LESSONS FROM CASES OF CONSOLIDATED PUPIL / PUBLIC TRANSPORTATION IN MICHIGAN

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Acronyms and Abbreviations

ADA	Americans with Disabilities Act
ALTRAN	Alger County Transit
BATA	Bay Area Transportation Authority
CDL	Commercial Drivers License
CMH	Community Mental Health
DAR	Dial-A-Ride
FCS	Flint Community Schools
FIA	Family Independence Agency
GRATA	Grand Rapids Area Transit Authority
GRPS	Grand Rapids Public Schools
IDEA	Individuals with Disabilities Education Act
ISD	Intermediate School District
ISTEA	1991 Intermodal Surface Transportation Efficiency Act
MCTI	Manistee County Transportation, Inc.
MISD	Manistee Intermediate School District
MDOE	Michigan Department of Education
MDOT	Michigan Department of Transportation
MTA	Mass Transportation Authority (Flint, Michigan)
NPR	National Performance Review
TCAPS	Traverse City Area Public Schools
UPTRAN	Bureau of Urban and Public Transportation

EXECUTIVE SUMMARY

In recent years, the federal and state governments have promoted the use of joint service efforts by local governments in a variety of policy areas including public transportation. The 1991 Intermodal Surface Transportation Efficiency Act (ISTEA) contained several provisions to foster innovative service delivery. Partly in response to ISTEA, the Michigan Department of Transportation (MDOT) Strategic Plan for Public Transportation encourages coordination and consolidation of services where feasible. Proposal A, the school finance reform adopted by voters in March of 1994, created a set of incentives that encourages local school districts to investigate more efficient transportation options, including that provided by public transit agencies. In social welfare policy, the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Welfare Reform Act) has a component that underscores the transportation link in helping to move persons from welfare to work.

Other sources of encouragement come from the popular press. In their widely read and acclaimed book, Reinventing Government: How the Entrepreneurial Spirit is Transforming the Public Sector, David Osborne and Ted Gaebler argue that consolidation and coordination, especially that provided by special service districts, is an effective means of providing local services such as transportation across broad geographic areas and to diverse populations. The Clinton Administration responded to calls to reinvent federal programs and created the National Performance Review (NPR) led by Vice-President Gore. The NPR seeks to foster new and innovative ways of performing public services.

The literature on coordination among government agencies is highly developed and reveals a continuum of partnership forms. These differ based on complexity of purpose, intensity of linkages, and formality of agreements. The simplest form of partnership is **Networking**, which is based on common interests but with no significant resource sharing other than information. **Cooperation** involves low-level linkages, informal to less formal agreements, some resource sharing, and limited integration of organizational services and goals. **Coordination** has yet more intense linkages that involve members sharing resources beyond information to pursue shared goals. **Collaboration** is the most sophisticated partnership form and is marked by strong linkages among members pursuing specific and often complex goals usually over a long period of time. It has a stable membership with formal processes and structure. Resource commitment is significant. Extending beyond these partnership forms, **Consolidation** involves one agency subsuming the service of another agency which then stops providing it. The cases examined in this report span the range of partnerships but focus on consolidation.

Current laws, ideas, and research findings encourage local school districts and public transit agencies to investigate and seek out coordination and consolidation as a potential option to gain better service at a lower cost. But how do a particular local school district and a public transit agency go about this investigation? This report addresses the question by offering answers based on the experiences of school and transit organizations who indeed created consolidated and coordinated transportation service.

SUMMARY OF FINDINGS

The thirteen organizations we visited at seven sites tailored their approaches to consolidation to their particular political, educational, and administrative environments. On the basis of our literature review, the views of transportation industry leaders, and our interviews with the top administrators working in these organizations, we identified seven lessons learned, as shown in Figure 1 on page 3, that were generally common to all thirteen organizations in implementing consolidated transportation initiatives.

First of all, consolidated public and pupil transportation can best be introduced and sustained where there is a committed policy leader or leaders to champion it. In the seven cases, a policy leader (such as a transit agency manager, school superintendent, or school or transit board member) working in concert with other leaders, played the crucial role in introducing consolidated service. These leaders forged support for consolidated service both within and across organizations and their constituencies, helped sustain momentum for their initiative over time, and adjusted strategies when barriers to consolidation arose.

Second, public transit officials as well as school leaders have to demonstrate clearly that the safety record and performance of public transit agencies, equipment, and drivers are as good as those of the public school district. Opponents to consolidation will assuredly raise safety as a "red flag" in an attempt to block service consolidation. Often such rhetoric is based on a misunderstanding of the laws and regulations governing the use of flashing red lights on school buses as well as a misreading of safety and accident statistics for both school districts and public transit agencies. Leaders must have accurate information and disseminate it to their constituencies as a way to meet the challenge raised by opponents.

