

**AMENDMENT #1 TO
CONTRACT NO. 2023000464
BETWEEN CHARLOTTE COUNTY
AND
ALFRED BENESCH & COMPANY
FOR
TRANSIT EFFICIENCY / OPTIMIZATION STUDY**

THIS AMENDMENT #1 to Contract No. 2023000464 is made by and between CHARLOTTE COUNTY, a political subdivision of the State of Florida, 18500 Murdock Circle, Port Charlotte, Florida 33948-1094 (hereinafter the "County") and Alfred Benesch & Company, 1000 North Ashley Drive, Suite 400, Tampa, Florida 33602 (hereinafter the "Consultant").

WHEREAS, March 12, 2024, the Parties entered into Contract No. 2023000464 (the "Contract") for the provision of transit consulting services; and

WHEREAS, the County desires to obtain additional professional services to complete the Transit Efficiency / Optimization Study, as described in the scope of work titled "Transit Efficiency / Optimization Study – Charlotte County Transit, November 5, 2025" (the "Optimization Study Scope"); and

WHEREAS, Consultant has agreed to provide such additional services for the fee set forth herein.

NOW, THEREFORE, in consideration of the mutual terms and conditions, promises, covenants and payment hereinafter set forth, County and Consultant agree to amend the Contract as follows.

ARTICLE I
COMPENSATION / SERVICES

1.1. Exhibit A to the Contract is hereby supplemented to include the Optimization Study Scope, attached hereto as Exhibit A, titled "Scope of Work", and incorporated herein.

1.2. The County shall compensate Consultant for performing the tasks contained in Exhibit A-1 in an amount not to exceed **Forty-Nine Thousand, Thirty-Eight Dollars and Thirty-Three Cents (\$49,038.33)**, billed on a percent-complete basis in accordance with the labor categories and hours set forth in the Optimization Study Scope.

1.3. This Amendment #1 increases the Total Not-to-Exceed Contract Amount by \$49,038.33. All other previously approved fee amounts remain unchanged.

1.4. All services performed under this Amendment shall be governed by the terms and conditions of the Contract unless expressly modified herein.

ARTICLE II
MISCELLANEOUS

2.1. The effective date of this Amendment #1 is the date on which it is fully executed by both Parties.

2.2. Any terms used in this Amendment #1 shall have the same meanings and definitions as they have in the Contract.

2.3. All other provisions of the Contract not in conflict with this Amendment #1 shall remain in full force and effect.

IN WITNESS WHEREOF, the parties have affixed their signatures on the dates written below.

WITNESS:

ALFRED BENESCH & COMPANY

Signed By: _____

Signed by: _____

Print Name: _____

Print Name: _____

Date: _____

Title: _____

Date: _____

**BOARD OF COUNTY COMMISSIONERS
OF CHARLOTTE COUNTY, FLORIDA**

By: _____

Joseph M. Tiseo, Chairman

Date: _____

ATTEST:

Roger D. Eaton, Clerk of the Circuit
Court and Ex-Officio Clerk to the
Board of County Commissioners

By: _____

Deputy Clerk

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY:

By: _____

Janette S. Knowlton, County Attorney

LR25-1168

Exhibit:

Exhibit A – Scope of Work

Scope of Work Transit Efficiency/Optimization Study

Charlotte County Transit
November 5, 2025

Introduction

The purpose of this study is to provide support for Charlotte County Transit to assess and optimize the existing on-demand services. This work will explore strategies to increase service efficiency while decreasing the cost per trip, which may include but is not limited to the addition of high-capacity vehicles or staff resources to enhance long-term efficiency and sustainability of the system. Furthermore, this study will assess the existing software functionalities and identify necessary upgrades that may be required to support an enhanced level of service.

The following scope of services describes the tasks and resulting deliverables that will be necessary to complete the Efficiency/Optimization Study. The scope is organized into three tasks, as listed below.

- Task 1: Project Management
- Task 2: Market & Service Analysis
- Task 3: System Efficiency Recommendations
- Task 4: On-Demand Efficiency/Optimization Report

Task 1: Project Management

Task 1.1: Kick-Off Meeting

A kick-off meeting will be held to ensure that staff and our project team are "on the same page" regarding the scope, individual tasks and deliverables, schedule, and the priorities for the study.

