



metroplan orlando  
*A REGIONAL TRANSPORTATION PARTNERSHIP*

# **QUALITY ASSURANCE TASK FORCE AGENDA**

**January 28, 2020 @ 10:00 a.m.**

---



# MEMORANDUM

January 17, 2020

To: Quality Assurance Task Force Committee Members

Fr: Virginia L. Whittington, MetroPlan Orlando

Re: QATF Meeting Notice & Agenda

The next QATF meeting will be held on **Tuesday, January 28, 2020 at 9:00 a.m.** The meeting will take place in MetroPlan Orlando's Live Oak Conference Room located at **250 S. Orange Avenue, Suite 200, Orlando, FL 32801.**

---

## Agenda

---

**1. Call to Order**

**2. Introductions**

**3. Public Comments (Action Items)**

Comments from the public will be heard pertaining to GENERAL ITEMS on the agenda for this meeting. People wishing to speak must complete a "Speakers Introduction Card" at the reception desk. Each speaker is limited to two minutes.

**4. TDLCB Member Recommendations**

**Tab 1**

Staff recommends reappointment of Ms. Marilyn Baldwin (representing the Disabled) and Mr. Robert "Bob" Melia (Citizen Advocate System User) through December 31, 2022. Interest statements from both members, along with a copy of the notice of open positions, advertised on the MetroPlan Orlando website December 30, 2019 through January 15, 2020, are provided.

**5. 2020 QATF Member Recommendations**

**Tab 2**

**6. Election of 2020 QATF Officers**

**7. Review of TDLCB Grievance Procedures**

**Tab 3**

**8. Review of CTC Evaluation Process and Instrument**

**9. CTC Update**

**10. Member Comments/Discussion**

**11. Public Comments (General)**

**12. Adjournment**

*In accordance with the **Americans with Disabilities Act (ADA)**, if any person with a disability as defined by the ADA needs special accommodations to participate in this proceeding, he or she should contact **Ms. Lisa Smith, MetroPlan Orlando, 250 S. Orange Avenue, Suite 200, Orlando, Florida, 32801** or by telephone at **(407) 481-5672 x307** at least three business days prior to the event. Persons who require translation services, which are provided at no cost, should contact **MetroPlan Orlando at (407) 481-5672 x315** or by email at [lsmith@metroplanorlando.org](mailto:lsmith@metroplanorlando.org) at least three business days prior to the event.*

*As required by Section 286.0105, Florida Statutes, MetroPlan Orlando hereby notifies all interested parties that if a person decides to appeal any decision made by MetroPlan Orlando with respect to any matter considered at such meeting or hearing, he or she may need to ensure that a verbatim record is made to include the testimony and evidence upon which the appeal is to be based.*

**TAB 1**



**From:** [Marilyn Baldwin](#)  
**To:** [Virginia Whittington](#)  
**Subject:** Transportation Disadvantaged Local Coordinating Board Reappointment  
**Date:** Tuesday, December 17, 2019 8:30:24 AM

---

Dear Mrs. Whittington,

I am writing this notice to humbly request reappointment to the Transportation Disadvantaged Local Coordinating Board for Orange, Osceola and Seminole Counties. During my term on the Board, I have Chaired the Quality Assurance Task Force, and represented the LCB in Tallahassee, Florida with our State Legislative Delegation. I also attended the Transportation Disadvantaged Statewide Training Conference as a member of the local Board. I am very pleased to have the opportunity to serve and represent citizens with disabilities on the Transportation Disadvantaged Local Coordinating Board, as a member of the disability community. I also had the opportunity to work with members of the Metroplan Board of Directors in selecting our current Director for Metroplan Mr. Gary Huttman during my term on the Board. I would be honored to be reappointed to this Board that helps people with disabilities and disadvantages, to have mobility in Central Florida. Thank you for the opportunity to serve our community on this Board.

Sincerely,

Marilyn Baldwin  
8427 Lainie Lane  
Orlando, Florida 32818  
(407) 293-0565 Home

Sent from my iPad

**From:** [Melia, Robert G.](#)  
**To:** [Virginia Whittington](#)  
**Subject:** RE: TDLCB Term  
**Date:** Friday, December 13, 2019 10:35:10 AM

---

Virginia,

I am more than willing to continue in any capacity the board feels that I can be of assistance. I believe I have valuable knowledge and insight that can benefit the board so please let me know what you need me to do.

