

STATEMENT OF QUALIFICATIONS

Comprehensive Analysis of Transit Driver Services

Charlotte County, FL



SEPTEMBER 24, 2025



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COVER LETTER



September 24, 2025

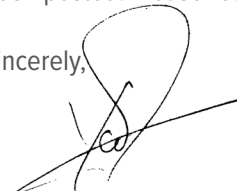
Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, Florida 33948-1094RE: **Comprehensive Analysis of Transit Driver Services**

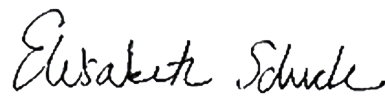
To the Selection Committee:

Benesch is pleased to submit this proposal to support Charlotte County with a comprehensive analysis of transit driver services. With decades of experience in transit operations and workforce analysis, Benesch is committed to delivering actionable solutions that enhance service quality and operational efficiency. Benesch's team looks forward to partnering with the County to address workforce needs and advance mobility goals. The benefits of our team are the following:

- ✓ **Long History with Charlotte County:** Benesch has a longstanding and trusted partnership with Charlotte County, Florida, built on years of collaboration and a deep understanding of the community's evolving needs. Over the last three decades we have served both Charlotte County and the Charlotte County-Punta Gorda Metropolitan Planning Organization, providing a wide range of transportation planning services that have shaped the region's mobility and growth. The firm's expertise is especially evident in its leadership on the County's Transit Development Plan (TDP) major updates and annual progress reports, having been selected by Charlotte County for two five-year TDP contracts in 2018 and 2023. The Benesch Team brings significant local knowledge and continuity, having managed every major TDP update since 2014 and worked closely with county staff to deliver innovative, technology-driven transit solutions. This ongoing relationship reflects Benesch's commitment to supporting Charlotte County's vision for accessible, efficient transportation and its ability to deliver results that meet both current demands and future opportunities.
- ✓ **Expertise in Comprehensive Analysis:** Our team members bring decades of experience supporting transit agencies with mobility operating models ranging from directly operated services, contracted services, use of non-dedicated labor and hybrid service models. Our relevant experience includes conducting operational analyses, feasibility studies and peer reviews to optimize staffing and service delivery. Our team includes professionals with direct transit agency experience and an understanding of the impact of in-house versus contracted service models on service quality, workforce stability and community trust. Benesch's data-driven approach assesses operations, driver performance and workforce strategies, delivering tailored, actionable solutions that enhance driver services, support workforce development and help agencies adapt to evolving mobility needs.
- ✓ **Technological Innovation to Enhance and Develop Services:** Benesch is well equipped to help Charlotte County implement a range of pre-booked trips and same-day paratransit and general public on-demand services by leveraging technology-enabled strategies such as mobility-on-demand, mobility brokered and microtransit platforms. These solutions use real-time data and app-based systems to match ride requests with available vehicles, allowing for flexible, efficient service that reduces wait times and operational costs. Randy Farwell, a recognized leader in transit planning, brings nearly 40 years of experience in developing cost-efficient, technology-driven transit solutions. His expertise in optimizing service delivery and deploying advanced technology ensures that Benesch can deliver a same-day shared mobility solution that is both effective for riders and fiscally responsible for the county.

Thank you for the opportunity to work with Charlotte County on this exciting project. We acknowledge all addenda that have been posted. Please reach out if you have any questions.

Sincerely,

Yash Nagal, PMP
Project Manager


Elisabeth Schuck, AICP, LEED GA
Vice President/Florida Division Manager

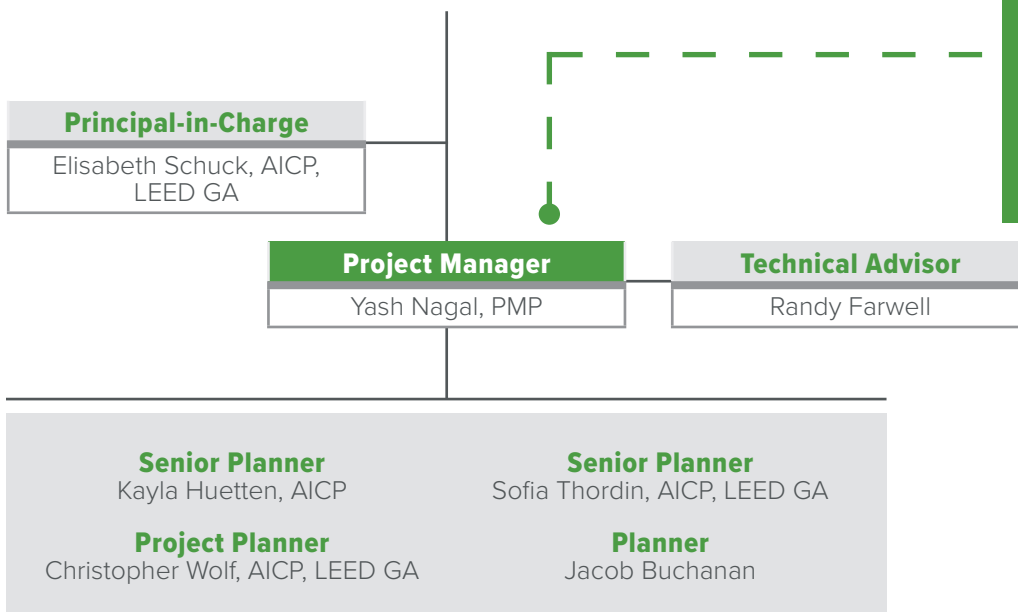


RELEVANT EXPERIENCE AND QUALIFICATIONS





RELEVANT EXPERIENCE AND QUALIFICATIONS



Mr. Nagal served as the Director of Transit Planning for Palm Tran over several years prior to joining Benesch. During this time, Yash had to work through similar challenges and projects identical to this one. Yash brings unique perspective, as he has served the role of the client, giving him the ability to anticipate needs and avoid obstacles.

OUR SPECIALTIES

Cost analysis is essential for understanding the financial drivers behind service delivery and identifying opportunities for greater efficiency. By evaluating expenses such as labor, fuel, maintenance and technology, agencies can make informed decisions that balance quality service with fiscal responsibility. Benesch's team applies data-driven methods to help clients optimize budgets, control costs and achieve sustainable transit operations.

Operational efficiency analysis examines how resources are used to deliver reliable, timely service while minimizing waste and unnecessary costs. By assessing factors such as route performance, vehicle utilization and scheduling, agencies can identify areas for improvement and streamline operations. Benesch's team leverages proven methodologies to help clients enhance productivity, boost service quality and achieve measurable results.

Risk and impact assessments are critical tools for identifying potential challenges and evaluating the effects of proposed transit projects or operational changes. These assessments help agencies anticipate issues, mitigate negative outcomes and ensure compliance with regulatory requirements. Benesch's team provides thorough, data-driven evaluations to support informed decision-making and promote successful project delivery.

Driver workforce evaluations assess mobility demand levels by time of day and associated staffing levels, performance and training needs to ensure safe, reliable transit service. These evaluations help agencies identify gaps, improve recruitment and retention and align workforce capabilities and costs with service goals. Benesch's team delivers thorough, data-driven assessments gained through experience designing and deploying services for communities in Florida and across the US, that support effective workforce management and operational excellence.

Peer review of staffing models and wage structures allows agencies to benchmark their practices against similar organizations and industry standards. This process helps identify strengths, gaps and opportunities for improvement in recruitment, retention and compensation strategies. Benesch's team conducts comprehensive peer reviews to provide actionable insights that support competitive, effective workforce planning.

Feasibility and implementation plans evaluate the practicality and potential success of proposed transit services or improvements. These plans analyze factors such as community needs, operational requirements and financial considerations to guide decision-making. Benesch's team develops clear, actionable roadmaps that help agencies move from concept to successful service delivery.

Yash Nagal, PMP

Project Manager

Yash is a skilled transit professional with a distinguished career in public service at transit agencies including LYNX in Orlando and Palm Tran in Palm Beach County. He has led transformative initiatives to enhance mobility and access for diverse communities. Yash leverages his extensive public sector experience to help agencies nationwide implement practical, scalable transit solutions. He is deeply committed to advancing equity by expanding access to reliable mobility, empowering individuals to connect and improve their quality of life. Yash's strategic approach and passion for inclusive transportation make him a trusted partner in delivering impactful, community-focused transit projects. Yash is proficient in ArcGIS and Remix and often leverages these to the benefit of his clients.

Collier County MPO - Collier Area Transit Fare Study - Collier County, FL

Project Manager: Mr. Nagal is managing a comprehensive fare study for Collier Area Transit, evaluating fare structures and their impacts on ridership, revenue and equity. He is leading the assessment of alternative fare models and payment technologies, overseeing Title VI equity analysis for federal compliance and coordinating with staff and stakeholders to align recommendations with operational, financial and customer experience goals.

Mr. Nagal worked on the following projects with Benesch staff while he served as Director of Planning for Palm Tran in Palm Beach County, FL:

Palm Tran - Transit Development Plan Major Update - Palm Beach County, FL

Agency Manager: This effort involved the completion of a TDP major update for Palm Tran. It required the evaluation of existing transit services and baseline conditions of the operating environment, significant virtual public engagement because of pandemic conditions in the county, an assessment of mobility needs and potential 10-year demand for transit services, completion of a situation appraisal, development and prioritization of alternative mobility enhancements and creation of a phased 10-year implementation plan and financial plan.

Palm Tran - Port St. Lucie Express Operations and Risk Mitigation Plan - Palm Beach County, FL

Agency Manager: Benesch developed an operations and risk mitigation plan for Palm Tran to launch its first commuter express service in the Port St. Lucie area. The plan addressed scheduling, operator assignments and cost efficiency, with a focus on optimizing driver productivity while minimizing non-revenue hours. Because this was a new service, Benesch conducted a risk assessment to anticipate challenges such as demand uncertainty and service integration. Mitigation strategies included phased rollouts, flexible scheduling and targeted outreach. We also established protocols for operators and dispatchers to follow in the event of accidents or incidents, ensuring safety and compliance. Finally, recognizing the service spanned county boundaries, we recommended a potential inter-county agreement to clarify responsibilities for operations and incident response.

Palm Tran - Go Glades Operations Analysis - Palm Beach County, FL

Agency Manager: As the Go Glades mobility-on-demand (MOD) pilot transitioned to a permanent Palm Tran service, Benesch conducted an operations analysis to evaluate how the service should be structured for long-term efficiency and sustainability. A key focus of this work was analyzing operational performance and costs under different service delivery models, including in-house operation by County staff versus contracted operations through a private provider. The analysis examined driver workforce implications, service quality, cost efficiency and compliance with ADA and Title VI requirements. By evaluating both models side-by-side, Benesch provided Palm Tran with a clear understanding of the tradeoffs and risks associated with each approach. This operational efficiency framework gave Palm Tran leadership the ability to make an informed decision about service structure, ensuring that the MOD program was aligned with long-term financial capacity, workforce realities and customer needs.