During the meeting the specific methods and assumptions that will be used during the assessment and the development of strategies will be discussed. We will establish a coordination process to assure clear communication and dialog with Charlotte County Transit's team throughout the study. This will facilitate full understanding of progress, analyses, findings, and recommendations, which will support informed decision-making.

Task 1.2: Project Administration

Due to the commitment to provide oversight, quality control, and transparency throughout the life of any project, this task establishes the parameters for providing these services successfully, including project administration and coordination. This, in part, will be facilitated through conducting two coordination check-in Teams meetings with the Project Manager and additional key staff depending on the topics to be addressed at each meeting. These check-in calls ensure continuous and collaborative communication, which is essential to vet and maintain a common understanding and agreement on findings, strategies, recommendations, and decisions.

Task 2: Market & Service Analysis

Task 2.1: Market Analysis

The quantitative and qualitative analysis will examine a range of relevant factors and indicators key to identifying the degree of and distribution of mobility need within Charlotte County appropriate for on-demand services. Analyses will examine socioeconomic and demographic data and existing mobility service indicators, each of which is described below along with how they will be analyzed. These analyses assess location and extent of mobility needs and mobility gaps in the service area.

Task 2.1.1 Socioeconomic Indicators

An examination of socioeconomic and demographic indicators helps us to understand specific community characteristics at the neighborhood level and how mobility needs and travel behavior within these areas relates to Charlotte County overall.

The market for on-demand mobility services is also attractive to discretionary riders, including young adults, workers, retirees, and older adults aging in place. The socioeconomic data gathered from the most recent TDP will be reviewed. We will enhance this analysis by introducing a bivariate analysis of need characteristics identified at the block group level with population density at the Census block level. This provides a more precise picture of the concentration and distribution of mobility needs geographically. This in turn increases the precision of the service planning results which will help create more cost-effective operating plans.

Task 2.1.2 Transit Service Indicators

Using existing Charlotte County Transit service data, we will examine how mobility supply can be improved. The objective is to create the most efficient on-demand Charlotte County Transit system for current riders and potential new riders by examining existing origin and destination pairs.

Using exported data from your scheduling system, we will examine the current service origin and destination trip pairs. This analysis involves examining daily individual vehicle operations from start to finish for a period of 2-4 weeks of service. The result is to track the pick-ups and drop-offs completed for each vehicle in operation each operating day. This provides the detail needed to assess critical performance metrics used to determine how well services are operating and identify opportunities for improvement. The findings will be represented in tables, graphs, and maps that reflect the following information for weekdays and Saturdays:

- Individual and total vehicle ridership by hour of the service day
- Individual and total vehicle productivity by hour of the service day
- Distribution of pick-ups and drop-offs by hour of the service day
- Shared-rides by vehicle and for total vehicles by hour of the day
- Total revenue hours by hour of the day

- Transit service area by weekday and Saturday
- Distribution of pick-ups and drop-offs for average weekday and Saturday
- Total Boardings, revenue hours, VOMS, productivity weekday and Saturday

Additionally, the volume of trip requests and trip denials will be examined. This analysis opens up opportunities for 1) further refinement of the services and 2) identification of likely on-demand service delivery types that may be conducive within each area. This task supports the evaluation and provides clues to optimize the existing on-demand zone.

Task 2.1.3 Replica Analysis

Data-driven transportation planning and creative spatial analysis have long been the driving force behind how we develop evaluation methodologies. Benesch utilizes Replica, which is a subscription-based data platform that uses multiple data points to model mobility, land use, demographics and economic data to better understand travel characteristics and trip making patterns. New data is captured, updated weekly and summarized on a quarterly basis, so analyzing real time data and trends over time is done with ease. For transportation planning, data such as trip origins, trip destinations, and trip purposes will be examined. The following are expected to be mapped and presented as part of the analysis:

- Origins and destinations for an average weekday and average weekend in the Spring 2025
 - Work
 - School
 - Shop
 - Recreation

In addition, based on our extensive use of Replica, we will augment the analysis by comparing ACS data on the distribution of mobility needs, and historical ridership data to ensure adequate representation of low-income persons in the travel desire lines produced with Replica.