Thanks,

Bob Melia

---

**From:** Virginia Whittington <vlwhittington@metroplanorlando.org>  
**Sent:** Friday, December 13, 2019 10:01 AM  
**To:** Melia, Robert G. <Robert.Melia@orlandohealth.com>  
**Subject:** TDLCB Term

**\*\*WARNING: This email originated from outside of the Orlando Health email system.\*\***  
**DO NOT CLICK** links or open attachments unless you recognize the sender and know the content is safe.  
**\*\* NEVER provide your User ID or Password. \*\***

Good morning Bob! I hope you're off to a fantastic Friday!! As you are aware, the TDLCB authorized extension of your current position through March 2020. We will be posting all open positions on our website at the end of the month, so I wanted to be sure that you are aware and that if you are interested in continuing beyond March you can simply send a short email stating so.

Please let me know!

Have a great weekend,  
Virginia

**Virginia L. Whittington**  
Director of Regional Partnerships



**MetroPlan Orlando**  
The Park Building ♦ 250 S. Orange Avenue ♦ Suite 200 ♦ Orlando, Florida 32801  
P: (407) 481-5672 Ext. 314  
F: (407) 481-5681  
M: (407) 497-1536

Email: [vwhittington@metroplanorlando.org](mailto:vwhittington@metroplanorlando.org)  
[www.metroplanorlando.org](http://www.metroplanorlando.org)

Connect with MetroPlan Orlando on  
our [website](#), [Facebook](#), and [Twitter](#)!

\*Please note: Florida has a very broad public records law. Most written communications to or from local officials regarding organization business are public records available to the public and media upon request. Your e-mail communications may therefore be subject to public disclosure.

This e-mail message and any attached files are confidential and are intended solely for the use of the addressee(s) named above. If you are not the intended recipient, any review, use, or distribution of this e-mail message and any attached files is strictly prohibited.

This communication may contain material protected by Federal privacy regulations, attorney-client work product, or other privileges. If you have received this confidential communication in error, please notify the sender immediately by reply e-mail message and permanently delete the original message. To reply to our email administrator directly, send an email to: [postmaster@orlandohealth.com](mailto:postmaster@orlandohealth.com) .

If this e-mail message concerns a contract matter, be advised that no employee or agent is authorized to conclude any binding agreement on behalf of Orlando Health by e-mail without express written confirmation by an officer of the corporation. Any views or opinions presented in this e-mail are solely those of the author and do not necessarily represent those of Orlando Health.

**TAB 2**

---



## 2020 Quality Assurance Task Force Member Recommendations

### Member

Baldwin, Marilyn

Ballard, Chad\*

Ford, Crystal

Levine-Silverman, Linda

Olson, Wayne

Radka, Karla

Hickling, Norm (non-voting)

### Representing

Persons with Disabilities

Medical Community

Orange County EMS

Representative for the Elderly (Over 60)

Department of Education & Vocational Rehabilitation

Senior Resource Alliance (Area Agency on Aging of Central Florida)

ACCESS LYNX

\* Mr. Ballard's LCB membership will be effective February 13, 2020 upon TDLCB action.

**TAB 3**

---



**ORANGE, OSCEOLA, AND SEMINOLE COUNTIES  
LOCAL COORDINATING BOARD**

**GRIEVANCE PROCEDURE  
FOR  
TRANSPORTATION DISADVANTAGED SERVICES**

*Approved February 14, 2019*

## **GRIEVANCE PROCEDURE**

### **I. CREATION OF A GRIEVANCE PROCEDURE**

- A. This is hereby created and established as a Grievance Procedure
- B. The Transportation Disadvantaged Local Coordinating Board (TDLCB) Grievance Committee is hereinafter created and referred to as the Grievance Committee.

### **II. DEFINITIONS**

As used in this procedure, the following words and terms shall have the meanings assigned herein:

- A. **Community Transportation Coordinator (CTC)**  
A transportation entity appointed to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.
- B. **Transportation Disadvantaged (Customer)**  
Those persons who, because of physical or mental disability, income status, or age or who for other reasons are unable to transport themselves or to purchase transportation, and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life sustaining activities, or children who are high-risk.
- C. **Funding Agency**  
Those agencies, which have a funding agreement with the CTC for transportation services for their transportation disadvantaged customers.
- D. **Transportation Operator (Carrier)**  
The entity providing transportation services for the transportation disadvantaged, whether it be private non-profit, private for profit, or public operator.