Education

MS, Project Management,
Harrisburg University

MURP, Urban & Regional
Planning, University of Florida

BS, Civil Engineering, Oriental
Institute of Science & Technology

Years of Experience: 10

Registrations and Certifications

Project Management
Professional: 3128919

Elisabeth Schuck, AICP, LEED GA

Principal-in-Charge

Ms. Schuck brings over two decades of experience in public transportation and multimodal planning. Before becoming Benesch's Florida Division Manager, she led Benesch's Florida Transit Group, where she served as Project Manager for a wide range of initiatives, including transit development plans, comprehensive operational studies, microtransit feasibility studies, paratransit planning, community visioning exercises and corridor plans. Elisabeth is highly skilled in financial and regulatory compliance for federal and state transportation funding programs. Her expertise includes developing statewide transit cost allocation and risk assessment programs, assessing metropolitan planning requirements and providing FHWA/FTA grant management and oversight for state DOTs and direct recipients. Her leadership, comprehensive knowledge and expertise in Remix, Replica and TBEST enables the successful delivery of complex transit and multimodal projects throughout Florida.

Fort Bend Transit - Bus Service Analysis - Fort Bend, TX

Senior Advisor: Benesch was contracted by Fort Bend Transit to evaluate several transit operating model scenarios for directly operated vs purchased transportation functions. This effort included an assessment of operating functions for selected peer agencies and the preparation of cost estimates to support future procurement for third-party contractor services.

The ATL Group - Transit Asset Management Plan - Atlanta, GA

Senior Advisor: Benesch supported The ATL with an update of its Group Transit Asset Management (TAM) Plan for seven transit operators in the Atlanta metro area. This included assessing the capital asset inventory, preparing a condition assessment of inventoried assets for which the operator's have direct ownership or capital responsibility, documenting the analytical processes and decision-support tools to estimate capital investment needs over time and preparing a prioritized list of investments and associated performance measures.

Broward MPO - Commitment 2050 Metropolitan Transportation Plan - Broward County, FL

Task Manager: In 2022, Benesch was selected to assist the Broward MPO with the development of their Route to 2050 Metropolitan Transportation Plan. In addition to ensuring this plan complies with federal regulations, Benesch is supporting the MPO in addressing their identified emphasis areas of safety, resiliency, emerging technologies and housing coordination. Focus will also be placed on evaluating multimodal accessibility and ensuring equity is considered throughout its development.

FDOT Central Office - TDP Guidance Handbook Update - Tallahassee, FL

Senior Advisor: This is an update of statewide handbook for preparing TDPs, following previous participation to develop 2003 inaugural TDP guidance manual and a 2009 update, including development and conduct of TDP training for local transit and planning agencies in all seven FDOT Districts. Project elements include revisions to better provide simpler and clearer guidance for transit agencies on required and best practice elements for Florida TDPs, practical guidance for leveraging opportunities and addressing constraints when developing plans, development of phased toolbox of techniques/approaches for effective public engagement, and developing tips/key points for efficiently completing key TDP elements, innovative ways to save time/resources while achieving same or better results.

FDOT District 5 - Triennial Reviews Grant Subrecipient Compliance - Orlando, FL

Senior Planner: Ms. Schuck conducted the Triennial Review process to ensure grant program compliance of FTA subrecipients as outlined in FDOT State Management Plan (SMP); coordinated with local and state agencies; reviewed plans, policies and documents; performed onsite inspections and review of files, records and practices; completed reports, compliance action plan and corrective actions; and tracked and followed-up program activities.



Education

MA, Geography, University of South Florida

BS, Environmental Science
Stetson University

Years of Experience: 23

Registrations and Certifications

American Institute of Certified Planners: 021945

LEED GA: 10609088

Randy Farwell

Technical Advisor

Mr. Farwell is a highly accomplished transit planner with nearly four decades of experience spanning both public agencies and consulting services. Throughout his distinguished career, he has held key leadership roles, including serving as Planning and Development Director for the transit system in Orlando, FL and as Planning Manager for the Potomac and Rappahannock Transportation District Commission in Northern Virginia. Randy specializes in transit operations, system design and optimization, scheduling and the planning and deployment of bus, rail, BRT, paratransit and microtransit services. Renowned for his expertise in microtransit, Randy excels at designing and integrating microtransit services to work seamlessly with complementary bus, rail and paratransit networks. His experience includes SaaS requirements development, procurement and deployment support for clients. Over his career, Mr. Farwell has designed more than 25 microtransit services and he is proficient in Remix, Replica and TBEST. His comprehensive knowledge and innovative approach have made him a trusted leader in advancing efficient, integrated and future-ready transit innovations.

City of Decatur - Comprehensive Operational Analysis - Decatur, IL

Project Manager: Benesch was selected by the City to conduct the first comprehensive operations analysis (COA) in over 25 years. The focus was on identifying improvements in productivity and efficiency in transit operations and leverage developments in technology to provide more cost-effective, accessible and attractive network of mobility services. The new service plan refocuses fixed-route on key corridors at higher frequencies and includes three MOD zones to expand access to mobility. Benesch created the GTFS files for the City and is supporting efforts to procure a microtransit vendor.

Palm Tran - Go Glades Mobility on Demand SaaS Technical Requirements - West Palm Beach, FL

Project Manager: This project included refining point-to-point mobility-on-demand service for a cloud-based Software as a Service (SaaS) platform and addressing key issues related to operating model (in-house vs. purchased), fare policy and integration with fixed-route and paratransit services. Technical requirements were prepared to acquire the SaaS platform and address key issues related to operating model (in-house vs. purchased), fare policy and integration with fixed-route and paratransit services. The procurement of a SaaS platform was successful. This effort served as a follow-on to the Go Glades Flex and MOD service development launched in December 2018 and April 2020, respectively. As of August 2022, Go Glades ridership exceeded 8,800 riders per month including reducing traditional ADA paratransit trips by half.

Gainesville Regional Transit Service - Transit Route Restoration Study - Gainesville, FL

Project Manager: Benesch is in the process of preparing a Transit Route Restoration Plan (TRRP) to assess the operational performance of the fixed route transit network and other transit-related services operated by RTS. Outcomes from this plan will feed directly into the upcoming TDP effort and focus on recommendations to improve operational efficiencies and mobility options for residents and visitors. The TRRP will serve as the catalyst for potential service changes to restore and revive RTS' transit ridership to pre-pandemic levels.

The Breeze - Route Network Optimization/MOD Design - Sarasota, FL

Project Manager: This project included the redesign and optimization of The Breeze's (formerly SCAT) fixed route network. The team identified and designed mobility on demand (MOD) service areas and services to serve ADA and general public demand in areas with low density of demand and poor fixed route performance. Service schedules and run cuts also were prepared. Expected to yield \$600k in net operating cost savings, a MaaS provider was selected and the redesigned transit network and new MOD services were launched in June 2021. Since, ridership on the new MOD service exceeds 20,000 per month and has created a shift by ADA passengers to MOD and increased fixed route ridership.



Education

Master of Urban & Regional Planning, Virginia Tech

BS in Urban Studies, Texas Christian University

Years of Experience: 38

Kayla Huetten, AICP

Senior Planner

Ms. Huetten specializes in transit development and master planning, transit feasibility studies, bus stop accessibility and connectivity analyses. Her expertise includes socioeconomic data and trends analysis, transit system performance evaluation, public involvement, situation appraisal and transit technology research. Kayla has contributed to the development of the FDOT TDP Handbook, a key resource that guides transit planning across Florida. She has also played a significant role in numerous transit development plans throughout the state. Kayla is proficient with ESRI products, OnTheMap, TBEST, Remix, SketchUp, ArcGIS and Replica. With her experience managing virtual rooms for public outreach, Kayla is able to support innovative public involvement initiatives and effective transit plans.

Charlotte County - Transit Development Plan Annual Progress Report - Charlotte County, FL

Planner: This project was for an update of Charlotte County Transit's accomplishments in the interim years between Major Updates. Benesch analyzed divergences between the implementation plan in the Major Update and the past years progress. Additionally, the Annual Progress Report revises the implementation plan and updates the financial plan for the new tenth year.

Charlotte County - Transit Development Plan Major Update - Charlotte County, FL

Planning Intern: This was an update through 2024, including documentation of study area conditions and demographic characteristics, evaluation of existing transit services, development of situation appraisal and needs assessment, preparation of 10-year financial plan with emphasis on building consensus for the future, educating decision-makers about transit service options, deploying activities to engage more stakeholders and reach more potential riders.

Palm Tran - Go Glades Mobility on Demand Service Delivery Evaluation - West Palm Beach, FL

Planner: Design new general public Mobility-on-Demand (MOD) service for Palm Tran Connection (agency's paratransit operation) to complement ADA door-to-door service with incentives to shift ADA customers to Go Glades MOD. Service designed to transition to full point-to-point MOD service (no routes, real-time requests) following procurement of new SaaS scheduling platform. With COVID, the MOD service was initiated in April 2020 and has operated successfully since. SaaS platform deployment due Fall 2020 at which time Palm Tran will begin assessing potential to expand service concept to other parts of the service area specifically to address local mobility and first/last-mile connectivity in hard-to-access areas and provide a more nimble and cost-effective way to serve choice riders and growing paratransit demand.

The Breeze - Route Network Optimization/MOD Design - Sarasota, FL

Planner: This project included the redesign and optimization of The Breeze's (formerly SCAT) fixed route network. The team identified and designed mobility on demand (MOD) service areas and services to serve ADA and general public demand in areas with low density of demand and poor fixed route performance. Service schedules and run cuts also were prepared. Expected to yield \$600k in net operating cost savings, a MaaS provider was selected and the redesigned transit network and new MOD services were launched June 2021. Since, ridership on the new MOD service exceeds 20,000 per month and has created a shift by ADA passengers to MOD and increased fixed route ridership.

Fort Bend Transit - Bus Service Analysis - Fort Bend, TX

Planner: Benesch was contracted by Fort Bend Transit to evaluate several transit operating model scenarios for directly operated vs purchased transportation functions. This effort included an assessment of operating functions for selected peer agencies and the preparation of cost estimates to support future procurement for third-party contractor services.