Task 2.1.4 Use of the Analysis Findings

A data-driven process will be used to identify strategies to optimize service. This analysis will include graphs, tables, and GIS maps to present and evaluate socio-economic, transit service indicators, and Replica data to support a defensible decision for the proposed strategies.

Task 2.2 Dispatching and Software Analysis

As dispatching plays a critical role in daily operations, making sure that existing processes and tools do not contribute to limiting performance and/or communication is necessary. The purpose of this task is to explore and evaluate Charlotte County Transit's dispatching operations and software to ensure efficient, coordinated, and data-driven service delivery. Through analysis of current technology use and staff availability, the

task will provide a clear understanding of operational strengths and weaknesses along with vital input for recommendations on any new staffing needs. The outcome will guide targeted improvements that enhance reliability, responsiveness, and overall system efficiency.

This task will also document and analyze existing dispatching workflows and ride requests from the current Charlotte Rides mobile app. Next, the existing EcoLane software used for dispatching will be analyzed for functionality, usability, and integration with other systems. Performance metrics will be reviewed to identify inefficiencies or gaps. Based on these findings, specific recommendations will be developed to streamline workflows, enhance software capabilities, and support better decision-making. The recommendations will include any findings from the analysis to increase dispatch staff and/or better utilize the existing software, or identify alternative software to optimize dispatch performance.

Task 2.3: Service Analysis

The focus in this task will be on assessing potential service optimization strategies, operating requirements, expected mobility benefits, and estimated costs savings for the existing on-demand service. The work in this task builds on Task 2.1 and will develop service optimization strategies in addition to an explanation of the relative cost savings and benefits likely to be derived from the optimized on-demand services.

The process will employ the following steps:

- Using GIS analytics of population, employment, trip generation, and assessing geospatial travel patterns and trip densities, identify strategies to meet demand efficiently.
- Quantify density of demand relative to density of service supplied to meet demand at appropriate service level response times by examining origin and destination pairs by time of day. It will include a calculation of daily revenue hours of service required by summing the number of vehicles required to meet demand during each operating hour of the day. This calculation reflects the variation in operating requirements over the course of the day due to fluctuations in demand.
- Explore the cost savings by service strategies.
- Explore details from these analyses to rank each strategy and then share findings with Charlotte County Transit staff to support decision-making for long-term sustainable service modeling.

Task 2.3: Vehicle Requirements Evaluation

This task focuses on analyzing and examining needed vehicle capacity with time-of-day demand to support informed fleet procurement decisions. The objective is to determine the most appropriate vehicle types throughout the day. This analysis will identify if and when high-capacity vehicles should be implemented to optimize service efficiency and meet ridership needs.

The process will employ the following steps:

- Examine vehicle capacity by time of day on an average weekday and average Saturday.
- Analyze the appropriate vehicle type(s) and capacity to meet demand by time of day.
- Determine number of vehicles and capacity needed by time of day.

Task 3: System Efficiency Recommendations

The objective of this task is to develop a detailed design for the identified optimized service strategy identified as the most feasible. This will involve the definition of an on-demand service delivery model that is convenient, cost-effective, and attractive to the public based on the specific demand and service zone characteristics.

We will work with staff to thoroughly review services with the intent of fully understanding how the optimized on-demand service will function. This process will include reviewing the service strategies, reviewing the operating rules, response times, operating requirements, operating costs, ridership, and net impacts on ridership and operations.

Task 3.1: Optimized Service Strategy

This task will refine the selected optimization strategies selected from Task 2 into a concept of operation. This will include estimates of operating requirements (vehicle capacity, vehicles by time of day, revenue hours), target service response times, operating rules for rider, driver, software, ridership and productivity targets, performance metrics, estimate operating costs, recommended fares, and operating costs. This task will also coordinate and consider any applicable recommendations/outcomes from the Comprehensive Analysis of Transit Driver Services study. Additionally, this task will also include any potential operating cost savings as a result from the selected strategy. In all cases, the service design objectives are to:

- Expand access to mobility and, thus, access to opportunity.
- Attract new riders.
- Optimize vehicle assignments to match capacity needs throughout the day.
- Provide a more convenient and cost-effective mobility solution to address existing, latent, and growing general demand for transportation alternatives.
- Create a greater return on investment for Charlotte County Transit services by transcending and transitioning to attract riders.