### **III. OBJECTIVE**

- A. The objective of the Grievance Process shall be to process, investigate and make recommendations, in a timely manner on formal written complaints/grievances that are not resolved between individual agencies/entities, including the CTC and the contract service provider and/or the contract service provider and the customer.
- B. The implementation of these rules and procedures will ensure quality control and the ability to provide participating customers, funding agencies and others with an impartial body to hear complaints and submit recommendations regarding the grievance as indicated.
- C. Apart from this grievance process, aggrieved parties with proper standing may also have recourse through Chapter 120, Florida Statutes Administrative Hearing Process, or the judicial court system.

#### **IV. MEMBERS**

- A. Members of the Grievance Committee shall be appointed by the Transportation Disadvantaged Local Coordinating Board Chair and shall consist of at least five (5) voting members of the TDLCB and may include other appointed volunteers.
- B. Grievance Committee members will be appointed annually, however, the committee will only meet should a grievance be elevated to the level of STEP TWO Appeal, as outlined in Section V. Grievance Procedures.
- C. Term of Members
  - 1. The members of the Grievance Committee shall serve a term of one year, with allowances for multiple terms.
  - 2. The Grievance Committee shall elect a Chairperson and Vice-Chairperson.
  - 3. A simple majority shall be present for any official action. The meetings shall be held at such times as the Grievance Committee may determine.
  - 4. No voting member will have a vote on an issue that is deemed a conflict of interest.

#### **V. GRIEVANCE PROCEDURES**

- A. A Grievance is defined as any ongoing service problem that interferes with accessing a major life activity, such as work, healthcare, employment, education, shopping, social activities, or other life sustaining activities.
  - 1. A service problem must be documented as ongoing for a 30-day period.
  - 2. The customer must demonstrate that they have unsuccessfully attempted to resolve the issue with the CTC on multiple occasions.
  - 3. The customer must demonstrate a level of service that has been provided which is below locally accepted service standards.
  - 4. The Grievance Committee may hear other issues at their discretion, such as issues related to carriers and/or sponsors of service.
- B. Every effort will be made by the CTC to resolve service problems. However, if unable to resolve the problem and/or the grievant wishes to take further action, then the CTC will provide the grievant with assistance with the official grievance process.

#### **C. STEP ONE**

- 1. When the CTC is advised that the customer wishes to file a grievance, the CTC will send the customer the Grievance Form and a copy of the current ORANGE,

OSCEOLA AND SEMINOLE COUNTIES LOCAL COORDINATING BOARD GRIEVANCE PROCEDURE FOR TRANSPORTATION DISADVANTAGED SERVICES. Notification of the intent to file a Grievance must be made in writing to the CTC's Manager of Paratransit.

All documents pertaining to the grievance process will be made available, upon request, in a format accessible to persons with disabilities.

2. Upon receipt of the completed Grievance Form, the CTC will assign a CTC File Number and initiate a Grievance Log Tracking Form. The CTC Designee will review the Grievance Form and all support documentation and then prepare a written response. The response shall be completed and mailed (Certified and Return Receipt Requested) within ten (10) business days after receiving the grievance. A copy of the response should also be provided to MetroPlan Orlando (MPO).

A file folder should be established for the grievance. This folder should have the name of the grievant and CTC File Number. The folder should contain the original support documentation, the CTC's response, and any other data about the case.

The CTC will respond to Grievance and issue a judgment based on:

- "Resolved" - The CTC feels that the customer's concerns, as stated in the Grievance Form, have been addressed to the best of their ability and the case is resolved.
  - "Unresolved" - The CTC feels that the issues stated in the Grievance Form have not been resolved due to existing policy, procedure, service standards, lack of evidence or a lack of resolve.
3. If the customer feels that the concern has not been properly addressed, they will have the option to appeal as stated in Step Two of the Grievance Process. As part of the Step One Response, the customer will be notified of their right to appeal, as well as the process for appeal. Appeals must be submitted to MetroPlan Orlando (MPO) within ten (10) business days of the Step One Response (based on postmark).

## STEP TWO

1. Upon responding to the customer's Step One Grievance, the CTC will forward all original documentation to the MPO.
2. Once notified of the customer's desire to appeal the decision, MPO staff will notify the Grievance Committee of the date of the Step Two Grievance Hearing. Upon receipt of the Appeal, the MPO shall have ten (10) working days to contact Grievance Committee members and set a grievance hearing date. The grievant and all parties involved shall be notified at least seven (7) business days before the hearing date by Certified Mail, Return Receipt Requested. The hearing will take place within thirty (30) days of the notice of appeal.

