

# A ppendix B: Survey Results

## Review of Section

As part of the this research study, school districts, public transit authorities, and agencies were surveyed about the coordination/integration of school bus and public transit services and, where applicable, Head Start transportation. Communities participating in this survey effort included areas in the United States and in Canada.

## Survey Method and Analysis

The project team, using the Bibliography and Glossary of Terms, developed an initial survey and prepared a preliminary list of survey sites. The survey was designed to capture information about school districts and transit properties at various stages of integration, or about sites where someone considered coordination but chose not to pursue such a strategy. To obtain the initial list of survey sites, the team used reports, articles, and other documents from the Bibliographic review. Contact names, addresses, and other information were maintained on a Microsoft Access database. To expand the list, team members called the State Directors of School Transportation (a list provided by a panel member) as well as State (and, when possible, City) Departments of Transportation. More than 100 survey sites in the United States and Canada were obtained using this methodology.

However, the project team grew concerned that not enough small transit properties and rural school districts were included in the preliminary list of sites. In response, the team designed a flyer announcing the project and mailed copies to persons on the Community Transportation Association of America (CTAA) Section 5311 mailing list, the membership list of the National Association for Pupil Transportation, and a targeted list from the National League of Cities. Over 177 additional sites were obtained from this mailing; more importantly, 90 percent were from rural and nonurban areas. A copy of the flyer can be found following the survey analysis.

Further, the team coordinated with several large private school bus and transit carriers, which announced the effort in a monthly newsletter to their employees. CTAA also agreed to assist with the effort and included the flyer image in a special "What's Happening" section of the CTAA web page. In addition, articles were written for and published in *Passenger Transport* and *School Transportation News* magazines.

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After receiving panel approval for the survey and site list, the team immediately began work on pre-testing the survey. Thirteen of the fourteen pre-test sites were contacted by telephone and then faxed a copy of the survey. Six completed surveys were returned immediately via fax, while the other seven sites completed the survey over the phone. After the pre-test phase, only one modification was made to the survey: accident data was requested as part of Question 1.5.

The project team distributed surveys to the 350 sites included in the project database. Stamped, self-addressed envelopes were included in the mailing to encourage participation. Before the due date, phone calls were made to one-quarter (or 87) of the contacts to confirm receipt of the survey and to answer any questions. A more comprehensive series of phone calls was made one week after the due date to encourage participation in the survey effort.

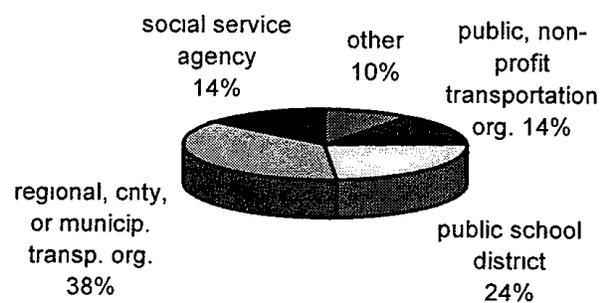
Even though a large majority of the respondents were public transit agencies, we were able to obtain parallel information about the local public school district through follow-up phone calls and through the National School Data Book. This exceptional resource allowed the project team to include complete demographic and financial data on each of the school districts studied.

To facilitate data entry, the Access database was expanded to include all fields found on the survey. Quantitative data entered into the Access database was exported to Microsoft Excel and to the statistical program SPSS, then analyzed. Qualitative information was analyzed separately in Access.

### Survey Results: Highlights

Of the 140 respondents, four were from Canada and the rest were from cities or towns within the United States. A majority of respondents were regional, county or municipal transportation organizations or departments. The breakdown by category is as follows:

"Other" respondents included two joint powers authority (public transit and school district), several transportation consortiums, a league of cities, one school bus vendor, a local council, and several state-level transportation agencies and local Head Start coordinator.



The following summarizes the highlights from the surveys.

- The most popular type of integration involved placing regular education students, Head Start, and/or agency clients on public transit vehicles. Only 30 communities used school buses to coordinate service, and of these, 20 *did not* co-mingle the public with students, while the remaining 10 *did* involve co-mingling.

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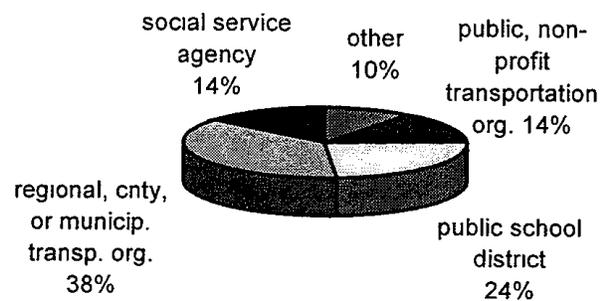
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## **Types of Integration**

One key component of this research project is to determine the cost savings potential of integrated service. One obvious result of the survey analysis is the fact that cost savings must be qualified by the *degree* of integration occurring. The degree of integration possible was highlighted in the Literature Review in the Hohenlohe study. In that town there was a high degree of integration, yet the cost savings were balanced by a substantial cost to design, implement, and manage the integrated system.

In general, integration can be divided into a hierarchy of approaches, spanning the following areas:

- **Management and administrative processes**, which may include the sharing or coordination of personnel, training, vehicle procurement, insurance, maintenance, advertising, etc.
- **Operating functions**, which may include coordination at the planning and routing level, including scheduling and dispatching functions
- **Service delivery**, which may include the joint use of vehicles and/or the co-mingling of passengers (students and the general public)

Service delivery integration is broken into two parts: Using School Bus Vehicles, or Using Public Transportation Vehicles. The following is a review of the various types of service delivery integration:

### **TYPES OF SERVICE COORDINATION AND INTEGRATION**

#### **USING SCHOOL BUS VEHICLES**

Yellow school bus (YSB) vehicles used for students during peak hours and for public transit/paratransit service during pupil off-peak hours (no co-mingling)

YSB vehicles are used for pupil transport and public transit/paratransit service during all hours of operation (co-mingling).

YSB vehicles are used for pupil transport during peak hours and for the transport of human service agency clients during off-hours (no co-mingling)

YSB used for transporting pupils and human service agency clients during all hours (co-mingling)

#### **USING PUBLIC TRANSIT/PARATRANSIT VEHICLES**

Students transported via fixed-route public transit service (including tripper service, i.e., regularly scheduled transit open to the public designed or modified to accommodate the needs of students. [Incidental use of public transportation to and from school by students acting on their own accord is not included.]).

Students transported to and from school via flexibly routed public transit service (e.g., route or point deviation service)

Students transported to and from school via paratransit service (e.g. curb-to-curb or door-to-door service).

Public transit vehicles chartered for special school events, i.e. field trips.

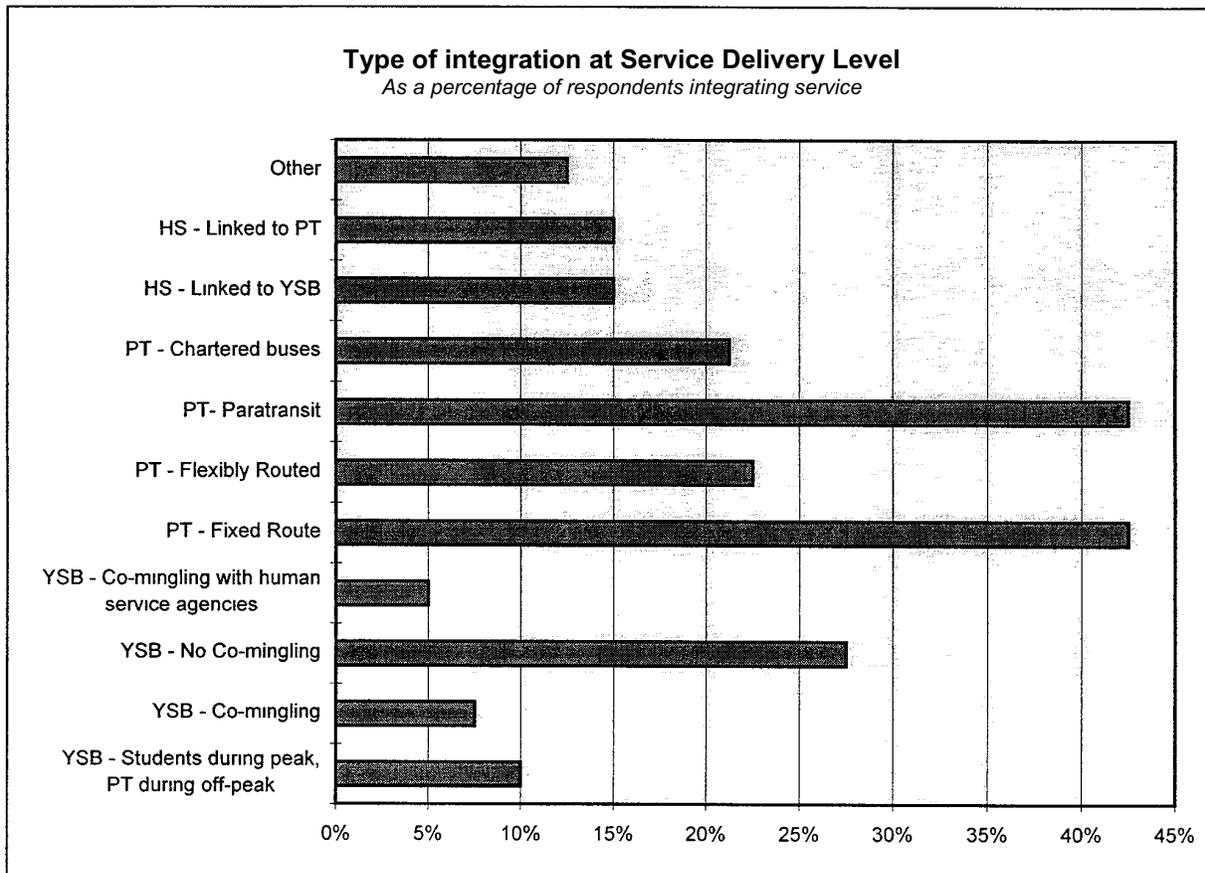
#### **HEAD START**

Head Start transportation linked to yellow school bus transportation

Head Start transportation linked to public transit/paratransit

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The survey analysis revealed that a majority of survey respondents were using public transit fixed-route service or paratransit service to transport school children and children with disabilities.



There was no correlation between the type of service delivery option and whether or not cost savings were achieved. What is of interest, however, is that cost savings were calculated for the institutions involved, not at the taxpayer level. Thus, if a community had chosen to place children with disabilities on the local paratransit network, then the costs accrued were listed by the school district and not by the public transit agency. In fact, if the respondent was a public transit agency reporting the type of integration, rarely did the respondent know the dollar figure for the cost savings achieved. This lack of shared knowledge about cost savings, in addition to the institutional focus, could affect communities attempting to gather a broad range of community support for an integrated initiative.

### Goals, Barriers, and Challenges

Of the 80 respondents involved in coordinating service, 45 percent (or 36 respondents) listed "maximizing the use of existing resources" and "cost savings/save taxpayers money" as key

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goals to their coordination effort. Equally important was that of these 45 percent who did list "maximizing resources" as a goal, 58 percent noted that they were "very" or "almost very" satisfied with the results. Respondents were more mixed in their reviews of their cost savings goals; only 39 percent rated their satisfaction as "very" or "almost very" satisfied, while 44 percent rated their response a neutral. Access to the general public was the next most important goal, with 31 percent of the 80 respondents that are integrating service listing this as a goal. The following were additional goals and their subsequent ratings (with 5 being the highest and 1 being the lowest):

Other Goals	Rating "5" = very satisfied
<i>Backup for our fleet in the summer to handle summer overflow</i>	5
<i>Improve small bus image in a small city</i>	5
<i>Serve transit needs not met by district</i>	5
<i>Meet state-mandated transportation requirements</i>	5
<i>Shared training</i>	3
<i>Service quality</i>	4
<i>Reduce number of buses for district-wide programs</i>	4
<i>Reduce number of buses for district-wide programs</i>	4
<i>Provided opportunity for employment transportation</i>	4
<i>Provide additional services without increased capital/operating expense</i>	4
<i>Increase ridership</i>	4
<i>Provided transportation to technical prep. classes, alternative ed. schools, and college students (nearest college is 36 miles away)</i>	4
<i>The number of special ed students needing transportation is larger than the school district has buses for; we were able to provide some transportation without extra time or drivers</i>	0

### **Barriers and Challenges**

In the second portion of the survey, respondents were asked to discuss the various barriers and challenges to implementing an integrated or coordinated system. More specifically, Question 2.5 asked, "What were/are the greatest challenges or barriers in the implementation of integrated services, and to what extent have you been able to overcome them?" Listed below this question were several pre-set barriers - **Institutional** (routing, scheduling, training, operating procedures, turfism, etc.), **Regulatory** (licensing, governance, tripper, co-mingling), **Financial** (dedicated funding streams/market specific funding), **Attitudinal** (parental/custodial pressures, perceived safety concerns) - plus an "Other" category.

Interestingly enough, financial concerns were only identified as significant by 14 respondents, and of these 14, a majority noted that they had overcome any funding constraints they may have had. On the other hand, institutional issues, regulatory concerns, and attitudinal barriers were not only of far greater concern, but often still prevalent, unresolved issues for the respondents.

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The respondents' comments are particularly revealing:

### ATTITUDINAL ISSUES

- Parental concerns about safety (5 RESPONDENTS)
- General concern about safety (2 RESPONDENTS)
- School transportation experts perceive that transit vehicles are not as safe as school buses. (2 RESPONDENTS)
- *50+ years of public education related to yellow bus.* School children would need to be re-trained to respect transit buses in the same way that they now respect school buses.
- *Few adults will willingly ride a school bus, which they regard as noisy, with small uncomfortable seats, offering inconvenient schedules.*
- *School children cannot be held liable for their actions; therefore, the bus is constructed and the driver trained to protect. If the courts extend this doctrine to public modes then strict regulation will follow.*
- *School superintendents have problem with newness of concept -- "haven't done it before" syndrome.*
- *Some reluctance, but minimal from those with whom we contract.*
- *There continue to be problems at boarding areas (schools). Involves a fair amount of supervisory time.*
- *There is concern that we did not know how to handle the disabled individual.*
- *Parents think we are the greatest thing that happened to Huron. (By transporting their children – nursing homes want service some days at a moment's notice or think we are an ambulance.*
- *We have structured a local advisory council that includes students, elderly, and regular passenger representatives. They have been very instrumental in gathering community support and problem solving.*

### INSTITUTIONAL ISSUES:

- Training for transit drivers when transporting students (6 RESPONDENTS)
- Routing/Scheduling (4 RESPONDENTS)
- Turfism (4 RESPONDENTS)
- *Different calendars*
- *School district simply drops home/school bus for summer school program and expects the public transit system to pick it up without discussion or compensation.*
- *Transit authorities risk greater liability; schools are not in the transportation business, which is a support function.*
- *Schools are reluctant to put their students on our vehicles running existing routes because it would result in their cutting one of their driver's hours.*
- *Initial attempts in late 80s to obtain vehicle maintenance through the school board was unsuccessful. We have set up a separate shop.*
- *I see our system growing due to wider need & acceptance of the idea that we offer a valid option*

**REGULATORY ISSUES**

- Must follow state and federal yellow school bus laws (4 RESPONDENTS)
- Co-mingling (3 RESPONDENTS)
- Driver not properly licensed (2 RESPONDENTS)
- Governance (2 RESPONDENTS)
- *Insurance for the vehicles was initially a problem.*
- *The principal drawback to further consolidation is the inability to expand into non-participating political jurisdictions in order to meet the needs of FIA, mental health, etc. Regional service is the next logical and significant service expansion.*
- *There is a requirement under Section 427 Florida Statutes, governing coordination of paratransit services, requiring the review of coordination of paratransit and school transportation.*
- *Some concerns in this regard but not major problem.*
- *Great cooperation between agencies.*
- *[Laws against] tripper service.*

***Recommending Coordination and/or Integration***

The final series of questions on the survey asked respondents whether or not they would recommend an integrated/coordinated approach to others. More specifically, respondents were asked "*Based on your experience to date with an integrated approach to school bus and public transportation, would you recommend this approach to other operators? If "yes with qualifications," please comment.*" Also, Question 2.5 asked respondents to answer "*What other advice would you offer to transit systems or school districts about using an integrated approach to transportation services?*" Again, the actual responses are far more interesting and valuable than any quantitative analysis. The following table includes responses, by category of service provider.

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Category	Would you recommend integration?	Comments	Additional Advice
Public school district	YES WITH QUALIFICATIONS	<i>Only on a limited basis for older students.</i>	<i>There is probably the potential for a lawsuit if students were injured on public transportation. Why do we transport some students on vehicles that are not as safe as others?</i>
Public school district	YES WITH QUALIFICATIONS	<i>Secondary students only.</i>	<i>Provide adequate driver training and meet monthly to address concerns.</i>
Regional, county or municipal transportation authority or department	YES WITH QUALIFICATIONS	<i>Clear definition of roles of participants must be understood. Good working relationship/communication between school boards and transportation service providers. Planning, planning and more planning.</i>	<i>Plan, plan, plan!</i>
Social Service agency	YES WITH QUALIFICATIONS	<i>Must pick appropriate age (mental &amp; chronological) mix of passengers — must not mix pre-school with general public without proper school supervision.</i>	<i>Use yellow bus for off-peak transportation services — seek public transit line service for peak school service needs.</i>
Public school district	YES WITH QUALIFICATIONS	<i>Transit buses should not replace school buses based on your financial considerations (cost savings) only. They are clearly not as safe. But for certain district-wide programs where rail system can be utilized, savings can be achieved.</i>	<i>Safety must not be compromised. Transit buses do not provide the same margin of safety as school buses. Use of transit service must be carefully implemented.</i>
Regional, county or municipal transportation authority or department	YES WITH QUALIFICATIONS	<i>In our case it is a one way integration. The school uses insurance as reason to allow students only on their buses. Independent contractors consider public transportation as threatening. Also, public perception is that fare would pay full cost of service. The public bus system must be careful not to use public transit funds to subsidize unfair amount of school transportation. The demand for subsidized public transit for students within 3-mile limit could inundate system.</i>	<i>Federal funding is available for special education student transportation. Negotiate for full cost. "No shows" or failure to cancel door-to-door disabled rides should be charged for. (Tripper service) one homeowners association has provided a pull-off spot that is insured. Proceed carefully as demand and level of expectation may be beyond transit's ability to provide.</i>
Public school district	YES WITH QUALIFICATIONS	<i>If practical and safe.</i>	<i>Need to use established stops. Safety concerns — especially involving elementary students.</i>
Private, for-profit transportation organization	YES WITH QUALIFICATIONS	<i>Must be certain to have high level of cooperation between school superintendents and human service agency executive directors.</i>	<i>Have a qualified school bus contractor to do it.</i>

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Category	Would you recommend integration?	Comments	Additional Advice
Regional, county or municipal transportation authority or department	YES WITH QUALIFICATIONS	<i>Please note: contractual agreements with private enterprise must be looked at or agreed upon before an agreement between the public transportation sector can happen.</i>	<i>We have been transporting students since 1974. The school system and City Bus have never sat down and discussed ways to integrate or improve our services. What we have done is to make two early morning runs along six routes and one run along three additional routes for three elementary schools. At 2:45 we add six additional buses to return children home from school. We don't use our Midday Route Buses to transport school children during school dismissal.</i>
Other	YES WITH QUALIFICATIONS	<i>The sensitivity required for drivers of school children is similar to that required of paratransit drivers. Regulators should be passenger-based, not vehicle-based. Regulations in conflict with one another should be resolved.</i>	<i>There will be no consistent pattern. Urban areas with a strong transit infrastructure should be taking the lead. Suburban/rural areas that lack transit should look to the school districts. School districts must become more concerned about employing idle capacity. It is likely school fleets are underutilized by 50% to 60%. School buses will have to become more adult friendly.</i>
Public school district	YES WITH QUALIFICATIONS	<i>Only on a limited basis — coordination is only with magnet school students.</i>	
Other	YES WITH QUALIFICATIONS	<i>Student safety must be the Number 1 concern before cost.</i>	
Regional, county or municipal transportation authority or department	YES WITH QUALIFICATIONS	<i>There are possibilities. Opportunities may be a factor of geography, also not everyone wants to work together.</i>	<i>There are tremendous differences in opportunity throughout the state and country. I see this from information compiled nationwide on transit systems. Noise was always a concern to me as a beginning when one looked at adults who rode a bus, particularly on an elementary run.</i>
Regional, county or municipal transportation	YES WITH QUALIFICATIONS	<i>Solid planning is a must. It is not enough to merely agree to begin a service. Both agencies need to commit time and resources to promotion and real encouragement to students to use the service.</i>	

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Category	Would you recommend integration?	Comments	Additional Advice
Public school district	YES WITH QUALIFICATIONS	<p><i>The use of transit vehicles for other community issues should be encouraged. School transportation, except for high school-based, is not an area that I would favor for integration.</i></p> <p><i>Within the school bus area I do favor the integration of day care and Head Start programs with public/private school transportation.</i></p>	
Social service agency	YES	<p><i>Full community (agencies and appointed/elected leaders, and citizens) needs to get info. out (i.e., sell idea to make it work).</i></p>	<p><i>Have not tried integrating with public school system, just beginning to initiate services for private schools to include Head Start.</i></p>
Regional, county or municipal transportation authority or department	YES	<p><i>School leaders must be convinced that transporting Head Start children on their school bus routes is not a threat to them — but rather it helps to prepare the children for entrance into the kindergarten programs. Also — it is hard to convince administrators that a transit system can save the schools transportation costs.</i></p>	<p><i>I do not feel that we have reached complete success in integration, but with time it will come. A system must be patient and let school districts discover for themselves how public transit and public schools can work together to benefit both of their budgets.</i></p>
Regional, county or municipal transportation authority or department	YES	<p><i>This was not a planned initiative for us. We have responded to needs of schools as they arise.</i></p>	
Private, non-profit transportation organization	YES	<p><i>Coordination with local Head Start and Senior Programs as well as Health and Human Service Agencies is imperative in eliminating duplication of services.</i></p>	<p><i>Coordination is cost efficient and very effective. The key is in the approach to the agencies and the ability to promote the idea of coordination. The process is critical in order to avoid perceived issues of safety, turfism, etc.</i></p>
Private, non-profit transportation organization	YES	<p><i>Cost-effective, creates partnerships, educates the public, teamwork, everyone wins</i></p>	<p><i>Be willing to coordinate for the good of the transportation disadvantaged — give and take. We must approach this issue as team players with no agendas but approaching it for the good of those we serve, then everyone wins.</i></p>

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Regional, county or municipal transportation authority or department	YES		<i>Please be advised that the use of school bus transportation service is accomplished on a small scale to support the transportation disadvantaged (TD) program efforts of Pasco County. The School Bus Transportation Director is a member of our Transportation Disadvantaged Local Coordinating Board which assists with policy and procedures related to the Transportation Disadvantaged Program. They have not been involved with our public transit efforts to date.</i>
Regional, county or municipal transportation authority or department	YES		<i>Making our handi-van available to all age groups was a priority. There was a need (especially for working parents) to have their children transported. And it helped increase our revenue.</i>
Regional, county or municipal transportation authority or department	YES		<i>Be cautious about how custom the service becomes. The details can be overwhelming and the operational impacts significant. The four high schools we work with are site managed, so each school has unique needs, which often don't mesh with the fixed route services. The school district is not able to help much in our situation, but could be an ally for others.</i>
Private, non-profit transportation organization	YES		<i>Coordination is very important. It is (a) more cost efficient, (b) less duplication of service, (c) may fill in gaps in areas where transportation may not always be available, (d) possibly share expenses (e.g., bulk fuel, maintenance training, etc.), (e) offers opportunity to improve services, (f) expansion, (g) promotes credibility, (h) involves the community, and (i) enables you to work with other transportation providers as well as gain support from consumers, human service agencies, and governmental entities.</i>

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Regional, county or municipal transportation authority or department	YES		<i>Some of the important considerations are (a) political and legal (e.g., compliance with federal and state regulations); (b) financial (e.g., funding security, urban vs. non-urban costs); (c) safety (e.g., driver/staff training, bus stop locations); (d) operational (e.g., coordinating transit schedules with daily and seasonal school schedules); (e) public relations (e.g., marketing approaches, parental and rider concerns); and (f) personnel considerations (e.g., wage/benefit differences, job specifications, and work rules).</i>
Regional, county or municipal transportation authority or department	YES	<i>In our small town, it allows us to maintain a viable system for all. We could not support public transit without serving all segments. In the region, it is meeting another unmet need and giving people a choice.</i>	<i>Give it a try. You may like the results. So may your passengers.</i>
Private, non-profit transportation organization	YES	<i>But elderly would not be able to get into school buses. Schools need to look at maybe "bending" some so that parents would have a little more leeway.</i>	<i>School buses should let children at day cares ride if the babysitter is within the bus route.</i>
Private, non-profit transportation organization	YES	<i>School Board remains the logical foundation for rural community service transportation</i>	<i>Given the vast resources that the yellow bus fleet represents in this country and the relatively, by paratransit standards, low level of utilization by these vehicles, federal and state initiatives are needed to facilitate an integrated approach. Most of the obstacles cannot be overcome at the local level.</i>
Regional, county or municipal transportation authority or department	YES		<i>Increase transit as a valued community resource — improve security for students — increase the quality of service to students — provides opportunity for route expansion for public — expands the transit funding base.</i>

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Regional, county or municipal transportation	NOT SURE	<i>The integrated approach works well with smaller cities; the approach might not work well with larger municipalities.</i>	
Regional, county or municipal transportation authority or department	NOT SURE	<p>1) <i>It solved the "big bus running less than full" image in a small community.</i></p> <p>2) <i>We purchased bus equipment — capital savings.</i></p>	<i>What is the political climate, what do they wish?</i>
Public school district	NO	<i>Studies in this area about coordinating all services seemed to benefit the organization that had few buses but large needs. The bigger systems would be utilized to aid the smaller systems without receiving benefit in return.</i>	
Public school district	NO		<i>School districts do not have the control of transit that they need at this time. The cost over safety seems to be the issue here — this is what I have now here at Costa. The problems that come with transit, in my opinion, outweigh any cost savings.</i>

# **Appendix C**

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## **Case Studies**

- 1. Bonifay, Florida**
- 2. Cheraw, South Carolina**
- 3. Cottonwood, Arizona**
- 4. Decorah, Idaho**
- 5. Gillette, Wyoming**
- 6. Glendale, Oregon**
- 7. Idlewild, Michigan**
- 8. Kalispell, Montana**
- 9. Minot, North Dakota**
- 10. Nampa, Idaho**
- 11. Selkirk, Washington**
- 12. Thousand Palms, California**
- 13. Trumbull County, Ohio**

## **CASE STUDY REPORT: BONIFAY, FLORIDA**

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### **I. AGENCY/ORGANIZATION**

Tri-County Community Council, Inc.  
301 North Oklahoma Street  
Bonifay, Florida, 32425

Tel: 850-547-3688

### **II. SUMMARY STATEMENT**

Since 1983, the Tri-County Community Council (hereinafter referred to as "Tri-County") has served as the Community Transportation Coordinator (CTC) in rural Holmes, Walton, and Washington Counties, located in the Florida Panhandle. As the CTC, Tri-County is responsible for the planning and provision of transportation services to several human service agencies as well as to unaffiliated individuals who qualify under Florida law as being "transportation-disadvantaged."

Tri-County recently expanded service to accommodate trips going to destination points in six outlying counties (Jackson, Jefferson, Gadsden, Okaloosa, Liberty, and Calhoun), coordinating service with the counterpart CTCs from these counties. Planning is underway to include the CTCs in three other counties (Leon, Bay, and Escambia) in this inter-county coordination effort.

Tri-County was selected as a case study because of the many different ways that it coordinates service with the local school districts from its three core counties. This has included providing feeder service to school bus routes both for school children and Head Start participants and cross-use of each other's vehicles, with school districts using Tri-County for field trips, and Tri-County utilizing idle school buses for group excursions.

### **III. HIGHLIGHTS**

#### **Coordination of Public and Student Transportation**

Coordination between Tri-County and local school districts includes the following efforts:

- ◆ As the CTC, Tri-County is responsible for Head Start transportation, directly transporting most of the Head Start participants. Working closely with the local school districts, Tri-County arranges for several other Head Start participants to ride on regular school bus routes, also providing feeder/distributor service to/from the school bus stops.

