

# Charlotte County Transit Fixed-Route Transit Feasibility & Operational Study

## Scope of Services

April 2026

At the request of Charlotte County Transit, Benesch has prepared this scope of services to support Charlotte County Transit assessing the feasibility of adding fixed-route bus services and supporting capital/ infrastructure to enhance its current transit services in Charlotte County. The explosive growth in population and increased demand for quick access to jobs and services has made improving and expanding current transit services a top priority for Charlotte County Transit. This study is intended to provide a solid foundation for a new operating and capital/maintenance model for Charlotte County Transit that includes an updated transit service and capital/maintenance options, including fixed-route bus and on-demand transit services.

The study will build on findings from the 2025-2034 Charlotte County Transit Development Plan (TDP) Major Update and the ongoing transit efficiency evaluation to recommend service and capital improvements that will help meet vehicle, facility, and maintenance needs to prepare Charlotte County Transit for the future. It will also explore the potential for additional federal formula funding opportunities that may result from population growth and ridership from a new fixed-route bus service.

The following describes the tasks that will be necessary to complete the study.

- Task 1: Project Management & Coordination
- Task 2: Data Assembly & Analysis
- Task 3: Transit Service Needs & Recommendations
- Task 4: Capital Needs & Recommendations
- Task 5: Federal Transit Administration (FTA) Formula Funding Review
- Task 6: Action Plan & Next Steps
- Task 7: Draft & Final Deliverables

## **Task 1: Project Management & Coordination**

### **Task 1.1: Kick-off Meeting**

A kick-off meeting will be held to ensure that staff and our project team are “on the same page” regarding the scope, individual tasks and deliverables, schedule, and the priorities for the study. In addition, a project coordination process will be discussed and established to provide oversight, quality control, and transparency throughout the life of the project as well as to ensure clear communication and dialog with Charlotte County Transit throughout the study.

### **Task 1.2: Project Management & Coordination**

To facilitate full understanding of progress, analyses, and findings, which will support informed decision-making, two project coordination meetings with Charlotte County Transit staff are included. In addition to these virtual meetings, project coordination will also include project update/check-in calls and emails, and monthly progress reports.

## **Task 2: Data Assembly & Analysis**

To develop logical recommendations for service and supporting capital/infrastructure, the unique interaction of service area, demand and service supply for transit services in Charlotte County must be understood. This would enable the identification of any existing geographic/temporal gaps between the needs of the community and the current services offered that may be addressed by new fixed-route bus service.

### **Task 2.1: Fixed-Route Transit Market Analysis**

The quantitative and qualitative analysis will review and examine a range of relevant factors and indicators key to identifying the degree and distribution of mobility need within Charlotte County appropriate for adding fixed route bus services. Analyses will examine existing market data and existing mobility service indicators, each of which is described below along with how they will be analyzed.

#### **Market Analysis & Findings Review**

An examination of socioeconomic and demographic indicators helps to understand specific community characteristics at the neighborhood level and how mobility needs and travel behavior within these areas relate to Charlotte County overall. Building on the data gathered from the ongoing Efficiency

Study, this socioeconomic and Replica data analysis will specifically focus on the feasibility of adding fixed-route bus services in Charlotte County.

### Task 2.2: Transit Demand Assessment

An important aspect of any transit planning process is to ensure that the resulting future vision for transit accommodates areas within the operating environment that are not served (or are underserved) but have latent ridership demand for transit services, especially fixed-route bus services. To identify the unserved/underserved demand for this mode option, a latent demand analysis will be conducted using GIS tools and data from the Market Analysis. This will assess locations and extent of mobility needs and mobility gaps in the service area.