**GRIEVANCE TRACKING FORM  
FOR OFFICE USE ONLY**

CTC File Number: \_\_\_\_\_

Step 1 of the Grievance Process

Date Grievance Received at CTC: \_\_\_\_\_

CTC Representative: \_\_\_\_\_ File Established: \_\_\_\_\_

Date Grievance responded to: \_\_\_\_\_ Date Certified Letter Sent: \_\_\_\_\_

Date of Action: \_\_\_\_\_

Step 2 of the Grievance Process

Date Grievance Received at MPO: \_\_\_\_\_

Date sent to Grievance Committee of the TDLCB: \_\_\_\_\_

Date of Hearing: \_\_\_\_\_ Date Certified Letter Sent: \_\_\_\_\_

Date of Action: \_\_\_\_\_

Date Certified Letter Sent Regarding Recommendation(s): \_\_\_\_\_

Step 3 of the Grievance Process

Date Grievance Received at MPO: \_\_\_\_\_

Date sent to Local Coordinating Board: \_\_\_\_\_

Date of Hearing: \_\_\_\_\_ Date Certified Letter Sent: \_\_\_\_\_

Date of Action: \_\_\_\_\_

Date Certified Letter Sent Regarding Recommendation(s): \_\_\_\_\_

**GRIEVANCE PROCESS FORM FOR THE  
ORANGE, OSCEOLA AND SEMINOLE COUNTIES  
TRANSPORTATION DISADVANTAGED LOCAL COORDINATING BOARD**

AGENCY/INDIVIDUAL NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

=====

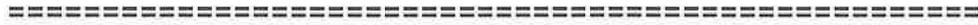
PLEASE REVIEW THE ATTACHED RULES AND PROCEDURES PERTAINING TO GRIEVANCES.

This form stating the grievance shall be sent to the Community Transportation Coordinator (CTC) outlining the nature of the grievance, and where applicable, the date, time and place of the incident(s) constituting the grievance. (Additional pages may be attached. Please be sure to number all additional pages and/or attachments.)

Please send completed form and any supporting documentation to:

LYNX  
Attn: Manager of ACCESS LYNX  
445 N Garland Ave  
Orlando, FL 32801 - 9920  
(407) 841-5969

**GRIEVANCE FORM - CONTINUED**



GRIEVANCE INFORMATION

A series of 20 horizontal lines provided for writing the grievance information.



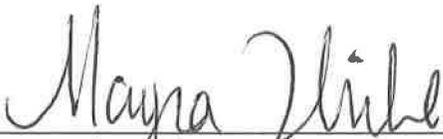
- a) The Grievance Committee shall have the power to hold hearings and conduct investigations in all matters relating to grievances brought before the committee.
  - b) The Grievance Committee shall review the material presented and issue a recommendation or recommendations to all parties involved within ten (10) working days of the date of the hearing. Said notice shall be sent to all parties by Certified Mail, Return Receipt Requested.
  - c) All meetings and hearings will be open to the public.
  - d) Minutes shall be kept at each hearing and filed with the TDLCB and shall be public record.
3. The MPO will complete the Grievance Tracking Form for this and subsequent steps of the process.

#### D. STEP THREE

1. Both the CTC and the grievant will have the right of appeal of any recommendation(s) of the Grievance Committee to the full TDLCB.
2. Upon notification of the desire to appeal the Step Two recommendation(s), the MPO will notify all parties of the date, time and location of the next scheduled TDLCB meeting via Certified Mail, Return Receipt Requested.
3. The MPO will update the file and the Grievance Log Tracking Form.
4. It is important to note that during the entire process, the CTC and/or MPO should keep the Commission for the Transportation Disadvantaged informed of the recommendation(s) made at the various steps of the process. Further, all files and documentation associated with the case must be kept updated by the CTC at all times during this process.

#### CERTIFICATION

The undersigned hereby certifies, as Chairperson of the Transportation Disadvantaged Local Coordinating Board for Orange, Osceola and Seminole Counties that the foregoing is a true and correct copy of the Grievance Procedure of the TDLCB as adopted the 9<sup>th</sup> day of February, 2017.

*for*  


Honorable Jose Alvarez, Chairperson, for the Orange, Osceola, and Seminole Counties Transportation Disadvantaged Local Coordinating Board