- ◆ The local school districts permit some high school students to ride on some of Tri-County's Head Start routes.
- ◆ The local school districts utilize Tri-County vehicles for student field trips.
- ◆ Tri-County as well as several local agencies (e.g., Head Start, the Boys and Girls Club) and companies (e.g., insurance companies) sublease school buses at a discount rate (\$0.45/mile) for field trips when the vehicles are otherwise not being used for student transportation.

#### **IV. BACKGROUND**

##### **Description of Public Transportation Services**

With a fleet of 77 vehicles, Tri-County provides door-to-door paratransit services to sponsored residents of its three counties as well as to selected residents of six (soon to be nine) surrounding counties. In 1997, Tri-County provided over 171,500 trips. Half of all trips involve transfers, and more than half of the trip destinations lie outside the Tri-County area.

In its role as CTC, Tri-County provides transportation services to Medicaid, Head Start, and Children and Family Services, as well as to a number of other local human service agencies. Tri-County also works closely with the local school districts, coordinating Head Start transportation with the districts' school bus routes and effectively making use of one another's vehicles for group trips.

##### **Description of Student Transportation Services**

All three counties provide both general and special education student transportation services within their respective districts -- which are contiguous with county boundaries. Their combined inventory of 200+ vehicles comprises a full range of vehicle types and sizes. General student transportation services are operated on a conventional fixed-stop/collector-point basis, and special education services are operated on a demand-responsive, subscription basis.

##### **Demographic Characteristics**

Key demographic statistics for the Tri-County service area are shown below:

	<u>Holmes</u>	<u>Walton</u>	<u>Washington</u>	<u>Total</u>
Population	17,412	34,328	19,751	71,491
Density	35.5	29.9	33.1	32
Median Household Income	\$19,975	\$23,283	\$20,806	N/A

With the relatively small population in all three counties, it is not surprising that the population density is so low. Only one city in each county has more than 1,000 residents, yet the number, of transportation-disadvantaged individuals, representing 43% of the population, is considerable.

## **Regulatory Environment**

Tri-County's regulatory environment is extremely conducive to the integrated provision of transportation services -- with the exception of many pupil transportation regulations and practices -- at both the state and local levels. These policies encourage, facilitate, and in some cases, require coordination. They include the following:

- ◆ Florida Coordinated Transportation System
- ◆ Local Comprehensive Plans
- ◆ Statewide Five-Year Transportation Disadvantaged Plan
- ◆ Transportation Disadvantaged Service Plan (TDSP)
- ◆ West Florida Strategic Regional Policy Plan

Paramount among these statutes and regulations is legislation that created the Florida Commission for the Transportation Disadvantaged (FCTD). In 1979, the State of Florida created the Transportation Disadvantaged (TD) Coordinating Council to oversee the coordination of service for persons who were defined as transportation disadvantaged. With the reenactment of Chapter 427 Florida Statutes in 1989, the TD Coordinating Council was elevated to a state-level commission (reporting directly to the Governor and State Legislature) and renamed the Florida Commission for the Transportation Disadvantaged (FCTD). Since then, FCTD has made great strides toward providing transportation for those "persons who because of physical or mental disability, income, status, age, are unable to transport themselves or purchase transportation."

In each county, the designated official planning agency, typically a metropolitan planning organization (MPO) or a regional planning council (RPC), and the local coordinating board (LCB) recommend selection of a Community Transportation Coordinator (CTC), which will be forwarded to the FCTD for approval.

The primary mission of each CTC is to improve the coordination of existing transportation programs through a service delivery system directly provided by or overseen by the CTC. The ultimate goal of this coordination is to stretch the funding dollars already committed to these transportation programs. Each CTC acts as both the funding and service coordinator, thereby reducing duplicative administration and service delivery; furthermore, the added economies of scale and increased ridesharing opportunities that result from a larger "pot" of trips improve the collective cost efficiency of these programs while at the same time abiding by the individual service needs of each sponsoring organization and maintaining or improving the quality of service. By achieving cost efficiencies in this manner, funding dollars can thus be stretched to purchase/provide additional service.

The enabling legislation also established a TD Trust Fund to help provide/purchase additional transportation for transportation-disadvantaged persons whose transportation needs were not fully covered by existing programs. In short, the fund was created to help alleviate the unmet demand of persons "falling between the cracks." Originally, the statewide allocation of funds (to each county) was based on population, area, ridership, and service mileage. This was later amended so that each county CTC would receive the same *base* amount, with *additional* funding based on a formula involving the same four criteria.

It also was envisioned that CTCs would be involved in eligibility determination for agency-sponsored customers, as well as for non-sponsored persons eligible for subsidization with TD funds. In this role, the CTC is responsible for ensuring that eligible customers are transported on the most appropriate *and* most cost-effective mode available. Thus, each CTC should first understand the needs of the agency sponsors and their customers and then identify different types of carriers available accommodate those needs, including fixed-route services, taxis, private for-profit chair car and stretcher companies, private non-profit carriers, agency operators, **public school transportation resources**, and volunteer drivers.

After the CTC has identified or -- when necessary -- secured (through competitively bid contracts as required by Chapter 427 or as otherwise advantageous) an appropriate network of transportation resources, the CTC then determines, based on the needs and limitations of each customer, the most appropriate and cost-effective mode for that customer, and sometimes for each trip made by that customer.

Indeed, a state policy encourages CTCs to use agency vehicles or **publicly owned school buses**, when they are not being used for agency purposes or student transportation. At the same time, state insurance regulations require a high level of insurance coverage when publicly owned school buses are used for purposes other than student transportation. The high cost of such coverage renders the use of school buses financially unattractive, if not prohibitive, for all but large group trips.

Regulations related to pupil transportation are similar to those of many other states in their prohibition and/or discouragement of school bus coordination with other services.

Among other things, state regulations prohibit the following:

- ◆ Use of non-yellow school bus services when pupil transportation services are available
- ◆ School children riding in "non-conforming" vans
- ◆ Co-mingling of passengers other than Head Start clients, pre-schoolchildren, or employees or volunteers of the school district on home-to-school pupil transportation services

At the same time, State regulations do **not** prohibit the following:

- ◆ Use of school buses for non-home-to-school purposes during "down time"
- ◆ Non-school agencies purchasing or operating school bus-certified vehicles
- ◆ Schoolchildren utilizing transit or other services
- ◆ Contracting of other vehicles for field trips and other non-home-to-school purposes

In addition, policies and practices at the local level have modified and complicated these barriers somewhat. For example, some school districts require vehicle inspection every 20 days. Tri-County does not generally comply with this standard, but does make an exception for Head Start vehicles, on which there are some high school students (by special permission of the local school districts).

## **V. GOALS AND OBJECTIVES**

Like other counties in Florida, the Tri-County area benefits from a broad range of goals and policies designed to encourage and, in many cases, promote service coordination and integration. Florida's goals and objectives are unusual because they include a commitment to both a process and an organizational structure (FCTD on the state level and CTCs on the local level) to effect integration and coordination, and specific measures to relieve and remove constraints to them. And while there is a FCTD policy encouraging CTCs to make use of publicly owned school buses where it is feasible and sensible, state insurance requirements effectively dampen this policy. Further, there are no state/local goals or objectives that relate specifically to the integration or coordination of student transportation with other types of transportation services.

## **VI. NARRATIVE DESCRIPTION**

### **History and Background of Integration/Coordination Effort**

Tri-County's involvement in transportation is rooted in clearly enunciated state legislation designed to effect high levels of coordination and/or integration in the state through the following means:

- ◆ Identifying and classifying "transportation disadvantaged" citizens who need transportation
- ◆ Preparing a five-year, statewide Transportation Disadvantaged Plan
- ◆ Creating or designating organizations and charging them with specific responsibilities

- ◆ Targeting directly provided and pass-through funds to these agencies
- ◆ Requiring these agencies to prepare formal plans, demand forecasts, implementation strategies, and service and performance evaluations

## **Legislative History**

For decades, many Florida agencies have used considerable leverage to effect coordinated transportation services, particularly among the social service agencies financed initially by a plethora of HUD, HEW, and Model Cities program funds created in the 1960s and 1970s largely for elderly and low-income individuals. The most significant of recent statewide coordination efforts has been Florida's commitment to statewide mobility in revising Chapter 427 of the Florida Statutes, effective October 1, 1996, to create the Florida Coordinated Transportation System (FCTS).

## **Designation of Tri-County Coordinating Council, Inc.**

Tri-County began as a social service agency charged with the responsibility for discharging Medicaid, Older Americans Act, and Head Start program provisions -- including the provision of transportation. In 1983, Tri-County was named the Community Transportation Coordinator (CTC) by the Walton, Holmes, and Washington County Boards of County Commissioners and began operating a small *coordinated* fleet of used vehicles. In 1990, the West Florida Regional Planning Council also designated Tri-County as the CTC for all three counties, a designation approved by the Florida Commission for the Transportation Disadvantaged (FCTD). In 1995, Tri-County was recommended as the three-county region's Metropolitan Planning Organization (MPO), also approved by FCTD. Consequently, Tri-County now provides transportation services for local, non-emergency medical treatment, nutrition, shopping, education, recreation, employment, and other needs. Non-emergency medical services are provided beyond county limits.

## **VII. DATA AND STATISTICS**

The table on the following page contains recent operating and performance data for the Tri-County system -- including performance improvement and decline in several key indicator areas. The table presented above ("Demographics") includes data regarding the percentage of estimated trip demand, for program- and non-program-related purposes, met in each county. Clearly, similarities in performance among the three counties mirror their similarities in demography.

## Operating and Performance Data (1997)

<i>Characteristic/County</i>	<i>Holmes</i>	<i>Walton</i>	<i>Washington</i>
<b><i>Costs, Trips, and Services Provided</i></b>			
Vehicle Service Miles (Including Deadhead)	409,347	552,746	512,673
Vehicle Service Hours (Including Deadhead/Idle)	27,040	18,720	24,960
Operating Expenses	\$366,507	\$437,304	\$522,884
Contract Rate/Mile: Subscription/Demand-Responsive	\$.89/\$.94	\$.92/\$.96	\$.89/\$.94
Vehicles (Tri-County Fleet)	26	27	24
Passenger Trips (1997)	55,334	61,390	67,025
Passenger Trips (1996)	46,667	57,492	67,406
<i>(Sponsored "Program" Trips)</i>	42,887	50,092	62,015
<i>(General Trips)</i>	3,790	7,400	5,391
<b><i>Trip Characteristics</i></b>			
"Average" Trip Length (VSM/PT)	7.1	8.7	7.3
Estimated Average Trip Length (SD Project)	75	75	75
<b><i>Performance-1997</i></b>			
Cost/Passenger Trip	\$6.62	\$7.12	\$7.80
Cost/Vehicle Service Mile	\$0.96	\$0.79	\$1.02
Cost/Vehicle Service Hour	\$13.55	\$23.36	\$20.95
Passenger Trips/Mile	0.14	0.11	0.13
<b><i>Performance-1996</i></b>			
Cost/Passenger Trip	\$10.29	\$10.21	\$8.25
Cost/Vehicle Service Mile	\$1.17	\$0.95	\$0.96
Cost/Vehicle Service Hour	\$23.09	\$30.65	\$21.39
Passenger Trips/Mile	0.09	0.09	0.12
<b><i>Performance Improvement/Decline (1996-1997)</i></b>			
Cost/Passenger Trip	35.70%	30.30%	5.50%
Cost/Vehicle Service Mile	30.30%	16.80%	-6.50%
Cost/Vehicle Service Hour	57.70%	23.80%	2.10%
Passenger Trips/Mile	55.60%	22.20%	8.30%

## VIII. LEGAL AND REGULATORY ISSUES

Three aspects of the regulatory environment in Holmes, Walton, and Washington Counties have had a considerable impact on Tri-County's integration of transportation services, as follows:

- ◆ The abundance of state requirements for coordination
- ◆ Funding policies and mechanisms that promote coordination
- ◆ The absence of institutional barriers to coordination at the state and local levels

The same is not true of state regulations regarding student transportation. These prohibit or limit school children's use of non-yellow school buses and non-conforming vans and prohibit the comingling of general public riders with school bus riders (with the exception of pre-school children and Head Start children) except where student transportation services are not available.

In addition, state insurance regulations requiring high levels of coverage when publicly owned school buses are used for purposes other than student transportation result in high premiums, which in turn effectively limit the usefulness of these resources.

## IX. EVALUATION

### Data Limitations

Tri-County has been providing and expanding its coordinated transportation services for so long, and in the absence of any others, that comparisons with even versions of their own past services have little meaning. Further, factors such as the addition of new vehicles and the expansion of service to satellite points mask any performance improvement that has occurred.

For these reasons, impacts on business and the local economy as a result of service integration are virtually impossible to measure. This is particularly true given that only a small percent of the estimated need for general or non-program-related trips currently is being met (although most transportation-disadvantaged individuals' trips in Florida are program-related, most of which Tri-County accommodates).

More important for purposes of this study, however, is that little or no data exist to measure the effects of the limited coordination of student and other transportation services -- apart from the Head Start savings of \$30,000 a year in seed money. Both Tri-County and the local school districts have obviously realized cost savings from the use of one another's vehicles for non-home-to-school purposes; however, they have not tracked or analyzed the extent of the savings.

## **X. TRANSFERABILITY**

### **System Features and Conditions for Success**

While the elements of Tri-County's success are numerous, the primary factors appear to include the following:

- ◆ Tremendous service needs amidst limited resources
- ◆ Supportive and flexible state regulations
- ◆ Channeling both federal and state transportation funds to a coordinated agency
- ◆ The program-inclusive structure of the coordinating agency
- ◆ The absence of other transportation services
- ◆ The skill of agency personnel in performing complex operating functions

### **Limitations of Transferability**

The primary limitation on transferability is that the State of Florida has institutionalized the coordination of transportation services in each county (or region) in the state. Hence, the participants here have not had to face many of the institutional barriers that confront prospective coordination participants in many other states with less progressive attitudes toward coordination.

## **CASE STUDY REPORT: CHERAW, SOUTH CAROLINA**

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### **I. AGENCY/ORGANIZATION**

Chesterfield County Coordinating Council  
PO Box 1313  
Cheraw, South Carolina 29620

Tel: 843-921-0717  
Fax: 843-537-1771

### **II. SUMMARY STATEMENT**

Formed in 1993, the Chesterfield County Coordinating Council (CCCC) is a private, non-profit organization that is participating in projects focusing on the coordination of all transportation services in Chesterfield County. To date, the CCCC has helped to establish a coordinated paratransit service, operated by the regional transportation authority, that accommodates the transportation programs of several human service agencies. The CCCC is also working with the local School District and the State to allow the co-mingling of students with the general public on school bus routes, noting that school employees, school volunteers, and parents are already allowed to ride on school bus routes on a space-available basis.

### **III. HIGHLIGHTS**

In 1997, a bill was passed in South Carolina allowing school employees, school volunteers, and parents to ride with children on regular school bus routes on a space-available basis. In concert with this state law, the Chesterfield County School Board approved a plan to allow these adults to ride on the County's school bus routes. Since this practice was initiated by the local School District in January 1998, no parent, volunteer, or employee has requested service. In the meantime, the CCCC also requested State approval of a one-year pilot project to allow other approved adults to ride on school bus routes on a space-available basis. The pilot project was not approved by the State because of concerns about co-mingling "other" adults with children on the same vehicle. CCCC is planning to resubmit its request in 1999.

## **IV. BACKGROUND**

### **Description of the Public Transportation Service**

Chesterfield County is served by the Pee Dee Regional Transportation Authority (PDRTA), which provides fixed-route transit and paratransit services. Transit service in Chesterfield County is limited to three routes, operated three times a day -- in the morning, midday, and afternoon. One route serves the towns of McBee and Pageland and the western part of the County, while the other two routes serve the towns of Cheraw and Chesterfield and the eastern part of the County. These routes carry about 45 passengers daily on three 14-passenger vans, or approximately 11,000 passenger trips annually.

PDRTA also operates a door-to-door, mostly subscription-based paratransit service designed primarily for the clients of the human service agencies in the County; however, service is available to the general public on request. Using nine 14-passenger vans, the paratransit service carries about 150 passengers daily (or approximately 40,000 passenger trips annually) and accommodates:

- ◆ Transportation of adults with developmental disabilities to sheltered workshops for the Chesterfield County Board of Disabilities and Special Needs
- ◆ Transportation of senior citizens to nutrition sites for the Chesterfield County Council on Aging
- ◆ Transportation of food stamp and Medicaid clients for Chesterfield County Department of Social Services

The transit and paratransit systems operate from 6:00 a.m. until 6:00 p.m., Monday through Friday.

### **Description of Human Service Agency Transportation Services**

Several human service agencies provide transportation services for their clients, using in-house resources and, in some cases, volunteer drivers and PDRTA. These include the following:

- ◆ Transportation of pre-school children from low-income families to Head Start centers is provided by the Chesterfield-Marlboro Economic Opportunity Council. This agency has its own school buses for the services.
- ◆ Transportation of Welfare-to-Work and Medicaid clients is provided by the Chesterfield County Department of Social Services. This agency has its own vehicles and roster of volunteer drivers for its services, and also uses PDRTA for "overflow" trips.

- ◆ Transportation of senior citizens to nutrition sites by the Chesterfield County Council on Aging; this agency owns approximately five vehicles, has 87 volunteer drivers for its services, and uses PDRTA for the overflow
- ◆ Transportation of medical clients by Sandhills Medical Foundation, Tri-County Mental Health Centre, and South Carolina Vocational Rehabilitation; these agencies own approximately three vehicles and use PDRTA for the overflow

### **Description of School Transportation Services**

Chesterfield County is served by school transportation services provided by the Chesterfield County School District. The services provide home-to-school transportation to students living more than 1½ miles from school.

The school transportation system serves 4,000 students and carries about 1,400,000 pupil passenger trips annually on 96 yellow school buses **owned by the State** and operated by the School District.

### **Demographic Characteristics**

The service area of the public transit and school transportation systems comprises Chesterfield County, population 40,000, in northeast South Carolina.

The county is primarily a rural farming area covering 800 square miles. It supports a number of towns, including Chesterfield and Pageland, with populations of about 4,000, and McBee and Jefferson with populations under 1,000. Cheraw, located at the eastern boundary of the county, is the largest city in the area, with a population of 7,000.

### **Regulatory Environment**

The State owns the yellow school buses used by the School Districts to transport students in South Carolina. In 1997, a bill was passed in South Carolina allowing school employees, school volunteers, and parents to ride with children on regular school bus routes on a space-available basis. With these exceptions, no one but students may be transported on the State's yellow school buses.

### **Political Environment**

The Chesterfield County Coordinating Council was formed in 1993 to "strengthen the systems that provide services to the citizens of Chesterfield County through improved communication,

adequate linkage and collaboration." It is a private, non-profit organization representing government agencies, private providers, civic groups, and others interested in improving human services in Chesterfield County. Its members include the School District and transportation authority.

The CCCC has identified lack of transportation as a barrier to Chesterfield citizens leading independent, productive lives. It is committed to the development of a multi-faceted, flexible, coordinated transportation system in the County.

## **V. GOALS AND OBJECTIVES**

The CCCC's mission is to strengthen the systems that provide services to the citizens of Chesterfield County through improved communications, adequate linkage, and collaboration. Its transportation goal is to improve access and the delivery of transportation services by maximizing existing resources through increased ridership and decreased caseworker time in providing transportation.

The CCCC in conjunction with the School District submitted in 1997 a proposal for a one-year pilot project to the state. The pilot design allows adults from the general public -- and not just school employees, school volunteers, and parents -- to ride on school bus routes, along with the school students on a space-available basis. The pilot project was rejected, however, by the State on the grounds that this expanded co-mingling may compromise the safety of the children. Undeterred, the CCCC is planning to resubmit the proposal in 1999.

## **VI. NARRATIVE DESCRIPTION**

Since its creation in 1993, the CCCC has provided leadership in coordinating and integrating the transportation services of PDRTA and the human service agencies in the County. The main coordinating accomplishments have included:

- ◆ Publishing a transportation calendar of routes and services so that agencies can coordinate services to clients
- ◆ Arranging for the pooling of liability so clients of one agency can be transported on another agency's vehicles
- ◆ Increasing community awareness of available transportation options
- ◆ Coordinating agency use of PDRTA and human service agency vans with extra capacity
- ◆ Arranging for the transportation of adults on the school buses in the County; to date, only parents, volunteers, and school employees are permitted to use the service

## **VII. DATA AND STATISTICS**

No parent, volunteer, or school employee requested service since the program was initiated in January 1998. Thus, there is no pertinent data.

## **VIII. LEGAL AND REGULATORY ISSUES**

CCCC believes that the state law permitting parents, volunteers, and school employees to ride on regular school bus routes on a space-available basis is a step in the right direction. At the same time, it wishes to go further, seeing a great unmet transportation need among other adults. It believes that its pilot program proposal to demonstrate how this could solve the mobility problems of adults has merit. The program also has the support of the local School Board and the community.

Because the State owns the school bus vehicles, and because there is currently a law which explicitly does not allow for any other exceptions, the State opted not to approve the proposal, believing that the potential benefits are not worth the potential risk to the school children as well as to the State. In addition, the State did not wish to set an exception precedent at this time in view of the fact that (1) the passing of the 1997 law created much political conflict, and (2) the results of the limited co-mingling that is now allowed under that law have yet to be analyzed.

## **IX. EVALUATION**

Because no parent, volunteer, or school employee has requested service since the program was initiated in January 1998, there is no pertinent data to analyze.

## **X. TRANSFERABILITY**

Although the legal environment in South Carolina is unique, with the school buses owned by the State, the techniques used to reduce administrative barriers to allowing the integration of student and public transportation are transferable to other locations. Long term relationships and positive communication with all persons potentially affected by the process are key. The Cheraw experience also illustrates that local consensus and commitment need to be secured before going to the State to ask for a demonstration waiver of prohibiting legislation and/or for funding.

The participants in Cheraw advise that a strong inter-agency council is required to achieve that consensus and commitment and to build trust. They also advise their counterparts in other locations not to expect overnight success. The pilot program proposal, for example, was three years in the making. In Cheraw, building a foundation of mutual trust and good faith has been a slow process; nonetheless, this is critical, as evidenced by other pre-1993 attempts to coordinate transportation services in Chesterfield County, which failed.

The participants in Cheraw also attribute their success thus far to the involvement of political leaders on the Coordinating Council, as well as the involvement of the local School Board members. Three of the nine School Board members are involved with the Coordinating Council.

## **CASE STUDY REPORT: COTTONWOOD, ARIZONA**

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### **I. AGENCY/ORGANIZATION**

Cottonwood Area Transit System  
c/o City Of Cottonwood  
827 Main Street  
Cottonwood, Arizona 86326

Tel: 520-639-5526

### **II. SUMMARY STATEMENT**

The Cottonwood Area Transit System (CATS) provides general public Dial-A-Ride paratransit service in the cities of Cottonwood and Clarkdale and in the unincorporated communities of Bridgeport and Verde Village, in north-central Arizona. A portion of this service is dedicated to client groups in three programs: Head Start, Yavapai Association of Retarded Citizens (YARC), and Adult Day Care. These programs pay a premium amount for guaranteed seating for their clients, who are co-mingled with other riders on CATS.

School-age children also are transported by CATS, although these are primarily trips arranged by parents for after-school activities or mid-day transportation for kindergartners. In addition, while the three school districts provide their own conventional school bus transportation, as well as special needs transportation, they do use CATS for student transportation when the need arises.

### **III. HIGHLIGHTS**

As in many small urban and rural areas, CATS was established to serve the transportation needs of persons without transportation alternatives. In the Cottonwood area, the service initially focused on the needs of Head Start children and persons with developmental disabilities. It has since evolved into a general public Dial-A-Ride paratransit service which now accommodates a broad variety of trip needs, including transportation to after-school activities for school children.

CATS now provides most of the transportation for the Cottonwood Head Start program through a funding agreement. According to the agency director, if additional funding could be found, CATS also would be used for the Head Start program in the nearby community of Clarkdale. However, coordination between CATS and Head Start in Cottonwood may be more difficult in the future given an anticipated ruling by the Arizona Attorney General's office which will require Head Start transportation to be provided in yellow school buses. Other regulations, such

as the new requirement that car seats be used when transporting children ages five and under, also will make the Cottonwood coordination effort more challenging.

There are three school districts in the Cottonwood area. Each of the three districts provides its own conventional school bus transportation as well as special needs transportation. However, these districts do contract with CATS for school trips. In addition, many families use CATS to transport their children to after-school activities.

There is a unfulfilled transportation need to provide a linkage between Mingus High School and the Yavapai Community College for students taking courses at both institutions. There is also a significant unmet demand for general public transportation service in the area, as evidenced by the fact that CATS currently turns down roughly 100 trip requests per month due to limited capacity. However, additional expansion of capacity has not been implemented due to funding constraints.

#### **IV. BACKGROUND**

##### **Description of the Public Transportation Service**

CATS provides door-to-door paratransit service for the general public in the Cottonwood area, which includes the incorporated communities of Cottonwood and Clarkdale and the unincorporated areas of Bridgeport and Verde Village. CATS is provided by the City of Cottonwood, and was born when the City took over a smaller public transportation service operated by another entity in 1987. CATS is organizationally housed within the City's Planning and Development Division, with policy direction provided by the Cottonwood City Council.

Since taking over the public transportation service, the City has strengthened management of the CATS and expanded its operation. CATS now serves a broad variety of general public transportation needs as well as the needs of specific client groups (e.g., Head Start children and persons with developmental disabilities).

Funding is provided from a variety of sources, including the cities of Cottonwood and Clarkdale; Yavapai County; the Federal Transit Administration Section 5311 program; and contracts with the Yavapai Association of Retarded Citizens, the Cottonwood Head Start program, and the Adult Day Care program in the area.

A total of five mini-buses (three operating and two back-up) are used to provide the service, which operates from 7:00 a.m. to 5:00 p.m. on weekdays. It also operates on Saturdays for trips scheduled by the previous Friday. Generally, riders are asked to call 24 to 48 hours in advance to reserve rides, although other trips can be accommodated if the schedule permits. The service area is separated into two zones. Zone A comprises the Cottonwood area and Zone B comprises all other areas. The fare for trips within Zone A is \$1.50. The fare for trips to or within Zone B is \$2.00.

Included in CATS's overall general public service is subscription service for specific client groups, whose rides are agency-sponsored. Subscription bus service is provided to three client groups: YARC, the Cottonwood Head Start Program, and Adult Day Care. The YARC and Head Start programs are billed monthly at a rate that equates to \$3.37 per trip, based on a charge of \$1.90 per vehicle mile. The Adult Day Care program provides the match for vehicles and also pays for passes for senior users. The YARC and Head Start contracts account for approximately \$32,000 annually, which is roughly half of the fare revenue received by CATS.

Staffing for the CATS operation includes a manager, a secretary/dispatcher, two full-time drivers, one part-time driver, and three volunteer drivers. The manager oversees the day-to-day operation of the system. Major issues related to budgeting, partnerships with other agencies, and service changes are made by upper management in the City and by the City Council.

A major issue facing the system is how to fund a service expansion (and possible implementation of a fixed-route transit system) to better meet current and future service demand. Even with CATS currently turning down 100 trip requests per month due to lack of capacity, service has not been expanded due to lack of funding. The City of Cottonwood, the City of Clarkdale, and Yavapai County use portions of their state Lottery Transportation Assistance Fund (LTAF) to support the system; however, this funding is limited. One possible source for additional funding is an annexation measure being proposed in the area that could result in additional LTAF funds for the City of Cottonwood. If this funding does not materialize, the City's only hope may be to seek additional revenues from the sponsoring human service agencies that CATS now serves.

### **Description of the School Transportation System**

There are three school districts in the Cottonwood area. The Cottonwood-Oak Creek and the Clarkdale-Jerome School Districts provide kindergarten through grade eight education for students in their districts. The Mingus School District provides high school education for the students in both elementary school districts. All three school districts provide conventional school bus service for students who live beyond designated walking distances. In Arizona, the State Department of Education will reimburse school districts for walking distances beyond one mile for kindergarten through grade eight and beyond two miles for high school. Each of the three school districts also provides special needs transportation.