Third, public transit agencies and school districts must gain valuable experience in having school children ride public transit buses to and from school. The Mass Transportation Authority in Flint served approximately two thousand students for a number of years before it provided all of the general pupil transportation for Flint Community Schools. Manistee County Transportation operated several Manistee Intermediate School District routes for a period of time before the agencies consolidated their service. These initial experiences on a small scale built confidence among school and public transit officials, administrators, drivers, and perhaps most importantly, among parents and children, that such service is effective, efficient, and that it meets their needs.

Fourth, reliable resources and information on transportation activity by the state and local participating agencies are needed, if local transit agencies are effectively and smoothly to make a sustained transition to transporting school-aged passengers. The agencies must have the facilities, buses, revenues, and stable policy support in place prior to making long-term commitments to parents and school districts. This includes trained staff, including drivers and mechanics, equipment, buses, garage and vehicle maintenance facilities, and passenger transfer stations (in urban areas).

FIGURE 1. LESSONS LEARNED FROM LOCAL CONSOLIDATION EFFORTS

1. Policy Champion

- Consolidation can best be introduced and sustained when a political leader champions it. Policy champions are people capable of shaping public and organizational opinions to support consolidation.

2. Safety

- Officials clearly demonstrate to their constituencies that school-aged riders are as safe riding public transit buses as they are riding school buses.

3. Experience and Confidence

- Public transit agencies and school districts have a gradually evolving relationship in transporting students on public transit buses. This provides positive experiences and growing trust and confidence that public transit is a safe and effective transportation mode.

4. Resource Capacity

- Public transit agencies must have the capacity (in facilities, vehicles, staff and drivers) as well as the revenues and federal and state policy to implement and sustain effective busing for school-aged children.

5. Implementation Structure

- School districts and public transit agencies have ongoing communication and cooperative management of facilities, schedules, discipline, training, and performance oversight.

6. Favorable Environment and Opportunities

- School districts and public transit agencies take advantage of unique or infrequently occurring opportunities to consolidate transportation service.

7. Common Expectations for Consolidated Service

- All transportation constituencies and rider groups have agreed-upon expectations regarding the nature of service to be provided to them. In particular, school-aged riders receive a service different from that typically provided by a school district.

Fifth, participating school districts and transit agencies must establish formalized lines of communications to manage actively the facilities, fleets, schedules, rider management, training

and performance monitoring to assure successful service. The transit agencies, often working in conjunction with the school districts, need to organize formal liaisons that are routinely used to identify implementation problems, define and enforce discipline and operational policies, train bus drivers, and instruct school-aged children on riding public transit. They must also create or adopt measures to identify service performance over time.

Sixth, the leaders of agencies involved in consolidation services must become aware of and take advantage of the unique or infrequently occurring opportunities to create, expand, or reinforce the consolidation of public and pupil transportation. In Flint, for example, a community-based strategic planning process for the Mass Transportation Authority (MTA) that involved nearly fifty participants identified the potential benefits of consolidated public and pupil transportation. When the Flint Community School District expressed a willingness to do so, the MTA administration reacted quickly to create a team to organize, contract, and provide for the district's general pupil transportation.

Finally, all transportation constituencies and rider groups must have expectations that conform to the pattern and kind of service typically provided by public transit agencies. For various reasons, transit agencies cannot usually provide door-to-door service for general school-aged passengers on a large scale. Such service is usually reserved for disabled or very young riders. The more common consolidated service pattern in rural areas has students assemble at bus stop "pick-up points" from which they are transported by bus to and from school. In urban areas, the transit agency may redesign some routes or create new ones to pass near schools, but does not fully replicate the previous school bus routes. In each case, the service pattern after consolidation, while serving most needs, still reflects differences that impact perceptions of convenience.

OBJECTIVE, SCOPE AND METHODOLOGY

Our objective was to ascertain the lessons learned by, and related experiences of, local transit agencies and school districts in consolidating their transportation services. To meet this objective, we went through a process to identify the agencies to survey, developed an information collecting framework refined with the assistance of UPTRAN officials, and then contacted various officials from the selected agencies and districts to obtain information and insights on their consolidation experiences.