### Task 2.3: Related Plans/Policy Review

Recent local plans and studies completed for Charlotte County Transit that may have a direct bearing on the considerations for expanded transit services will also be collected and reviewed. Key elements, policies, as well as any applicable input from the community identified in recent plans on transit will be reviewed and summarized. At a minimum, the reviewed plans will include:

- Efficiency/Optimization Study (ongoing)
- Transit Driver Study (ongoing)
- Transit Development Plan (2025)
- Charlotte County – Punta Gorda MPO 2050 Long Range Transportation Plan (2025)
- Charlotte County Comprehensive Plan
- City of Punta Gorda Comprehensive Plan

### Task 2.4: Key Stakeholder Outreach

This task will include developing an inventory of key stakeholders and a plan of engagement to identify and involve them, primarily including major employers and any applicable local agencies, such as the tourism/visitor bureaus, LeeTran, and Breeze. This effort will use and expand on the stakeholder engagement efforts that were completed as part of the adopted Charlotte County Transit TDP, to assess and/or reevaluate their level of interest and influence on improving transit, including the potential addition of fixed-route bus services in Charlotte County.

Up to 10 virtual/phone discussions will be conducted to educate about transit services and solicit input on improving access for their employees or clients, specific future needs, and other aspects that may impact transit. The findings will be summarized, and any applicable feedback will be integrated into the final service and infrastructure recommendations.

## **Task 3: Transit Service Needs & Recommendations**

Findings gathered from the data analyses and plans/policy reviews in Task 2 will then be used to identify service and capital/infrastructure gaps as well as potential opportunities for fixed route transit in Charlotte County. Thereafter, the service and capital project needs for expanding the reach of Charlotte County Transit will be developed and detailed.

### **Task 3.1: Existing Service Gaps & Opportunities**

This task will identify any gaps in current service as well as new opportunities for improving transit in the study area. These will be summarized in detail to help develop recommendations for an enhanced service delivery model that adds fixed route bus services in Charlotte County. These may include:

- Spatial and temporal gaps with current service provision and existing challenges in filling them
- Options for enhancing delivery of the existing on-demand services with the use of capital and technology improvements
- Potential opportunities for ridership and transit system growth and efficiencies with the introduction of fixed-route bus services

This task will include an analysis of travel flows and activity centers to help identify where any fixed routes and where on-demand microtransit services should operate. In addition, a general assessment of key corridors in the study area will also be conducted to help identify the gaps and opportunities for new or expanded services.

### **Task 3.2: Service Needs & Operational Recommendations**

This task will identify the service needs, potentially including new fixed-route services and reconfigured on-demand transit options for a new service delivery model for Charlotte County Transit in three different timeframes, including:

- Short-term (0-5 years)
- Intermediate (6-10 years)
- Long-range (11-15 years)

Practical and implementable recommendations for each timeframe will be developed to address the needs and challenges identified as part of previous tasks of this scope of services. The recommended network will also be designed to provide a path forward, including route planning with alignments and service patterns, for Charlotte County Transit to take advantage of any opportunities to grow into a service model that includes fixed route bus as a key service component. The recommended service delivery model will also identify the suitable capital/infrastructure investments, which will be covered under the next task.

### Task 3.3: Technical Memorandum #1 – Service Needs & Network Recommendations

The findings from Tasks 1 through 3 will be summarized and documented in a draft tech memo and provided to Charlotte County Transit staff by email for review and comment. Benesch will then review and address any comments and incorporate the final technical memorandum into the Fixed-Route Transit Feasibility & Operational Study draft report.

## Task 4: Capital Needs & Recommendations

The information and analytical results from previous tasks and the resulting service-related recommendations will be used to identify and develop logical recommendations for any capital-related needs to support the service needs and recommendations identified in Task 3.

### Task 4.1: Capital Needs Review

Availability of supporting capital, including fleet, passenger transfer facilities, suitable maintenance and administration facilities, trained and dedicated personnel, bus stop infrastructure, and access to new technologies/software are all key to implementing the service improvements that may be identified. With the potential addition of fixed-route bus services to the current transit service options in Charlotte County, it becomes a critical need that will determine the degree of success in the phased implementation proposed previously in Task 3. This subtask will also incorporate findings from the ongoing Transit Driver Study.

Therefore, a review of vehicle requirements and other capital/infrastructure needs, such as a new maintenance facility, transfer hubs, park-and-ride lots, bus stop infrastructure, and enhanced technologies/software will also be conducted. A detailed and implementable plan for the aforementioned capital

needs necessary to support the implementation of service improvements will be developed in coordination with Charlotte County Transit.