The three school districts in the area also purchase service from CATS on an as-needed basis; this includes the transportation of some kindergarten children on mid-day trips, for example. CATS also provides after-school transportation for school children, although this is arranged by parents. In the past, CATS had Coordination Linkage Agreements with the three school districts, but these were simply agreements to notify children and parents of the availability of the CATS service. These agreements have not been used recently because they are not seen as needed.

A brief description of each of these school districts is found below:

- ◆ Cottonwood-Oak Creek School District provides conventional school bus transportation for 1,560 students daily. This includes 35 to 40 special needs children and six contracts with parents in areas where school buses are not used due to road conditions or other special circumstances. One student is carried by Cottonwood Area Transit System (CATS) because the student is not on an existing school bus route. The Cottonwood-Clarkdale School District operates eleven 84-passenger buses, two 72-passenger buses, one wheelchair van, and one 72-passenger bus that has been modified for wheelchair use. The District provides transportation for kindergarten students (other than special needs students) only during their regular morning and afternoon runs. For children who attend half-day kindergarten, other accommodations must be made by parents, who often use the CATS service for their children. If requested, the Cottonwood-Clarkdale District will provide transportation for school children to after-school activities. If the trip is on a bus route, it is provided for free; if not, parents are either charged by the School District or referred to CATS.
  
- ◆ Clarkdale-Jerome School District provides conventional school transportation for 385 children who live beyond the one-mile walking distance. Special needs students also are transported. The District operates a fleet of one 84-passenger bus, three 72-passenger buses, three 15-passenger vans, and a back-up vehicle. Some children are transported to Cottonwood schools for special programs that are not available at the Clarkdale-Jerome schools. After-school transportation currently is provided by CATS, although the School District would probably provide the service if CATS did not, according to the Superintendent. A new Boys and Girls Club is opening in "Old Town" Cottonwood, and the School District may need to provide transportation if CATS does not have the capacity.
  
- ◆ Mingus High School District provides transportation for 300 to 400 high school students who live beyond the two-mile walking distance. The Superintendent expressed interest in using the Cottonwood Area Transit System (CATS) to provide transportation between the high school and Yavapai Community College. According to the Superintendent, this potential market, as well as the trend in expanded community-based learning, indicates a need for a broader level of public transportation service. A change in the image of the service by some high school students also would be needed.

### **Description of Head Start Transportation**

Two Head Start programs are provided in the area; one is in Cottonwood and one is in Clarkdale. Head Start transportation is provided to roughly 100 families at the two Head Start programs in the area. Head Start contracts with CATS for service to the Cottonwood site and provides service directly, using one 15-passenger van, to the Clarkdale site. According to the program director, Head Start would use CATS for both centers if additional funding were available. The

director indicated a strong interest in getting out of the direct transportation business and in utilizing existing community resources such as CATS. Reasons cited for wanting to discontinue direct transportation service included (1) difficulty in getting and retaining drivers, (2) the need for ongoing driver training, (3) insurance, and (4) other liability issues. Also, at the Clarkdale center, school attendance drops when the driver is out sick.

The availability of transportation is an issue in assigning children to the Head Start programs. No transportation is provided to the Clarkdale program in the morning. If parents need transportation for their children, they are assigned to the Cottonwood program where CATS provides the service. This can create long travel times when children live in Clarkdale and must travel to Cottonwood for Head Start.

According to the Head Start program director, Head Start must use yellow school buses for direct transportation service. According to the director, however, yellow school buses are not required for contract service. It is not clear to the director why CATS drivers are not required to have Commercial Drivers Licenses (CDLs) and can use volunteers.

Foster grandparents who work at the Head Start centers also use CATS to get to work. More CATS service is needed, according to the Head Start director. Service currently is not provided to Camp Verde. The Head Start program is growing rapidly. In fact, another class of 18 students could be started if funding were provided, as there is a waiting list at both Head Start centers. Head Start is considering Friday operations in the coming year. An expanded Head Start program would require additional transportation.

Issues that will affect the future of the overall Head Start program, as well as its transportation needs, are as follows:

- ◆ New legislation that requires children ages five and younger to be in car seats
- ◆ The new "Early Head Start" program, which targets infants, potentially with its own transportation requirements
- ◆ A pending ruling by the State Attorney General's office requiring Head Start transportation to be provided on yellow school buses

The Head Start program director also reiterated concerns expressed by the superintendent of the High School District regarding the need for expanded general public transportation service. Many high school dropouts are due to pregnancy. High school-age parents may need transportation to the Community College to take advantage of community-based learning, and they may need Head Start for their children. Expanded public transportation services appear to be needed.

One issue about using CATS to provide Head Start transportation, according to the director, is the reduced face-to-face connection with parents if children are brought to school and picked up from school by CATS or another third-party provider.

### **Demographic Characteristics**

In 1997, the estimated population of the Cottonwood area was 18,659. This includes 6,794 in Cottonwood, 2,777 in Clarkdale, and 9,089 in Verde Village, a large unincorporated area for which annexation is currently being considered. In the year 2000, the population projection for the area is 20,184. This represents an increase of 3.6 percent per year. According to the 1990 Census, 24.3 percent of the population was age 65 or older, and the median age was 43.6 years. In Cottonwood, 22.7 percent of the population was below the poverty level. In Clarkdale 16.2 percent was below the poverty level. Approximately 97 percent of the population is white, with the remainder of the population comprised of Native American and African-American racial groups.

### **Regulatory and Political Environment**

There has been a growing acceptance of CATS since the City took over the service in 1987. While public transportation service has grown, and its management strengthened, it has not been able to keep up with unmet demand because of budgetary limitations. Indeed, the three primary local government funding sources -- the City of Cottonwood, the City of Clarkdale, and Yavapai County -- are cautious in considering service expansion requests and appear to be depending on human service agency funding to expand service. At the same time, it would also appear that a variety of constituent groups, including the school districts and the Yavapai Community College, will need to work together with local government to politically and financially support significant future service expansion.

In Arizona, school districts are only mandated to provide special needs transportation. School districts may, however, be reimbursed for transporting other students who live beyond maximum walking distances from their "home" school. The maximum walking distances are one mile for kindergarten through grade eight and two miles for grades nine through twelve. Students who live within the walking distances may be transported by school districts, but the districts will not be reimbursed by the State.

According to state contacts, yellow school buses must be used for all designated school transportation unless the vehicle is designed to carry ten passengers or fewer. An exception has been made for local school districts if it is more cost efficient to provide public transit passes for students; if this is the case, school districts would be reimbursed only for the direct cost of the passes.

Yellow school buses may be used for non-school bus service at the discretion of the local school district. If buses are used for non-school purposes, however, the "School Bus" signage on the bus must be covered. Standing is not allowed on school buses, and seat belts are not used. A state certificate is required to drive a school bus as well as a Commercial Drivers License. Periodic refresher training is required to maintain the school bus certificate.

Recently, advertising has been allowed on the side of yellow school buses in Arizona. There are restrictions on the type of advertising that may be used and where it may appear on the vehicle.

The school districts are aware of the CATS service and contract with CATS for individual trips, as needed. The districts also make referrals to CATS for non-pupil transportation.

With respect to Head Start transportation, there is a somewhat less restrictive regulatory environment, although it is anticipated that this will change once the State Attorney General's office issues a formal ruling regarding the use of yellow school buses in transporting Head Start children. New regulations requiring the use of car seats in transporting young children may create another barrier to continued and expanded coordination between CATS and Head Start. The local Head Start program director, however, has been instrumental in advocating the use of existing community resources such as CATS in the provision of Head Start services

## **V. GOALS AND OBJECTIVES**

There are no formal written goals for the coordination of public, student, and Head Start transportation. While CATS, Head Start, and the three school districts work together, the most extensive coordination effort is between CATS and Head Start, where a specific agreement exists for CATS to provide transportation for the Cottonwood Head Start program. The three groups are aware of one another's services, however, and work to coordinate to the extent possible. Based on the on-site visit, the following appear to be unwritten goals for transportation coordination in the area:

- ◆ CATS's goal appears to be to provide a well operated public transportation service in the area, working with existing programs to respond to transportation needs and utilizing human service agency funding to help support the overall public service. Politically, there is a desire to maintain, but not expand, existing general revenue funds used for CATS and to rely on social service and other funding in the community to address service expansion needs;
- ◆ Head Start's goal, according to the program director, is to utilize existing community resources, such as CATS, to provide transportation for its children; and
- ◆ The three school districts see the need to continue their own direct transportation services, but they value CATS and contract for service on an as-needed basis. They appreciate the availability of CATS for after-school trips and for mid-day trips for kindergartners. Some

interest has been expressed for expanded CATS service to address additional school-related needs, particularly the Community College.

## **VI. NARRATIVE DESCRIPTION**

### **Historical Sketch of Events**

CATS began in 1987 when the City of Cottonwood took over a special needs transportation service originally based in nearby Jerome, Arizona. Head Start riders were one of the original client groups served by CATS, along with persons with developmental disabilities who were clients of YARC. Since the City takeover of the system, management has been strengthened, the service has expanded, and broad community support has developed. In addition to Head Start and YARC client groups, school children are now a major client base and other general public riders are also served.

### **Current Status**

Currently, the service is an important part of the community transportation infrastructure in Cottonwood. CATS is generally accepted as a necessary community service. The service, however, is unable to meet the demand. As previously mentioned, roughly 100 trips requests are turned down each month due to capacity limitations, and the system is not being marketed. Based on the on-site visit, a broader range of community transportation needs could be served if additional funding were provided. One example is the provision of service between Mingus High School and the Yavapai Community College, as some students take courses at both institutions. Another related service would link a potential high school-community college service with the Head Start program where teen pregnancies may indicate a service need between the high school, the Community College, and the Head Start programs.

Issues related to the existing coordination effort that will need to be resolved include new requirements related to car seats for young children (Head Start and kindergarten) and the expansion of the Head Start program to include infants.

## **VII. DATA AND STATISTICS**

### **Costs and Revenues**

The annual budget for CATS was \$172,302 in 1997, with a projected increase to \$198,342 in 1998. Funding for CATS comes from a variety of sources. The 1997 and 1998 budgeted revenues are shown on the following page.

<u>Line Items</u>	<u>1996-97</u>	<u>1997-98</u>
Cash fares	\$25,000	\$33,000
Head Start contract	13,000	13,000
YARC contract	19,000	19,000
Federal grant - FTA 5311	87,102	96,696
Cottonwood LTAF	17,172	21,988
Clarkdale LTAF	5,514	7,329
Yavapai County LTAF	<u>5,514</u>	<u>7,329</u>
<b>Total</b>	<b>\$172,302</b>	<b>\$198,342</b>

### Service Data

CATS ridership data for 1996 and 1997 are presented below. As the table shows, 21 to 22 percent of ridership is Head Start children, 17 to 22 percent is from YARC, and 56 to 60 percent are other general public riders.

<u>Year</u>	<u>Head Start</u>		<u>YARC</u>		<u>Other</u>		<u>Total</u>
1996	7,058	21.3%	7,330	22.1%	18,823	56.7%	33,211
1997	7,558	22.6%	5,927	17.7%	19,954	59.7%	33,419

Service denial data are presented below. Of the total annual requests for service, 10 to 14 percent are denied.

<u>Year</u>	<u>Total Requests</u>	<u>Provided As Requested</u>		<u>Modified Service</u>		<u>Service Denials</u>	
1994	16,351	10,142	62%	1,302	13%	1,586	10%
1995	18,096	12,534	69%	1,382	11%	2,298	13%
1996	18,927	12,447	66%	1,613	13%	2,673	14%
1997	19,016	13,787	73%	1,763	13%	2,282	12%

### Accidents, Incidents, Passenger Injuries, and Complaints

Accidents have not been a significant issue for CATS. Since 1994, CATS has had a formal, written safety manual that documents safety practices and is used for employee training. CATS uses regular staff meetings to reinforce safety, special training, safety posters, and staff assignments related to safety. Since CATS operates door-to-door demand-response service, safety related to children crossing streets to board or disembark a public transportation vehicle has not been an issue.

There are few complaints related to the CATS system other than those associated with service denials.

## VIII. LEGAL AND REGULATORY ISSUES

There have been no major legal or regulatory issues affecting the public/student transportation coordination efforts in the Cottonwood area to date. Since the City of Cottonwood took over CATS in 1987, two separate transportation systems have operated, one for public transportation and one for the school bus services. The coordination effort has focused on the coordination between general public transportation and Head Start, where significant success has been achieved. While only one of the local Head Start programs currently contracts with CATS, the Head Start director would like CATS to serve both programs if funding could be found.

Several issues exist, however, related to continuing and/or expanding the existing coordination effort into the future. These are listed below.

- ◆ **Yellow School Buses.** Currently, most of the pupil transportation in Cottonwood is provided on yellow school buses, with a minimal level of contracted service provided by CATS. Head Start contracts all the transportation for its Cottonwood center to CATS. A potential issue exists related to the differences in the requirements or in the perceived meaning of the requirements for Head Start as opposed to school district transportation for grades K through 12.
- ◆ **Car Seat Requirements.** New regulations related to the use of car seats for children under five years of age could have an effect on the service currently being provided by CATS to Head Start and kindergarten children.
- ◆ **Head Start Expansion to Infants.** The expansion of the Head Start program to include infants will present new challenges to both Head Start and CATS if transportation service needs to be provided.
- ◆ **Driver Training.** Driver training may become an issue given the fact that drivers for transportation provided directly by Head Start in yellow school buses are required to have a Commercial Drivers License, whereas CATS drivers, due to the vehicle size, are not required to have CDLs, and some drivers are volunteers who may not opt to continue driving if a CDL is required.
- ◆ **FTA Limitations on "Exclusive School Bus Service."** The City of Cottonwood receives Federal Transit Administration (FTA) funding under the Section 5311 program. The City is required, therefore, to comply with FTA regulations prohibiting subrecipients from providing "exclusive school bus service." However, this is not an issue in Cottonwood because CATS is open to the general public at all times and only serves school trips in an incidental way.

Other current issues appear to relate more to CATS's ability to expand to accommodate additional transportation service needs in the area. It appears that additional options for coordination exist but currently are not being implemented due to CATS's limited capacity.

## **IX. EVALUATION**

### **Limitations/Uncertainties from Data Availability and Data Sources**

There has been no real analysis of cost savings achieved as a result of the coordinated effort or other alternatives to increase the coordinated service. Ideally the City, the school districts, and Head Start would develop detailed cost allocation models in order to more specifically identify cost savings, appropriate reimbursement rates, and potential alternatives for further coordinated efforts. This may be particularly important given new regulations regarding car seats for young children, the inclusion of infants in the Head Start program, and options for services related to high school-Community College transportation.

### **Performance Compared to Objectives**

As previously stated, formal written goals for the coordination program have not been developed. While there appears to be general agreement among staff and local policy makers regarding the need to have a reliable, cost-effective transportation service that meets the basic needs of the community, a broad level of consensus will be required to develop the funding that will be needed to expand service.

### **Changes in Effectiveness/Efficiency**

The existing coordination arrangement appears to be effective and efficient. Both Head Start and school district administrators believe that the cost of utilizing CATS (for the transportation of Head Start participants and school children, respectively) is reasonable. Funding appears to be the primary limitation to expanding service to the community at large and to Head Start and school district-related services.

### **Impact on Transit Dependent**

The transit-dependent in Cottonwood are the primary beneficiaries of the coordinated service. The service contracts between the City and Head Start, and between the City and YARC have been foundation pieces to the general provision of public transportation service in the area.

### **Qualitative Evaluation**

During the on-site visit to the Cottonwood area, those interviewed appeared to be very supportive of CATS and believe that CATS has responded to the transportation needs of primary client groups while providing an important service to the general public. There is also considerable

interest in expanding CATS to better meet broader community needs. The need for expanded funding and building of constituencies is apparent.

## **X. TRANSFERABILITY**

In Cottonwood, while the coordination effort focuses on public transportation and Head Start, the coordination between CATS and the local school districts, although on a lesser scale, is very important for many families. A major issue with this and other coordination efforts is how a variety of constituent groups, including Head Start and public school interests, can join together with other community elements to develop and fund a service that benefits the constituent groups as well as the larger community.

Specific transferable elements include the following:

- ◆ Use of Head Start funding to pay for a significant component of the general public transit service
- ◆ Use of school district funding to support a portion of the public transit service
- ◆ Use of public transportation vehicles for Head Start transportation and some school transportation
- ◆ Interface and cooperation between Head Start, school districts, parents, and public transportation system personnel
- ◆ Inclusion of Head Start trips and after-school trips for school children as a significant component of the public transportation service
- ◆ Provision of a general public transportation service based on a market segment approach to service development

## **CASE STUDY REPORT: DECORAH, IOWA**

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### **I. AGENCY/ORGANIZATION**

Northeast Iowa Community Action Corporation  
305 Montgomery Street  
Decorah, Iowa 52101

Tel: 319-382-9608

### **II. SUMMARY STATEMENT**

The Northeast Iowa Community Action Corporation (NEICAC), a non-profit organization, is responsible for delivering and coordinating public transit services in northeast Iowa. It does this through its subsidiary, the Northeast Regional Transit System (NRTS).

NRTS is the State-designated regional public transportation system for Region I in northeastern Iowa, a predominately rural area of 3,304 square miles with 85,000 people. It provides a region-wide paratransit service for clients of the local human service agencies and for the general public, including seniors, persons with disabilities, and low-income families. It also places Head Start pre-school clients on the yellow school buses of school districts in the area.

### **III. HIGHLIGHTS**

The Northeast Regional Transit System (NRTS) in Iowa is based on a collaborative approach to the delivery of public transportation services. It provides a region-wide paratransit service for the general public and for clients of the local human service agencies using small buses and vans operated by NRTS staff and contractors. Pre-school children, students, and adult clients all ride on its paratransit services at the same time, resulting in significant cost savings. NRTS estimates that its annual budget would increase by about 40 percent without the co-mingling of these riders.

NRTS also places pre-school Head Start children on regular school bus routes operated by the Region's school districts. The co-mingling of Head Start and school children has saved NRTS about 12 percent of its operating budget.

## IV. BACKGROUND

### Description of the Public Transportation Service

The northeast region of Iowa is served by NRTS, a region-wide public transportation system which provides door-to-door paratransit service using small buses and vans operated by NRTS staff and contractors. This system serves about 244,000 passenger trips annually. The following types of service are provided by NRTS:

- ◆ Non-dedicated subscription bus services operated by NRTS
  - \* Transportation of adults with developmental disabilities to work activity centers under the Managed Care Programs of the Counties.
  - \* Transportation of senior citizens for meals, medical, and other purposes under the Northland Agency on Aging and other programs; fares are required only for nonessential services.
  - \* Transportation of pre-school children from low-income families to Head Start and Child Development Centers under the Head Start and Early Childhood programs of the federal and state governments.
  - \* Transportation for group home residents to medical appointments, activity centers, and churches under contracts with the group homes and churches.
  - \* Transportation of school children to and from the public schools on a parent-pay and school-pay basis.
  - \* Transportation of the general public, including seniors and persons with disabilities, on existing services for a fare.
- ◆ Dedicated subscription bus services contracted by NRTS to group homes - Transportation for individual group home residents to work and social activities using vans leased from NRTS; each group home assumes the costs of these services.
- ◆ Taxi services subsidized by NRTS - Transportation for seniors in Decorah using the local taxi services; riders pay about half the meter rate, and NRTS subsidizes the taxi company.
- ◆ Yellow school bus services contracted by NRTS - Transportation of pre-school children from low-income families to Head Start and Child Development Centers under the Head Start and Early Childhood programs of the federal and state governments; passengers are not charged for these services. The children are carried on the regular school buses of 14 of the 18 school districts in the region.

NRTS service operates from 6:30 a.m. until 4:00 or 5:30 p.m. Monday through Friday, and during evenings and on weekends by special arrangement. The taxi service operates from 8:00 a.m. until 6:00 p.m. Monday through Saturday.

The paratransit services use a total of 42 revenue vehicles owned by NRTS, including the following:

- ◆ 10 small buses - 4 straight and 6 accessible with capacities of 15 to 19 seats
- ◆ 28 vans - 13 straight and 15 accessible with capacities of 9 to 14 seats
- ◆ 4 minivans - 3 straight and 1 accessible with capacities of 6 to 7 seats

### **Description of School Transportation Services**

The northeast region of Iowa is served by school transportation services provided by the region's 18 public school districts. The services provide home-to-school transportation to elementary students living more than two miles from school and to high school students living more than three miles from school.

The school transportation system carries about 4,006,000 pupil passenger trips annually on 222 yellow school buses owned and operated by the school districts. The system carries some 21,000 Head Start passenger trips annually on its regular school bus routes.

### **Service Area Characteristics**

The service area consists of the Counties of Allamakee, Clayton, Fayette, Howard, and Winneshiek in northeastern Iowa. With a total population of 85,700, the region is primarily a rural farming area covering 3,304 square miles. It supports a multitude of small towns, most with populations under 500. The five largest cities in the region have populations ranging from 2,500 to 8,000, the largest of which is Decorah, located in central Winneshiek County.

### **Regulatory Environment**

The State of Iowa does not permit non-school children to be carried on yellow school bus routes. However, yellow school buses and drivers can be used to carry the general public when not in school service.

The State of Iowa does not permit transit vehicles to be used on school bus routes, although school children can be carried on transit systems that are open to the general public.

## Political Environment

The NRTS is governed by the Northeast Iowa Community Action Corporation, a private, nonprofit agency representing local governments and businesses providing services to seniors, persons with disabilities, and low-income families in northeastern Iowa. It is responsible for *coordinating* all transit services and for providing transit services aimed primarily at the mobility-disadvantaged in the region. For this, it receives capital and operating assistance funds from the Federal Transit Administration, the Iowa Department of Transportation, and the five County governments.

## V. GOALS AND OBJECTIVES

NRTS coordinates all transit services in the region to ensure that the services of the public and private transit providers are not duplicated and are utilized as effectively as possible. A coordinated rural transportation system is considered essential to the transportation-dependent residents of the region because of the scattered, low-density nature of the population.

## VI. NARRATIVE DESCRIPTION

Since its creation in 1979, the NRTS has grown from a paratransit service primarily for seniors to a paratransit service for seniors, persons with disabilities, and low-income families in the region. While the NRTS does not provide a fixed-route transit service for the general public in the region, it does carry the general public on its paratransit service on a space-available basis.

Its main coordinating accomplishments are as follows:

- ◆ Using existing yellow school bus services to transport Head Start clients
- ◆ Using existing taxi services to transport seniors in Decorah
- ◆ Co-mingling of human service agency clients with Head Start participants

It plans to expand its seniors taxi service program and its subscription bus services.

## VII. DATA AND STATISTICS

### Annual NRTS Passenger Trips by Customer Group

- ◆ Non-dedicated subscription-based services (NRTS Operated):
  - \* Adults with disabilities to and from work centers 60,100
  - \* Seniors to and from meals, medical and other activities 41,700
  - \* Group home residents to/from medical and other activities 16,100

* Pre-school children to and from Head Start centers	27,700
* Students to and from school on a parent/school-pay basis	12,700
* General public on a space-available basis	5,800
◆ Dedicated group paratransit services (contracted out by NRTS):	
* Group home residents to/from medical and recreational activities	42,100
◆ Subsidized taxi services (provided by the Decorah taxi company):	
* Seniors riding Decorah taxi services for all activities	16,400
◆ Head Start participants on regular school bus routes:	
* Pre-school children to and from Head Start centers	20,900
<b>TOTAL</b>	<b>243,500</b>

#### Annual NRTS Revenue Hour Statistics

◆ Non-dedicated subscription services	Annual Rev. Hrs.	38,600
	Passengers/Rev.Hr.	4.2
◆ Dedicated group paratransit services	Annual Rev. Hrs.	3,640
	Passengers/Rev.Hr.	11.6
◆ Subsidized taxi services	Annual Rev. Hrs.	3,070
	Passengers/Rev.Hr.	5.4
◆ HS participants on school bus routes	Annual Rev. Hrs.	2,170
	Passengers/Rev.Hr.	9.7

#### Annual NRTS Operating Cost Statistics

◆ Non-dedicated subscription services	Annual Op. Costs	\$559,000
	Op. Cost/Rev.Hr.	\$14.50
◆ Dedicated Group paratransit services	Annual Op. Costs	0
	Op. Cost/Rev.Hr.	0
◆ Subsidized taxi services	Annual Op. Costs	\$19,000
	Op. Cost/Rev.Hr.	\$6.20
◆ HS participants on school bus routes	Annual Op. Costs	\$2,650
	Op. Cost/Rev.Hr.	\$1.20

## **Accidents and Incidents**

No accidents or incidents were recorded in 1997.

## **Complaints**

Complaint data was not available.

## **VIII. LEGAL AND REGULATORY ISSUES**

School Districts are limited in the extent to which they can integrate school bus and public transportation services. The State of Iowa does not permit non-school children to be carried on yellow school bus routes while the buses are in school service.

The State of Iowa does not permit transit vehicles to be used on school bus routes, although school children can be carried on transit systems that are open to the general public.

## **IX. EVALUATION**

Co-mingling saves NRTS approximately \$300,000 per annum because of changes in efficiency:

- ◆ Co-Mingled Paratransit Services. Co-mingling pre-school, student, and adult groups on the NRTS paratransit vehicles has enabled the paratransit services to reach average efficiency levels of 4.2 passenger trips per revenue hour. Without co-mingling, efficiency levels would likely be about 3.0 (or less) passengers trips per revenue hour. This would increase the annual budget by about \$230,000, or 40 percent.
- ◆ Co-Mingled Yellow School Bus Services. Co-mingling of pre-school Head Start children on yellow school bus services has resulted in efficiency levels of 9.7 passenger trips per revenue hour compared to 4.2 passenger trips per revenue hour on the paratransit services. Further, most school districts are able to accommodate the Head Start children on existing school bus routes without increasing operating costs. If NRTS had to carry the 21,000 Head Start passenger trips on its paratransit services, annual operating costs would increase about \$70,000, or 12 percent.

Co-mingling has not had a negative impact on paratransit or school transportation ridership. The higher efficiency levels, however, have enabled NRTS to expand its transit services within available funding without burdening the local tax base. This has made more transit services available to the general public, although not to the extent that would be possible if the yellow school bus services were opened to the general public on a seat-available basis.

There is a reluctance by the School Districts to use NRTS for student transportation because (1) it would result in cuts in school bus driver hours; and (2) the Districts believe that NRTS vehicles may not be as safe as school buses (even though the experience in Decorah does not seem to support this perception).

## **X. TRANSFERABILITY**

The NRTS system is a good example of a collaborative approach to the delivery of rural public transportation services. It enables rural areas to have a public transportation service without overly burdening the local tax base. It is also a good example of a transit operator taking the initiative to deliver and coordinate all public transportation services in its service area.

All aspects of the approach are transferable to other jurisdictions with similar legislative environments.

## **CASE STUDY REPORT: GILLETTE, WYOMING**

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### **I. AGENCY/ORGANIZATION**

Campbell County School District  
1000 West 8<sup>th</sup> Street  
Gillette, Wyoming 82716

Tel: 307-682-9592

### **II. SUMMARY STATEMENT**

The Campbell County School District in Wyoming operates a large fleet of yellow school buses that travel over two million miles every school year. On weeknights and weekends, local nonprofit groups rent the yellow school buses to travel to nearby towns (some of which are located 100 to 400 miles away) for special events, athletic tournaments, regular season games, academic competitions, and special group trips. Non-profit groups must reserve a bus and School District driver, cover the cost of the driver and fuel, sign a waiver, and pay \$0.25 per mile insurance fee which allows the groups to fall under the School District's umbrella for vehicle and/or property damage. Non-profit groups must provide their own personal liability coverage.

### **III. HIGHLIGHTS**

The central highlight of the Campbell County case study is the use of yellow school buses during off hours by non-profit groups. The School District is committed to the use of School District resources by the community and the use of School District vehicles is an extension of this philosophy.

### **IV. BACKGROUND**

#### **Description of the Public Transportation Service**

There is no public transportation provider in the City of Gillette or in the entire County. The local Area Agency on Aging operates two buses for local service, and residents may charter buses from the local charter bus operator for intra-city services.

## **Description of School Transportation Service**

The Campbell County School District (CCSD) serves all of Campbell County. The school facilities of the District include the following:

1	High School	1	Jr./Sr. High School (Wright)
2	Jr. High Schools	2	Middle Schools (Rural)
1	Alternative Transitional Center	16	Elementary Schools (5 Rural)

District enrollment totaled about 7,900 students for the 1996/97 school year.

