936,104	\$29,221	\$2,282,597	\$4,656,777	\$7,286,722	\$10,326,481
Capital Expenses & Revenues						
Expenses						
Contracted Services	\$103,462	\$620,000	\$150,000	\$0	\$0	\$175,000
Buses and Related Equipment	\$190,152	\$640,455	\$2,700,000	\$0	\$3,000,000	\$0
Trolleys	\$54,000	\$0	\$0	\$400,000	\$200,000	\$0
Support	\$66,840	\$22,000	\$60,000	\$60,000	\$80,000	\$100,000
Paratransit Vans	\$0	\$385,000	\$385,000	\$385,000	\$385,000	\$110,000
Commuter Vans	\$20,111	\$112,500	\$100,000	\$100,000	\$50,000	\$100,000
Purchase Land and Construct New Fac.	\$0	\$2,900,000	\$4,455,500	\$0	\$0	\$0
Refurbish 4 1997 New Flyers (estimated \$100,000 per bus)	\$0	\$0	\$0	\$0	\$400,000	\$400,000
Shelters and Passenger Amenities	\$0	\$200,000	\$100,000	\$100,000	\$100,000	\$50,000
Lehigh Circulator	\$0	\$0	\$0	\$0	\$0	\$312,325
Sanibel Circulator	\$0	\$0	\$0	\$0	\$0	\$376,015
Marketing and Communications	\$0	\$0	\$100,000	\$100,000	\$100,000	\$100,000
Purchase Bus Arrival Display Product	\$0	\$57,545	\$0	\$0	\$0	\$0
Community Events/Community Service	\$0	\$0	\$24,000	\$24,000	\$24,000	\$24,000
Total Expenses	\$434,565	\$4,937,500	\$8,074,500	\$1,169,000	\$4,339,000	\$1,747,340
Revenues						
FTA Section 5307	\$355,916	\$5,587,897	\$1,662,402	\$1,662,402	\$1,662,402	\$1,662,402
Misc Revenue	\$8,286	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Interest	\$16,363	\$13,000	\$13,000	\$13,000	\$13,000	\$13,000
Additional General Fund Authorization	\$222,603	\$222,603	\$229,281	\$236,160	\$243,244	\$250,542
Total Revenues	\$603,168	\$5,828,500	\$1,909,683	\$1,916,562	\$1,923,646	\$1,930,944
Current Unfunded Capital	(\$168,603)	(\$891,000)	\$6,164,817	(\$747,562)	\$2,415,354	(\$183,604)

Section III

Performance Measures



Lee County Transit Performance Measures

The purpose of this publication is to provide general information concerning system management, performance, productivity, cost distribution and safety of the Lee County Transit system. The data reported includes 3 modes of operations: Fixed Route (buses), ADA Demand Response and Vanpools unless otherwise noted. These performance indicators are published pursuant to Florida Statute 341.014(3).

Performance Indicators		FY 2001/2002	FY 2002/2003
1	SERVICE AREA POPULATION	475,639 (Lee Co)	373,498 (Service Area)
2	PASSENGER TRIPS	2,367,952	2,474,440
3	REVENUE MILES	3,827,813	3,856,023
4	ROUTE MILES (FIXED ROUTE ONLY)	415	417.7
5	TOTAL OPERATING EXPENSE	9,372,280	10,965,095
6	OPERATING REVENUE	1,818,134	2,224,331
7	VEHICLES OPERATED IN MAX. SERVICE	66	72
8	PASSENGER FARE REVENUE	1,630,402	1,679,034
9	PASSENGER TRIPS PER CAPITA	5.12	6.63
10	AVERAGE AGE OF FLEET	3.30	4.12
11	REVENUE MILES BETWEEN SAFETY INCIDENTS	347,983	275,430
12	REVENUE MILES BETWEEN VEHICLE SYSTEM FAILURES (FIXED ROUTE ONLY)	4,837	8,932
13	OPERATING EXPENSE PER CAPITA	\$19.70	\$29.36
14	OPERATING EXPENSE PER PASSENGER TRIP	\$3.96	\$4.43
15	OPERATING EXPENSE PER REVENUE MILE	\$2.45	\$2.84
16	OPERATING REVENUE PER OPERATING EXPENSE	19.40%	20.29%
17	AVERAGE FARE	\$1.00 Fixed Route \$2.00 Demand Response	\$1.00 Fixed Route \$2.00 Demand Response

Days/Hours Service Available

Fixed Route Bus Service

Monday – Friday	4:55AM – 9:55PM	5:05AM – 10:00PM
Saturday	4:55AM – 9:55PM	5:05AM – 10:00PM
Sunday	5:55AM – 9:20PM	6:10AM – 9:10PM

Fixed Route Trolley Service - Beaches

Monday – Friday	5:55AM – 9:15PM	5:55AM – 9:15PM
Monday – Friday (DEC-APR)	5:55AM – 9:55PM	5:55AM – 9:45PM
Saturday	5:55AM – 9:15PM	5:55AM – 9:15PM
Saturday (DEC-APR)	5:55AM – 9:55PM	5:55AM – 9:45PM
Sunday	5:55AM – 9:15PM	7:10AM – 9:15PM
Sunday (DEC-APR)	5:55AM – 9:55PM	5:55AM – 9:45PM