Education

MS, Urban and Regional Planning, University of South Florida

BS, Sustainability and the Built Environment, Minor in Innovation, University of Florida

Years of Experience: 6

Registrations and Certifications

American Institute of Certified Planners: 34678

Christopher Wolf, AICP, LEED GA

Project Engineer

Mr. Wolf is a transportation planner with a broad and diverse background, specializing in transit planning and analysis. He has played a key role in the successful completion of Transit Development Plans, operations analysis and feasibility studies for agencies across the nation. Chris is highly proficient in a range of industry-standard software essential to transportation planning, including ArcGIS, Replica, Remix and TBEST. His expertise supports the development of efficient, accessible and forward-thinking transit systems that meet the evolving needs of communities.

Gainesville Regional Transit Service - Transit Route Restoration Study - Gainesville, FL

Planner: Benesch is in the process of preparing a Transit Route Restoration Plan (TRRP) to assess the operational performance of the fixed route transit network and other transit-related services operated by RTS. Outcomes from this plan will feed directly into the upcoming TDP effort and focus on recommendations to improve operational efficiency and mobility options for residents and visitors. The TRRP will serve as the catalyst for potential service changes to restore and revive RTS' transit ridership to pre-pandemic levels.

Broward County Transit - Transit Development Plan - Broward County, FL

Planner: Benesch assisted Broward County Transit with the development of its 2013 10-year transit development plan. In light of an upcoming referendum including transit funding, the TDP's financial plan clearly illustrated the funding necessary to continue to operate the current services in the future as well as the funding necessary for the addition of various improvements. The plan also focused heavily on ridership projections developed using the Transit Boardings Estimation and Simulation Tool (TBEST). Significant public outreach was undertaken throughout the project.

NCDOT - Statewide Locally Coordinated Plan

Planner: Benesch was contracted by the North Carolina Department of Transportation (NCDOT) Integrated Mobility Division (IMD) to prepare an update of the Statewide Locally Coordinated Plan. This plan supports the funding of programs and services in non-urbanized areas of the state through the FTA's 5310 program and NCDOT's Rural Operating Assistance Program (ROAP). This effort includes assessing transportation needs for 5310-eligible individuals, preparing an inventory of available services, identifying service and coordination gaps, prioritizing identified implementation strategies and engaging private and nonprofit transportation and human services providers, along with members of the public including individuals with disabilities, older adults and people with low incomes.

NCDOT IMD - Regional Transit Pilot Studies - Greater Rocky Mount, Greenville & Wilson Area Regional Transit Plan

Planner: With communities in North Carolina becoming more socio-economically diverse and regionally connected, planning for public transportation needs in a consistent and coordinated manner is more important than ever. Benesch has partnered with the North Carolina Department of Transportation (NCDOT) Integrated Mobility Division (IMD) to support several pilot studies that will complete the Regional Transit Plans for selected Coordinated Regions. The Rocky Mount, Greenville, & Wilson Area pilot study covers Beaufort, Bertie, Edgecombe, Halifax, Herford, Martin, Nash, Northampton, Pitt and Wilson counties.

Atlanta Region Transit Link Authority (ATL) - Group Transit Asset Management Plan - Atlanta, GA

Planner: This project assessed inventories of capital assets from eight Tier II transit operators in the Atlanta region. A condition assessment was performed on the inventoried rolling stock, equipment and facility assets for which these agencies have direct capital responsibility over and a prioritized list of investments was developed to identify a timeline for asset replacements.



Education

MS, Urban & Regional Planning,
University of Florida

BS, Sustainability and the Built
Environment, University of
Florida

Years of Experience: 2

Registrations and Certifications

American Institute of Certified
Planners: 36480

LEED GA: 11425152

Sofia Thordin, AICP, LEED GA

Senior Planner

Ms. Thordin is a senior planner with specialized expertise in multimodal transportation planning, GIS analysis and sustainability-focused initiatives. Her experience encompasses both short- and long-range transit planning, ridership forecasting, system performance evaluations and robust public engagement. Sofia is highly skilled in ArcGIS and is proficient in Fulcrum, Remix, Replica, PowerBI and TBEST, positioning her to deliver data-driven insights that support informed decision-making. She has also contributed to ADA planning, complete streets studies and transit operations assessments, consistently bringing strong project coordination, communication and stakeholder outreach skills to every assignment. In addition to her consulting work, Sofia shares her knowledge as an adjunct lecturer, teaching GIS applications in urban planning and helping to shape the next generation of planning professionals.

Palm Tran - Transit Development Plan Major Update - West Palm Beach, FL

Planner: The development of Palm Tran Accelerate 2031 TDP, includes documenting study area conditions, analyzing socio-demographic characteristics, evaluating existing transit services, gathering and analyzing public input, developing situation appraisal and needs assessment and preparing 10 year financial and implementation plan. It was adopted by the Palm Beach County Board of County Commissioners in December, 2021. Ms. Thordin was responsible for gathering, analyzing and visualizing all geographic and demographic characteristics pertinent to the study area such as population growth, major employment centers, transit network coverage, etc. This includes generating a proprietary transit propensity score based on US Census data in ArcGIS Pro and modeling future ridership using T-BEST software.

Gainesville Regional Transit System (RTS) - Transit Development Plan Major Update - Alachua County, FL

Planner: This TDP update is the first major strategic transit/mobility planning effort since RTS became part of City's new Mobility Department. Key initiatives include expansion of microtransit service, development of strategies to enhance transit throughput along major corridors, redesign of network in response to creation of an auto-free zone on the University of Florida campus and development of a series of general public mobility-on-demand zones to function as an overlay of the fixed route network and address need for improved mobility and growing paratransit demand.

Hillsborough Transit Authority (HART) - Tampa Arterial Bus Rapid Transit Study - Tampa, FL

Planner: This project involved the identification of the most appropriate corridor to connect Downtown Tampa to USF Tampa campus with premium BRT service using combination of streets. Sofia provided assistance to HART to improve local, street-level bus service, support infrastructure along three major streets and on intersecting corridors between two major activity centers. Ms. Thordin was responsible for spatial data creation and procurement for the prioritization of potential BRT alignments. Using ArcGIS Pro, she created a scoring matrix for geographic and categorical characteristics of the route alignments to rank options in a consistent, quantifiable manner.

Midland Odessa Urban Transit District (MOUTD) - EZ-Rider Comprehensive Operations Analysis - Midland, TX

Planner: This analysis includes the strategic redesign of transit networks in Midland and Odessa. Responsibilities include evaluating existing services and service area conditions, developing alternative concepts to optimize mobility services, identifying areas for mobility on demand service, leading public outreach and developing a phasing plan and financial plan.



Education

MS, Leadership and Organization for Sustainability, Malmo University

Graduate Certificate in GIS for Urban Planners, University of Florida

Master of Urban & Regional Planning (MURP), University of Florida

BS, Sustainability & the Built Environment, University of Florida

BA, Geography, University of Florida

Years of Experience: 10

Registrations and Certifications

American Institute of Certified Planners: 32985

LEED GA: 11129980

Jacob Buchanan

Planner

With experience in data analysis across multiple projects, Mr. Buchanan is well-versed in the technical components of common transit planning documents, including Transit Development Plans (TDPs), Transit Feasibility Studies (TFS) and Long Range Transportation Plans (L RTPs). He is skilled in developing scripts to clean, polish and edit data for effective visualization and is comfortable with graphic design tools and principles. Jake has a strong background in analyzing data to create graphics and maps using software such as ArcGIS, Adobe Illustrator, InDesign, Photoshop, Python and Excel. He frequently leverages OpenSource data and utilizes a wide range of online data sources, including agency transit data, MPO and local datasets, The National Map, U.S. Census and Replica. Jake effectively incorporates and interprets these data sources to draw meaningful conclusions and enhance planning documentation.

Gainesville Regional Transit Service - Transit Route Restoration Study - Gainesville, FL

Planner: Benesch is in the process of preparing a Transit Route Restoration Plan (TRRP) to assess the operational performance of the fixed route transit network and other transit-related services operated by RTS. Outcomes from this plan will feed directly into the upcoming TDP effort and focus on recommendations to improve operational efficiencies and mobility options for residents and visitors. The TRRP will serve as the catalyst for potential service changes to restore and revive RTS's transit ridership to pre-pandemic levels.

City of Greenville - Transit Development Plan - Greenville, OH

Planner: Benesch is preparing Greenville Transit System's (GTS) first TDP to identify strategies to more efficiently provide rural transit services to county residents outside of the city limits, address GTS' aging fleet and enhance coordination of regional trips for necessary medical services.

Gallia County - Transit Development Plan - Greenville, OH

Planner: Benesch is preparing the first TDP for Gallia County Jobs and Family Services (GCJFS), which will focus on initiating new transit services to meet the growing transportation need in the county. This TDP will also include an operations plan, fare structure and implementation framework.

City of Brownsville - Microtransit and Operations Analysis - Brownsville, TX

Planner: The Brownsville Microtransit project, led by Benesch, focuses on enhancing the city's transit network through the integration of a mobility-for-all microtransit service. This initiative aims to redefine existing fixed route and paratransit services to be more efficient and cost-effective. Benesch's team, with extensive experience in microtransit design and deployment, will manage the project, ensuring high-quality deliverables and meeting the city's standards. The project will leverage local knowledge and technological expertise to connect underserved communities to job centers, addressing the unique challenges of Brownsville as a border city. The redesigned transit network will improve access to key services, reduce travel times and lower costs, specifically catering to ADA-eligible persons and complying with FTA regulations.

Charlotte Area Transit System (CATS) - Zero Emission Vehicle Transition - Charlotte, NC

Planner: The CATS Zero Emission Project involves the Charlotte Area Transit System (CATS) implementing a fare capping policy to enhance customer experience and ensure affordability. This policy rewards customers with a monthly pass once they have paid the equivalent value in eligible fares through the CATS-Pass mobile app. The project aims to improve accessibility and affordability for all users, particularly benefiting those unable to afford the upfront cost of a monthly pass.