Campbell County School District buses traveled an average of over 10,000 miles per day in 1996/97 to provide home-to-school transportation for over 3,500 students. Buses traveled a total of about two million miles on regular routes, field trips, and activity trips during the course of the 1996/97 school year.

A fleet of 150 buses, ranging in capacity from 8 to 84 passengers, serves the County's 4,756 square miles. The department's 165 employees include drivers, bus maintenance personnel, crossing guards, office staff, and substitute drivers.

## **Demographic Characteristics**

The population of Campbell County is 31,350, about two-thirds of which (21,585) resides in Gillette. About one-fourth of the County's residents in 1996 were elementary or secondary students.

## **Political Background**

In an effort to develop a social and political vision for the Campbell County area, the local Chamber of Commerce sponsored the development of a 20-year plan, called the Vision 20/20 Report, involving "a broad-based community-wide process to create a vision for Gillette and Campbell County [which would] incorporate the values of the community, build a consensus within the community, prioritize the community's short and long-term goals, and create an action-oriented plan for the future." As explained by the Campbell County School Superintendent, the use of the School District resources -- more specifically, School District buses -- is part of the Vision 20/20 plan.

## **V. GOALS AND OBJECTIVES**

Other than the more general Vision 20/20 goals and objectives, no details for the coordination effort have been developed. Verbally, however, the School Transportation Director expressed a desire to offer the School District buses to local organizations at a reasonable price.

## **VI. NARRATIVE DESCRIPTION**

The use of School District school buses began when the local adult intramural baseball league expressed a desire to travel to games outside Gillette. Other than the high cost option of chartering private buses, the league had no other transportation options. The league president then contacted the School District to see if they could "borrow" the buses to travel to and from games during the summer months.

After considering the plan, the Superintendent for the School District agreed to the rental of the School District buses during off hours. A local attorney was contacted to draft a list of guidelines and to research liability and insurance issues.

The following is the list of nine guidelines that must be followed by all bus users.

1. Allowable users will ordinarily be restricted to non-profit organizations. Requests from for-profit organizations will be referred to local transportation agencies (charter bus operator). Use of school district buses by for-profit organizations will be allowed only in exceptional cases and only after local transportation agencies have been unable to support the request.
2. The use of school buses by outside groups should not interfere with scheduled or projected school transportation.
3. The use should not subject CCSD buses to unusually high mileage (beyond a 400-mile radius of Gillette) or maintenance. Any use outside this radius would require approval by the Superintendent of Schools or his/her designee.
4. The user agrees to pay for all fuel and oil required as part of the trip. The cost of repairs attributable to mechanical failure or damage due to neglect or abuse will be the responsibility of the user.
5. Any user of CCSD school buses shall provide trip insurance or proof of insurance (i.e., liability insurance, which provides for hires and non-owned coverage, naming Campbell County School District as an additional insured). This requirement may be waived by the Superintendent of Schools or his/her designee. The insurance shall be for coverage of not less than \$1,000,000.00

6. The user agrees to use only a certified CCSD bus driver and to accept responsibility for direct payment of the bus driver. The driver will be required to follow all CCSD – Transportation Department activity rules of operation in addition to applicable DOT requirements.
7. There are no provisions for extended use. Each request for the use of a school bus will be acted upon individually and each trip will require a written request.
8. The use of school buses by outside groups during summer months will be strictly limited. Only buses which are spares and whose use will not adversely affect total route miles may be used by outside groups during the summer months.
9. User agrees to pay a \$0.25 per mile operating cost. Mileage begins at pick up of the bus at the CCSD – Transportation Department facility and continues until it is returned to that facility.

In addition, Campbell County School District reserves the right to refuse the use of school buses to any outside group or to defer any request to the Board of Trustees.

## VII. DATA AND STATISTICS

The following is an overview of the public use of school buses since the program's inception during the 1994/1995 school year.

<b>Public Use of School Buses</b>			
<b>School Year</b>	<b>Total Trips</b>	<b>Total Mileage</b>	<b>Ave. Miles/Trip</b>
1994/1995	150	28,465	189.8
1995/1996	125	18,007	144.1
1996/1997	110	22,511	204.6

The charter bus operator in the area charges a rate of approximately \$2.40 per mile. The School District charges \$0.25 plus personal liability insurance at approximately \$0.75 per trip and the bus driver wages. The total cost of the school bus rental is significantly less than for a charter bus, particularly for long trips into Montana, Idaho, and Colorado. The charter bus operator also only has available between 2 and 10 vehicles at any given time, while the School District has 150 buses and 40 Suburbans from which to choose. The most economical choice for non-profits in the area has been the yellow school bus vehicles.

## **VIII. LEGAL AND REGULATORY ISSUES**

All legal and regulatory concerns are addressed through the liability agreement signed by nonprofit groups. The State DOT and Department of Education have not expressed any concerns over the after-school use of the vehicles.

## **IX. EVALUATION**

The use of school bus vehicles during off-hours seems an excellent choice for communities without any other transportation providers in the area. The school benefits from gained public support and stature, and the non-profit groups benefit from improved mobility at a reasonable price.

## **X. TRANSFERABILITY**

In communities with few transportation options, the use of available vehicles -- in this case school buses -- during idle hours seems an effective strategy for meeting transportation demand. The use of a legal document to protect the rights of the school district in case of accident or injury also seems like a wise course of action.

## **CASE STUDY REPORT: GLENDALE, OREGON**

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### **I. AGENCY/ORGANIZATION**

Glendale-Azalea Skills Center  
P.O. Box E  
Glendale, Oregon 97442

Tel: 503-832-2133

### **II. SUMMARY STATEMENT**

The Glendale-Azalea Skills Center serves southern Douglas County, an isolated rural area beset by poverty, high unemployment, and lack of public transportation. After the closing of one local mill and the downsizing of the other, the community faced a severe economic and social crisis. The first step to community revitalization was the opening of the Glendale-Azalea Skills Center in December 1992. The Center, developed by a coalition of businesses, residents, agencies, and the school district, provides a range of on-site services, including job training, GED, counseling, community college courses, child care, AFS branch office, and life skills training.

In an effort to enhance the Skills Center's effectiveness, the staff applied for and received a JOBLINKS grant for their GATEWAY transportation program, a coordinated transportation and driver education system designed to link residents with the Center and with employment opportunities in the community and the County. GATEWAY has been viewed as the critical link in the ongoing success of the Center and in helping residents become self-sufficient. The mission of GATEWAY is two-fold: (1) it assists individuals in overcoming the barriers to employment and self-sufficiency by providing them with transportation and auto consumer skills needed to access services and employment; and (2) the project fosters economic development by facilitating access for all residents to economic development and work force training activities.

One of the many transportation strategies that comprised GATEWAY was to utilize existing school bus routes (with extra capacity) for the transportation of Skills Center participants. In Oregon, state regulations allow only school monitors to ride along with students in school buses; monitors are first required to pass a formal criminal background check. In response to Skill Center queries, the attorney for the State Legislature advised the Skill Center that participants could ride on regular school bus routes as long as the necessary background checks were conducted for anticipated riders and as long as these individuals served as monitors while on the school bus. Fourteen participants have since utilized school bus routes to get to the Skills Center.

### III. HIGHLIGHTS

The following transportation services have been provided as part of the GATEWAY demonstration:

- ◆ A carpool matching service is provided by the Skills Center. Self-service matches can be found on-line; or, a dispatcher at the Skills Center can provide assistance.
- ◆ Dial-A-Ride services for billable (e.g., Medicaid, Senior Services) rides, coordinated by Skills Center staff and using volunteer drivers.
- ◆ Rides are arranged on regular school bus routes on a space-available basis to approved participants willing to serve as bus monitors.
- ◆ Education and training for individual riders and agencies on how to use these services more effectively.

There are also plans to establish shuttle services between (1) Glendale/Azalea and Canyonville to connect with the Douglas County Loop System; and (2) Glendale/Azalea and Grants Pass to connect with the Grants Pass public transit service.

### IV. BACKGROUND

#### Description of Existing Transportation Services

There is no transportation service in the Glendale area. Agency transportation programs include:

- ◆ Oregon DHR Volunteer Services - Douglas County DHR Volunteer Services coordinates with a dispatcher at the Skills Center to transport Douglas County DHR clients to medical and mental health appointments. Skills Center staff recruit, train, and dispatch drivers. Volunteer Services registers, assists with training, and reimburses the volunteer drivers. Under this grant, the Glendale project will coordinate with the Josephine County branch of Volunteer Services to better serve residents in northern Josephine County.
- ◆ Community Volunteers - Volunteer drivers are recruited by the Skills Center staff and provide connecting rides for residents of all ages, incomes, and needs. AFS reimburses the project for rides on a limited basis. Currently, the project is working with AFS in Douglas and Josephine Counties to expand and improve the reimbursement process so that it is not so cumbersome to administer.

- ◆ Douglas County Special Transportation - This is a specialized transportation services in southern Douglas County, which provides transportation to congregate nutrition sites for seniors, along with two trips a month to Roseburg.

## **Demographic Characteristics**

Glendale's total population, according to the 1990 census, was 707. The population of the Glendale School District (including the City of Glendale) is 2,807.

The average City household income in 1990 was \$19,453. Seventy-five percent of household incomes were under \$26,000. After a mill closure in 1991, the average City household income was \$10,000, with seventy-five percent of household incomes under \$18,500. After the mill closed, many of the managers and supervisors left the community; as a result, the percentage of City households receiving incomes of \$30,000 or more dropped by 72 percent. Half of the eligible workers age 18 to 55 are unemployed. The number of families in the community (city and rural) receiving public assistance (ADC) is twice the state average and 5 percent higher than the County average.

In this community, some residents live up to 35 miles away on one of the rural routes. A Department of Transportation-funded survey and surveys of local residents indicated that many residents do not have reliable transportation and cannot regularly access needed services at the Center. Similarly, JOBS participation rates are extremely low for the area, primarily due to the lack of transportation.

## **Regulatory Environment**

Regarding the use of school buses to transport participants to the Skills Center, staff initially found the regulatory environment to be a significant challenge. When the staff first contacted the State Departments of Education and Transportation to determine whether or not the general public could legally ride on yellow school buses, officials responded that such transportation was prohibited (but could not reference a specific law). After months of research, the Skills Center contacted the attorney for the State Legislature, who reported that state regulations allow only school monitors to ride along with students in school buses and that formal criminal background checks were prerequisites for all monitors. The attorney further advised that Skills Center participants could ride on regular school bus routes as long as (1) approval of the local School District was obtained; (2) the necessary background checks were conducted and the participant "passed;" (3) the individual was willing to serve as a monitor while on the school bus; and (4) there was space available on the regular route.

## Political Background

When the Skills Center was first proposed, community and political support for the effort was very high. The residents of the area understood the acute need for a "one-stop shopping" facility for social services and were so greatly affected by lack of transportation that any efforts to alleviate the problem were received very positively. The School District Superintendent also was very supportive of the Skills Center and of the transportation program, adhering to the view that the School District's resources were the *community's* resources.

Unfortunately, as the Skills Center's success became apparent, public opinion shifted somewhat in the other direction. In the span of a few years, new members were elected to the school board. They were far more reluctant to support the Center than were their predecessors, arguing that the school and the community were using too many dollars and resources on a small segment of the population. They also argued that since the target population for the Center services were nontaxpayers, then local funding should go toward supportive services focused on the taxpaying public.

## V. GOALS AND OBJECTIVES

The **objectives** of the GATEWAY project were as follows:

- ◆ Coordinate existing pupil, special needs, and public transportation services so that residents of the Glendale, Azalea, and northern Josephine County communities have improved access to employment, services, programs, and activities
- ◆ Develop an innovative and sustainable management system and flexible funding structure that addresses the unique transportation needs of rural areas
- ◆ Educate consumers and agencies so that riders and drivers can more effectively and responsibly use public, carpool, and agency transportation systems
- ◆ Work collaboratively with local, state, and national transportation agencies to develop systems and regulations that more effectively foster rural transportation partnerships

Measurable outcomes or expected benefits were as follows:

- ◆ A carpool data bank will include at least 40 drivers by December 1996.
- ◆ An average of 680 rides per month will be provided to residents of Glendale, Azalea, and northern Josephine County.

These goals, including the use of school bus routes to transport 14 Skills Center participants, were achieved during the course of the demonstration.

## **VI. NARRATIVE DESCRIPTION**

Aware of the acute financial problems facing the community, a group of business people and interested residents formed an Economic Development Council designed to create goals and the necessary action plans to improve the struggling community. Although there was no financial base from which to work, the Economic Development Council generated interest and support from a significant number of local residents.

A number of authors and researchers have recognized the role that local schools can fulfill in distressed times in small communities. Their rationale is that schools may be the only healthy, intact institutions left in distressed rural communities. As such, the school can be instrumental and important in leading economic survival and rejuvenation. This theory was embraced by the Glendale School District and Superintendent throughout the design and implementation of the Skills Center as well as the GATEWAY program. Directly and indirectly, the Glendale School District Board of Directors and the local Superintendent support the premise that school leadership in economic and community development is a rightful role for local school districts.

The concept of the center was first presented in June 1992 and received wide support from inside and outside the community. A local business donated the use of a 5,000-square-foot office space to use as a Skills Center. Social service agencies, whose services were formally offered only in the County seat 60 miles away, operate satellite offices in the Skills Center. GED, life skills, and alternative education are being offered as basic skill development opportunities for patrons of all ages.

The Skills Center continues to operate, but since the end of the JOBLINKS demonstration, the supplementary transportation services have been significantly cut back due to lack of funding.

## **VII. DATA AND STATISTICS**

The JOBLINKS demonstration grant totaled \$85,000. Additional local funding included:

Businesses and Donations	\$72,042
Agencies	\$125,763
School District/Grant Funds	\$236,251

Monthly operating costs, vehicle hours and miles, and passenger trips are presented on the following page.

No accidents, incidents, passenger injuries, or complaints were reported.

<b>Project Monitoring Data</b>	
<b>Uniform Measures</b>	<b>Sample Month</b>
Operating Costs	\$2,150.75
Operating Revenues	0
Number of Demonstration Project Participants/Clients Served	14*
Total Vehicle Hours of Service	12
Total Vehicles Miles of Service	680
Total Operating Days	22
Number of Rides Provided Per Day (average)	5.09
Number of Rides Provided per Month	112
Number of Requested Rides Which Cold Not be Accommodated	0
Number of Scheduled Rides Not Taken	3
Rides Per Target Group	112
Average Passenger Fare per Trip	N/A
Average Cost Per Participant	19.20
Rides Per Vehicle Hour	9.33
Rides per Vehicle Mile	0.16
Cost Per Vehicle Hour	179.23
Cost Per Vehicle Mile	3.16
Cost of Direct Service Transportation as a Percentage of Overall Demonstration Budget Versus Administrative Cost	1.00
Non-Demonstration Funds as a Percentage of Total Operating Costs	N/A

\* This figure does not reflect medical rides, which are funded by Department of Human Resources (DHR).

### **VIII. LEGAL AND REGULATORY ISSUES**

State regulations prohibiting all but monitors on school buses appeared at first to be a road-block, but later were used to the advantage of the Skills Center staff, which "converted" participants who lacked transportation but could access the Skills Center via regular school bus routes into school bus monitors, with the blessing of the local School District. Thus, the co-mingling issue never materialized in the community because (1) each of the participant/monitors were checked and approved; (2) they provided a value-added resource as a bus monitor at no extra cost to the School District; and (3) the community empathized with participants who were trying to become retrained but could not do so without this needed transportation. Hence, it was "win-win" for the community.

## **IX. EVALUATION**

The impact of the Center on the community has been profound, but difficult to measure. The increased access to job opportunities and retraining programs are substantial steps toward improving the economic health of the community. The overall increased mobility is measurable in terms of trips per month by the Skills Center; in some ways, however, it is immeasurable in terms of the positive benefits such services have had on the stability of the community.

## **X. TRANSFERABILITY**

The transferability of the Skills Center and the GATEWAY transportation program are perhaps best summarized in a Skills Center grant application, which states, "The problems facing Glendale and Azalea reflect the problems of many rural communities. Rural communities must address a changing economy, lack of resources, and a need for workforce training. Many rural communities are, like this area, isolated from centralized county services. Yet, because of their size, it is unrealistic to expect most rural communities to have the financial resources and the population base to support a full public transportation system, especially one that must often connect with places in different counties, north and south, east and west. On the positive side, most rural communities do have school transportation and a history of neighbor helping neighbor. GATEWAY builds on these two rural resources through a recruitment, training and dispatching system and does so at a reasonable cost."

Lastly, the conversion of approved participants to school bus monitors should not be viewed as a way to beat the system but rather as a way to work within limiting regulations. For this reason, Glendale's experience is noteworthy and transferable in states where there is a similar regulatory environment.

# CASE STUDY REPORT: IDLEWILD, MICHIGAN

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## I. AGENCY/ORGANIZATION

Yates Dial-A-Ride  
1399 US-10, P.O. Box 147  
Idlewild, Michigan 49642

Tel: 616-745-7311

## II. SUMMARY STATEMENT

The Yates Dial-A-Ride (YDAR) system provides demand-response, fixed-route, and school transportation in the northern lower peninsula north of Town Line 16 and is on the main traffic line between the upper and lower peninsula. The system began operations in 1975 under the name of Lake County Transportation for the purpose of providing county-wide transportation. In 1979 the name of the system was changed to the Yates Dial-A-Ride transit system because Yates Township became the grantee agent for state and federal operating funds. Formal student transportation, with students riding with the general public at the same time, was folded into operations in 1995 as a less costly alternative to starting a separate student transportation service.

From its inception, the integration project has had the cooperation and assistance of the Governor, Senators, Legislative Representatives, the Michigan Department of Transportation, County Government, Local Government, Human Service Agencies, the Baldwin School District and the entire School Board, local citizens, and the community. YDAR's local Advisory Council, which includes students, elderly, and regular passenger representatives, has been very instrumental in gathering community support and in problem solving.

## III. HIGHLIGHTS

Three key features stand out from this effort:

- ◆ **YDAR operates a fully integrated system.** Every type of transportation except for Head Start service is under the umbrella of Yates Dial-A-Ride. In the early morning and early afternoon, the converted Bluebird buses are used to transport students. During the mid-day and evening hours the buses are used for general public transportation on fixed routes, door-to-door demand-response paratransit transportation, and agency client transportation.
- ◆ **Community involvement in the process was exceptional.** Under the direction of the Executive Director of the Yates Dial-A-Ride service, key stakeholders, parents,

community leaders, and agency representatives were all included in the development of the system. In fact, support for the service continues to be very high, so much so that parents recently volunteered their services to work with the local Boy Scouts and Girl Scouts to erect shelters for the bus stops.

- ◆ **State was very supportive.** From the moment the Governor visited the area, State-level representatives have offered both financial and technical assistance to YDAR for its integrated system. State DOT representatives continue to view YDAR as an exceptionally well run national model of excellence.

## **IV. BACKGROUND**

### **Description of the Public Transportation Services**

The Yates Dial-A-Ride is the only public transportation provider in the county. There are no taxis, shuttle buses, public school transportation, commercial bus line, or even inter-city carriers to service Lake County. YDAR provides demand-response and flexibly routed transit service, accommodating human service agency trips, employment-related trips, Medicaid-sponsored non-emergency medical trips, and school trips.

Service hours are from 6:00 a.m. until 6:00 p.m., Monday through Friday, and from 9:00 a.m. until 4:00 p.m. on Saturday. The regular fare is \$1.50, with half-fares available to seniors, persons with disabilities, and students (during non-school hours). There is also a \$2.00 fare for riders living in communities that are not sponsoring members of YDAR.

In 1995 the system grew from 7 to 21 employees and presently employs 3 full-time and 10 part-time drivers, 3 part-time clerical/dispatchers, a director, a supervisor, a bookkeeper, and 2 full-time mechanics.

In order to accommodate both students and the general public on the network, buses were added to the peak hour schedule for expanded routes. Efforts to consolidate mobility needs have had significant results. Of the agencies in the YDAR service area, only two still operate their own transportation services.

YDAR presently utilizes 10 vehicles daily, with one back-up bus to transport approximately 898 K-12 students daily and to operate the regular demand-response service. The vehicles range in capacity from 19 to 55 passengers; all vehicles are lift-equipped. Eighteen designated stops were added in order to accommodate the student load as well as the general public. Each of these routes are published and open to the general public.

Since many Lake County residents are without private transportation due to health, age, economic, or personal reasons, a vast majority depend on YDAR for all of their transit needs. Yates Dial-A-Ride coordinates with local agencies such as the Department of Social Services,

Mental Health, Meals and Human Services, Family Health Care, Grand Oaks Nursing Home and other contracts from organizations that have a special need for lift-equipped vehicles.

YDAR has made a concerted effort to overcome any negative perceptions pertaining to safety and security in the vehicles. YDAR has installed video cameras in each vehicle and often invites parents to view footage when disciplinary action is required. These one-on-one conferences with parents and groups are essential for resolving problem situations by finding effective solutions.

The "imaging" of the YDAR is accomplished through newly developed brochures, news articles, handbooks, mailings and an aggressive marketing campaign. (Most items were developed by a marketing consultant.) In order to increase ridership in 1995, some fares were lowered and a rate was set for the newly established county-wide service. Due to the marketing effort, Yates saw a 7 percent increase in new passengers that is attributed to the expanded service area and to the availability of accessible buses.

### **Description of School Transportation Services**

The Baldwin Community School District serves all of Lake County and has had an enrollment of approximately 900 during the past decade. There are close to 90 students in each of the lower grades. This number decreases to about 60 students in the higher grades, with 55 graduates each year because of the out-migration of younger families.

Lake County does not provide separate school bus transportation to its students because of insufficient funding. There have been seven unsuccessful millage elections for this purpose. One key factor in the repeated defeat is the perception of some retired residents that they are being asked to pay additional taxes for a service that provides them with no benefits. Before the integrated system, students walked to school, were transported by parents or relatives, or participated in carpools. This was very difficult, particularly in winter and for students with disabilities.

In 1993, the Executive Director of the Dial-A-Ride program was approached by the Baldwin Public Schools to provide yellow school bus transportation throughout the school year for regular-education students. (All special education students who are unable to travel on lift-equipped yellow school bus vehicles, or who require special assistance, are transported by the Intermediate School District, which houses the special education programs for Mason and Oceana Counties and the Baldwin School District. In 1994, the State Department of Transportation paid for six 55-passenger vehicles; the School District agreed to provide operating funds for these buses. In 1995, under a contract with the Baldwin School District, YDAR began transporting students to school.

## **Demographic Characteristics**

Lake County has a population of 9,607, spread over 162.7 square miles. Lake County has a poverty rate of 26 percent and one of the highest unemployment rates (15.3 percent) among Michigan's 83 counties, more than double the statewide figure. The population of the Yates and surrounding community consists of a large percentage of senior and handicapped, poor, low-income, transportation-deprived individuals.

## **Regulatory Environment**

The Michigan State Pupil Transportation Act (Public Act 187) of 1990 As Amended states that a school bus may only be used to transport persons other than students if these other persons are "senior citizens or retired or disabled persons, or by a nonprofit organization for the purposes of transporting its members to or from an activity, event, or outing, if the school determines that suitable or economically feasible public or private transportation is not available for this purpose" (page 23). While this language may suggest some flexibility in the off-peak use of school buses, in Yates this Act was interpreted as severely constricting the alternative uses of school buses because it did not allow for the general public to ride the buses.

Another key component of this Act is the section limiting millages exclusively for school transportation. This has meant that YDAR, Idlewild, and Baldwin are not legally able to offer a millage to support school transportation exclusively; instead, any such additional public funds must go toward supporting transportation in general.

Otherwise, the principal obstacle to further integration is the inability to expand into non-participating political jurisdictions. In other words, while regional services are the next logical step for service expansion, without the participation of other townships and villages, the YDAR consolidated system will remain the same size.

## **V. GOALS AND OBJECTIVES**

Yates' goal for the integrated service was to increase the usage of public service from the outer areas of Lake County, while the School District for the area had the primary goal of offering transportation for its students. Immediately after the service expansion/ integration, Yates experienced a 10 percent increase in first-time user passengers, most of whom were taking advantage of the daily routes and the designated stops that are available for all public services. The new expansion service also includes a route-deviation component in order to meet the needs of the rural, sparsely populated communities.

The following goals and objectives were detailed at the beginning of the integrated effort:

- ◆ Maximize use of existing resources
- ◆ Cost savings/save taxpayers money
- ◆ Address concerns of redundancy and duplication
- ◆ Provide increased access to the general public
- ◆ Provide opportunity for employment transportation
- ◆ Provide transportation for School District children, as well as technical preparatory classes/alternative education schools and college students (the nearest college is 36 miles away)

The following services were added to the growing operation in order to meet the above stated objectives:

- ◆ Shuttle services to Baldwin students
- ◆ Work-First welfare clients transported to class daily
- ◆ Transportation for the Technical Preparatory classes at neighboring colleges
- ◆ Increased coordination with employers (now employers in neighboring cities are utilizing Yates's services)
- ◆ New lift-equipped buses accessible to passengers with disabilities
- ◆ Trained mechanics to perform maintenance on other agency vehicles

The following measures of performance detail the success of the YDAR system:

Ridership increased:	128%
Revenue increased:	30%
Cost savings increased:	30%
No cost over-runs	

## **VI. NARRATIVE DESCRIPTION**

Before 1990 Yates Dial-A-Ride struggled to survive. Bake sales and dances were held, and merchandise such as hats and jackets was sold to raise local matches for state and federal grants. In 1990, Yates Township passed an assessment that taxed residents \$.04 on every acre of land; this calculated to a total of \$12,000 annually in local funds. Other townships also began to contribute (literally) a few thousand dollars here and there. Over time, Yates was awarded the local contract for the Department of Mental Health transportation grant worth \$26,000. The expansion continued throughout 1991, 1992, and 1993, with Yates obtaining contracts from the former Department of Social Security for a local welfare contract, and from other agencies and

departments for medical transportation outside of the county, substance abuse program transportation, and transportation to and from factory jobs (a contract paid by an employer). During this period Yates Dial-A-Ride tried to pass a millage exclusively for transportation; the effort failed three times in a row.

In 1994, the Governor traveled to Lake County to hear the thoughts and concerns of the area's residents. The key issue regardless of age or socio-economic status was transportation. The seniors needed a better and more comprehensive transportation service; parents needed transportation for their children because the School District had stopped funding service in 1992; agency clients needed more reliable service; and children under driving age needed a transportation alternative. After considering the matter, the Governor decided against funding the School District transportation exclusively. He was particularly concerned that if he funded school buses only, then the buses would sit idle and empty throughout much of the day. Instead, the Governor opted to support consolidation by approving the provision of capital assistance to Yates and encouraging the School District to provide operating assistance.

**VII. DATA AND STATISTICS**

Ridership

As shown below, total ridership during the last four months of 1995 totaled 65,473 trips, which equates to almost 200,00 trips annually. It is also noteworthy that student ridership represents 90 percent of the ridership during the school year.

<b>Demonstration Project            Student/Public Ridership Statistics            September, October, November, December 1995</b>							
September 1995		October 1995		November 1995		December 1995	
Student	General Public	Student	General Public	Student	General Public	Student	General Public
14,423	2,050	17,124	1,385	13,895	1,472	13,359	1,765
New passengers from expansion		Oct. 2%		Nov. 5%		Dec. 7%	

Costs and Funding

Yates's funding sources are provided through state and federal funds that comprise 60 percent of their revenue, with farebox and local funds providing the balance. The four contributing townships are Yates, Webber, Cherry Valley, Pleasant Plains, and an occasional contribution from the Village of Baldwin. The Michigan Department of Transportation has actively promoted

coordinating transportation services for several years. The annual budget for FY 1995/96 by funding source is shown on the following page.

<b>ANNUAL BUDGET: FY 1995/96</b>	
State Funds	\$81,743
Federal Funds	\$69,809
Fareboxes	\$52,000
Local Revenue	\$39,000
Baldwin School	\$300,000
	\$542,552

Unit cost figures for FY 1995/96 are shown below:

Cost Per Passenger-Trip	\$1.93
Cost Per Vehicle Mile	\$1.60
Cost Per Vehicle Hour	\$24.59

### **VIII. EVALUATION**

The Executive Director of YDAR believes that providing school transportation builds community image and provides students with an opportunity to familiarize themselves with public transit. It also demonstrates the fact that public transit can and is a dependable, cost effective, and safe method of transit for the entire family. It opens up a "whole new world of mobility for those that were previously deprived." In conversations with student, agency, and general public riders, as well as in conversations with local residents, the response to YDAR was overwhelmingly positive. The older residents feel that they are receiving a service for their financial contributions, while the parents of students feel indebted to YDAR for providing the school transportation services they lacked for so many years.