Task 3.2: Review Software-as-a-Service (SaaS) Functionality

This task will examine the existing software and explore other SaaS options to support same-day on-demand services. We will examine the existing software and other options to support the advanced reservation as well as the day of service requests. While the specific functionalities needed to support the service concept of operations will be identified as the concept of operations is further defined, the functionalities will address:

- Ride hailing (pre-booked and/or same-day booking)
- Fare payment
- Trip assignment to vehicle
- Pick-up and drop-off sequencing optimization
- Rider real-time service information
- Real-time service information for connecting services

It is critical that each on-demand concept of operation fit hand-in-glove with the SaaS functionalities for optimal performance and to assure intermodal connections with other services. Our recommendations will identify the functional requirements necessary for software/SaaS platforms used for managing and controlling on-demand services. The primary deliverable of this subtask will be the examination and exploration of other SaaS functionalities which Charlotte County Transit may use to inform on-demand service delivery concepts.

Task 3 Outcomes

Based on the analysis and SaaS review efforts, we will optimize the service model with staff to assure agreement with the findings and recommendations for the optimized service concepts, SaaS functionalities, and SaaS strategy for advancing on-demand services. Findings and recommendations describing:

- Service optimizations/changes to on-demand services, including maps, service span, operating requirements, revenue hours, vehicle capacity recommendations, and capital and operating costs. This will include any anticipated savings from the selected optimization strategy.
- On-demand concept of operations including dispatcher and software needs, key operating rules and procedures, operating requirements, and SaaS functionalities.
- Assessment of service deployment strategies, SaaS (procure software but directly operate service).

Task 4: Draft & Final Deliverables

The report will include recommendations for optimized service, operating requirements, and any changes in vehicles, dispatchers, or software. This also may include cost savings that may result from optimization.

A draft report will be prepared and provided for review by Charlotte County Transit. Based on comments received, we will refine the report and prepare the final report and submit it to staff.

Estimated Duration and Fee:

This effort is expected to take 12-16 weeks, depending on the number and duration of reviews and the internal decision-making process within Charlotte County Transit. The fee for this scope of work is \$49,038.33 to be billed on a percent complete basis. The labor rates, staff hours, and budget are provided on the following page.

Task Description		Project Principal		Project Manager	Senior Transit Specialist			Senior Planner	Planner	GIS Analyst	Admin/ Clerical	Task Totals	
		\$284.33	\$236.59	\$257.84	\$148.53	\$120.32	\$106.80	\$102.33	Hours	Fee			
Task 1	Project Management	2	4	4	10	1	0	6	27	\$4,765.98			
1.1	Kick-off Meeting (Virtual)	1	2	2	4	1	0	0	10	\$1,987.63			
1.2	Project Administration and Coordination	1	2	2	6	0	0	6	17	\$2,778.35			
Task 2	Market Analysis and Service Design	0	9	36	35	24	15	0	119	\$21,099.78			
2.1	Market Analysis	0	2	8	8	8	14	0	40	\$6,181.90			
2.2	Dispatching and Software Analysis	0	4	8	6	4	0	0	22	\$4,381.54			
2.3	Service Analysis	0	2	16	16	10	0	0	44	\$8,178.30			
2.4	Vehicle Requirement Evaluation	0	1	4	5	2	1	0	13	\$2,358.04			
Task 3	Service Recommendations	4	2	32	40	22	0	4	127	\$18,858.94			
3.1	Develop Service Strategy	0	1	16	20	16	0	0	53	\$9,257.75			
3.2	Review SaaS Functionality	0	0	8	10	2	0	0	20	\$3,788.66			
3.3	Service Recommendation Outcomes	4	1	8	10	4	0	4	31	\$5,812.53			
Task 4	Final Deliverables	1	0	8	10	4	0	0	23	\$4,313.63			
	Total	7	15	80	95	51	15	10	273	\$49,038.33			