Education

Masters, City and Regional Planning, The Ohio State University

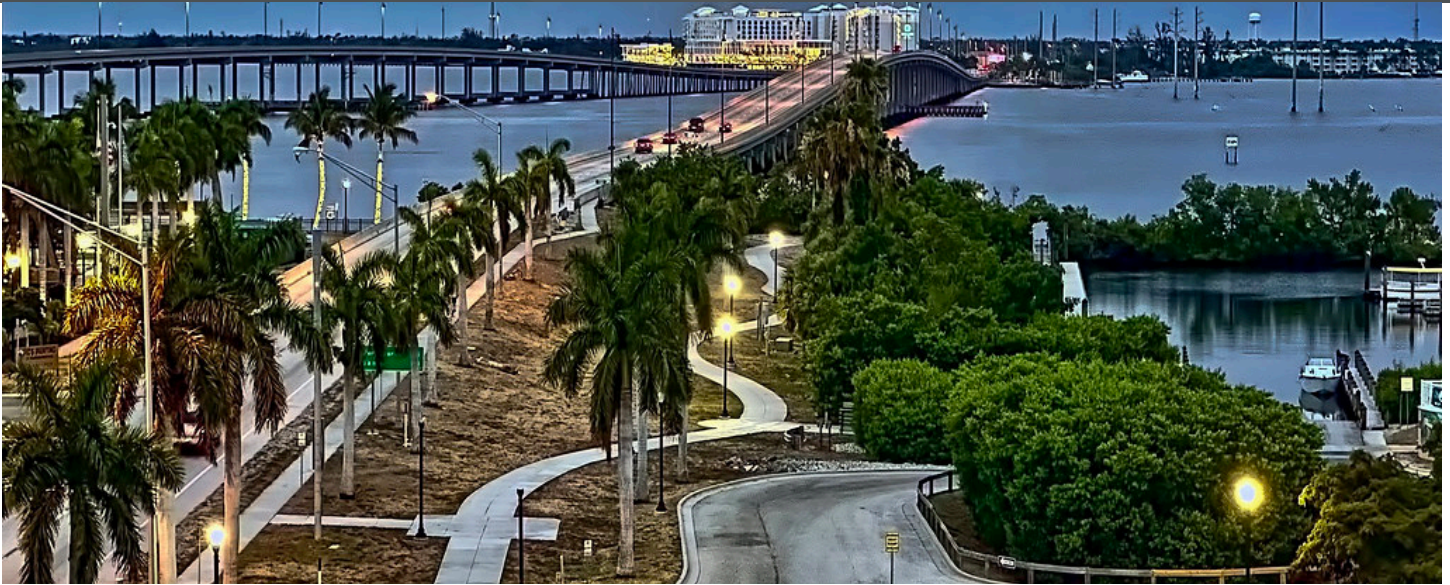
BS, Geography, Ohio University

Years of Experience: 2

Project Experience with Charlotte County

Charlotte County, FL

PROJECT EXPERIENCE



Transit Development Plan (Charlotte County, FL)

Benesch was selected to complete the 2019 major Transit Development Plan (TDP) update for Charlotte County, Florida, after completing the major TDP update in 2014, dubbed the Charlotte Rides TDP. The 2014 TDP recommended major restructuring and service changes that were not implemented. The priority for the plan update in 2019 was to design service improvements that retained the prominent mode as dial-a-ride while using technology to improve service delivery and add rider options. The Charlotte Rides TDP brand was retained and an extensive public engagement campaign was conducted, including workshops, discussion groups, stakeholder interviews, web and social media outreach, grassroots efforts, multiple surveys and a Board interactive visioning session. With 1,421 individuals engaged, the results included a new mix of alternatives using technology and innovative delivery options to the recommended service strategies.

The TDP that Benesch staff developed achieved a balanced blend of adopted service options that adhered to financial limitations, while also introducing a fresh emphasis on technology-driven solutions and Mobility-on-Demand services. Enhancements to the existing dial-a-ride system were made through mobile applications for Transportation Network Companies (TNCs), alongside the establishment of regularly-scheduled transit routes connecting the airport and other locations. Additionally, Benesch proposed the construction of a new transit administration facility and the implementation of mobile applications. This comprehensive TDP was successfully adopted by the Board of County Commissioners and received compliance approval from the Florida Department of Transportation (FDOT). The related outreach efforts were notably effective, delivering measurable outcomes that further fortified the plan's success.

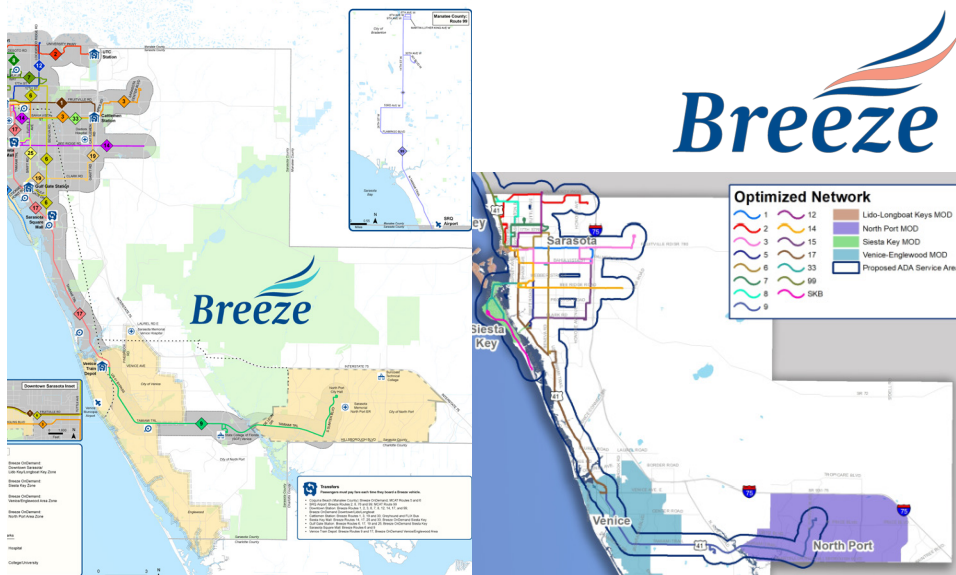
General Planning Consultant (Charlotte County-Punta Gorda MPO)

Benesch has performed numerous general planning services for Charlotte County-Punta Gorda MPO and some these services resulted in: a public involvement process that resulted in input from different demographic audiences and developing solutions appropriate for the County and its short- and long-term situation, the unanimous approval of a cost efficient transit plan that will improve service delivery and effectiveness and provide enhanced service and access options and the unified vision for transportation that implements goals and objectives identified by the community.

Mobility Optimization Study

Breeze Transit

PROJECT EXPERIENCE



Background: Breeze Transit conducted a Mobility Optimization study to improve the effectiveness, productivity, responsiveness and cost-efficiency of county mobility services post-COVID-19. The study evaluated service performance, analyzed mobility needs and identified gaps and opportunities for improvement. Public outreach included both in-person and virtual engagement with interactive online mapping tools to help stakeholders understand and compare mobility needs and the recommended optimized network.

Scope: The optimized network eliminated unproductive fixed routes, mainly in low-demand areas and improved remaining routes by streamlining alignments, removing large loops, making services more direct, enhancing connections at mobility hubs and introducing shared-ride, point-to-point mobility-on-demand MOD solutions. MOD services were developed for four county areas, sometimes replacing poor fixed routes and other times overlaying streamlined service. The study included detailed operations planning for both fixed routes and MOD zones, with savings used to boost frequency in high-demand corridors and support scheduling, run cutting and bid support. The optimized fixed routes and new MOD service launched in June 2021. By July 2022, MOD ridership exceeded 20,000 trips per month at an average cost of \$14.09 per trip, expanding mobility access, increasing ridership—40% over age 65—and reducing net operating costs.

Key Issues

- Restructuring transit networks to be more direct
- Improving route and network connectivity
- Increasing service/connectivity to major trip generators
- Designing services for SaaS and TaaS applications
- Benefits of mobility-on-demand to complement fixed route

Dates of Service

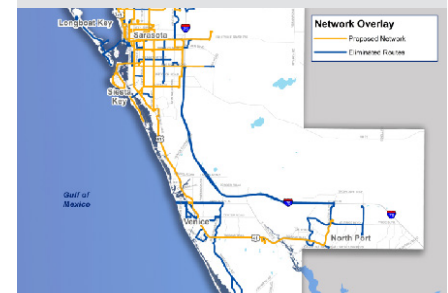
6/2020 - 6/2021

Project Cost

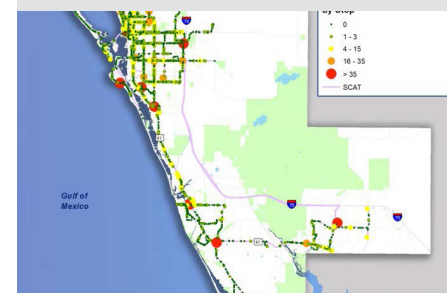
\$222,887

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Previous fixed route network;
Optimized network with MOD zones



Average Weekday Boardings

Microtransit Feasibility and Implementation

Volusia County, FL

PROJECT EXPERIENCE



Background: Benesch was engaged by Votran to complete the major update of the Votran Transit Development Plan. Through the course of the TDP, several areas of the county were identified to be candidate locations for mobility-on-demand (MOD) services (also known as microtransit). Votran subsequently engaged Benesch to define and develop a MOD service to better serve high mobility demand areas with a more precise and cost-effective mobility service option. The study involved assessing existing transit and paratransit services, defining concept of operations for on-demand service and assessing the feasibility of implementing MOD service. The study developed strategies for changes to the fixed route network, developed a MOD service concept for all (general public and paratransit), operating requirements, technical specifications for procurement of technology and services and recommended phasing strategies to deploy MOD services in western Volusia County. The County launched VoRide microtransit in December 2023. Benesch provided the procurement and deployment support. Service expanded to two zones, serving a larger area. After the first year, ridership increase 25% and operating costs were reduced by \$300,000.

Scope: Integral to these efforts, Benesch worked with Votran to understand specific mobility objectives and needs. Benesch developed a series of MOD concepts that included optimizing the fixed route network, focusing MOD service on more populous areas and designing MOD to serve a hybrid suburban-rural areas to expand access to mobility for a significant ADA demand more cost-effectively.

Specific efforts included developing the functional requirements for the software-as-a-Service (SaaS) platform to support each service option, including impacts on riders, operations, policy and integration with existing systems and services. This support defined the MOD service area and phasing, developed on-demand operating rules, response times, operating requirements, operating costs, ridership estimates and calculated net impacts on ridership and operations. It also includes procurement support to select a TaaS contractor, service deployment, monitoring, troubleshooting and supporting Votran in efforts with the selected TaaS contractor.