### **IX. TRANSFERABILITY**

YDAR has had to address the following four key issues during the implementation of the integration project and on an ongoing basis: (1) student discipline on vehicles, (2) safety, (3) designating bus stops for school students, and (4) generating and maintaining broad-based public support for the system. The solutions developed by YDAR to these common problems are exemplary.

1. Student Discipline - YDAR developed a policy of written reprimands that follow this sequence: (1) Warning, (2) Conference with Supervisor/Director, and (3) suspension from the Yates bus. The Executive Director reports that the school districts cooperate fully with this

process, and parents are encouraged to work with YDAR staff in solving these and other problems.

2. Safety - Initial and ongoing driver training continues to be a focus of Yates's efforts. Driver training is performed by YDAR staff; additional training is provided by the local ISD. Students are trained in proper boarding, seat belt use, bus conduct, etc.
3. Bus Stops - Currently, 18 designated bus stops have been established specifically with students in mind. Some stops were originally eliminated, while others were established to ensure that students did not walk farther than one mile and that there were high levels of lighting and visibility. To minimize other safety concerns, bus stops were not allowed on major streets. Finally, parking lot owners, churches, stores, and families were contacted to assess their willingness to "host" a stop.
4. Broad-based Support - The broad-based support enjoyed by YDAR is not a coincidence. Again, the tireless efforts of the Executive Director have translated into an entire community that supports the transportation system financially, politically, and socially.

## CASE STUDY REPORT: KALISPELL, MONTANA

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### I. AGENCY/ORGANIZATION

Eagle Transit  
723 5th Avenue  
Kalispell, Montana 59901

Tel: 406-758-5728

### II. SUMMARY STATEMENT

Eagle Transit is the public transportation provider in Kalispell, Montana, operating (1) a paratransit service that focuses on seniors and persons with disabilities but that also is available to the general public; and (2) a student transportation service for both regular education and special education students.

Eagle Transit, the School District, and the local taxi operator have been coordinating special education transportation for more than 10 years. At the beginning of each school year, they work together to determine the best methods for providing service, usually with Eagle Transit and the taxi operator serving students from more remote parts of the valley.

In response to a new three-mile walk distance imposed by the School District, parents now pay Eagle Transit directly to transport their children from school to individual homes in the afternoons.

### III. HIGHLIGHTS

There are two key highlights from the Kalispell coordinated system:

- ◆ **The coordinated system saves money.** By passing on outlying trips to Eagle Transit and the taxi operator, the School District saved \$15,000 last year alone.
- ◆ **Discussions with parents can lead to transportation solutions.** By coordinating with parents to provide service to children, parents save time and money while at the same time retaining a high level of safety for their children.

## IV. BACKGROUND

### Description of the Public Transportation Service

Eagle Transit is the rural transportation provider in the Kalispell area. Eagle Transit grew out of the Area Agency on Aging and continues to house and provide administrative support for the service. Eagle Transit originally provided transportation for the elderly residents of Kalispell. When demand for other local agencies reached a threshold, Eagle Transit was established to provide transportation service. Eagle Transit now receives rural transportation (Section 5311) funding, as well as funding from local agencies and several governments.

Eagle Transit operations historically have focused on the provision of specialized paratransit, although with the advent of rural transportation funding it provides service for the general public as well. In FY 96, for example, Eagle Transit served about 34,000 trips. Almost 19,900 of these trips were taken by seniors. Another 8,300 were taken by persons with disabilities, and 3,500 trips were taken by the general public. The remaining 6,200 trips were provided to riders with developmental disabilities under an agency contract.

Eagle Transit uses 24-passenger accessible buses designed with rollover protection, lower floors, and safety belts.

In providing paratransit services, Eagle Transit gradually became involved in providing service to up to seven special education students, under contract to local school districts. And, in response to a recent three-mile walk distance imposed by the School District, parents now pay Eagle Transit directly to transport 18 children from school to individual homes in the afternoons. Note that these are referred to as "tripper" runs because they are also available to the general public.

### Description of School Transportation Service

Enrollment in the local school district is summarized in the table below.

<b>Enrollment</b>	
High School Students (Grades 9-12)	2,349
Junior High Students (Grades 7-8)	629
Elementary Students	1,891
<b>Total</b>	<b>4,869</b>

Of these 4,869 students, 500 (slightly over 10 percent) are special education students.

The School District utilizes a number of different mechanisms for addressing the transportation needs of students with disabilities, including the following:

- ◆ Yellow school buses
- ◆ Yellow school buses with wheelchair lifts
- ◆ Eagle Transit
- ◆ Parents (offered gas vouchers)
- ◆ Flathead Area Custom Transportation, Inc. (Kalispell taxi and airport shuttle service)
- ◆ Western Montana Health Clinic

Currently, the School District has two special education buses that exclusively transport special education children. These are used mostly for special education students who live in or close to Kalispell. The School District utilizes Eagle Transit (at fully-allocated rates which range from \$0.85 to \$1.43 per mile depending on the size of the vehicle) and the local taxi company for outlying special education students. In the 1996/1997 school year, for example, the School District paid Eagle Transit a total of \$5,558 in reimbursements to transport special education students from outlying areas. The School Transportation Director calculates the savings that accrued to the School District at about \$14,500, on the premise that he would have had to otherwise purchase and operate another accessible school bus at a total cost of \$20,000 per year.

### **Description of Taxi Service**

Over the past four years, Kalispell Taxi has provided home-to-school transportation for special education students as well as for students with mobility impairments. These contracts have typically involved the transportation of one to three students. The taxi company also transports some students to after-school care as often as two or three times per week. The equipment used by the taxi company includes three accessible vehicles.

## **V. GOALS AND OBJECTIVES**

The goals and objectives for Eagle Transit are simple: provide high-quality service to passengers, whether they are elderly residents, students, or persons with developmental disabilities. The goals of the coordinated relationship with the School District and local taxi operator are the same.

With population growth in the area and the accompanying sprawl, however, Eagle Transit has had a difficult time keeping pace with the growing and increasingly disperse demand at the current funding level. In the future, Eagle Transit hopes to become a transit authority, which would allow the agency to receive tax dollars directly and therefore obtain a measure of funding stability it currently does not enjoy.

## VI. NARRATIVE DESCRIPTION

The concept of "tripper" service first surfaced when a family from the community of Evergreen, a housing development *within* the three-mile school district walking distance, approached Eagle Transit to encourage the provision of tripper service to the community. Issues arose almost immediately from the School District, which wished to avoid any liability that would in any way be construed from facilitating this arrangement. Consequently, the School District issued a policy statement precluding Eagle Transit vehicles involved in such a service from entering school grounds. The commissioners did not want to address the need either, fearing a precedent that might expand to a number of other housing developments. Several years later, the housing development of Westview contacted Eagle Transit to operate a tripper service. In this case, however, Westview was asking for a far smaller number of students to be transported each day, and only in the afternoon. The parents also suggested to the School District that since the families are privately paying for the cost of the transportation, without any remuneration from the school, the school was not liable. And, while the School District stance on liability has not changed, the School District did not thwart Eagle Transit from performing this service.

The Westview service provides a needed service to that community. The community itself was instrumental in smoothing some of the School District's concerns. It also provided a pull-off spot that is insured. These types of relationships can be crucial in developing an effective, safe system for student use.

## VII. DATA AND STATISTICS

### Ridership

Annual ridership on Eagle Transit for FY 96 was 40,229, with daily ridership averaging about 161 trips per day. In addition, an average of about 7 special education students are transported on Eagle Transit vehicles, and approximately 17 to 18 Westview children are transported one-way during school days. A breakdown of FY 96 ridership is shown below:

<b>FY 1996 Ridership Data</b>					
<b>Passengers</b>	<b>Elderly</b>	<b>Disabled</b>	<b>D.D. Contract</b>	<b>Public</b>	<b>Totals</b>
Bus	19,864	8,279	6,228	3,522	33,979
Taxi	1,966	370			2,336
Totals	21,830	8,649	6,228	3,522	40,229

## Operating Costs and Performance Data

The operating costs for the entire Eagle Transit system are presented below.

Transit System	Operating Costs Per Passenger			Operating Costs Per Mile			Riders Per Mile		
	1990	1994	1995	1990	1994	1995	1990	1994	1995
Eagle Transit	\$3.44	\$4.28	\$5.89	\$1.46	\$2.53	\$3.04	\$0.40	\$0.60	\$0.52
<i>Rural Transit Avg.</i>	\$2.75	\$4.65	\$5.95	\$1.80	\$2.17	\$2.24	\$0.70	\$0.50	\$0.47
<i>Urban Transit Avg.</i>	\$2.33	\$2.90	\$2.86	\$2.45	\$2.78	\$2.92	\$1.10	\$1.00	\$1.01

*Excerpted from Public Transportation, Exhibit 14, Selected Transit System Performance Measures.*

### Average Cost per Passenger

Bus Only	\$5.00
Taxi (Incl. Fares +10% Admin. Costs)	\$5.60
All Services	\$5.04

### Eagle Transit Buses Only\*\*

Average Cost per Mile	\$2.58
Average Revenue Hours per Week	105
Average Cost per Hour	\$31.33

\*\* Please note: Developmental Disability contract rides/costs not included, as contract is on different fiscal year.

## VIII. LEGAL AND REGULATORY ISSUES

There have been no challenges with respect to Eagle Transit's provision of tripper service or special education service from the private sector. In addition, the provision of public transportation services to students who are ineligible for school-subsidized transportation because they live within the walk distance is fairly commonplace, as long as the school does not remunerate the public transit provider or the families.

At the same time, the Director of Eagle Transit is quick to state that at no point should a publicly subsidized transportation provider reduce competitive pressures by offering subsidized service in place of private transportation providers.

## IX. EVALUATION

Demand for transportation in the Kalispell area is extremely high. Real estate development and a booming economy have led to a dispersed community with severe transportation needs. The fact that Eagle Transit is able to survive given such acute demand is extraordinary, and in and of itself

is a benefit to the community. Eagle Transit's success in providing coordinated service with the School District is also a laudable achievement.

## **X. TRANSFERABILITY**

The Director of the Eagle Transit service, a veteran of public transportation operations, cautions that the public believes that fare will pay for the full cost of service, but the public bus system must be careful not to use public transportation funds to subsidize an unfair amount of school transportation. She also cautions that the demand for subsidized public transportation for students within the designated walk limit -- in this case, three miles -- could inundate a system. Given these possible constraints, a measure of caution should be exercised by anyone willing to address student transportation concerns in an area with similarly high levels of transportation demand.

# **CASE STUDY REPORT: MINOT, NORTH DAKOTA**

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## **I. AGENCY/ORGANIZATION**

Minot City Bus  
1025 31<sup>st</sup> Street SE  
Minot, North Dakota 58201

Tel: 701-857-4140

## **II. SUMMARY STATEMENT**

The City of Minot operates fixed-route public transit service within the city limits. The service focuses on transit-dependent client groups, including school children, the elderly, persons with disabilities, and others without transportation alternatives. Although service is always open to the general public, early morning and late afternoon fixed-route bus service is oriented to the trip needs of school children. Mid-day fixed-route service is oriented to the travel needs of the elderly and persons with disabilities.

Historically, Minot City Schools has not provided conventional school bus transportation for school children in its service area. In recent years, however, it began providing "special needs transportation" for public school students with disabilities, in response to state and federal mandates. The District also provides transportation for Head Start students, an inter-school shuttle, and transportation to athletic events, in addition to special needs transportation service. The School District recognizes the benefit of the Minot City Bus service to students and parents and provides some funding to support that service.

## **III. HIGHLIGHTS**

Highlights of the coordination effort are listed below.

- ◆ High-level transportation service is provided to school children in Minot by the public transit operator, Minot City Bus.
- ◆ The high level of public transit service provided to school students is viewed as a community service by both the City of Minot and the School District. The volume of school children carried by Minot City Bus (65 percent of total ridership) helps to justify the system in the eyes of City Council and saves the School District the expense of operating a separate service itself.

## IV. BACKGROUND

### Description of the Public Transportation Services

Minot City Bus provides public transit service in the City of Minot. The transit function is located in the City's Department of Public Works. The transit system manager, known as the Bus/Shop Superintendent, reports to the Director of Public Works, who in turn reports to the City Manager. Funding for the public bus service is provided from a variety of sources, including the City of Minot, the Federal Transit Administration Section 5311, and the Minot City Schools.

The fixed-route public transit system includes two basic elements, Early Morning Service and Mid-day Service.

- ◆ Early Morning Service is operated from approximately 7:00 a.m. until 8:30 a.m., using six buses operating on eight routes. The Early Morning routes focus on bringing children to the public schools: eleven elementary schools, one middle school, and one high school. Most routes have two bus trips each in the morning. In the afternoon, beginning around 3:30 p.m., buses are used to return students from their schools to their homes. Normally, one bus trip is made from each school in the afternoon. Early Morning Service is only operated during the school year.
- ◆ Mid-day Service is operated from 9:00 a.m. until 4:30 p.m., year-round. Six routes are operated on hourly headways. The Mid-day Service is used primarily by the elderly and persons with disabilities. It is anticipated that in 1998 a mid-day bus will be added to better serve shopping areas in the city.

Complimentary ADA paratransit service also is provided through a contract with the Minot Commission on Aging. The service operates from roughly 7:30 a.m. until 5:30 or 6:00 p.m. The City pays for a driver and provides maintenance and bus storage for the Commission.

The cash fare for riding the bus is \$.75, with a \$.10 transfer charge that is good for one hour. Discounts are available for adult tokens (10 tokens for \$6.00) and for senior/ disabled and student tokens (10 tokens for \$4.00). Children under six years of age ride free and student transfers on school days are free.

According to the transit system manager, the system is able to function the way it does due to the use of part-time drivers. Currently, there is one full-time driver and there are eleven part-time drivers. During the school year drivers work an average of 25 to 30 hours per week. Their wage is roughly \$9.30 per hour, which is considered good pay in Minot. Six drivers are used in the summer. The Bus/Shop Superintendent is the only transit staff other than the drivers. Policy decisions for transit are made by the City Council, with daily operating decisions made by staff. There is little marketing for the transit system, and complaints are handled directly by the Bus/Shop Supervisor, who also supervises nine maintenance personnel for the city shop.

## **Description of Student Transportation Services**

Although the Minot School District does not operate conventional school bus service and relies on Minot City Bus to meet that transportation need, it does operate several transportation services. These include special needs transportation, Head Start transportation, transportation to athletic events, and an inter-school shuttle. These services are summarized below.

- ◆ Special needs transportation is provided to 165 children using 11 buses. Service is provided to the Air Force base from roughly 6:20 a.m. to 7:00 a.m. Transportation is provided from the base from 7:15 a.m. until 8:15 a.m., from 10:45 a.m. until 12:45 p.m., and from 2:40 p.m. to 5:15 p.m. At 5:30 in the evening, transportation is provided for special needs children returning to the base.
- ◆ Head Start transportation is provided to roughly 200 children using the same 11 buses used for special needs transportation. Service is provided to half-day pre-school children and to kindergarten students. Service is provided from 8:20 a.m. to 9:15 a.m., from 11:10 a.m. to 1:15 p.m., and from 4:20 p.m. to 6:00 p.m.
- ◆ Inter-school shuttle service is provided during the day, with two buses operating hourly service, for a total of 16 vehicle trips per day.
- ◆ Transportation for school athletic events is provided using seven large (71 to 77 passenger) buses on an as-needed basis.

The School District also has eight stand-by buses, which are in use depending on the season. In addition, the District contracts with the Northland Bus Company to transport students in grades nine and ten to Central Middle School and students in grades eleven and twelve to Magic City High School. Northland also is used for elementary school transportation on the Air Force base during cold weather.

## **Demographic Characteristics**

The population of the City of Minot was 34,554 in 1990, according to the U.S. Census. This includes a population of approximately 11,000 on Minot Air Force Base, which is located within the city limits. The median age of the population of Minot was 32.0 in 1990, with 13.9 percent age 65 or older. This is a relatively high percentage given the inclusion of the Air Force base population in this data. Ninety-six percent of Minot's population is white. The largest minority groups are Native American, 2.1 percent, and African-American, 1.1 percent. Approximately 1 percent of the population is Hispanic. Of the total population in Minot in 1990, 15 percent was below the poverty level.

Minot's population is projected to be relatively stable in the future. One concern is the potential for a reduction in size of Minot Air Force Base, which is currently under consideration.

## **Regulatory and Political Environment**

In Minot, as in many small urban areas, the need for public transit is acknowledged, yet political constraints limit the amount of City General Fund revenue used to support the system. Budgetary goals limit the percentage of the City's General Fund used to support transit to 2 to 3 percent. The service focuses on its primary users (i.e., children, the elderly, persons with disabilities, and others without transportation alternatives). Changes to the transit service are incremental and must be cost effective.

This fiscal conservatism has contributed to the joint effort by the City and the School District to have one, rather than two, transportation services. There is a mutually expressed desire to minimize the overall burden on taxpayers, through both City and School District funding. Given this philosophy, school children are seen as one of the primary user groups of Minot City Bus, and use of the public transit system by school children helps to justify its existence.

In North Dakota, school transportation, other than for special needs children, is not mandated for children living within city limits; it is mandated for students living outside the city limits. Non-conforming vehicles are allowed as long as their capacity is 15 passengers or fewer. School buses may be used for non-school bus service at the discretion of the local school district. There is no standing allowed on school buses, and seat belts are not used.

The School District pays the City \$.175 per school passenger-trip, for a total of \$19,000 per year. According to local contacts, the School District would probably provide school bus service if the city transit system did not meet this need. It is estimated that it would cost the School District \$200,000 a year plus capital expenses to operate the service now provided by the City through Minot City Bus.

As previously mentioned, the School District and the City are both looking for ways to minimize the tax impact to residents of the area through transportation services. This philosophy has been an important driving force behind the coordinated transportation effort.

## **V. GOALS AND OBJECTIVES**

There are no formal, written goals for the coordinated transportation service effort. Based on the on-site visit, the following appear to be unwritten goals:

- ◆ Provide a safe, effective public transit service that addresses the basic travel needs for (1) those residents of Minot who do not have access to transportation alternatives, (2) children, (3) the elderly/disabled, and (4) other transportation-disadvantaged persons
- ◆ Minimize the tax burden to City residents by not operating duplicate public transit and school bus transportation services

- ◆ Operate cost-effective transportation services that utilize available federal funding and that do not use more than 2 or 3 percent of City General Fund revenues

## **VI. NARRATIVE DESCRIPTION**

As previously mentioned, the Minot School District has historically not provided conventional pupil transportation in which elementary, middle, and high school students are transported to school in yellow school buses if they live beyond a certain walking distance from their "home schools." Recently, the School District began providing "special needs" transportation using its own equipment. It also provides transportation for athletic events and an inter-school shuttle during the day.

In North Dakota, the State Department of Public Instruction will reimburse school districts \$.175 per student per mile if the school district chooses to provide transportation to students who live beyond these limits. The limits are one mile for elementary and middle school students and two miles for high school students. The State does not reimburse local school districts for transportation if parents chose to send their children to schools other than their home schools.

Since Minot City Bus began operations in 1974, providing transportation for children has been one of its primary focuses. Prior to federal funding cut backs in 1992–1993, transit service in Minot was more extensive, serving commuters as well as transit-dependent populations. With the reduction in federal funding, the City decided to re-focus the service to meet the needs of its primary users -- children, the elderly/disabled, and others without transportation alternatives.

In reality, the City of Minot operates two separate fixed-route public transit services. One service, Early Morning Service, focuses on school transportation, with fixed-routes oriented to the elementary, middle, and high schools. Minot City Bus is very responsive to changing school transportation needs. Accommodations are made for early school dismissals, school holidays, and other changes. Early Morning Service is open to non-students, but few ride given the school orientation in terms of pick-ups and destinations and travel times. The second service, Mid-day Service, uses different fixed-routes that focus on the travel needs of the elderly/disabled and other transit-dependent persons. Mid-day service ends at approximately 4:30 p.m., when return trips from schools are made.

In 1998, Minot City Bus hoped to initiate a shopping route on the Mid-day Service to better serve shopping destinations in town. The City also hopes to receive federal funding to replace five aging vehicles. Replacing these vehicles in the next two years is a top priority with the City.

The School District currently is able to respond to its other transportation needs. It is concerned, however, that it would need to expand its service if new Head Start regulations disallow the use of "non-conforming vans," which they do currently use.

## VII. DATA AND STATISTICS

### Costs and Revenues

The annual budget for Minot City Bus was \$354,901 in 1997, with a projected increase to \$389,721 in 1998. Funding for the Minot City Bus comes from a variety of sources. The 1997 and 1998 budgeted revenues are shown below.

<u>Line Items</u>	<u>1997</u>	<u>1998</u>
Cash reserves	\$18,859	\$30,102
Operating revenue	63,000	71,800
Personal property replacement	8,600	8,600
Federal grant - FTA Section 5311	84,800	91,725
State grant - School transportation	19,000	19,000
State grant - Registration fees	17,500	22,500
Interest income	2,000	2,000
Miscellaneous revenue	2,500	2,500
Tax levy	<u>138,642</u>	<u>141,494</u>
<b>Budget Total</b>	<b>\$354,901</b>	<b>\$389,721</b>

### Service Data

Minot City Bus does not track service miles, hours, and costs on a monthly basis to prepare performance statistics. Annual data is available for ridership, by category, and for expenditures. Historical ridership data by user-category is presented below.

Minot City Bus, Ridership Data								
<u>Year</u>	<u>Adult</u>		<u>Student</u>		<u>Senior</u>		<u>Total</u>	
1992	22,649	14%	93,872	58%	45,531	28%	162,052	100%
1993	12,327	8%	96,694	62%	45,808	30%	154,829	100%
1994	6,008	4%	108,063	65%	52,138	31%	166,209	100%
1995	5,001	3%	113,680	67%	50,710	30%	169,391	100%
1996	5,487	3%	113,359	66%	52,165	31%	171,011	100%
1997	4,693	3%	109,200	64%	55,420	33%	169,313	100%

## **Accidents, Incidents, and Passenger Injuries**

Accidents have not been a major issue in Minot. Typically, there are fewer than four accidents a year, and those are usually "fender benders." Nearly 10 years ago there were two near-fatalities and other near-misses associated with the school service when children ran in front of the bus into traffic after exiting the bus. This has not been a problem in recent years. School District personnel indicated that a similar problem exists when yellow school buses are used, as the public is not sufficiently trained to stop for flashing lights and the stop arm on yellow school buses.

Safety concerns do not exist relative to the special needs school children, because they are dropped off on the right side of the street so that they do not need to cross.

## **Complaints**

Complaints are also not an issue in Minot. An average of one complaint is registered every two weeks, and complaints are usually not related to school transportation.

## **VIII. LEGAL AND REGULATORY ISSUES**

There appear to have been no major legal and regulatory issues related to the implementation of the coordinated public transit/pupil transportation effort in Minot. Since conventional pupil transportation in yellow school buses has not been provided historically, parental concern in switching from yellow school buses to transit buses without school bus markings was not an issue. Generally in Minot, it appears that parents are pleased to have transportation provided for their school children and are relatively unconcerned about not having the transportation provided in a yellow school bus. Even though accidents have not been a problem recently, safety is an important issue that receives ongoing attention.

The State Department of Instruction provides reimbursement to the Minot School District for school transportation provided in non-school buses.

The City of Minot receives Federal Transit Administration (FTA) funding annually under the Section 5311 program. The City is required, therefore, to comply with all related federal regulations. With respect to school bus transportation, FTA regulations prohibit subrecipients from providing "exclusive school bus service" unless the service qualifies and is approved by the FTA Administrator under an allowable exemption. Minot City Bus service is open to the general public at all times. Even the Early Morning Service, which is oriented to school transportation needs, is not exclusively school bus service. The fact that nearly all of the riders on the Early Morning Service are school children and that the routes are specifically designed to serve the schools in the area, however, suggests that sensitivity with respect to the FTA School Bus regulation will continue to be important.

## **IX. EVALUATION**

### **Limitations/Uncertainties from Data Availability and Data Sources**

There has been no recent analysis examining cost savings achieved as a result of the coordination effort or alternatives to increase the coordinated service. This is due to the historical nature of the Minot transit/pupil transportation coordination effort and the general acceptance of the service by all concerned. Ideally, however, both the City and the School District would develop detailed cost allocation models in order to more specifically identify cost savings, appropriate reimbursement rates to the City from the School District, and potential alternatives for further coordinated efforts.

Safety data comparing school bus versus public transit accident statistics would also be useful in identifying needed responses, if any, in terms of training riders, drivers, and/or the general public regarding safety issues associated with students using the public transit system.

### **Performance Compared to Objectives**

Again, given the historical nature of the coordination effort, formal, written goals for the program have not yet been developed. There is only general agreement among staff and local elected officials (City and School District) regarding the need to have a reliable, cost-effective transportation service that meets the basic needs of the community while focusing on transit-dependent populations. There is apparently a consensus to work together to provide quality service with a minimal impact on the overall tax base in the community. There has, therefore, been no specific measurement in terms of service effectiveness. However, continued funding of the system by the City and by the School District demonstrates its acceptance in the community.

### **Economic Evaluation**

A formal evaluation of cost savings has not been conducted, as previously mentioned. An informal assessment by the Bus/Shop Superintendent, however, suggests that it would cost the School District roughly \$200,000 annually (plus capital expenses) to provide service equivalent to the school-oriented Early Morning Service provided by the Minot City Bus. This amount, however, would not be an overall savings to the taxpayer, unless it is assumed that public transit service would continue during the same hours if pupil transportation service was not provided by the City.

### **Changes in Effectiveness/Efficiency**

The existing service arrangement appears to be quite effective and efficient. Additional coordination options should be considered as the need arises.

## **Impact on Transit Dependent Populations**

The transit-dependent residents in Minot appear to be beneficiaries of the coordinated service. The use of the transit service to address school transportation needs helps justify the overall public transit system in the eyes of elected officials. Without the school component, justifying the overall system may be more problematic, with the potential that the public system could be eliminated. Alternatively, one could argue that the focus on school children diverts service that could otherwise be used for other user groups. If existing resources were not used for school-oriented service, one could argue, they could be used to expand service for other transit-dependent populations or for commuter service.

## **Qualitative Evaluation**

During the on-site visit to Minot, local contacts appeared to universally support the coordinated service and viewed the coordinated effort as mutually beneficial. School District representatives appear to understand the benefit that the transit service provides to them and to parents and the children who use the system. Representatives of the City see the provision of transportation to children as a strong reason that the public bus system receives broad-based community support and financial support from the City.

## **X. TRANSFERABILITY**

Due to the historical nature of the coordinated transportation service effort in Minot, it is difficult to determine what elements could be transferable to other communities. Issues that face other communities in transferring from separate transit and school bus services have not been present in Minot. Concerns in terms of co-mingling school children with the general public and issues related to using a public transit buses as opposed to yellow school buses have not been major concerns.

Perhaps one transferable result of the Minot experience is the very fact that the coordinated service exists and seems to be working well to meet the broad interests of the City, in terms of public transit, and the more specific needs of the School District, in terms of school transportation. It is important to note that using public transit service to meet school transportation needs helps to justify the system to political leaders and, therefore, contributes to broader community needs.

The following transferable elements are present:

- ◆ Use of transit buses for school transportation, as part of an overall public service
- ◆ Orientation of the public transit route system to schools in the early morning and late afternoon
- ◆ Use of School District funding to support the transit system
- ◆ Close interface and cooperation between the School District and parents and the transit system personnel
- ◆ Inclusion of school children as a major transit user group, which broadens the level of local political and funding support for public transit
- ◆ Need for ongoing safety training for the public and others regarding children and other transit-dependent persons on city buses

# **CASE STUDY REPORT: NAMPA, IDAHO**

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## **I. AGENCIES/ORGANIZATIONS**

Treasure Valley Transit  
423 11<sup>th</sup> Avenue South  
Nampa, Idaho 83686

Tel: 208-465-6472

## **II. SUMMARY STATEMENT**

Treasure Valley Transit, Inc. (TVT) is the private, non-profit public transportation in Nampa, Idaho. TVT provides one fixed transit route in Nampa, county-wide paratransit service for agency clients (and for unaffiliated riders) between agency runs, and a commuter route.