To develop the list of potential agencies and districts, we met with UPTRAN officials. A tentative list of six principal public transit agencies and several secondary cases that were known to have undertaken full or partial consolidation of pupil and public transportation was identified. A seventh case, that of the Bay Area Transportation Authority (BATA) in Grand Traverse and Leelanau Counties, was added later after the Traverse City Area Public Schools (TCAPS) eliminated high school busing and consolidation became an immediate alternative. The cases selected represented two urban providers and five non-urban (predominantly rural or small town) providers. These cases are:

- **City of Flint and Genesee County**
  - Mass Transportation Authority
  - Flint Community Schools
- **City of Grand Rapids**
  - Grand Rapids Area Transit Authority
  - Grand Rapids Public Schools
- **City of Big Rapids**
  - City of Big Rapids Dial-A-Ride
- **Lake County**
  - Yates Dial-A-Ride
  - Baldwin Community Schools
- **Manistee County**
  - Manistee County Transportation Inc.
  - Manistee County Intermediate School District
- **Grand Traverse and Leelanau Counties**
  - Bay Area Transportation Authority
  - Traverse City Area Public Schools
- **Alger County**
  - ALTRAN Public Transit
  - Munising Public Schools
  - Superior Central Public Schools

The Flint MTA and Grand Rapids Area Transit Authority (GRATA), representing urban conditions, both had several years of experience. The MTA transports all general pupils, while GRATA transports high school pupils. The Yates Dial-A-Ride experience in Lake County represents the most extensive rural-based effort to provide consolidated service on a county-wide basis. The Big Rapids Dial-A-Ride case illustrates the informal system of consolidation whereby parents individually or collectively organize an arrangement with public transit to provide service. The Manistee County case represents the experience of a transit agency working with an intermediate school district to provide service to special education students. The Alger County case reflects a blend of services to both special and general education students in a variety of contractual relationships. Finally, the BATA and TCAPS experience in Grand Traverse and Leelanau Counties reveals information about the factors that become important in developing a consolidated transportation service.

We also collected assorted data on the political, economic, and social background of each case to develop an environmental scan. These profiles serve to identify characteristics that show similarities as well as differences among the cases. In addition, we include two maps of service arrangements, one for a rural case (Yates Dial-A-Ride) and one for an urban case (Grand Rapids Area Transit Authority).

Before interviewing officials, we reviewed published literature on service consolidation and coordination, school bus and public transit agency operations, transportation safety, and public transportation in Michigan and in other states. We next interviewed 14 agency officials on their experiences and perceptions of consolidated service. These officials provided us with information on such topics as:

- The events leading up to consolidation
- The prior and current service pattern
- Individuals who promoted change in prior service patterns
- Problems associated with service change
- Operational considerations
- Barriers to consolidation and strategies employed to overcome the barriers
- Advice to others seeking to duplicate their service in other places

In addition to our interview data, we reviewed such documents as commission reports, planning documents, policy and procedural guidance, budget and contract documents, agency performance and service reports, disciplinary policies, and pertinent legislation.

From our analysis of the information obtained, we distilled a list of major lessons learned in consolidating pupil and public transportation. The list was not intended to be an exhaustive compilation of all possible or actual lessons learned or experiences in consolidating such service. However, we believe we garnered the key conclusions to be drawn from our research.

Because our objective was to identify lessons learned by the organizations at the seven sites we visited, we relied on their own evaluations and assessment of their experiences. Using information they gave us, we summarized the lessons on consolidation. We did not evaluate the service or independently verify the accuracy of information provided by the agencies.

We did our work at Central Michigan University and in the field from September 15, 1997 to March 15, 1999. After each interview, we provided the public organization officials with a draft of the interview reports for review and comment. These officials concurred with the message of our reports and provided clarifying comments, which we included where appropriate.

HOW TO IMPLEMENT CONSOLIDATED TRANSPORTATION

First Part: Develop Policy Support

Consolidation is first and foremost a policy decision by top leaders of a community's public transit agency and school district. As a policy, and hence having political implications, it must be supported by the groups and individuals with vested interests in transportation. These groups and individuals are often called stakeholders. Without the initial support of one or more of these stakeholders to begin an investigation of its merits, further efforts toward consolidation are largely futile. The first step is, then, one of persuading local stakeholders such that they become accustomed to thinking about the idea of consolidating school and public transportation. To do this, one must consider the following items.

Finding A Partner in the School District

As someone outside the school organization, the public transit manager will find it difficult to identify precisely who within another organization is supportive of or willing to consider transportation consolidation. However, certain local experiences or events may point to people or groups with an interest in changing the service profile to include consolidation. These experiences or events may include:

- School board election campaigns that included issues associated with future policy changes.
- Labor agreements with new privatization and outsourcing provisions.
- Financial difficulties and budget shortfalls.
- School transportation as a program with its demands for service and fleet replacement or expansion.
- Public statements made by the school superintendent, business manager, or school board members.