Key Issues

- Restructuring transit networks to be more direct
- Improving route and network connectivity
- Increasing service and connectivity at major trip generators
- Designing services for SaaS and TaaS applications
- Benefits of mobility-on-demand to complement fixed route and paratransit

Dates of Service

10/2021 - 7/2024

Project Cost

\$181,411

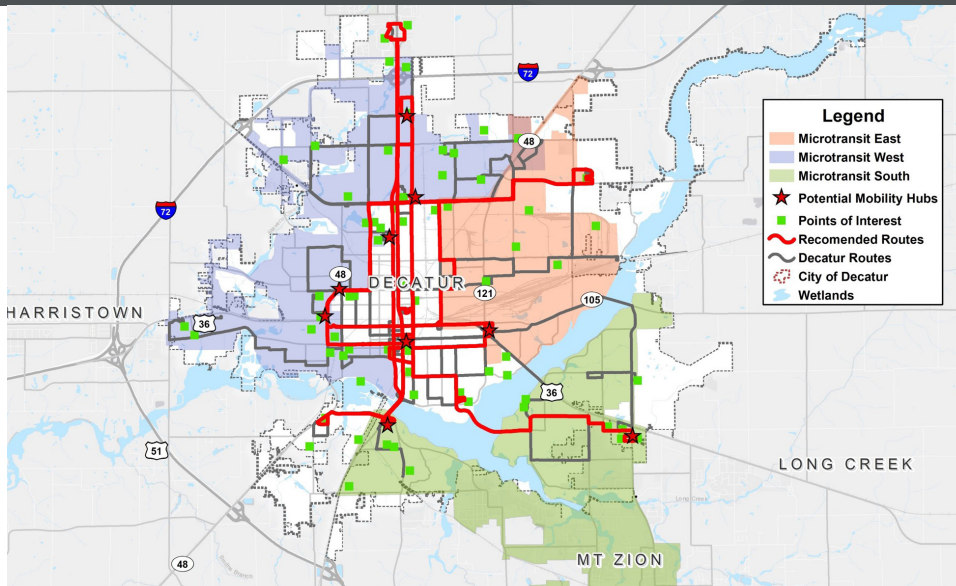
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Comprehensive Operational Analysis

City of Decatur, IL

PROJECT EXPERIENCE



Background: Benesch was selected by the City of Decatur to conduct their first comprehensive operations analysis (COA) in over 25 years. Given the significant changes within the community, the COA examined the mobility needs market, existing services and identified mobility need gaps. The COA evaluated service network structure and operational performance and efficiency. Service concepts and operating requirements were developed to guide decision-making by the City to establish priorities for improving mobility and access to mobility within the community.

Scope: Guided by COA principles and thorough data and operations analyses, service recommendations were developed to enhance the route network, boost productivity and efficiency and leverage technology for a more cost-effective, accessible and appealing mobility service. The evaluation of operating scenarios led to restructuring the fixed-route network for more direct and frequent service along key corridors, introducing microtransit in low-productivity areas and establishing mobility hubs at key centers to connect services. Recommendations included shifting over 65% of ADA paratransit trips to microtransit, improving job access with citywide service during 2nd and 3rd shifts. Operating plans and costs were outlined to expand service to two adjacent municipalities, with phased changes aligned to fiscal capacity to increase ridership, reduce cost per trip and boost productivity. The initial COA project was supplemented by additional technical support tasks including developing GTFS data and microtransit design and procurement support.

Key Issues

- Assess changes in market conditions
- Define mobility need gaps
- Redesign fixed route network
- Define microtransit services
- Quantify ADA paratransit needs
- Define ways to integrate services
- Analyze service and fare policies
- Develop net operating impacts
- Develop/upload GTFS data
- Identification of bus stops
- Automated Passenger Counter analysis

Dates of Service

3/2023 - 12/2024

Project Cost

\$204,000

Client Reference

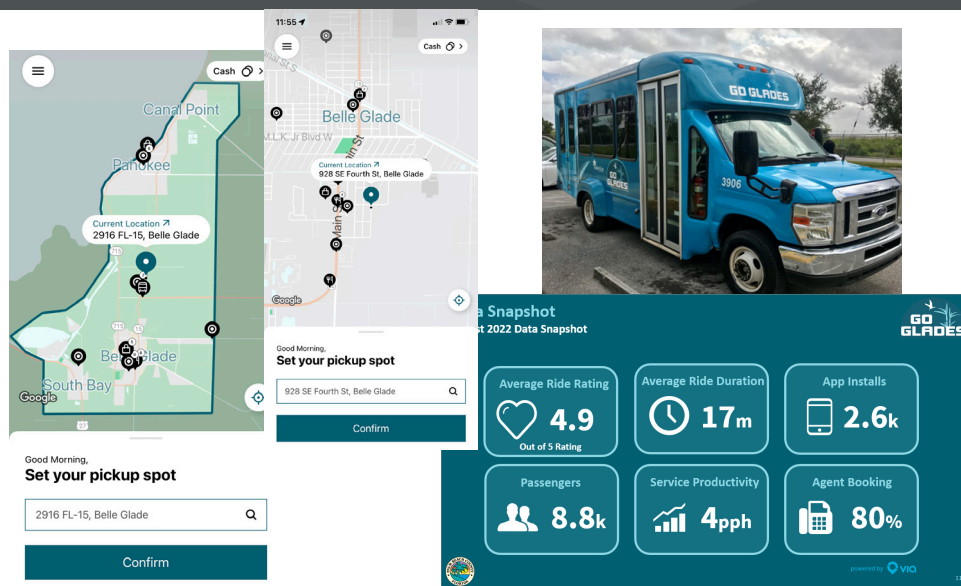
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Palm Tran Network Redesign/Deployment

Palm Beach County, FL

PROJECT EXPERIENCE



Background: Benesch was selected by Palm Beach County to develop and deploy the first transit network redesign since 1996. The project included providing lead planning services for Palm Tran for the redesign of the fixed-route network of 33 routes plus development of the Go Glades microtransit services.

Scope: The project included: transit performance analysis; network redesign; route modifications, additions, eliminations; frequency and span adjustments; scheduling, runcutting and deployment support. Work was completed as the Route Performance Maximization (RPM) project. The redesign was adopted unanimously by the Palm Beach County Board of County Commissioners. The new network and services were deployed September 30, 2018, a study period of seven months. Post service change, on-time-performance improved from 65% to 85%, passenger response was positive and ridership increased. The changes were cost neutral as modification to low performing routes “paid” for improvements to service span and frequency. The redesign strategy was to better fit service supply with demand, improve connectivity through route network design, add span and frequency to cover work times and make travel more direct and convenient.

In addition, Benesch developed a microtransit service strategy for Palm Tran Connection, the paratransit service, within the Glades, a rural agricultural community. The Go Glades service was designed initially to provide curb-to-curb shared ride service to the general public with 2-hour advance notice. The service was converted to curb-to-curb shared ride mobility-on-demand (MOD) in April 2020. Benesch created procurement specifications for a SaaS platform that was acquired by Palm Tran and Go Glades began using the Via microtransit platform and app in February 2022. With the new software and a fully real-time on-demand operation, Go Glades ridership grew to over 10,000 trips per month. In 2023, the fixed route service in the Glades was redesigned to be more direct and more frequent connecting key points in Pahokee, Belle Glade and South Bay with an accompanying recommendations for Go Glades to provide localized trips and connect riders to the improved fixed route for longer trips.

Key Issues

- Transit operating strategies and SaaS functionalities required to provide compliance with ADA and mobility-on-demand services
- Procurement support for SaaS platform acquisition and deployment
- Fare and Title VI equity policy analysis

Dates of Service

7/2018 - 6/2021

Project Cost

\$565,617

Client Reference

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As of June 2022, monthly ridership on the Go Glades microtransit service exceeded 8,000. Ridership includes new riders and a significant shift in riders from paratransit and fixed route. Overall mobility and access to mobility has increased and Palm Tran is planning to expand the service to other parts of the Palm Tran service area.

Grant Program Compliance & Other Support

Florida Department of Transportation Central Office



Background: Benesch provided support for the State Management Plan, Section 5310/5311 Programs and other programs as needed, including various field and office support activities. Specific field support includes on-site vehicle maintenance inspections and inventory support and documentation, as well as on-site Grant and Triennial Reviews for determining program and regulatory compliance. FDOT's Transit Office administers federal and state transit grants, monitors compliance with transit regulations, Title VI and provides planning, procurement assistance and technical assistance to Florida's transit agencies and communities. Benesch has served as a consultant to the Transit Office since 2010.

Scope: This project required a unique blend of applicable experience with national, state and local level oversight and implementation of basic program requirements, regulatory restrictions and local needs and priorities. A balanced approach of implementing programs effectively while meeting regulatory guidelines and management was needed, in addition to preparation of guidance documents and resources, basic and extended training or technical assistance and oversight/direct implementation.

Outcomes include successful training and support of local agencies to ensure compliance with federal and state regulations. Local agencies effectively implemented programs, expended grant funds and providing needed services. Benesch met FDOT's staff needs for program support and documentation of compliant services and activities.

Highlights of relevant work performed by Benesch over the past five years include:

- Develop the statewide FTA pre-award Risk Assessment Program and resources
- Develop the statewide Cost Allocation Program/Indirect Cost Plan Guidance and resources
- Prepare the Transit Financial Management & Oversight Manual resource to support FDOT's State Management Plan update
- Prepare the Local Agency Procurement Manual resource and conducted statewide training courses
- Update the Procurement Guidance for Transit Agencies resource
- Support FDOT's 2023 FTA review of management practices and program implementation for FTA funding programs

Key Issues

- Develop new policies/ resources for consistency across Districts
- Provide training/technical support for District/agency staff
- Update FDOT manuals and resources to be consistent with new FTA rules and procedures

Dates of Service

12/2023 - Ongoing

Project Cost

\$465,464

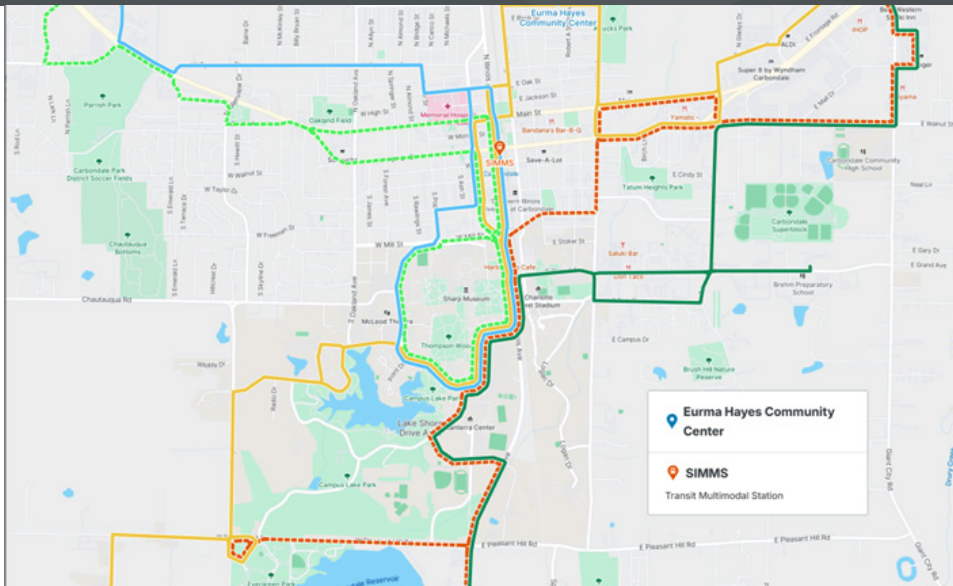
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Benesch also supports four of seven FDOT Districts under various contracts regarding subrecipient compliance needs as a condition of receiving agencies FTA funds through FDOT. Primary activities include conducting FTA-required on-site vehicle maintenance inspections and triennial reviews for determining program and regulatory compliance. Additionally, Benesch has planned and conducted annual FTA 5310/5311/5339 Grant Application & Information workshops for multiple Districts over the past 10 years.