The establishment of TVT was -- to a large extent -- attributable to the efforts of Canyon County Head Start (CCHS), which successfully applied for the enabling grant and supplied school bus vehicles and drivers (when they weren't being used for Head Start runs) to TVT for the organization's first phase of service. Subsequent contracts with the Department of Health and Welfare to transport clients to and from JOBS programs and the Canyon County Office of Aging led to the purchase of four additional vehicles. While TVT now relies primarily on its own vehicles, Head Start vehicles are available in emergencies.

A local for-profit school bus carrier also played a role in supporting the fledgling public transit property. This company provided maintenance for TVT/CCHS vehicles and even provided back-up vehicles when needed. Training also was coordinated between the school bus operator and TVT, with TVT employees attending the school bus operator's Skills Testing and School Bus Driver Training programs and the school bus employees attending TVT's passenger-assistance training programs.

Currently, TVT is used by students who cannot be reached by school bus and by students who wish to participate in after-school activities or who have an after-school job. In addition, families of students who live beyond the school district boundary (and therefore are not eligible to receive subsidized school transportation) also use TVT.

### **III. HIGHLIGHTS**

Two key points stand out from the Nampa case study:

- ◆ There was an exceptional level of coordination between the local Head Start operator and the new public transportation provider (which later became known as Treasure Valley Transit, or "TVT"). The private school bus contractor also played a role in supporting the new public transit property.
- ◆ There was an exceptional level of support from local human service agency staff, who volunteered for the initial Ad Hoc Committee and later became members of TVT's Board of Directors. TVT has enjoyed representation from Canyon County, the cities of Nampa and Caldwell, Mercy Medical Center, Boise State University (Canyon County), the Department of Health and Welfare, Vocational Rehabilitation, and Canyon County Organization of Aging, among others. TVT also has supportive relationships with local physicians, clinics, hospitals, shelter homes, group homes, senior centers, nursing homes, retirement facilities, and individuals who depend on TVT's services.

### **IV. BACKGROUND**

#### **Description of the Public Transportation Service**

TVT is a private, non-profit corporation serving the greater Canyon County area in the State of Idaho. The current services provided by TVT include:

- ◆ One transit route, which serves Nampa and operates Monday through Friday from 8:00 a.m. until 5:00 p.m., with a one-hour headway.
- ◆ Demand-response paratransit service, which is provided throughout Canyon County and in northwest Owyhee County, and operates Monday through Friday from 6:00 a.m. until 5:00 p.m. Most of the paratransit service is provided to human service agencies for the transportation of their clients. These agencies include the Ada County Highway District, Canyon County Head Start (nine-month program), the Foster Grandparent program, Medicaid, the Retired Senior Volunteer Program, and the Western Idaho Training Program. Service is provided to unaffiliated riders between agency runs.
- ◆ One commuter route, which serves Caldwell, Nampa, and Boise, and operates Monday through Friday during commuter hours (6:30 a.m. until 7:50 a.m. and 4:50 p.m. until 6:05 p.m.).

The regular fare for the Nampa transit route is \$0.50. A senior/youth half-fare is also available. There are also monthly passes available, including a family pass. Fares for the paratransit system range from \$1.50 to \$4.00, depending on the number of fare zones traversed. TVT also charges a

"contract rate" for dedicated vehicle service at approximately \$25 per hour (reflecting the fully allocated cost of service.)

TVT utilizes 18 accessible vehicles ranging from 7 passenger mini-vans to accessible mini-buses with a capacity of 20 ambulatory and 2 wheelchair stations.

### Description of Student Transportation Services

School transportation for the Nampa School District (and several surrounding school districts) is provided by a private company. The following information best summarizes this company's operation in the Nampa area.

1996-1997 Statewide Pupil Transportation Operational Costs							
	Nampa	Caldwell	Wilder	Middleton	Vallivue	Total	Average
<b>Total Reimbursable Miles</b>	625,149	355,203	28,996	279,520	563,550	1,852,418	370,484
<b>Total Reimbursable Costs</b>	\$1,697,261	\$1,038,197	\$80,022	\$522,425	\$967,153	\$4,305,058	\$861,012
<b>Reimbursement @ 85%</b>	\$1,442,672	\$882,467	\$68,019	\$444,061	\$822,080	\$3,659,299	\$731,860
<b>Daily Ridership</b>	4,116	2,748	250	1,315	2,035	10,464	2,093
<b>Number of Buses</b>	59	43	5	32	45	184	37
<b>Total Reimb. Cost/Mile</b>	\$2.71	\$2.92	\$2.76	\$1.87	\$1.72	\$11.98	\$2.40
<b>Total Cost/Student</b>	\$411.91	\$377.80	\$320.09	\$396.91	\$475.23	\$1,981.94	\$396.39
<b>Total Reimb Bus Cost/Student Mile</b>	\$0.039	\$0.046	\$0.055	\$0.045	\$0.038	\$0.223	\$0.045

### Demographic Information

Canyon County is in the southwestern part of the state, bordering Oregon. It is the second most populous county, but it is the seventh smallest in the area. Unlike most counties, the vast majority of Canyon County is privately owned (90.9 percent). Logging, lumber, agriculture, electronics manufacturing, government, and the military comprise the strong and diversified

economic base of the region. Total civilian employment grew over 42 percent from 1985 through 1995. Two private colleges, Albertson College of Idaho and Northwest Nazarene College, are located here. Canyon County is also the heart of Idaho's wine country.

The total Canyon County population was 105,660 in 1996 and is projected to increase by approximately 11 percent over the next 20 years. Caldwell is the County seat. Nampa is the employment center for the County, with a population of 37,558.

## **V. GOALS AND OBJECTIVES**

The following goals and objectives were outlined by the stakeholders and agencies in the establishment of TVT:

- ◆ Provide a cost-effective service to seniors, persons with disabilities, and young people
- ◆ Coordinate with local agencies to maximize resources
- ◆ Develop a broad base of support

## **VI. NARRATIVE DESCRIPTION**

In the late 1980s, Terry Reilly Health Services and Canyon County Head Start encountered several problems transporting clients from the Head Start classrooms to the clinics for health appointments, and back. Agency surveys confirmed this need; in fact, agency clients listed "transportation" as even more important than "housing."

Several other agencies expressed interest in helping to develop a public transportation system for their clients' use, including the following:

- ◆ Idaho Migrant Council (season is April to October)
- ◆ Department of Health and Welfare
- ◆ Canyon County Office on Aging

In 1992, Canyon County Head Start (CCHS) and the Terry Reilly Health Services Center responded to this need by submitting a grant application to the Idaho Office of Rural Health Policy to establish TVT, a private, non-profit public transportation provider. The grant was for three years, at \$150,000 per year, and covered operating costs but not any capital expenses. The grant was awarded, and a public transit manager was hired to manage the operation.

For the first six months of operation, Head Start provided six 21-foot yellow school buses, drivers, mechanics, and staff to the fledgling public transportation service, which was operated between Head Start runs. One of the first contracts was with the Department of Health and Welfare to transport clients to and from JOBS programs, enabling TVT to purchase two used 15-foot accessible buses. A subsequent contract with CCOA enabled the purchase of two additional

vehicles: a van and an accessible minibus. With rapid growth of service, TVT hired two in-house, full-time employees.

The start-up struggles faced by TVT are similar to other new rural programs. The service area was so spread out that buses were essentially running all over the County at all different times of the day. Coordinating with doctors' offices also was a challenge, with medical appointments often running an hour to an hour and a half late, although tardiness issues have become less significant over time.

In the summer of 1994, the manager met with city officials to establish a fixed route in the town. The city contributed \$21,000 to TVT in order to establish a fixed city route that circled from the North End to the recreation center and then back to the North End (with several stops in between). Although the city's contribution was reduced in following years, the city plans to offer TVT more financial support in the coming year.

During the start-up years the private school bus operator and TVT shared an excellent relationship, with the school bus operator providing maintenance for all TVT and CCHS vehicles and back-up vehicles as needed. TVT and the school bus operator also coordinated training efforts with one another; this included CDL skills testing, school bus driver training, and special needs training.

Currently, TVT provides a limited amount of student transportation, as described below:

- ◆ In the Middleton School District, two children that the longer yellow school buses cannot reach (given the narrow turning roads) are transported by TVT.
- ◆ Some students use the fixed-route service in the afternoon. Currently, TVT's service day begins at 8:00 a.m., which is too late in the morning for direct travel to school. If the mayor agrees to extend financial assistance to the fixed-route operations, then morning service hours will begin between 6:00 a.m. and 7:00 a.m., in time for children to take the bus on morning trips to school as well as on afternoon trips.
- ◆ The parents of several other children pay TVT to pick up and drop off their children. For example, one child lives outside the School District boundary, while another sometimes travels from school to a grandmother's house. Since the School District does not pay for out-of-school-district travel or for travel that is not to or from a parent or guardian's home, TVT was the only option for these families.

## VII. DATA AND STATISTICS

TVT was fully operational in April of 1992 and has continued to grow steadily since then, with the 1992 ridership of 42,584 trips more than doubling to 89,968 trips by 1996. The following figures offer an overview of the scope of TVT's current public transportation services.

Annual Ridership	125,000
Annual Mileage	400,000
Annual Vehicle Hours	27,000
Annual Passenger Revenues/Donations	\$10,000
Noncapital Expenses	606,000
Administrative as a Percent of Noncapital	29%
Passenger Recovery Ratio	2%
Cost per Passenger Trip	\$4.85
Cost per Mile	\$1.52
Cost per Vehicle Hour	\$22.45
Federal Share of Noncapital Expenses	\$227,000
Federal Cost per Passenger Trip	\$1.82
Federal Cost per Mile	\$0.57
Federal Cost per Vehicle Service Hour	\$8.41

## VIII. LEGAL AND REGULATORY ISSUES

There are no laws or regulations that explicitly prohibit TVT from using Head Start vehicles or the school bus operator from performing the maintenance on TVT vehicles. The only regulatory issues that have arisen in the last nine years have been the legal issues raised by the school bus operator regarding competing against TVT in procurements for human service agency transportation contracts.

## IX. EVALUATION

TVT is a thriving, successful public transportation provider. Mobility for residents has increased since TVT began operating service, and scarce resources have been leveraged and maximized to the benefit of the community.

## X. TRANSFERABILITY

The following transferable elements can be gleaned from the Treasure Valley Transit case study:

- ◆ **Head Start can play a key role.** In Nampa, Idaho, the local Head Start operator provided the vehicles, personnel, and experience necessary for TVT to begin operation. This support and coordination led directly to the success of TVT's early transportation efforts.
- ◆ **Informal relationships can be effective.** TVT did not draft written agreements with the Head Start operator or with the school bus operator. Instead, the manager and staff continue to encourage informal, but nonetheless effective, relationships with local agencies, clients, and other service providers. This is an important precedent for communities that assume that complex legal agreements and formal, binding relationships are crucial for a successful coordination effort.
- ◆ **Public transportation can augment traditional school bus service.** Currently, TVT is used by students who physically cannot be reached by school bus and by students who wish to participate in after-school activities or who have an after-school job. In addition, families of students who live beyond the school district boundary (and therefore are not eligible to receive subsidized school transportation) also use TVT.

# **CASE STUDY REPORT: SELKIRK, WASHINGTON**

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## **I. AGENCY/ORGANIZATION**

Selkirk Consolidated School District  
P.O. Box 129  
Metaline Falls, Washington 99153

Tel: 509-446-3485

## **II. SUMMARY STATEMENT**

Selkirk is a rural community approximately 10 miles from the Canadian border in the northeast corner of Washington State. The area is not heavily populated and, prior to the Selkirk Shuttle, had no public transportation services for its residents. This changed when the Selkirk Consolidated School District successfully applied for a rural transportation grant from the Washington Department of Transportation to introduce a new public transit service.

Called the Selkirk Shuttle, this service consists of 28-mile transit route which connects the three towns of Metaline, Metaline Falls, and Ione (where the District schools are located), and is operated with a refitted, 56-foot, lift-equipped school bus. The route is repeated three times per day on weekdays only. One of the novel things about the Selkirk Shuttle is that students use the service as an intra-district school shuttle since the high school, middle school, and elementary school are not centrally located (instead, each town houses one school). Parents and residents use the service at the same time to get to work, run errands, to travel to the Selkirk health clinic, and/or to visit friends and family.

## **III. HIGHLIGHTS**

The Selkirk Shuttle service is notable both for the involvement of the School District in providing public transportation service to the community and for the significant positive impact the service has had on this very rural and isolated community.

## **IV. BACKGROUND**

### **Description of the Public Transportation Service**

Operated by the Selkirk Consolidated School District, the Shuttle is a (limited route-deviation) transit service which serves the three towns of Metaline, Metaline Falls, and Ione on weekdays only. It may best be described as a circulator route, running on a 28-mile circuit which takes

roughly 1-1/4 hours to run. Three loops are made each weekday between the hours of 9:30 a.m. and 2:15 p.m.

The service uses a refitted, 56-foot, lift-equipped school bus. The bus will deviate from the route to pick up and drop off a person who requires a lift, as long as the rider gives sufficient advance notice. The service is free.

### **Description of the Student Transportation Service**

The Selkirk Consolidated School District, located in Metaline Falls, Washington, is situated along the northern extremity of the Pend Oreille River in Pend Oreille County, approximately 100 miles north of Spokane and 10 miles south of the United States/Canada border. There are only four incorporated towns in Pend Oreille County (Cusick, Ione, Metaline, and Metaline Falls), two unincorporated towns (Usk and Dalkena), and one city (Newport), which is the County Seat. The District serves a K-12 enrollment of 447 students spread over a 700-square-mile area.

In addition to the wide distribution of students, the school facilities are dispersed as well. The Lillian Bailey Elementary School and the district office are located in Metaline Falls, and Ione Primary is almost 14 miles to the south in Ione. Selkirk Junior/Senior High School is centrally located on the highway between the towns. Getting students from one facility to another is quite difficult; this same problem affects faculty and staff who also need to travel between schools. Consequently, the school bus fleet covers over 450 miles per day.

### **Demographic Characteristics**

The population of Pend Oreille County is approximately 10,000, most of whom reside in Newport, the County Seat, and the four towns of Cusick, Ione, Metaline, and Metaline Falls.

<b>Population</b>				
	<b>1970</b>	<b>1980</b>	<b>1990</b>	<b>1995</b>
<i>Pend Oreille County</i>	6,025	8,580	8,915	10,700
Cusick	257	246	195	261
Ione	529	594	507	511
Metaline	197	191	198	197
Metaline Falls	307	296	210	231
Newport	1,464	1,665	1,691	1,816

As mentioned above, the Selkirk School District facilities are located the three towns of Ione, Metaline, and Metaline Falls. These towns are briefly described below.

- ◆ Ione - The Town of Ione, located in north central Pend Oreille County, is situated on State Highway 31. It is 22 miles south of the Canadian Border and approximately 90 miles north of Spokane.
- ◆ Metaline - Metaline, the oldest town in Pend Oreille County, is situated on State Highway 31, just north of Ione, approximately 90 miles north of Spokane and 14 miles south of the Canadian border.
- ◆ Metaline Falls - The Town of Metaline Falls, located in north Pend Oreille County, is located on State Highway 31, 2 miles northeast of the Town of Metaline, 12 miles south of the Canadian Border, and approximately 90 miles north of Spokane.

The County has an available workforce of approximately 4,000 people. The median household income is \$23,122. The majority of the workforce is employed in producing timber-related products, light industry, and government services. The unemployment rate for 1995 was 11.1 percent compared with 6.4 percent in Washington State. Pend Oreille County consistently has had the highest rate of unemployment in the State, with approximately 37 percent of its residents on public assistance and a large population of senior citizens.

In addition to the needs generated by a large number of low-income residents, the rural nature of the community and the widely dispersed services have proved problematic. Specific services may be provided in one town but not in another, making it very difficult for low-income, disabled, or senior citizens to access medical and dental services or even grocery stores. For example, the dentist's office, fabric store, and bakery are in Metaline Falls, while the health care clinic and drug store are in Ione. The combined community offers most basic services, but many residents do not have their own transportation and therefore have a hard time accessing all of the services.

## **V. GOALS AND OBJECTIVES**

The Selkirk Shuttle's prime objective was to remain a consistent, reliable, and free system of transportation for the communities of Ione, Metaline, and Metaline Falls. More specifically, the Selkirk Shuttle project was jointly intended to fill the School District's need for intra-district student transportation, while concurrently filling a community need for public transportation.

For example, the Selkirk School District Self Study (1991) mentioned that an intra-district transportation component would create and enhance the education opportunities for students and their families. Three years later, a Pend Oreille Economic Development Council report stated the need for a system of rural transportation as a requirement for sustained economic growth. This

project demonstrated the fulfillment of each area by providing home-to-work transportation and student access to community assets for at-work, hands-on experience.

The specific goals and milestones of the project included the following:

- ◆ Purchase a mid-size, 35-passenger school bus with wheelchair lift. This would operate at approximately 75 percent of the current District cost per mile of \$1.41, and accommodate disabled students or community members.
- ◆ Hold a public meeting and visit local organizational meetings to solicit community input for devising time and route schedules that would benefit the community and to publicize the shuttle.
- ◆ Advertise locally for maximum ridership.
- ◆ Begin round-trip service to Ione, Metaline, and Metaline Falls three times daily, Monday through Friday, and twice daily on Saturdays beginning in September 1995 for students, teachers, and residents. The Selkirk Shuttle would also run twice daily Monday through Saturday throughout the summer months of 1996.
- ◆ Design the Shuttle service with sustainability in mind by operating as efficiently as possible and by working with local towns and community members to meet the greatest need.
- ◆ Increase cooperation and good-will between the community and the District as partners in the benefits of this service. Students, teachers, and community members would be riding the Shuttle together, which could be a first step in involving the community more in the school system.

Each of these goals was achieved by the Selkirk Shuttle service. Future goals of the Shuttle service include the following:

- ◆ Construction of shelters at some of the very exposed stops
- ◆ Expansion of service to include more runs and service on weekends

## **VI. NARRATIVE DESCRIPTION**

The central driving force behind the Selkirk Shuttle effort was the Transportation Director for the Selkirk School District, which conceived the idea of a local community circulator that would also allow students to utilize community resources for educational purposes. Local support was first obtained by establishing a committee of local government officials and later by establishing a local organizing/steering committee.

Public meetings were held to allow community input during the planning stages, particularly so that their needs could be considered along with the needs of the students. The Transportation Director for the Selkirk School District also made presentations before the Young at Heart Senior Citizen Club in Ione and the Metaline Falls Town Council. During these meetings, he explained the plan to establish the Selkirk Shuttle as a community service. At both meetings, which took place in March 1995, the proposal received enthusiastic support. Many seniors concurred that the Shuttle would aid their access to basic services such as dental and clinic appointments. The Metaline Falls Mayor and attending council members endorsed the plan as well. Letters of support from the Young at Heart Club and the local mayors were included in the original grant application.

After establishing the availability of a vehicle for use as the shuttle, the Transportation Director submitted an application for a rural transportation grant, a funding stream supported by the State of Washington. The Rural Mobility Grant Program is aimed at assisting rural residents who need transportation for obtaining basic services. These grant funds are intended as a stimulus or a jump start in providing communities the means for providing their citizens with access to basic services, with the intent that local communities will seek long-term funding strategies to sustain new or improved service. Successful projects demonstrate a strong level of local support, the creation of meaningful partnerships to implement the project, and an ability to positively benefit rural residents in a measurable fashion.

## VII. DATA AND STATISTICS

Detailed data and statistics are not maintained by the School District. Nonetheless, the following figures were available:

<b>For Six-Month Period in 1996</b>	
Days/Week Service Operated	5
Boardings	1,220
Miles	8,883
Service Hours	329
Approximate Cost of Service for Six-Month Period	\$24,989
Cost per Mile	\$2.81
Cost per Boarding	\$20.48

The specific work tasks associated with implementing and operating the Selkirk Shuttle are presented below, along with the respective budgets.

<b>Scope of Work and Project Budget*</b>		
<b>Task</b>	<b>Description</b>	<b>Amount</b>
<b>Task 1</b>	<u>Vehicle Purchase</u> Purchase wheelchair accessible vehicle	\$48,000
<b>Task 2</b>	<u>Planning &amp; Marketing</u> Coordinate with community representatives to determine the initial service schedule. Develop marketing materials describing the service and distribute them to the community.	\$6,900
<b>Task 3</b>	<u>Service Operations</u> Provide fixed route shuttle service to the communities of Metaline, Metaline Falls, and the Town of Ione. The service shall consist of a minimum of three round trips each week day and two round trips on Saturday, serving all three communities listed.	\$45,054
<b>Total</b>		<b>\$99,954</b>

\* *Initial contract for service from September 1995 - September 1997.*

In early 1998, the grant was extended and received a new allocation in the amount of \$77,435.

## **VIII. REGULATORY ENVIRONMENT**

Since no federal funds are utilized in supporting the service, the regulatory issues are purely on state and local levels. The community presented the plan for the Selkirk Shuttle to the Washington Department of Education as a non-profit transportation venture to service the community. Since the vehicle was retrofitted to comply with non-school use of school buses, the Department of Education was fully supportive of the effort, and no regulatory issues arose during the planning stages.

An accident in Cosmopolis, Washington, where a young boy was killed crossing a rural highway after disembarking from a public transit vehicle, caused some concern to the administrators at the Washington State Board of Education. In addition, the State Office registered concern that the comingling of students and the general public is in many ways unwise. The community, on the other hand, has not expressed any reservations whatsoever with co-mingling students and the general public on the Shuttle.

## **IX. EVALUATION**

The Selkirk Shuttle has proven to be a very valuable service for the communities of Metaline, Metaline Falls, and Ione. The service also has given individuals and organizations an opportunity to participate in the planning and operation of this service. Organizations participating in the process have included the Selkirk School District, the Town of Ione, the Town of Metaline, the Town of Metaline Falls, the Young at Heart Club, youth sports, the Lions Club, and the Chambers of Commerce.

The obvious and proven benefits of public transportation make the Selkirk Shuttle a tool of cooperation for all of these agencies. The Shuttle also has made it possible for the students of Selkirk High School to expand their educational and experiential opportunities, such as peer tutoring at elementary schools, theatrical experiences at the local community theater, and job training. It will be the priority in the future to cultivate and strengthen these alliances with the ultimate goal of making the shuttle self-sustaining.

## **X. TRANSFERABILITY**

The Selkirk Shuttle is an excellent example of the local, rural school district taking the lead in becoming the public transportation provider for the community. By using an old school bus, the School District together with the communities of Metaline, Metaline Falls, and Ione have fashioned an exceptionally effective yet low-key solution to their transportation problems.

Also significant for other communities is the non-issue of co-mingling. Since "everyone knows everyone else" in this community, parents, teachers, and the general public feel that the children in their community are safe and secure when using the Shuttle service.

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## **CASE STUDY REPORT: THOUSAND PALMS, CALIFORNIA**

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### **I. AGENCY/ORGANIZATION**

SunLine Transit Agency  
32-505 Harry Oliver Trail  
Thousand Palms, California 92276

Tel: 760-343-3456  
Fax: 760-343-3097

Palm Springs Unified School District  
333 South Farrell Drive  
Palm Springs, California 92262

Tel: 760-416-8000 Ext. 3102  
Fax: 760-416-8015

### **II. SUMMARY STATEMENT**

Serving an area composed of smaller communities and rural areas, SunLine Transit Agency is more than a public transportation agency, it is an important resource in the Coachella Valley. Besides SunBus, the general public fixed-route transit system, which is composed of several intra-community and inter-community routes, SunLine Transit Agency provides (through an operations contract) ADA paratransit (SunDial) for persons who are unable to use SunBus because of their disability, and social services transportation for human service agency-sponsored clients. Note too that SunLine serves as the Coordinated Transportation Services Agency (CSTA) for over 40 human service agencies in the valley. Having converted its entire transit and paratransit fleet to CNG-powered vehicles and equipped its transit vehicles with bicycle racks, SunLine has made a statement about its concern for the environment. Under the SunGas moniker, SunLine also sells CNG to other agencies and organizations operating CNG-powered vehicles. SunLine's graffiti-removing capabilities are available for hire. SunLine even operates street-sweepers for several municipalities and private developments (SunSweep). SunLine is also currently working with several public agencies in the Coachella Valley in a number of pursuits: from providing key communication links in the event of a natural disaster to solving the key transportation piece of the Welfare-to-Work puzzle. In addition, SunLine regulates the taxi industry in the valley. The mission of SunLine is very simple: it wishes to be a viable resource for its member communities. Included in this mission is SunLine's principal focus: providing a transportation alternative to residents of and visitors to the Coachella Valley, and thereby enhancing their mobility options. Thus, it is hardly surprising that SunLine also serves as an important resource for public schools and students in its service area.

Annual ridership on the intra-community and inter-community routes that compose its fixed-route transit system (SunBus) has been growing yearly since 1992, when the SunBus fleet was replaced with new CNG-fuel buses. This past year, SunBus carried nearly 3,000,000 passengers. Six percent of these riders (over 175,000 trips) were high school and middle school students traveling to and from school, either because they are ineligible for school bus service (because they are within their school's mandatory walk distance) and/or because the flexibility that public transit offers -- in contrast to school bus service -- allows them to participate in after-school

activities or to get an after-school job. SunBus also solves the home-to-school transportation problem connected with open enrollment; families wishing to send their children to a different school now have a transportation solution. And, when the school districts require students to attend summer school yet do not provide school bus transportation, SunBus provides the link between home and school.

Faced with financial constraints, the three school districts within SunLine's service area could not afford to transport groups of students from elementary schools, middle schools, and high schools on field trips or to after-school athletic contests if they were not able to utilize SunBus routes. The same is true for several elementary school student after-school programs run by the YMCA and Boys and Girls Clubs throughout the Coachella Valley; the only affordable option for the programs and the parents of the children, short of parents leaving work early to transport their children from the school to the after-school site, was a supervised SunBus route. School officials, after-school programs, the parents, and the students are all delighted. And, SunLine is delighted to be of help. This past year, over 62,000 riders (reflecting over 2 percent of the SunBus ridership) were able to go on group trips because of SunLine.

In addition to these very successful, ongoing services, the *formal* use of SunBus for home-to-school transportation was explored during the 1991-92 school year. At this time, the Palm Springs Unified School District (PSUSD) was facing a very difficult funding crisis and a skyrocketing enrollment. A decision was made to demonstrate whether or not savings could be achieved by eliminating the school bus routes serving high school students from the small community of Thousand Palms and providing them with transit passes paid for and provided by PSUSD. The results: savings were achieved; student participation in after-school activities increased; youth ridership on the specific SunBus routes did not dip on holidays; and, the experiment led to the permanent installation of these routes and schedules and the continued use of these routes by students, despite the availability of school bus service that was reestablished after the demonstration.

This case study focuses on this demonstration, but also touches upon how SunBus is currently used by students for home-to-school and other transportation throughout the Coachella Valley.

### **III. HIGHLIGHTS**

1. Pilot Demonstration Results - Savings: The elimination of high school bus routes from the Thousand Palms area to Palm Springs High School and Cathedral City High School enabled the elimination of one school bus (\$204.56 per day for the 1991/92 school year). High school students who would have been eligible for student transportation were given Freedom Passes for SunBus, at a cost of \$19.00 per month to PSUSD. Based on a 180-day school year, the annual savings from eliminating one school bus was \$36,820. The total cost of Freedom Passes purchased by PSUSD was \$15,200. Thus, net savings of this demonstration to PSUSD was \$21,620.