#### Task 4.2: Operations/Maintenance Needs Review

A primary goal for Charlotte County Transit in its efforts to enhance and sustain future operations is to ensure the transit infrastructure, including its fleet of vehicles, is maintained to remain in a state of good repair. Therefore, a key part of the capital needs assessment would explore the feasibility of Charlotte County Transit conducting the fleet maintenance and repairs on its own with dedicated mechanics and facilities.

This will include a review of its current practices and processes as well as how other Florida transit agencies have successfully accomplished transferring to using their own facilities and functions. A peer review analysis will be conducted, including up to five transit agencies selected based on similar geographics, fleet-size, and other applicable criteria. Then, a review of the selected peer's maintenance procedures, such as number of full-time employees and delivery of maintenance, among other factors, will be conducted. This review will include whether each selected peer agency has dedicated mechanics and their respective maintenance expenses.

#### Task 4.3: Capital & Maintenance Recommendations

This task will identify a set of capital-related recommendations (including vehicle, facility, technology, etc.) to help Charlotte County Transit implement the phased service model, that may add fixed route bus option to its existing and expanded on-demand transit options.

### Task 5: FTA Formula Funding Review & Risk Analysis

The potential for a large UZA designation in the next Census and the possibility of fixed-route bus service addition could both impact the amount of federal formula fund allocations for Charlotte County. This task will review the FTA formula funding programs applicable to Charlotte County Transit and provide associated recommendations.

#### Task 5.1: Funding Processes & Methodologies

This task will first include a review of current FTA apportionment and fund allocations processes and methodologies. An evaluation of FTA apportionment formulas for formula funding programs that may be applicable to Charlotte County Transit in a large UZA with expanded services, including fixed-route bus,

will then be conducted. This will include programs such as Section 5307 and 5310 as well as other applicable formula funding programs that provide financial assistance for public transit capital, operating, and/or planning projects. Associated FTA or FDOT regulatory requirements for each funding program that should be considered as part of Charlotte County Transit's future decision making in implementing fixed route transit will be documented.

### Task 5.2: Feasibility/Implementation Risk Review

This task includes a sketch-level risk analysis, to identify any potential hazards for the implementation of fixed-route bus services in Charlotte County, evaluate their likelihood and impact, and identify applicable mitigation strategies. Key factors such as cost overruns, ridership uncertainties, and other operational, funding, and policy constraints will be considered and reviewed.

### Task 5.3: Funding & Associated Recommendations

Recommendations will be developed regarding the current process and potential changes going forward, based on the findings from this review as well as input/discussions with Charlotte County Transit staff.

### Task 5.4: Technical Memorandum #2 – Capital Recommendations, Funding & Risk Review

The findings from Tasks 4 through 5 will be summarized and documented in a draft technical memorandum and provided to Charlotte County Transit staff by email for review and comment. Benesch will then review and address any comments and incorporate the final technical memorandum into the Fixed-Route Transit Feasibility & Operational Study draft report.

## Task 6: Action Plan & Next Steps

With the continued and sustained population growth in Charlotte County, the need for expanded mobility options also is expected to continue to grow.

### Task 6.1: Action Plan & Next Steps

To ensure Charlotte County Transit is operationally ready for this increased demand with necessary service, capital/technology/infrastructure improvements, an action plan with essential next steps will be developed and presented.

This will also include action steps on leveraging any potential increase in federal formula funds resulting from expected population and transit demand shifts in the Charlotte County Transit service area.

### Task 6.2: Establish Key Benchmarks

In addition, key benchmarks will also be identified to track the proposed phased plan. A layered approach with matrices for short- to long-term tracking will be defined and proposed. This may include indicators covering efficiency/effectiveness of service such as trips per revenue hour, on-time performance, transit access and coverage such as route/stop walkshed population. Additional benchmarks that may be considered include customer satisfaction and capital/asset benchmarks covering state of good repair and useful asset life.