Comprehensive Transit Study

JAX Mass Transit



Key Issues

- Rural populations
- Extensive mobility need
- Lack of mobility services
- Financial Constraints

Dates of Service

9/2024 - 9/2025

Project Cost

\$79,944

Client Reference

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Background: JAX Mass Transit operates transit services in Carbondale, IL, the location of Southern Illinois University (SIU). The RLS & Associates and Benesch team was selected to perform a comprehensive review of services to help guide the agency and community through a pivot point affecting changes in mobility services and fiscal capacity within the community.

Scope: The planning effort builds upon and expands system enhancements implemented by JAX leadership and its governing body, reinforcing the agency's commitment to improving the system to better serve the residents and visitors of Jackson County. The recommendations from this study form the basis for future operational, administrative, facility and passenger infrastructure improvements, as well as internal policy updates for the agency.

Unique Features: The JAX service area, Carbondale-Marion UZA, was decertified following the 2020 Census rendering it ineligible for Federal Transit Administration urban 5307 funding. The reduction in Federal support heightened the need to secure additional revenue from state and local sources. Study efforts and recommendations addressed a comprehensive system analysis, review of the service market, transit demand analysis, review of standard operating procedures and emergency management policies, staffing and management review, review of existing and planned facilities, development of service alternatives for near-term, medium-, and long-term improvements, development of future transit facility requirements, bus stop improvements and definition of an optimal vehicle mix.

Benesch prepared the market analysis, service analysis, long-term service plan, and staffing, management, and facilities reviews. Key recommendations included a fixed route redesign that eliminates large one-way loops in favor of a network of streamlined bidirectional routes that include a series of designated mobility hubs at key activity centers to facilitate shorter travel times and a more fully integrated and connected transit network offering riders with choices in which routes to use depending on the rider's origin and destination.



METHODOLOGY AND PROJECT APPROACH



UNDERSTANDING

Charlotte County is at a pivotal point in determining the most efficient, cost-effective and sustainable way to provide transit driver services. This decision affects not only short- and long-term costs, but also operational performance, workforce stability and rider experience.

Our team understands that the County’s analysis must: Compare in-house versus contracted driver service models with a full accounting of direct and indirect costs.

A full accounting of direct and indirect costs ensures Charlotte County can clearly see the true “all-in” expense of each option—including wages, benefits, HR, insurance, supervision, recruitment and contractor margins—so leadership understands which model is most financially sustainable as the County transitions from a Small urbanized area (UZA) to a Large UZA. For transit agencies everywhere, this type of total cost of ownership analysis prevents hidden expenses from undermining budgets and helps leaders make better long-term decisions.

Evaluate the operational and workforce impacts of each model.

Examining how each model affects scheduling flexibility, on-time performance, safety culture and driver recruitment is critical for Charlotte County, where labor market realities and service reliability directly shape rider confidence and community access. More broadly, transit agencies know that service quality depends on workforce stability and training, making it essential to weigh operational impacts when comparing delivery models.

Identify risks, transition challenges and scalability considerations.

Charlotte County must be prepared for potential risks such as service disruption, labor issues, or funding changes, while also ensuring capacity to scale services as demand grows with population and federal designation shifts. Transit systems in general face the same challenge: transitions

succeed only when risks around labor, compliance, technology and scalability are anticipated and managed with clear mitigation strategies.

Benchmark peer agency practices to provide a grounded perspective.

Using peer agency data gives Charlotte County a practical lens to compare wages, service models and performance benchmarks, grounding recommendations in real-world experience rather than theory. For transit more broadly, peer benchmarking accelerates learning, highlights proven solutions and strengthens the credibility of recommendations with boards, funders and the public.

Deliver a clear, step-by-step plan that enables County leadership to act decisively.

Charlotte County’s leadership will benefit from a 90-day roadmap with clear milestones that align with budget cycles and provide actionable steps—procurement, HR, technology integration and communications—to ensure any transition is smooth and disruption-free. For transit agencies everywhere, actionable implementation plans are what turn studies into results, ensuring accountability, budget alignment and continuity of service.

We also recognize that Charlotte County’s growth will bring a transition from a Small UZA to a Large UZA, requiring updates to its FTA funding formula, reporting and compliance structure. This shift has significant financial implications: as a Small UZA, Charlotte County is currently able to use a larger share of its Section 5307 federal funds for operating assistance. Once reclassified as a Large UZA, federal rules restrict the use of 5307 dollars for operations, which can result in less federal funding available to cover day-to-day service costs. This change may require Charlotte County to identify higher levels of local investment in operations to maintain and expand service. Considering this funding transition alongside operating model choices will be essential to ensuring long-term sustainability.



PROJECT APPROACH

Task 1: Cost Analysis

We will conduct a comprehensive cost comparison between in-house and contracted driver service models using our proven Multi-Factor Cost Analysis methodology, which has been successfully implemented in transit agencies nationwide. Our analysis will include:



Driver wages and benefits: Comprehensive assessment of base wages, healthcare coverage options, retirement plans, paid time off accruals and other benefits. We will utilize our proprietary Wage Comparability Database to benchmark against public and private sector positions with similar qualifications across Florida.



Recruitment, hiring and onboarding expenses: Full accounting of advertising costs, background checks, drug testing, administrative processing and training time investments. We will analyze current turnover rates to project ongoing recruitment needs. Our experience shows that contractor-managed recruitment can reduce agency administrative burden per new hire significantly.



CDL and professional training costs: Detailed analysis of initial and recurring training requirements, including CDL licensing, passenger assistance techniques, defensive driving, customer service, ADA compliance and safety procedures. We will quantify the cost differential between agency-provided training versus contractor-provided programs, which often leverage economies of scale across multiple contracts.



Administrative support costs: Comprehensive evaluation of HR support functions, payroll processing, scheduling and dispatch operations, supervision ratios and performance management requirements for both service delivery models. Our past analyses demonstrate that administrative overhead typically accounts for a sizable percentage of total operational costs, with significant variations between in-house and contracted models.



Insurance and liability coverage: Analysis of workers' compensation, general liability, umbrella policies and vehicle insurance requirements. We'll examine how self-insured agencies carry different risk profiles than those using contractor-provided coverage, with implications for long-term claim exposure and premium volatility.



Overhead and indirect costs: Quantification of facility space requirements, utilities, IT infrastructure, vehicle maintenance impacts and other support services needed under each model. In our experience, agencies often underestimate facility and overhead costs when transitioning to in-house operations.



Contractor overhead and profit margins: Analysis of typical contractor markup rates in the Florida transit market, evaluating both fixed-fee and performance-based contract structures. Based on our procurement experience, we will examine how competitive procurement strategies can optimize contractor margins while maintaining service quality.

Beyond direct comparison, we will incorporate advanced sensitivity testing for long-term scenarios, modeling how changes in wages, healthcare costs, turnover rates and service growth affect costs over a 5–10 year horizon. Our analysis will utilize our Transit Workforce Cost Projection Model, which incorporates:

- Inflation factors for wages and benefits based on historical trends and economic forecasts
- Multiple service growth scenarios aligned with Charlotte County's TDP projections
- Turnover rate variability based on industry benchmarks and local labor market conditions
- Health insurance premium escalation projections
- Potential union organization impacts on wage structures and work rules

Our analysis will produce visualizations that clearly illustrate the “crossover points” where one model becomes more cost-effective than the other based on service hours, ridership volume and other key variables.

Task 2: Operational Efficiency Analysis

We will evaluate how each staffing model influences system performance by applying our Transit Operational Assessment Framework, which examines quantitative metrics alongside qualitative organizational factors. This methodology provides a comprehensive view of operational implications for both service models.

SCHEDULING FLEXIBILITY AND OPTIMIZATION

- Coverage protocols for call-outs and absences
- Split-shift management capabilities
- Extra board utilization and deployment efficiency
- Work rules regarding minimum guarantees, overtime distribution and break requirements
- Ability to adapt to seasonal ridership fluctuations
- Cross-utilization possibilities for drivers across service types
- Schedule adherence management and accountability mechanisms

Our experience shows that contracted services often demonstrate higher scheduling efficiency through dynamic shift adjustments and automated scheduling tools, particularly during special events and seasonal fluctuations.

PERFORMANCE ANALYTICS TOOLKIT

- Operator performance incentive structures
- Schedule adherence tracking and enforcement mechanisms
- Service recovery protocols during disruptions
- Route familiarization processes and operator route knowledge
- Supervisor-to-operator ratios and field support capabilities
- Performance monitoring and reporting consistency

Our analyses reveal that performance-based contractor incentives, when properly structured, can improve on-time performance significantly compared to traditional fixed-price contracts, with key performance indicators (KPIs) serving as effective management tools regardless of operational model.



SAFETY CULTURE AND INCIDENT PREVENTION

- Accident and incident rates under each operational model
- Safety training frequency and effectiveness
- Safety recognition programs and incentives
- Near-miss reporting practices
- Safety meeting participation and follow-through
- Safety accountability structures and enforcement mechanisms
- Ongoing certification maintenance and remedial training protocols

Drawing from our safety performance analyses, we will evaluate how consistent safety management systems (SMS) implementation affects incident rates, which can vary between different operational models.

COMMUNICATION AND COORDINATION WITH COUNTY OPERATIONS

Operational communication channels and responsiveness
Decision-making authority and escalation protocols
Policy implementation and consistency
Public information coordination during service disruptions
Customer complaint response and resolution processes
Route and schedule adjustment implementation processes
Integration with emergency management protocols

Our studies demonstrate that clearly defined roles and communication protocols are more significant factors in operational coordination than the service delivery model itself, with formalized service level agreements (SLAs) proving effective in both contexts.