2. Pilot Demonstration Results - Increased Flexibility to Participate in After-School Activities: Because of the financial constraints facing PSUSD, late school bus runs were eliminated. Students participating in after-school activities (sports, band, clubs, etc.) were required to find their own way home, which often would involve walking distances of up to four miles or relying on parents. For many, the walk distance was unreasonable and both parents worked, precluding students' participation in extra-curricular activities. For others who wished to get an after-school job, lack of transportation to the worksite presented an obstacle. A secondary result of the pilot demonstration was that a significant number of high school students were given these opportunities and took advantage of them.
3. Pilot Demonstration Results - Turn-Around of Parental Concern: While parents of the students to be transported on SunBus initially expressed concerns about the safety of their children, especially with respect to the co-mingling issue and the opportunity for their children to get off at whichever stop they chose, the parents' qualms were appeased by the overwhelmingly positive experiences of their children, the professionalism of the SunBus drivers, and SunBus's accident-free record.
4. Pilot Demonstration Results - Use of Transit by Middle School Students for Home-to-School Transportation - A surprising finding was that several Thousand Palms parents of middle school children with high student siblings elected to purchase Freedom Passes for their children traveling to the middle schools located close to the high schools.
5. Pilot Demonstration - Increased Transit Use by Students on Holidays: A startling finding of the demonstration was that usage of Freedom Passes was almost as extensive on weekday holidays during the school year as it was on school days. During the demonstration, pass ridership on school days on the primary route involved in the demonstration (Line 8) averaged 200 trips. On weekday holidays, pass ridership on this route totaled 165 trips.
6. Pilot Demonstration - Increased Transit Use by General Public: Prior to the demonstration, Line 8 only operated three days a week (Monday, Wednesday, and Friday). As an integral part of the demonstration, service on this route was expanded to Tuesdays and Thursdays. Ridership on Line 8 totaled 7,255 trips from September through June in 1990-91, the year before the pilot demonstration. During those same ten months the following year, ridership on Line 8 totaled 35,319 trips, of which 23,986 were pass trips. If one assumes that the passes were student trips (SunLine did not differentiate between regular and youth passes at this time, and records of pass sales have since been lost), then the number of general public trips increased by 56 percent.
7. Pilot Demonstration Aftermath - Permanent Installation of Routes and Continued Student Use of SunBus: PSUSD elected not to pursue the purchase of transit passes as an alternative to providing school bus service -- either for the Thousand Palms route or on a more wide-spread basis. Despite the achieved savings and the parental support, PSUSD's decision not to continue the Thousand Palms demonstration was made in part because the

school bus contractor demonstrated that it could reduce its school bus fleet further, and that the Thousand Palms route could be reinstated without additional cost (noting the number of school buses is often a function of the number of elementary school runs, not high school runs). PSUSD's decision may also have been affected by SunLine's decision to permanently keep the new routes and schedules, with the underlying premise that parents/students who wished to take advantage of SunBus could do so, without PSUSD paying for it. This is exactly what happened. For example, pass ridership on Line 8 totaled 2,508 trips in May 1993, which actually represented a 5 percent increase over the 2,389 pass trips in May 1992 (during the demonstration), despite the reinstatement of school bus service in the Thousand Palms area.

8. Annual Increases in Use of SunBus by Students for Home-to-School Transportation - For the 1992-93 school year, PSUSD increased its walk distances. Many of the students who were no longer eligible for school bus transportation turned to SunBus. As the benefits of using SunBus became clearer, more and more families have opted to purchase transit passes for their children, enabling them to get to school without having to walk unreasonable distances, to get to a school to which school bus transportation is not provided (e.g., open enrollment), to participate in after-school activities, and to get a job. The number of monthly trips taken with youth passes during the school months averaged 1,343 trips per month in 1992-93. In 1997-98, this figure had increased to 14,619 trips per month.
  
9. Use of SunBus by School Districts for Group Trips - The three school districts in the Coachella Valley are continuing to face financial difficulties. In the case of PSUSD, for example, the mileage-based funding that comes from the state for school bus transportation only covers about 40 percent of the school bus contractor costs. The remaining 60 percent is covered by unrestricted lottery revenue. However, to the extent that the school districts can minimize school bus costs, that lottery revenue can be redirected to educational services. This trade-off has manifested itself in the increase in walking distances (mentioned above), the elimination of late buses, and the elimination of school bus service. Because of these decisions, these trips would simply not be made. Enter SunLine. In running extra buses along their SunBus routes at requested times, and with deviations (if needed) within FTA guidelines, the school districts are now able to afford these teacher-supervised group trips for the cost of a transit fare per rider. During FY 1997, these three school districts collectively requested 443 (out of 639) group trips, reflecting about 46,450 (out of total of 62,296) group trip riders. Claims from the private bus community allege that SunLine is in effect running charter service in competition with the private bus operators. FTA has not found that to be true. Moreover, PSUSD stresses the point that it simply would not be able to utilize the private bus operators at the commercial rates; indeed, if SunLine had not come along, the students of PSUSD would not be making the trips. Further, SunLine is not trying to compete with the private bus operators, it simply is trying to fulfill its mission, helping out the community where and when it can be of service.

10. Use of SunBus for After-School Transportation - Another cutback among the three school districts has been the elimination of subsidized school bus transportation for elementary school students to after-school programs operated offsite at YMCAs and Boys and Girls Clubs throughout the Coachella Valley. With the elimination of this transportation, these agencies had few options. They simply could not afford the \$200+ per group trip charge quoted by most of the private bus operators, and many parents could not leave work in the middle of the afternoon to transport their children. Consequently, many families dropped out of the program. SunLine was approached by three such agencies who requested after-school service. In providing these trips on SunBus routes, much like tripper service in concert with FTA guidelines and with supervision provided by agency staff, SunLine has been lauded by the agencies and the parents of the children for saving the day.

#### **IV. BACKGROUND**

This section provides a brief description of SunLine Transit Agency's public transportation services and the school bus services of the three different school districts in the Coachella Valley.

##### **SunLine Transit Agency**

SunLine Transit Agency is a Joint Powers Authority created by the County of Riverside and various cities in the Coachella Valley, including Desert Hot Springs, Palm Springs, Cathedral City, Rancho Mirage, Palm Desert, Indian Wells, La Quinta, Indio, and Coachella.

The Coachella Valley is located in the center of Riverside County, approximately 120 miles to the east of Los Angeles. The northern and southern borders of the valley are mountain ranges roughly 12 miles apart. Tourism and agricultural are the top two local industries.

The SunLine service area, about 816 square miles in size, covers much of Coachella Valley. The permanent population of this service area is about 260,000, although seasonal residents add another 100,000 to 150,000, not to mention millions of tourists. The eastern part of the valley, especially, is very rural.

The SunLine Transit Agency provides (1) a public transit service, called *SunBus*; (2) an ADA complementary paratransit service, called *SunDial*; and (3) a subscription-based paratransit service for sponsored human service agency clients requiring accessible transportation, called *Social Services*. SunBus is directly operated by SunLine. The two paratransit services are operated by Laidlaw, under contract to SunLine, but with SunLine vehicles. The SunBus fleet is composed of 38 vehicles, while the paratransit fleet is composed of 18 vehicles. The entire fleet is both accessible and powered by CNG. Vehicles are garaged and maintained at SunLine's main facility in Thousand Palms, and at its Indio facility.

The SunBus system, completely redesigned in 1993, may best be described as a modified pulse system of 12 fixed routes that link the entire Coachella Valley from Desert Hot Springs in the northwest to Mecca in the southwest. The major trunk line that forms the spine of the system is Line 111, which connects Palm Springs with Indio. The other 11 routes serve as community-based routes that play a dual role: (1) they provide transit service within their respective communities, and (2) they all connect with Line 111, serving as feeders and distributors. SunBus recently added weekend service and now provides service seven days a week between the hours of 4:00 a.m. and 11:00 p.m.

SunBus fares vary by time of day. The peak fare (weekdays 6:00-9:00 a.m.; 2:00-6:00 p.m.) is \$0.75, plus \$0.25 for transfers. A \$0.25 fare and \$0.10 transfer charge is also available during the off-peak for seniors and persons with disabilities. In addition, monthly passes are available, ranging from a Senior/Disabled Pass (\$16.00) to a Regular Pass (\$28.00). Youth Passes are available for \$20.00. In addition, a Regular Handy-10 (10 ride) ticket book and a Youth Handy-10 ticket book are available for \$7.50 and \$5.00 per book, respectively. Note that with the ticket book, fares for youth are reduced from \$0.75 to \$0.50. With a monthly Youth Pass, the average fare is \$0.50 if the holder makes two trips (one round-trip per day). If the holder makes more trips, the average fare for the holder is further reduced.

In FY 1997, SunBus served over 2.95 million (unlinked) passenger trips over 1.56 million revenue miles at an operational cost of \$8.4 million. SunBus's unit costs were \$4.84 per vehicle mile and \$2.83 per passenger trip. Productivity of the SunBus service was 1.89 passenger trips per mile. Special Services (combining SunDial and Social Services) served 66,000 trips over 25,000 revenue vehicle hours at an operational cost of \$1.06 million. Special Services' unit costs were \$37.22 per vehicle hour and \$16.13 per passenger-trip. Productivity of Social Services was 2.67 trips per hour.

### **Palm Springs Unified School District**

The Palm Springs Unified School District is a 502-square-mile area located in the northwestern portion of the Coachella Valley and includes the communities of Palm Springs, Cathedral City, Rancho Mirage, Thousand Palms, and Desert Hot Springs. The PSUSD has two high schools, four middle schools, and 13 elementary schools. The total student population is about 18,600 students.

PSUSD retains Laidlaw as its school bus operations contractor. Roughly 900 high school students, 900 middle school students, and 2,100 elementary school students are transported between home and school each day via school buses. The cost per one-way trip for school bus transportation works out to \$1.44/passenger-trip.

Up through the 1992-93 school year, PSUSD's walk distances (beyond which students were eligible for home-to-school transportation) were 0.75 miles for grades 1 through 3, 1.5 miles for grades 4 and 5, 2 miles for middle school students, and 3 miles for high school students. As the funding crisis in the early 1990s grew in severity, the walking distances were increased in 1993-

94 to 1 mile for grades 1 through 3, 2 miles for grades 4 and 5, 2.5 miles for middle school students, and 4.5 miles for high school students. The increase in walk distances and the subsequent decrease in the required number of school buses saved PSUSD approximately \$1 million annually. These walk distances remain in effect today.

### **Desert Sands Unified School District**

The Desert Sands Unified School District (DSUSD) is located in the central portion of the Coachella Valley and includes the communities of Palm Desert, Indian Wells, Bermuda Dunes, La Quinta, and Indio. The DSUSD has three high schools, four middle schools, and several elementary schools.

DSUSD has its own fleet of school buses and, with a roster of approximately 60 drivers, directly operates home-to-school transportation. Roughly 1,200 high school students, 1,000 middle school students, and approximately 2,500 elementary school students are transported between home and school each day via school buses. DSUSD's cost per one-way trip for school bus transportation works out to about \$0.77 per passenger-trip.

### **Coachella Valley Unified School District**

The Coachella Valley Unified School District (CVUSD) is a 1,700-square-mile area located in the rural, southeastern portion of the Coachella Valley. The CVUSD has one high school, one middle school, and three elementary/middle schools.

CVUSD has its own fleet of school buses and directly operates home-to-school transportation. By changing bell times and modifying routes, CVUSD recently reduced the number of tours from 23 to 8. Roughly 2,000 high school students and 2,550 middle/elementary school students are transported between home and school each day by school buses. The cost of student transportation is approximately \$2.1 million per year, which works out to about \$1.32 per passenger-trip.

## **V. GOALS AND OBJECTIVES**

### **Thousand Palms Home-to-School Student Transportation Pilot Demonstration Goals**

The PSUSD and SunLine Transit Agency were equal partners in the pilot demonstration. For PSUSD, the primary, stated goal of the demonstration was to achieve a net savings. Inherent in the premise of the demonstration was that the elimination of high school routes from the Thousand Palm area to both Palm Springs High School and Cathedral City High School would lead to the elimination of one school bus.

Assuming that this could be accomplished, a secondary goal for PSUSD was to determine whether or not the use of public transit was a safe and reliable mode for home-to-school student transportation and to determine what other advantages or disadvantages accrued to the student vis a vis school bus transportation.

For SunLine Transit Agency, the primary goal was to assist one of its member community's achieve its stated goals, i.e., to fulfill a public need. A secondary goal of the agency was to increase ridership. By expanding a three-days-a-week service to a weekday service, SunLine hoped to capture more general public trips in addition to accommodating the Thousand Palms high school students. By giving students monthly passes, SunLine hoped that the students might take advantage of other opportunities that transport on SunLine offered. SunLine also aspired to convince these students (and their parents) that an automobile is not the only answer to their transport needs, and that transit provides a viable, low-cost alternative; in working toward this goal, SunLine hoped that these students, as prospective commuters in the not too distant future, would become part of the solution to reducing traffic congestion and air pollution in the Coachella Valley.

### **Group Trip Service Goals**

In approaching SunLine about utilizing its SunBus routes for group trips, PSUSD was hoping that it could find an affordable way to transport groups of supervised students during school (field trips) and after school (to athletic contests). The school bus contract allows for six hours of work per bus, which could include a field trip or athletic trip if that trip (along with the home-to-school runs) fit into the six-hour threshold. If it did not, the school bus contractor could make the school bus available, but at a cost which was not affordable. The ultimate goal for PSUSD was to give its students these group trip opportunities, but at the same time to remain fiscally responsible.

In approaching SunLine about utilizing its SunBus routes to transport supervised elementary school students from school to after-school programs, organizations such as the Cathedral City Boys and Girls Club, the La Quinta Boys and Girls Club, and the YMCA/Jean Benson Child Care Center in Palm Desert all hoped to give families without private transportation an opportunity to take advantage of their programs. When the school districts no longer could afford school bus transportation for this purpose, several families dropped out of the programs because they had no way to transport their children to the after-school sites. The after-school programs sought proposals from private bus companies, but at an average of \$200 per day per bus, the rate was unaffordable. To keep their children in the program, some parents were forced to leave work early to transport their children from their elementary school to the after-school program site; others could not, and consequently had to pull their children from the program.

For SunLine, the implementation of the group trip program was viewed as a response to the needs of its member communities, without competing with private bus companies. SunLine took this goal very seriously. It did not wish to deprive private bus companies of business opportunities. In these cases, the group trips simply would not have been made. Thus, SunLine

responded to these requests as a community service. Accommodating group trips is also in concert with SunLine's overall goal of reducing traffic congestion and air pollution by providing low-cost and customer-friendly public transit to as many people -- and for as many trip purposes -- as possible. A secondary goal of SunLine is to find ways to increase ridership, thereby further justifying the public expenditures for the SunBus fleet, infrastructure, and staff. Such group trips, operated on regular SunBus routes, are open to the general public, per FTA guidelines; hence, another secondary goal of SunLine is to see how many additional non-student riders are able to utilize the increased level of service.

## **VI. NARRATIVE DESCRIPTION**

### **Thousand Palms Home-to-School Student Transportation Pilot Demonstration**

At the close of the 1990-91 school year, the PSUSD was confronted with a financial crisis because of a decrease in state funding. One of the areas targeted for scrutiny was the home-to-school transportation program, because state funding only covered about 40 percent of the cost. The remainder of the transportation costs were covered by unrestricted funding from lottery revenue. At that time, PSUSD was in the midst of a three-year contract with a national, private school bus carrier. The school bus contract was typical of the industry: it provided for six-hour days per school bus, at rate of \$204.56 per day (for the 1991-92 school year), and a minimum of 180 school days per year. This six-hour piece of work included home-to-school transportation in the morning, kindergarten transportation during the mid-day, and return trips during the afternoon. The six-hour piece also could include field trips and athletic trips, if they could fit, along with the home-to-school work, within the six hours. If not, an additional fee, based on a per-hour plus a per-mile fee, would be charged.

Also typical of the industry, the PSUSD school bus tours, designed by the operator, generally consisted of three or four tiers: a high school run, a middle school run, and one or two elementary school runs. Because the walking distance is greater for middle school students than elementary school students, and because the walking distance is greater for high school students than middle school students,<sup>1</sup> there are generally more elementary school runs than middle school runs and more middle school runs than high school runs, although the judicious use of staggered bell times can often result in fitting two elementary school runs into one school bus tour.

The General Manger of SunLine Transit Agency was serving on the PSUSD School Board at this time. He suggested that PSUSD might wish to look into exploring the use of public transit for the home-to-school transportation of high school students, if the number of school buses could be reduced as a result. From this suggestion, PSUSD staff, working with SunLine and private school bus operator staff, conceived of a pilot demonstration to be tested during the 1991-92 school year. By eliminating high school bus runs from the Thousand Palms area to Palm Springs

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<sup>1</sup> For the 1990-91 school year, the walk distances beyond which students were eligible for school bus transportation were as follows: elementary school students (grades 1 through 3): 0.75; elementary school students (grades 4 and 5): 1.5 miles; middle school students: 2 miles; high school students: 3 miles.

High School and Cathedral City High School, the private operator conceded that it would be possible to reconfigure the school bus tours so that one less bus would be needed. At a daily rate of \$204.56 and a minimum of 180 school days per year, this would generate a savings of \$36,820. However, as part of the pilot demonstration, PSUSD would purchase from SunLine -- and distribute to the eligible high school students in Thousand Palms -- monthly transit passes, called Freedom Passes, at a rate of \$19.00 per student per month. Based on boarding counts from May 1991, it was estimated that PSUSD would provide passes to about 80 high school students for 10 months, equating to an outlay of \$15,200. Thus, the net savings would be \$21,620, not including lost state revenue from mileage-based funding, which was determined by PSUSD staff to be negligible.

The demonstration pilot project was planned and approved in August 1991. SunLine expanded three of its routes (Lines 8, 3, and 19) enabling (1) direct, through service from Thousand Palms to Palm Springs High School, i.e., the same bus was used for Line 8 from Thousand Palms to Cathedral City (at Ramon and Date Palm) and for Line 19 from Cathedral City to Palm Springs High School; and (2) service to Cathedral City High School by transferring from Line 19 to Line 3 in Cathedral City (at Ramon and Date Palm).

PSUSD and SunLine conducted a number of community outreach meetings prior to and during the demonstration to explain how the service would work and to hear and respond to the concerns of parents. The two most voiced concerns were (1) safety issues associated with the co-mingling of students and the general riding public, lack of supervision, and perceptions that riding on a school bus vehicle was safer than riding on a public transit vehicle; and (2) the opportunity for students to get off the bus wherever they pleased. With respect to the safety issue, SunLine officials assured the parents that the SunBus drivers would receive special training related to student transportation, and that they would be especially attentive to interactions on-board. They also added that there had been no conclusive evidence to suggest that one mode was safer than the other. SunLine officials also suggested that the opportunity to get off at a different stop might actually be a benefit, rather than a disadvantage, as it would enable a student to get an after-school job. PSUSD staff also pointed out that the flexibility offered by SunBus schedule would enable students to participate in after-school sports and clubs and still get a ride home.

The demonstration was implemented successfully. As required by law, students were dropped off at a nearby SunBus bus stop, and not on school grounds. SunBus schedules were modified to reflect the schedule changes. The logistics of the Cathedral City transfer to Cathedral City High School went very smoothly. And, although a seat could not always be guaranteed because of the numbers of riders on some days, SunLine would respond by placing an additional vehicle into service when needed. Interestingly, the lack of a *guaranteed* seat was never raised by parents as a concern. Parental qualms were appeased by the overwhelmingly positive experiences of their children, the professionalism of the SunBus drivers, and SunBus's accident-free record. Because of the positive experiences and benefits, several Thousand Palms families with high school students who were participating in this demonstration opted to purchase Freedom Passes for their middle school-age children, since the middle schools they attended were located close to the high schools. This too turned out to be a success, with one exception: an on-board scuffle between a

high school student and a middle school student. Another unexpected result was that pass usage did not significantly decrease on weekday holidays during the school year, indicating that high school students used SunBus for transportation on these holidays. Just about the only complaint that arose from the community came from a few senior riders who were not anxious to share "their" bus with the students.

As an indirect benefit of the demonstration, SunLine also achieved one of its other goals: an increase in transit usage by general public riders. Prior to the demonstration, Line 8 only operated three days a week (Monday, Wednesday, and Friday). With the expansion of this route to weekday service, Line 8 became a viable alternative for commuters as well. Ridership on Line 8 totaled 7,255 trips from September through June in 1990-91, the year before the pilot demonstration. During those same ten months in the following year, ridership on Line 8 totaled 35,319 trips, of which 23,986 were pass trips. If one assumes that the passes were student trips (SunLine did not differentiate between regular and youth passes at this time), then the number of general public trips increased by 56 percent.

After the conclusion of the demonstration, PSUSD elected not to pursue the purchase of transit passes as an alternative to providing school bus service -- either for the Thousand Palms route or on a more widespread basis. Despite the achieved savings and the acknowledged support of the Thousand Palms families involved, PSUSD's decision was made because (1) the school bus contractor demonstrated that it could reduce its school bus fleet further and that the Thousand Palms route could be reinstated without additional cost, and (2) regardless of the decision, SunLine had made a decision to permanently keep the new routes and schedules anyway; hence, parents/students who wished to take advantage of SunBus could do so, without PSUSD paying for it. This is exactly what happened. For example, pass ridership on Line 8 totaled 2,508 trips in May 1993, which actually represented a 5 percent increase over the 2,389 pass trips in May 1992 (during the demonstration), despite the reinstatement of school bus service.

Looking at the system-wide increases of youth pass ridership over the years (SunLine began differentiating Youth Passes from Regular Passes in 1993), it would appear that SunBus has become a viable resource for home-to-school transportation, as the number of Youth Pass trips has more than doubled in the four years since the demonstration, increasing from about 78,500 trips in 1993-94 to 175,400 in 1996-97, and from 2.9 percent of the total SunBus ridership in 1993-94 to 5.9 percent in 1996-97. And, looking at how Youth Pass ridership has fared on Line 8, which in 1993 became Line 31, we see that during the course of this current school year, Youth Pass ridership reflected between 18 percent and 24 percent of the total ridership, depending on the month. Interestingly, the Youth Pass ridership on this route (and many other routes) remained fairly constant during the summer, indicating that transit has become a viable mobility option for youth in general.

### **After School Tripper Services**

The Cathedral City Boys and Girls Club (CCBGC) operates an after-school program and for a few years had been directly operating two vans to transport children from Landau Elementary

School and Sunny Sands Elementary School. As the number of participating children increased, the vans alone were not enough. This problem was exacerbated by the loss of the second driver. CCBGC looked into private carriers but found their rates, which ranged from \$200 to \$300 per day, to be unaffordable. The only option available for parents was to transport their children directly, which for many involved leaving work early. Those who could not do this had to arrange with other parents or friends to transport their children or pull their children from the program. CCBGC suffered a severe drop in program participation as a result. In 1994, CCBGC approached SunLine, which responded to CCBGC's request by instituting an after-school tripper service from Landau School following Line 31 and carrying between 25 and 30 children per school day. One year later, SunLine was asked to initiate similar after-school tripper service, with a similar ridership, for Sunny Sands. When these after-school trips were first initiated, the parents were responsible for purchasing books of fare tickets for their children. This proved to be unworkable, as the children frequently lost or forgot to bring their tickets. Accordingly, CCBGC included the cost of these tickets in the monthly fee for the program, with supervisory staff paying the fare each day. To date, the experience has been very satisfactory and has been applauded by CCBGC and parents alike.

At the beginning of the current school year (September 1997), the new transportation director of the DSUSD informed the YMCA that it would no longer transport students from Lincoln and Washington Elementary Schools to the YMCA's after school program at the Jean Benson Child Care Center as well as to the YMCA's main facility. Both schools are located in Palm Desert, three or four miles away from the after-school program site, which is too far to walk. The YMCA approached PSUSD's school bus contractor for a cost proposal, but the contractor did not have any spare vehicles available at that time. Other private contractors in the valley who were contacted quoted prices ranging from \$800 to \$1,000 per week. The YMCA, learning of the CCBGC after-school tripper service, then contacted SunLine, which was able to initiate service. The after-school trip starts at Lincoln Elementary School, where it picks up 40 students, drops 25 at the Jean Benson Child Care Center, and drops the remainder at the YMCA's main facility. Then the bus picks up about 25 students from Washington Elementary School (which has a later dismissal time) and transports these students to the YMCA. The cost of fare tickets (at \$0.50 per trip) are included in the program's monthly fee. Tickets are then handed to the driver by the YMCA's on-board monitor as students board the bus. The only incident that has marred the overwhelmingly successful program was that the school failed to tell SunLine about a scheduled day off (a teacher in-service day), and the SunBus bus arrived on schedule.

A similar story underlies the after-school tripper service set up for the after-school program run by La Quinta Boys and Girls Club (LQBGC). The LQBGC is also located within the DSUSD and faced the same dilemma as the YMCA; however, LQBGC did not know of SunLine's after-school trip service at that time. LQBGC called around to different carriers, and, as above, found the private carrier rates to be unaffordable. Consequently, LQBGC informed the parents that they had to fend for themselves. As a consequence, the program lost 40 of the 250 participating students because their families had no way to transport them to the LQBGC. Staff contacted the City of La Quinta about the problem. The City contacted SunLine, which implemented after-school tripper around Line 70 in December 1997. Initially involving 20 children, ridership has

since grown to 30 to 40 trips per day. Note, too, that the LQBGC now also utilizes SunBus for group trips as well (see below). Parents of these children are delighted.

## **Group Trip Services**

In concert with SunLine's mission to provide low-cost and customer friendly transit service to as many residents and visitors to the Coachella Valley as possible, and as part of SunLine's ongoing effort to introduce people to public transit, SunLine initiated in 1992 a special fare (\$0.50 one way; \$1.00 per round trip) for groups composed of 10 or more people going from one common origin to one common destination on SunBus. Further, SunBus allows groups of 40 or more to request that additional buses be placed into service on a regular route at the time of travel, recognizing that SunBus has a limited number of vehicles, that it can only honor a certain number of requests per day, and that the supply of regular SunBus service takes precedence over these requests. Indeed, SunLine has begun limiting the number of group trips to five per day and typically does not honor requests that call for a pick-up before 8:30 a.m. and between 2:00 p.m. and 4:00 p.m.

It is important to distinguish this service from privately-contracted charter service. First, all group trips must be taken along SunBus's regular routes; deviations up to one mile only are permitted, per FTA regulations. Second, as with tripper service, SunBus vehicles involved in group trips are open to the general public and will make any stop along the regular route where there is a passenger wishing to get on or off the bus. Third, payment (cash fare, tickets, or passes) must be made at the time of boarding.

Group trips and additional vehicles may be requested by calling SunLine's customer service staff. Requests must be placed at least five days and up to three months in advance. Cancellations must be placed by noon on the preceding day.

Once a group trip request is booked, the customer service representative (CSR) generates a request sheet and gives it to the SunBus dispatcher, who determines whether the trip request can be accommodated without impairing the transit service. If there is a problem, the CSR calls the contact back to negotiate a different time or day.

As detailed below, group trip ridership has increased from 40,000 trips to 63,000 over the last four years, while remaining relatively constant in terms of percentage of total trips at about 2 percent. About 75 percent of the group trips involve groups of students from the three school districts; these reflect requests for field trips taken by high school, middle school, and elementary students making field trips during the school day, and high school students making athletic/band trips. Group trips involving students require supervision at a ratio of one adult for every 6 to 10 children, per district policy. The remaining group trips reflect requests from senior citizen groups, the YMCA, Boys and Girls Clubs, day care centers, etc.

## VII. DATA AND STATISTICS

### Thousand Palms Home-to-School Student Transportation Pilot Demonstration

Administrative and Operating Labor Hours and Cost - While SunLine and PSUSD did not keep track of the administrative effort to plan the demonstration and perform start-up activities such as public meetings, they did keep track of operational costs. For PSUSD, there were clear savings. The elimination of high school bus routes from the Thousand Palms area to Palm Springs High School and Cathedral City High School enabled the elimination of one school bus (\$204.56 per day for the 1991/92 school year). High school students who would have been eligible for student transportation were given Freedom Passes for SunBus at a cost of \$19.00 per month to PSUSD. Based on a 180-day school year, the annual savings from eliminating one school bus was \$36,820. The total cost of Freedom passes purchased by PSUSD was \$15,200. Thus, the net savings of this demonstration to PSUSD was \$21,620.

For SunLine, the expansion of service to Tuesday and Thursday totaled about 5 hours per day, or 10 hours per week, while the additional service on Monday, Wednesday, and Friday totaled about 5 hours per day or 15 hours per week. Averaging these, we calculate an average daily total of 5 hours per day, which equates to 940 hours over the school year, based on a 188-day schedule. This operational cost, at about \$50 per hour, totaled \$47,000 over the course of the demonstration period. Fare revenue (in addition to the PSUSD pass sales) can be estimated from Line 8 total ridership during the demonstration period (35,319) and pass trips (23,986). The difference in trips (11,333), at \$.75 per trip yields \$8,500 in general public fare revenue. Thus, total revenue is equal to \$8,500 plus the \$15,200 in pass revenue for PSUSD. Subtracting this fare revenue from the total operating cost leaves \$23,300 as the SunLine deficit.