### Task 7: Draft & Final Deliverables

The technical memoranda developed throughout this effort will be reformatted and compiled together with the recommended action plan into a complete project draft report. The complete draft will be submitted to Charlotte County Transit staff for their review and comment. Any comments provided on the draft report will be addressed before preparing the Fixed-Route Transit Feasibility & Operational Study final report.

In addition, Benesch will prepare and make up to two presentations to present the draft study, as directed by the Charlotte County Transit project manager. Benesch will provide the draft PowerPoint slide presentation for staff review and will make the final version available for any additional uses by Charlotte County Transit staff.

### Project Schedule and Fee

This effort is expected to take 9 months from Notice to Proceed, depending on the number and duration of reviews and the internal decision-making process within Charlotte County Transit. The fee for this scope of work is \$147,862 to be billed on a lump-sum percent complete basis. The labor rates, staff hours, and budget for the project are provided on the following page.

**Charlotte County Transit  
Fixed-Route Transit Feasibility & Operational Study  
Budget**

Task Description		Project Principal	Project Manager	Senior Transit Specialist	Senior Planner	Planner	GIS Analyst	Admin/ Clerical	Hours	Fee
		\$284.33	\$236.59	\$257.84	\$148.53	\$120.32	\$106.80	\$102.33		
<b>Task 1</b>	<b>Project Management &amp; Coordination</b>	2	12	0	22	14	0	0	50	\$8,360
1.1	Kickoff Meeting		2		4	6			12	\$1,789
1.2	Management & Coordination	2	10		18	8			38	\$6,571
<b>Task 2</b>	<b>Data Assembly &amp; Analysis</b>	4	10	2	32	34	16	8	98	\$15,390
2.1	Fixed-Route Transit Market Analysis	1	2	1	4	8	8		24	\$3,426
2.2	Transit Demand Assessment	1	4	1	8	10	8	1	32	\$4,837
2.3	Related Plans/Policy Review	2	2		10	8		1	22	\$3,592
2.4	Key Stakeholder Outreach		2		10	8		6	20	\$3,535
<b>Task 3</b>	<b>Service Needs &amp; Recommendations</b>	11	38	19	76	120	38	6	307	\$47,416
3.1	Existing Service Gaps & Opportunities	2	10	2	24	32	16		86	\$12,574
3.2	Service Needs & Operational Recommendations	8	24	16	40	80	20	1	188	\$29,883
3.3	Technical Memorandum #1: Service Needs & Network Recommendations	1	4	1	12	8	2	5	33	\$4,959
<b>Task 4</b>	<b>Capital Needs &amp; Recommendations</b>	8	30	24	56	90	1	0	209	\$34,814
4.1	Capital Needs Review	2	10	8	20	30	1		71	\$11,684
4.2	Operating/Maintenance Needs Review	2	12	8	20	40			82	\$13,254
4.3	Capital & Maintenance Recommendations	4	8	8	16	20			56	\$9,876
<b>Task 5</b>	<b>FTA Formula Funding Review</b>	6	18	10	36	30	3	1	103	\$17,923
5.1	Funding Processes & Methodologies		2	4	14	16	1		37	\$5,616
5.2	Feasibility/Implementation Risk Review	2	4	2	10				18	\$3,516
5.3	Funding & Associated Recommendations	4	10	4	8	6	1		33	\$6,552
5.4	Technical Memorandum #2: Capital Recommendations & Funding Review		2		4	8	1	1	15	\$2,239
<b>Task 6</b>	<b>Action Plan &amp; Next Steps</b>	2	4	0	12	0	0	4	18	\$13,098
6.1	Develop & Document Action Plan & Next Steps	6	12	4	18	12	1	4	53	\$9,801
6.2	Establish Key Benchmarks	2	4		12				18	\$3,297
<b>Task 7</b>	<b>Draft &amp; Final Deliverables</b>	2	8	1	20	26	8	10	73	\$10,861
7.1	Draft Study Report	1	2	1	8	12	2	4	26	\$3,861
7.2	Final Study Report	1	2		4	6	2	2	15	\$2,287
7.3	Presentation (2)		4		16	8	4	4	32	\$4,713
	<b>Total Hours</b>	35	120	56	254	314	66	29	858	
	<b>Total Fee</b>									\$147,862