LABOR RULES AND THEIR IMPACTS ON COST AND EFFICIENCY

- Work rule constraints on scheduling efficiency
- Overtime management approaches
- Extra work assignment processes
- Leave management and impact on service delivery
- Progressive discipline approaches and effectiveness
- Grievance processes and historical patterns
- Labor relations climate and impact on operational flexibility

Our analyses identify that work rules significantly influence productivity metrics, with contracted operations often demonstrating higher revenue hours per total hours ratio in areas with similar service characteristics.

Our analysis will incorporate our Service Delivery Quality Assessment methodology, which includes both quantitative performance metrics and qualitative organizational factors that influence service quality. Through our implementations, we have developed key performance indicators that effectively measure service quality across different operational models, allowing for objective comparisons regardless of delivery approach.

Additionally, we will apply lessons learned from our implementations of dynamic scheduling technology, which have demonstrated significant efficiency improvements for both in-house and contracted operations. Our analysis will quantify how advanced scheduling tools might benefit Charlotte County under either operational model.

Task 3: Risk and Impact Assessment

We will create a risk matrix that identifies and evaluates:

- Legal, labor and compliance risks under each model
- Impacts of transitioning between models on employees, contracts and riders
- Service continuity considerations
- Scalability to meet future service demands or regulatory changes

Benesch will apply a structured, scenario-based methodology that combines regulatory review, workforce transition planning and operational continuity analysis. Each risk will be scored by likelihood and impact and paired with tailored mitigation strategies such as phased implementation, pilot testing, performance-based contracting, or workforce incentive programs. This approach ensures that Charlotte County receives not just a list of risks, but a decision-ready framework for managing them, giving leadership confidence that any chosen operating model can be implemented smoothly, sustainably and in compliance with FTA requirements.

Task 4: Driver Workforce Evaluation

Building and maintaining a strong driver workforce requires a multifaceted approach. In Benesch's experience, establishing recruitment pipelines through partnerships with local community colleges, veteran organizations and workforce development agencies has created sustainable candidate pools that reduced vacancy rates in similar markets.

For Charlotte County, similar collaborative strategies could address the challenges of a competitive regional labor market. Retention programs and career development opportunities are also critical; agencies with structured career progression paths have consistently experienced lower turnover than those offering static positions. Developing clear advancement opportunities within the transit operation or broader County employment could significantly improve retention rates for Charlotte County. Recognition, mentoring and incentive programs further support workforce stability. Implementing tiered recognition programs tied to performance metrics has improved both retention and operational outcomes with minimal financial investment.

Benesch's analysis will identify incentive structures that align with Charlotte County's operational priorities and budget realities. Finally, competitive salary and benefits benchmarking is essential. Comprehensive compensation analyses across multiple sectors reveal that schedule quality and work-life balance often outrank base compensation in driver retention decisions. For Charlotte County, a multifaceted approach to competitiveness should extend beyond simple wage comparisons to address these broader factors.

We deliver workforce evaluations through our Transit Workforce Development Framework, which integrates quantitative labor market analysis with qualitative assessment of organizational culture. This approach has identified non-traditional candidate pools and innovative scheduling approaches that significantly improved workforce stability. For Charlotte County, we will apply these same techniques to address the specific challenges of a growing transit operation in a competitive labor market.

Task 5: Peer Review

Benesch will conduct a peer review of comparable agencies, both in Florida and nationally, to benchmark staffing approaches, costs and outcomes. This review will focus on several key areas relevant to Charlotte County's transit operations.

First, the team will examine staffing models, comparing in-house and contracted approaches. Experience shows that hybrid models—where certain functions remain agency-controlled while others are contracted—often provide optimal flexibility. This spectrum of options, rather than a simple binary choice, may offer Charlotte County tailored solutions that address specific local challenges.

Second, the review will analyze wage and benefit structures. Benesch has identified innovative compensation approaches that will improve retention without proportional cost increases by restructuring work schedules and progression systems. These creative strategies for recruitment and retention extend beyond simple wage increases and may be applicable to Charlotte County's competitive labor market.

Third, the analysis will address service reliability and safety outcomes. Benesch's research quantifies the operational performance impacts of different staffing models, revealing that performance-based contracts can achieve reliability metrics similar to well-managed in-house operations. For Charlotte County, understanding these comparative outcomes will help establish realistic expectations for either model.

Finally, the review will incorporate lessons learned from agencies that have transitioned between models. Interviews with these agencies reveal that implementation timelines typically extend beyond initial projections due to unforeseen challenges. These practical insights will provide Charlotte County with realistic expectations and proven mitigation strategies.

We deliver peer reviews through our Comparative Transit quantitative benchmarking and qualitative interviews with agency leadership. This approach has uncovered innovative scheduling practices that were subsequently implemented with significant operational benefits. Our extensive industry network allows us to access insights beyond published reports, providing Charlotte County with practical, experience-based guidance.

Task 6: Feasibility & Implementation Plan

If transitioning to in-house services is recommended, we will develop a step-by-step implementation roadmap that:

- Defines required actions, milestones and responsibilities
- Identifies challenges and mitigation strategies
- Provides a realistic phased timeline for implementation

Benesch will build this roadmap through a collaborative planning process that engages County staff, reviews operational and HR capacity and stress-tests potential timelines against funding cycles and service continuity needs. Our methodology combines best practices from prior workforce transitions with scenario planning to identify potential bottlenecks—such as recruitment lead times, training requirements or technology integration—and proposes phased implementation strategies to minimize disruption. This ensures Charlotte County receives a practical, actionable plan that aligns with both short-term operational realities and long-term strategic objectives.

Task 7: Reporting & Presentations

We will deliver clear and decision-ready documentation through:

- Draft and final reports summarizing methodology, findings and recommendations
- Using bi-weekly meetings as points where we review findings, strategies and decision-making in the study process to assure that staff and the project team are fully in agreement on how and what is advanced
- Cost spreadsheets, risk matrices and performance dashboards
- An executive summary for elected officials and leadership
- Presentations of findings to Charlotte County staff and decision-makers

Benesch will package all findings in a format that is both technically rigorous and accessible to a range of audiences. Our reports will combine detailed analysis with clear visualizations, dashboards, charts and matrices, that make complex information easy to interpret. We will also prepare concise executive summaries to support decision-making at the policy level and conduct presentations tailored to both staff and elected officials. This approach ensures Charlotte County receives decision-ready documentation that is transparent, actionable and usable well beyond the life of the study.



Above are a few examples of covers for similar projects we have worked on that correlate with Charlotte County.

TASK 8: DELIVERABLES TIMELINE

All major deliverables will be completed within 90 days of contract execution, with interim check-ins at 30 and 60 days to align with County expectations.

		2025			2026
Task		October	November	December	January
1	Project Management				
1.1	Project Coordination				
1.2	Project Status Meetings (up to 6 meetings)				
2	Cost Analysis				
3	Operational Efficiency Analysis				
4	Risk and Impact Assessment				
5	Driver Workforce Evaluation				
6	Peer Review				
7	Feasibility and Implementation Plan				
8	Reporting and Presentations				

LEGEND

	Task Duration		Status Meetings		Final Document
	Subtask Duration		Draft Document		Presentation

Task 1: Cost Analysis

Interactive comparative cost model with visualizations of short- and long-term cost trajectories, including scenario-based “what if” analyses that can be adjusted during County planning discussions.

Task 2: Operational Efficiency

Comprehensive operational performance comparing in-house and contracted models across key metrics, with visual indicators of relative performance and specific operational recommendations for optimizing each model. This document will include scenario modeling capabilities to test different operational assumptions and service configurations.

Task 3: Risk and Impact Assessment

Risk and mitigation matrix with likelihood/impact scoring, accompanied by a technical memorandum summarizing potential transition scenarios and recommended mitigation strategies.

Task 4: Driver Workforce Assessment

Workforce strategy report tailored to Charlotte County’s labor market. This will include prevailing wage rates and benefits, typical qualifications and training, likely sources of candidates and evidence (recent studies) of worker employment

longevity, retainage and resignation rates for directly employed vs. contracted and non-dedicated service models.

Task 5: Peer Review

Peer benchmarking summary and case study highlights. We will work with staff to identify known peers and identify new peers with histories reflecting direct employment, contracted services and non-dedicated drivers.

Task 6: Feasibility & Implementation Plan

Feasibility study and detailed implementation roadmap. This product will clearly and concisely present the analysis, findings, service and labor strategies examined and recommendations. Comparisons of costs and benefits to Charlotte County, your services and your riders will be presented in easy-to-understand tables to improve the accessibility of the report for the community.

Task 7: Reporting & Presentations

Draft report, final report, supporting visuals and executive presentation (one in-person to county leadership). Benesch will work with staff in the preparation, review and editing of the written reports and presentations for County and public consumption.



4 INDUSTRY KNOWLEDGE



Benesch demonstrates a comprehensive understanding of the public transportation industry, its regulatory environment, compliance requirements and contract operations. Our experience with partnering with transit agencies, state departments of transportation and local governments, providing technical, financial and compliance support for a wide range of public transportation initiatives, spans decades.

Benesch's expertise includes in-depth knowledge of FTA and state DOT regulations, ensuring that all projects adhere to the latest federal, state and local requirements. The team routinely supports clients with FTA and DOT program compliance, including grant management, triennial reviews, safety and security planning, Title VI and ADA accessibility and procurement oversight. Benesch has developed guidance handbooks, policy manuals and conducted statewide training for planning professionals, ensuring that clients remain fully compliant with evolving regulations.

Contract operations are managed with a focus on transparency, accountability and adherence to all required terms and conditions. Benesch's approach includes incorporating all FTA-mandated contract provisions, such as nondiscrimination, record retention, access to records and DBE participation. The firm's contract compliance representatives monitor and enforce civil rights, prompt payment and utilization compliance, ensuring that all contractual obligations are met throughout the project lifecycle.

Benesch's team is well-versed in the technical and administrative aspects of public transportation contracts, including labor compliance, procurement regulations and reporting requirements. The firm's experience with federally funded projects ensures that all plans, specifications and contract documents are prepared in accordance with current regulations, including Davis-Bacon Act, Buy America, NEPA, ADA, Title VI and DBE requirements.

In summary, Benesch's proven track record in the public transportation industry is built on a foundation of regulatory expertise, robust compliance processes and a commitment to delivering practical, implementable solutions that support agency goals and community needs.

EVALUATION OF OPERATING MODELS

A key element of this analysis was a detailed comparison of different operating models for demand response service, including:

- County-operated in-house service, with Palm Tran managing drivers and operations directly.
- Contracted service delivery, where operations were outsourced to a private provider.
- Hybrid approaches, where certain functions technology, scheduling, call center could be contracted while drivers remained in-house.