The total net cost (subsidy) for the taxpayer can be calculated by subtracting the PSUSD savings of \$21,620 from the SunLine deficit of \$23,300; the total net cost to the taxpayer was \$1,380. To put this in perspective, it is appropriate to calculate this net cost on a per-trip basis. Total ridership on Line 8 from September 1990 to June 1991 was 7,255 trips. During the same months the following year, ridership totaled 35,319 trips. The increase in ridership was 28,064. Based on this figure, the taxpayer cost of the demonstration was \$0.19 per trip.

Vehicle Service Hours - From the perspective of the PSUSD, dropping one school bus reduced the number of service hours per day by six. At the same time, SunLine increased its service hours during the demonstration by an average of five hours per day. (See the discussion above.) Neither PSUSD nor SunLine tracked changes in vehicle service miles.

Ridership - Total and pass ridership on Line 8 was tracked by month. The table below shows the degree to which the routes were used by students during the 1991-92 demonstration period (September – June) and also compares these figures with the counterpart ridership for the preceding year.

Total Ridership (Line 8)		Pass Ridership (Line 8)	
<u>1990-1991</u>	<u>1991-1992</u>	<u>1990-1991</u>	<u>1991-1992</u>
7,255	35,319	161	23,986

Accidents, Incidents, Passenger Injuries - No accidents or injuries occurred during the demonstration. The only reported incident was an on-board scuffle between a high school student and a middle school student. Note that the middle school student was a sibling of one of the high school riders and was using SunBus to go to and from school; his pass was purchased from SunLine by the family.

Complaints - At the time of the demonstration, SunLine did not track complaints either by route or by customer type (e.g., youth). Therefore, there is no data on complaints available that can be traced specifically to the demonstration.

**Ongoing Use of SunBus for Home-to-School Transportation**

Ridership - While PSUSD no longer formally participates in the use of SunBus for home-to-school transportation by purchasing transit passes for its students, Youth Pass ridership has steadily increased over the years. The 1993-94 school year serves as a reasonable baseline, because SunLine began differentiating Youth Passes from Regular Passes in 1993. As shown in the chart below, the number of Youth Pass trips has increased from about 78,500 trips in 1993-94 to 175,400 in 1996-97, and from 2.9 percent of the total SunBus ridership in 1993-94 to 5.9 percent in 1996-97.

Summary of Youth Pass Trips on SunBus				
<u>School Year</u>	<u>Youth Pass Trips</u>	<u>% Increase</u>	<u>Total Trips</u>	<u>% Youth Pass Trips</u>
1993-1994	78,547	-----	2,702,563	2.9%
1994-1995	113,608	45%	2,571,021	4.4%
1995-1996	152,110	34%	2,809,319	5.4%
1996-1997	175,428	15%	2,965,726	5.9%

It is also noteworthy that Youth Pass ridership on many of the SunBus routes has remained fairly constant during the summer (averaging 14,600 trips per month on the selected routes during July and August compared to an average of 15,000 trips per month on those same routes from September through December), indicating that transit has become a viable mobility option for youth in general.

**After-School Tripper Services**

As is the case with regular tripper service, SunLine does not distinguish after-school tripper ridership -- and the service and cost statistics that pertain to that service -- from youth ridership on its regular SunBus routes.

## Group Trip Services

Administrative and Operating Labor Hours and Cost - SunLine and PSUSD do not keep specific track of the administrative effort required for handling group trips. SunLine does have one staff person who is responsible for intaking group trip requests and passing these requests along to the dispatcher who, in turn, is responsible for ensuring that an appropriate number of vehicles are added to certain routes at certain times of the day to accommodate these group trips. Group request intake and dispatching consumes about 30 percent of their daily responsibilities. This equates to about \$17,651 per year in administrative labor costs. Operational costs for group trips can be estimated by multiplying vehicle service hours times the operational cost per hour. In FY 1997, 890 hours of service were devoted to group trips. At a unit cost of about \$50 per hour for SunBus operations, the operation cost of group trips is estimated to be \$44,500 for FY 1997.

Another way to calculate total costs of the group trip program is to multiply the fully allocated unit cost of SunBus (\$67.75 per hour) times the group trip service hours above. This works out to about \$60,298 for FY 1997.

Fare revenue for FY 1997, at \$1.00 per round-trip, is equal to about \$63,000 based on 63,000 group trips being served. Hence, the total SunLine subsidy (taxpayer cost) for operating group trips in FY 1997 was \$2,702, or about \$0.23 per trip.

One could also compare this subsidy with what PSUSD, as a publicly funded institution, would have spent for field trips. However, it is important to note that such a comparison is not appropriate since PSUSD had decided that it could not afford to provide these group trips.

Vehicle Service Hours - As shown below, total SunBus service hours devoted to group trips has grown since FY 1994, when SunLine began tracking this information.

FY 1994	247 hours
FY 1995	550 hours
FY 1996	825 hours
FY 1997	890 hours

Ridership - Group trip ridership over the last four years is shown below. Over this four-year period, group ridership has increased by 57 percent, while remaining relatively constant at about 2 percent of total ridership.

Summary of Group Trip on SunBus				
Fiscal Year	Group Trip Ridership	Percentage Increase	Total Ridership	% Group Trip Ridership
1993-1994	40,227	-----	2,702,563	1.5%
1994-1995	45,798	14%	2,571,021	1.8%
1995-1996	59,211	29%	2,809,319	2.1%
1996-1997	62,296	6%	2,965,726	2.1%

Accidents, Incidents, Passenger Injuries - No accidents or injuries have occurred with any group trip since this service was initiated.

Complaints - SunLine's complaint tracking system does not differentiate complaints associated with group trips.

## **VIII. LEGAL AND REGULATORY ISSUES**

### **Federal Regulations**

Charter and Tripper Service - As a recipient of federal funding, SunLine Transit Agency is prohibited under 49 CFR Part 605 from providing exclusive (i.e., charter) bus service. However, SunLine is allowed to provide school tripper service, under the conditions that such service is open to the public, must serve the regular bus stops, cannot deviate more than one mile from the regular route, and must be delineated on route schedules and maps.

FTA is currently looking into complaints by the California Bus Association (representing private carriers) that SunLine's group trip service constitutes charter service, violating these federal guidelines. FTA has not yet ruled on the complaint. Until a ruling is made, FTA has directed SunLine to continue to provide these services.

### **California State Regulations**

Under Section 39801.5 of the California Codes, for the purpose of home-to-school student transportation, school boards may (1) contract out for school bus service; or (2) pay parents, if this proves to be more cost effective. Under the guidelines of the latter, the board may pay parents an amount "no greater than the statewide average of non-subsidized cost...on a publicly owned or operated transit system..." One could interpret Option 2 to enable the school board to pay parents the equivalent of transit fare, and then for the parents to use that money to pay for monthly transit passes or fare tickets. Or, following that interpretation, the school boards could bypass the parents and pay for the fare media directly. This is what was done by PSUSD during the demonstration. This is also what PSUSD does for group trips taken on SunBus.

SamTrans, the public transit agency serving the San Mateo area, serves as a good model. School districts pay the regular fare for transportation-eligible students who use SamTrans to get to and from work. Note, too, that the school districts also serve as transit pass outlets, for which they receive a 5 percent discount, ostensibly to cover administration. The school districts use this discount to further subsidize the pass cost for low-income students.

## IX. EVALUATION

### **Evaluation of the Thousand Palms Home-to-School Student Transportation Pilot**

In evaluating the Thousand Palms pilot demonstration, it is appropriate to identify and quantify, if possible, whether specific objectives were achieved.

For PSUSD, the primary, stated goal of the demonstration was to achieve a net savings. A net savings of \$21,620 was achieved. A second goal for PSUSD was to determine whether or not the use of public transit was a safe and reliable mode for home-to-school student transportation. SunBus was deemed to be both safe and reliable. A third goal was to identify other advantages or disadvantages. PSUSD found that the increased flexibility of SunBus enabled Thousand Palms high school students to participate in after-school, extra-curricular activities. Many students did, although PSUSD did not track the exact number. The SunBus drivers who drove these routes also reported that a number of students got jobs at the mall (located next to the Palm Springs High School) knowing that they could get a ride home after work using SunBus. The drivers also reported that a handful of Thousand Palms middle school students, mostly siblings of high school riders, were able to utilize SunBus because the middle schools were located a short walking distance from the high schools. Indeed, just about the only negative mark, remembered by a bus driver, came from an incident involving a scuffle between a high school student and a middle school student over a seat. It should be noted also that the middle school student was not riding SunBus as part of the demonstration. The other negative mark, also remembered by one of the bus drivers, were some complaints voiced by a few senior riders that the students had overtaken *their* bus. Despite the fact that the demonstration was not continued, the Superintendent of PSUSD and the Chair of the School Board (a parent herself) viewed the demonstration to be a success. And, while complaint records were not available for scrutiny, the general endorsement of the parents of the Thousand Palms student-riders can be substantiated in the number of students who continued to use SunBus. For example, despite the reinstatement of school bus service in the Thousand Palms area, SunBus youth pass ridership on Line 8 totaled 2,508 trips in May 1993, which actually represented a *5 percent increase* over the 2,389 pass trips in May 1992 (during the demonstration).

For SunLine Transit Agency, the primary goal was to assist one of its member communities achieve its stated goals. It did this. A second goal was to increase ridership. Ridership on the routes involved increased from 7,255 trips during the 1990-91 school year to 35,319 trips during the 1991-92 school year. General public ridership increased by 56 percent, largely as a result of the expansion of service on these routes to weekday service. SunLine also aspired to convince these students (and their parents) that SunBus was a viable transportation alternative to the automobile. While achievement of this goal is perpetually a work in progress, the evidence of student pass usage on weekday holidays during the demonstration period, and the growth of youth pass ridership (57 percent) over the last four years, albeit bolstered in part by PSUSD's increase in walk distances at the beginning of the 1993-94 school year, would appear to substantiate that SunLine has made some significant inroads toward this goal.

The total net cost (subsidy) for the taxpayer was calculated by subtracting the PSUSD savings of \$21,620 from the SunLine deficit of \$23,300. Thus the total net cost to the taxpayer was \$1,380, or \$0.19 per trip.

While it was viewed as a success by most of the participants, PSUSD opted to discontinue the pilot demonstration when the school bus contractor found a way to streamline its routes, resulting in (1) a reduced number of vehicles (and hence additional savings) and (2) the reinstatement of the Thousand Palms runs without additional cost. At the same time, SunLine had already made a decision to permanently keep the new routes and schedules anyway; hence, parents and students who wished to take advantage of SunBus could do so without PSUSD paying for it.

Undeterred by the discontinuation of the pilot demonstration, SunLine remained committed to designing its routes and schedules so that students could take advantage of SunBus, especially when SunLine restructured its service delivery design to a modified pulse system in 1994. SunLine also commissioned a study in 1996, *SunLine Youth Transit Ridership Project*, performed by Crain & Associates, to determine the advantages and disadvantages -- and feasibility in general -- of the valley's three schools utilizing their school bus fleets and transit in a more effective manner. The study was based on an intriguing premise: that eligibility for school bus transportation should be based not only on walk distances from school, but also on walk distances from existing transit routes. The conclusion of the study was that some significant savings could accrue to all three school districts; for example, up to 32 percent in the case of PSUSD. However, the authors also acknowledged that since all three schools were able to afford school bus transportation for their high school and middle school students, there was no financial incentive at that time to modify their walking distance policies. In the meantime, the youth pass ridership would appear to substantiate that SunBus continues to be a viable (if informal) alternative for the home-to-school transportation of high school students -- and even middle school students.

### **Evaluation of After-School Tripper Service**

Here, too, it is appropriate to identify and quantify, if possible, whether specific objectives related to after-school tripper service were achieved. The goal of organizations such as the Cathedral City Boys and Girls Club, the La Quinta Boys and Girls Club, and the YMCA/Jean Benson Child Care Center in Palm Desert, as well as several other after-school child care programs, was to provide families without private transportation options with an affordable way to take advantage of their programs, especially those in the Desert Sands Unified School District, which ceased operating school bus service for this purpose. These organizations were able to meet this goal, with SunLine providing what amounts to tripper service to these sites and carrying between 25 and 40 supervised elementary school students per load. Program staff, community officials, and parents have applauded SunLine for providing this service.

## **Evaluation of Group Trip Service**

SunLine's primary impetus for implementing group trip service was to respond to the needs of member communities that were unable to afford the rates of private bus companies. SunLine's second goal was to increase ridership, thereby making better use of its vehicles and staff. Group trip ridership has increased from 40,000 in FY 1994 to 63,000 in FY 1997, an increase of 57 percent. SunLine's third goal was to introduce Coachella Valley youngsters to a clean, safe, and well-run public transit system, in hopes that these future commuters elect to ride public transit if posed with a choice. Achievement of this goal is a perpetual work in progress.

The goal of the school districts in approaching SunLine was to be able to continue to transport groups of students to field trips and athletic events in the face of diminishing resources. None of the three school districts were in the financial position to utilize their school bus contractor's vehicles or their own fleets and drivers for these group trips. By utilizing the valley's public transit system in a creative fashion, these three school districts have avoided having to deny their students these opportunities.

In FY 1997, SunLine provided 890 service hours of group trip service. At SunLine's fully allocated unit cost for SunBus (\$67.75 per hour), the estimated cost of providing this service works out to about \$60,300 for FY 1997. Group trip fare revenue for FY 1997, at \$1.00 per round-trip, is equal to \$62,300 based on 62,300 group trips being served. Thus, the fare revenue covers the cost of service.

## **X. TRANSFERABILITY**

### **Use of Public Transit for Home-to-School Student Transportation**

Students use public transit for home-to-school transportation all over the country. In many cases, the school district pays for the cost of transit passes or tickets for transportation-eligible students as an alternative to transporting them by school bus. In other cases, the family has a choice: utilize the school bus transportation provided or purchase a transit pass. The Thousand Palms demonstration is an example of the former, and it is important as a model because the use of public transit was demonstrated as an alternative and the demonstration resulted in a savings to the school district. The extra-curricular opportunities and employment opportunities that the flexibility of public transit allowed, as well as the turn-around of parental concerns about public transit, were additional results of the demonstration that subsequently induced SunLine to ensure that future route planning cater to home-to-school transportation, even if families and not PSUSD pay the fare. Thus, when walk distances were significantly lengthened, the community had a fall-back resource.

At the same time, the shortcoming of duplication of transit and school service, such as that which occurred in the Thousand Palms the year after the demonstration, is that it leads to a higher expenditure of tax dollars among PSUSD and SunLine collectively, even if it does not cost PSUSD any more, if transit service continues to operate in a duplicative manner. In short, the community has two groups of riders making the same journey on two different, subsidized vehicles.

In essence, the importance of the Thousand Palms demonstration and the continued use of Sun-Bus by students for home-to-school transportation with regard to their transferability is that they verify that (1) public transit is a viable, safe, and flexible mode for home-to-school transportation of older students; and (2) better coordination between the public transit system and the school bus transportation service to effect less duplication in conjunction with more effective contracting will lead to a lower taxpayer outlay, which will be especially important to communities facing financial constraints.

### **Use of Public Transit for the Transportation of Supervised Elementary School Students to After-School Programs**

Trip service has long been recognized and utilized as an important component of public transit services. The importance of the SunLine case studies involving the transportation of supervised elementary school students to after-school programs is that it has successfully expanded the conventional purpose of trippers from home-to-school transportation to school-to-after-school program transportation. The secondary importance of these SunLine case studies is that it demonstrates that a clean, safe, flexible, customer-sensitive, and customer-responsive public transit system can represent a safe mode of transportation for elementary school students, albeit supervised elementary school students, in a non-urban environment. We see no limitations to the transferability of using public transit for this reason, especially if no other affordable options exist.

### **Use of Public Transit for the Transportation of Supervised Groups of Students**

Of all the innovative services that SunLine has implemented and that are pertinent to the focus of this study, SunLine's group trip service represents the most unique aspect of coordination between public transit and student transportation. Offering group rates (for groups of 10 or more), ostensibly as an introduction to public transit, is fairly unique in itself; we know of no other transit system that does this. Enabling groups of 40 or more (which, for the most part, are composed of students or child day care groups) to request that an available transit bus be placed into service along regular routes, albeit with allowed deviations from the route at the time of travel, is also quite unique. Besides fulfilling a community need, especially where there are no other affordable options, the SunLine case study has demonstrated that the group trip service offers a marvelous way to introduce students to the benefits of public transit. Moreover, it is probably true that a transit property could effect such a service without specifically orienting its regular routes to the home-to-school transportation market; indeed, such a service could stand on

its own. At the same time, a transit property may wish to offer such a service as an entrée to a subsequent, higher degree of coordination in the context of home-to-school transportation. There would appear to be a great opportunity for other transit properties to provide group trip service, along with all of its caveats; however, they should probably wait until the FTA ruling on the California Bus Association complaint is finalized before pursuing such efforts.

## **CASE STUDY REPORT: TRUMBULL COUNTY, OHIO**

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### **I. AGENCY/ORGANIZATION**

Trumbull Area Coordinated Transportation (TACT)  
c/o Southwind Transportation, Inc.  
5437 Mahoning Avenue  
Youngstown, Ohio 44515

Tel: 330-270-0102

### **II. SUMMARY STATEMENT**

Prior to May 1997, a private, for-profit carrier took the lead in delivering and coordinating paratransit services in Trumbull County, a rural area of about 625 square miles in northeast Ohio. The private carrier took on this function as an extension of its school bus transportation business.

As of May 1997, this responsibility was formally transferred to the Trumbull Area Coordinated Transportation (TACT), a newly formed organization charged with coordinating fixed-route transit and paratransit services through the collaboration of the human service agencies in the County. While the County formed TACT, the private carrier was a driving force behind the initiative and assisted the County in obtaining state and federal funds for capital and operations.

TACT staff manage the system and directly operate a portion of the service. The private carrier continues to be involved as an operations contractor. Service consists primarily of paratransit service provided to human service agency clients, with sponsoring agencies purchasing service through TACT. Plans are afoot to expand this system to provide public transportation to the general public.

### **III. HIGHLIGHTS**

TACT is based on a collaborative approach to the delivery of agency transportation services. TACT purchases excess capacity available on private carrier buses for a significant segment of its population. Indeed, some of the ridership is carried on the private carrier's yellow school buses when the buses are not in school service.

TACT acquired its own vans and drivers and used the vans and drivers of participating agencies to expand its paratransit services in 1997. By the end of the year, it was providing and coordinating client transportation for seven human service agencies; this enabled it to provide

more affordable transportation to seniors and the disabled in the County. By 2000, TACT will be providing both fixed-route transit and paratransit services in the County.

Except for students, all customers on TACT will be carried on the same vehicles so that capital and operating costs can be covered by available local, state, and federal funding programs. There are no plans to co-mingle students and the general public on the Trumbull County School Districts' yellow school buses.

#### **IV. BACKGROUND**

##### **Description of the TACT Transportation System**

The TACT transportation system may best be described as a coordinated human service agency transportation collaborative. Mostly subscription-based paratransit services are provided to clients of sponsoring human service agencies, utilizing in-house vehicles, agency vehicles provided to TACT by the sponsoring agencies, and contractor vehicles. Service operates on weekdays only from 8:30 a.m. to 5:00 p.m.

Until recently, a private carrier under contract to TACT operated this paratransit service. Initially, human service agencies provided vehicles to TACT that the private carrier then operated. The private carrier also purchased two vehicles exclusively for TACT use and made available excess capacity on its (special needs) school bus fleet vehicles. This arrangement occurred between April 1997 and June 1998.

This paratransit system carried about 35,000 agency client trips in 1997, including seniors (39 percent), adults with disabilities (59 percent), and Head Start children (2 percent). About 95 percent of the trips were subscription trips. Except for students, all customers on the paratransit system are carried together.

On June 22, 1998, TACT opened its own bus-operating facility independent of the private carrier. TACT hired its own drivers. The plan now is to slowly assume all of the non-yellow bus paratransit service into TACT's direct operations. This has not yet occurred because TACT has not developed the capacity to provide the level of service that the private carrier now provides on a contracted basis for TACT. It is expected that TACT will develop this capacity by January 1, 1999. Until then, the private carrier has been hired to manage and dispatch the operation.

Currently, TACT handles about 90 daily trips using its own vans and drivers and the vans and drivers of the participating agencies; a total of about 12 vans are used. The private carrier handles about 65 daily TACT trips on its yellow school buses.

## **Description of Student Transportation Services**

Trumbull County is served by school transportation services provided by the County's 20 public school districts.

A private carrier operates all the school transportation services for students with special needs, including door-to-door services for students with disabilities. The door-to-door school transportation services in the County carry about 186,000 pupil passenger trips annually on 40 small, Type C yellow school buses owned by the contractor. They are the core of the TACT fleet.

## **Demographic Characteristics**

Trumbull County, with a population of 230,000 and covering 625 square miles, is largely rural. Its largest city, Warren, has a population of 51,000.

## **Regulatory Environment**

The State of Ohio does not permit non-school children to be carried on yellow school bus routes in school service. Yellow school buses and drivers can be used to carry the general public when not in school service. If a school bus is owned by a public school system, a question exists as to whether or not it can legally be used for service other than public school service. Privately owned school buses can be used for purposes other than providing public school bus service.

## **Political Environment**

The private carrier was a driving force in getting the Trumbull County Commissioners to create TACT to *coordinate* agency transportation services in the County as the basis for eventually developing a county-wide public transportation system. It assisted the County in obtaining federal and state funds for capital and operations. TACT has not yet secured federal and state operating and capital dollars. A process is underway that will determine the amount and timing of federal and state capital and operating disbursements.

Because of its success to date, TACT now has the political backing to provide fixed-route transit services in the County and to make more of its paratransit services available to the general public.

There are no plans to co-mingle students and the general public on the school districts' yellow school buses. The school districts have not, as of yet, joined the TACT collaborative.

## V. GOALS AND OBJECTIVES

TACT's ultimate mission is to develop a coordinated county-wide program of public transit, agency transportation, general public dial-a-ride, and specialized paratransit transit services, utilizing the collaborative efforts and expertise of all County departments and human service agencies. A coordinated county transit system is considered essential to the transportation-dependent residents of the region, particularly the poor, elderly, and disabled. By the year 2000, TACT expects to have successfully spearheaded the implementation of a county transit system that provides mobility and access for all citizens and is valued for safety, service, quality, cost-effectiveness, affordability, and long-term stability.

## VI. NARRATIVE DESCRIPTION

The private carrier (prior to May 1997) and TACT (since May 1997) have provided and coordinated the transportation services of a number of human service agencies to lower costs and provide more affordable transportation for seniors and for people with disabilities.

The main coordinating accomplishments of the private carrier and TACT are as follows:

- ◆ Use of existing yellow school bus services, on a non-co-mingling basis, to transport Head Start and human service agency clients (private carrier)
- ◆ Provision and coordination of the trips of seven human service agencies in 1997 (TACT)
- ◆ Provision of more affordable transportation to seniors and people with disabilities (TACT)

TACT plans to expand its services by the year 2000 to provide fixed-route transit and to make more of its paratransit services available to the general public.

## VII. DATA AND STATISTICS

### TACT passenger trips by customer group (November 1997)

- ◆ Paratransit services (private carrier operated)\*:
  - Valley Counseling 936
  - Salvation Army 284

\* The private company carried 1,220 TACT passenger trips on its yellow school buses in November 1997. This compared to 30,000 student trips for the school districts.

◆ Paratransit services (TACT operated):

- People with developmental disabilities	412
- Seniors	1,105
- Head Start	69
- Other	58
<b>TOTAL</b>	<b>2,864</b>

**TACT Operating Cost Statistics (November 1997)**

Paratransit services (private carrier)	Cost/Trip \$6.70
Paratransit services (TACT-operated)	Cost/Trip \$8.39

**Accidents and Incidents**

- Private Carrier	Two accidents per 100,000 miles
- TACT	None recorded in 1997
- Complaints	Not available

**VIII. LEGAL AND REGULATORY ISSUES**

School districts are limited in the extent to which they can integrate school bus and public transportation services. The State of Ohio does not permit non-school children to be carried on yellow school bus routes while the buses are in school service.

The State of Ohio does not permit transit vehicles to be used on school bus routes, although school children can be carried on transit systems that are open to the general public.

**IX. EVALUATION**

The co-mingling of non-school clients for the human service agencies in Trumbull County has enabled the private carrier and TACT to reduce costs and improve services to the general public.

Cost savings are offset to some degree by the routing and scheduling software that is required. This was a one-time cost of \$94,000 in early 1998, which compares to a projected TACT operating cost of approximately \$250,000 for 1998.

## **X. TRANSFERABILITY**

A school bus operator took the initiative to become the mobility manager in Trumbull County. While it was not successful in its bid, it was the catalyst for getting the County to form TACT to deliver and coordinate public transit services. The school bus operator continues to manage and provide the core services for the County transit system.

The private carrier/TACT initiative is a good example of a collaborative approach to the delivery of public transportation services. It demonstrates how the coordination of transportation services can maximize the use of vehicles to keep costs low, as the private carrier has done with the use of its school buses for non-school purposes. The experience of using yellow school buses to carry the general public in off hours is transferable to other jurisdictions.

# **Appendix D**

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## **Implementation Guide**

The **Transportation Research Board** is a unit of the National Research Council, which serves the National Academy of Sciences and the National Academy of Engineering. The Board's mission is to promote innovation and progress in transportation by stimulating and conducting research, facilitating the dissemination of information, and encouraging the implementation of research results. The Board's varied activities annually draw on approximately 4,000 engineers, scientists, and other transportation researchers and practitioners from the public and private sectors and academia, all of whom contribute their expertise in the public interest. The program is supported by state transportation departments, federal agencies including the component administrations of the U.S. Department of Transportation, and other organizations and individuals interested in the development of transportation.

The National Academy of Sciences is a private, nonprofit, self-perpetuating society of distinguished scholars engaged in scientific and engineering research, dedicated to the furtherance of science and technology and to their use for the general welfare. Upon the authority of the charter granted to it by the Congress in 1863, the Academy has a mandate that requires it to advise the federal government on scientific and technical matters. Dr. Bruce M. Alberts is president of the National Academy of Sciences.

The National Academy of Engineering was established in 1964, under the charter of the National Academy of Sciences, as a parallel organization of outstanding engineers. It is autonomous in its administration and in the selection of its members, sharing with the National Academy of Sciences the responsibility for advising the federal government. The National Academy of Engineering also sponsors engineering programs aimed at meeting national needs, encourages education and research, and recognizes the superior achievements of engineers. Dr. William A. Wulf is president of the National Academy of Engineering.

The Institute of Medicine was established in 1970 by the National Academy of Sciences to secure the services of eminent members of appropriate professions in the examination of policy matters pertaining to the health of the public. The Institute acts under the responsibility given to the National Academy of Sciences by its congressional charter to be an adviser to the federal government and, upon its own initiative, to identify issues of medical care, research, and education. Dr. Kenneth I. Shine is president of the Institute of Medicine.

The National Research Council was organized by the National Academy of Sciences in 1916 to associate the broad community of science and technology with the Academy's purpose of furthering knowledge and advising the federal government. Functioning in accordance with general policies determined by the Academy, the Council has become the principal operating agency of both the National Academy of Sciences and the National Academy of Engineering in providing services to the government, the public, and the scientific and engineering communities. The Council is administered jointly by both the Academies and the Institute of Medicine. Dr. Bruce M. Alberts and Dr. William A. Wulf are chairman and vice chairman, respectively, of the National Research Council.

Abbreviations used without definitions in TRB publications:

AASHO	American Association of State Highway Officials
AASHTO	American Association of State Highway and Transportation Officials
ASCE	American Society of Civil Engineers
ASME	American Society of Mechanical Engineers
ASTM	American Society for Testing and Materials
FAA	Federal Aviation Administration
FHWA	Federal Highway Administration
FRA	Federal Railroad Administration
FTA	Federal Transit Administration
IEEE	Institute of Electrical and Electronics Engineers
ITE	Institute of Transportation Engineers
NCHRP	National Cooperative Highway Research Program
NCTRP	National Cooperative Transit Research and Development Program
NHTSA	National Highway Traffic Safety Administration
SAE	Society of Automotive Engineers
TCRP	Transit Cooperative Research Program
TRB	Transportation Research Board
U.S.DOT	United States Department of Transportation