This comparative analysis looked at costs, service performance, staffing implications and compliance requirements for each operating scenario. The study demonstrated that a contracted MOD model using a SaaS platform could improve service efficiency, reduce costs per trip and expand same-day trip options.

CASE STUDY: PALM TRAN GO GLADES SERVICE EVALUATION AND MOD TRANSITION

The Go Glades project began as an FDOT Service Development Project to expand rural mobility in Palm Beach County's western communities Belle Glade, Pahokee, South Bay. Palm Tran launched four Flex routes in September 2018, aligned with the County's Route Performance Maximization RPM fixed-route restructuring.

After the first 8-9 months of operation, Benesch prepared the initial Rural Transit Initiative report July 2019 evaluating the performance of the Flex routes and recommending a transition to a Mobility-on-Demand (MOD) model supported by a Software as a Service SaaS scheduling platform.





5 COST PROPOSAL



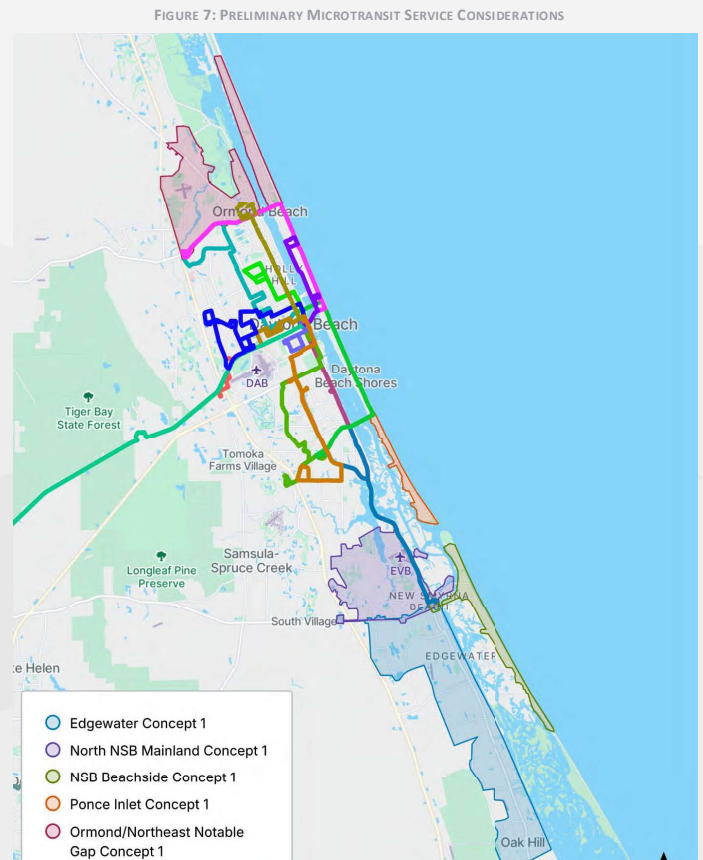
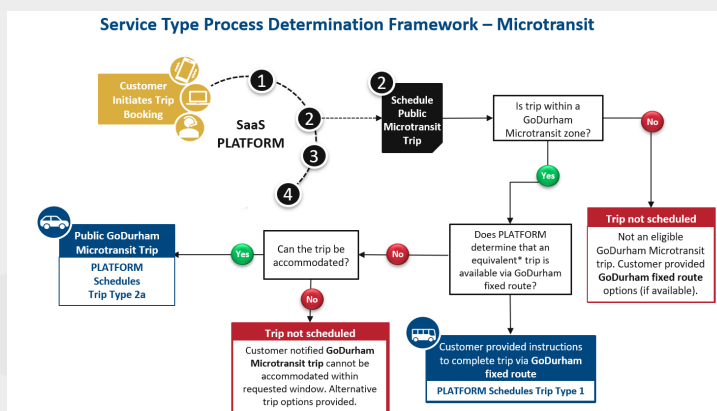
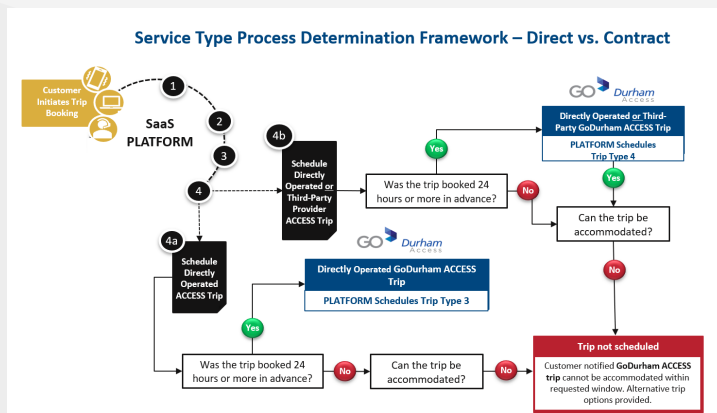
		Staffing Category						Task Totals	
		Principal-in-Charge	Senior Technical Advisor	Project Manager	Project Planner	Planner	Admin		
Task Descriptions		\$274.07	\$262.74	\$179.31	\$128.48	\$104.75	\$96.04	Hours	Fee
Project Management and Coordination									
		3	6	20	6	0	4	39	\$7,140
1.1	Project Coordination	0	0	8			4	12	\$1,819
1.2	Project Status Meetings	3	6	12	6			27	\$5,321
Cost Analysis									
		2	4	8	20	30		82	\$10,357
Operational Efficiency Analysis									
			4	12	16	30		62	\$8,401
Risk and Impact Assessment									
		2	4	12	16	20		54	\$7,902
Driver Workforce Evaluation									
			4	8	16	20		48	\$6,636
Peer Review									
			4	12	16	20		52	\$7,353
Feasibility and Implementation Plan									
		2	8	16	20	26	8	80	\$11,581
Reporting and Presentations									
		2	16	16	4	4	4	46	\$8,938
TOTALS	Labor Hours and Cost Estimate	11	50	104	114	150	16	463	\$68,308
ODC	Other Direct Costs (travel for presentations and meetings)								\$1,020
	Total Labor (all tasks)								\$69,328



6 COMMUNICATION AND REPORTING

Benesch's approach to reporting and final report delivery is built on clarity, actionable insights and user-friendly formats. The process begins with compiling all findings and analyses into a draft report, which typically includes an executive summary, project background, methodology, key findings and, if applicable, a transition plan outlining implementation steps. Tools such as ArcGIS, Tableau and Power BI are used to analyze data and create interactive dashboards, enabling stakeholders to visualize progress, track key performance indicators and monitor compliance in real time. These dashboards and scorecards support data-driven decision-making and provide timely, reliable analytics for both technical and executive audiences. The final report is delivered in accessible electronic formats (PDF and, when needed, 508-compliant versions), often accompanied by supporting documentation, maps and data files. If a transition plan is required, it is integrated into the report, detailing prioritized actions, schedules and budget considerations. Benesch also prepares concise executive summaries and graphical presentations to facilitate communication with decision-makers and the public, ensuring that recommendations are clear, actionable and tailored to the client's needs.

EXAMPLES OF OUR WORK



Benesch enhances transit system reporting and final documentation by leveraging advanced technology, including GIS platforms, automated data collection and analytics tools, to compile and visualize comprehensive datasets for clients. The firm's Transit Solutions Team applies innovative methodologies and industry-leading software to deliver clear, actionable reports, interactive dashboards and detailed maps. Benesch's culture of innovation, supported by internal initiatives and the adoption of AI-driven tools, ensures continuous improvement in reporting processes. Final deliverables are formatted for seamless integration with client systems and undergo thorough review cycles, resulting in in-depth, accessible documents that empower transit agencies to make informed decisions.



APPENDIX

PART V - SUBMITTAL FORMS
PROPOSAL SUBMITTAL SIGNATURE FORM

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

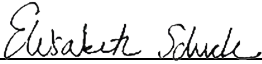
By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List or is not participating in a boycott of Israel.

As Addenda are considered binding as if contained in the original specifications, it is critical that the Consultant acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. <u>1</u> Dated <u>9/11/2025</u>	Addendum No. _____ Dated _____	Addendum No. _____ Dated _____
Addendum No. _____ Dated _____	Addendum No. _____ Dated _____	Addendum No. _____ Dated _____

Type of Organization (please check one):	INDIVIDUAL CORPORATION	☐	PARTNERSHIP JOINT VENTURE	☐ ☐
<u>Alfred Benesch & Company</u>		<u>813-224-8862</u>		
Firm Name		Telephone		
<u>Benesch</u>		<u>36-2407363</u>		
Fictitious or d/b/a Name		Federal Employer Identification Number (FEIN)		
<u>1000 North Ashley Drive, Suite 400</u>				
Home Office Address				
<u>Tampa, FL 33602</u>		<u>79</u>		
City, State, Zip		Number of Years in Business		

Address: Office Servicing Charlotte County, other than above	
<u>Elisabeth Schuck, AICP, LEED GA - Vice President</u>	<u>813-825-1278</u>
Name/Title of your Charlotte County Rep.	Telephone
<u>Elisabeth Schuck, AICP, LEED GA - Vice President</u>	
Name/Title of Individual Binding Firm (Please Print)	
<u></u>	<u>9/23/2025</u>
Signature of Individual Binding Firm	Date
<u>eschuck@benesch.com</u>	
Email Address	

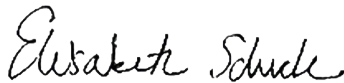
(This form must be completed & returned)

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that Alfred Benesch & Company does:
(name of business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



Proposer's Signature

8/29/2025

Date

NAME OF FIRM Alfred Benesch & Company

(This form must be completed and returned)

**HUMAN TRAFFICKING AFFIDAVIT
for Nongovernmental Entities Pursuant To FS. §787.06**

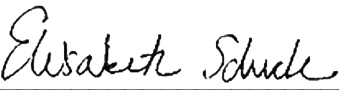
Charlotte County Contract #20250626

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.



Signature

Elisabeth Schuck, AICP, LEED GA

Printed Name

Vice President

Title

Alfred Benesch & Company

Nongovernmental Entity

9/23/2025

Date

NAME OF FIRM Alfred Benesch & Company
(This form must be completed and returned)

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

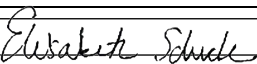
(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION Alfred Benesch & Company	
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
Prefix: Ms.	* First Name: Elisabeth Middle Name: Paige
* Last Name: Schuck	Suffix:
* Title: Vice President	
* SIGNATURE: 	* DATE: 9/23/2025

END OF PART V
(This form must be completed & returned)