Finding A "Third Party" Leader to Make A Connection

An alternative to locating a school district partner directly may be to go to a prominent community leader who has a favorable standing with both the public transit agency and the school district. This could be a state legislator, county commissioner, or other person with the public stature and policy savvy to broach the idea of consolidation with school district officials. In doing so, this person can help make connections with interested school officials on behalf of the public transit manager.

In either case, it is critical to bear in mind that the school district partner should ultimately be someone capable of making decisions.

Locating Other Supportive Groups

Public transit managers operate in a politicized environment and by doing so they develop political knowledge and expertise. Most managers, over time, successfully cultivate political support from groups like elders and the disabled, or from public and non-profit organizations. These groups and organizations typically seek improved transportation service. The manager should introduce the idea of consolidation to these groups and organizations as a means to increase the capacity of a system generated by expanded service. Second, the manager can use the group or organization to leverage yet more community support for the idea of public and pupil transportation. These groups and organizations often come with both votes and voices.

Defining Consolidation as A Policy Option

Managers must hone an argument for consolidation in order to be effective in getting it adopted as policy. Politics is in part a competition among ideas. In this instance, the idea of consolidation must be viewed by a majority of policy makers as in the best interest of their respective organizations and their constituencies. This item is elaborated on in a later step.

Using Experience of Prior Transportation Consolidation

This is using success in past consolidated or coordinated public and pupil transportation ventures to help make a case for more extensive arrangements as well as to allay uncertainty or anxiety among stakeholders and decision makers. Most public transit agencies have some experience in coordinated service with their local school districts. At the extreme, all transit agencies have experience transporting school-aged passengers on public transit buses, even if on a before or after school basis. These successful experiences can form the basis for extended service consolidation.

Using Earlier Studies of Coordination

The Michigan Department of Transportation has sponsored many local transportation coordination studies that usually included local schools and their needs. The studies have typically involved making arguments for coordinated service, conducting an inventory of resources, identifying needs, and investigating options to meet those needs. If conducted in the immediate area, the study would be a source of political information as well as representing an experience of marshalling community stakeholders to address matters of local concern. The relationship could be renewed and extended to mobilize resources to address consolidation.

Comment

It takes time to reach the goal of persuading local stakeholders about the benefits of consolidating transportation. Much of the work is done informally, with one-on-one conversations that raise the issue throughout the community. In this regard, the manager must present the idea as a win-win solution to the problem of unmet transportation needs.

Second Part: Making A Case

Ideas shape public events and influence governmental actions. In this sense, consolidation as an idea or concept has to be developed and refined so as to generate support from local stakeholders and guide subsequent action targeted toward its adoption in a community as a policy change. Further, the concept of consolidation itself is multifaceted, and often an individual stakeholder may only see one side of it. As a result, these following action items reflect a variety of concerns to be addressed when soliciting support.

Safety

Surveys on consolidated public and pupil transportation conducted by Ferris State University and the Grand Rapids Area Transit Authority and Grand Rapids Public Schools uniformly revealed the emphasis stakeholders, and especially parents, place on personal safety of passengers who ride buses to and from schools. They also revealed misconceptions and lack of information about both the public transit and school transportation safety records. Consolidation proponents must supply information to their constituents about the relative safety of riding public and pupil transportation. In most cases, this effort involves gathering statistics from both the school district and public transit agency because uniform and comparative safety statistics for this use are unavailable. In such arguments, the lack of safety data at the national or state levels means that the local safety records and statistics have to be used to convince constituents and stakeholders that there is not a substantive safety difference between public and pupil transportation.

Finances

A sound financial case has to be made to support consolidation. Consolidation itself may help governments avoid future costs or reduce some existing costs, but proponents must be careful to present honestly accurate projections of any consolidation options. In cases reported here, financial gain or cost avoidance were important, but there were also misperceptions at many points that consolidation may generate enormous "savings." Stakeholders need a well-grounded and detailed financial case built from sound data in order to support efforts to consolidate transportation. Along these lines, cost analysis may have to be conducted to determine the exact and full costs associated with existing services. Many organizations do not isolate their transportation costs per se, and must exert effort to extract these costs from their financial reports.

Capacities

Consolidation, at least initially, is premised on the notion that a certain amount of slack capacity, or unused resources at certain points in the workday, exist and can be used to transport school children. The fleet, personnel, and infrastructure resources have to be identified and measured by the participating organizations. At the same time, these slack resources have to be matched with the kinds of services desired by the school district. The service profile and available organizational resources may have to be adjusted to meet at some point to allow consolidation efforts to proceed. This is augmented by a need for enhanced training for both drivers and student riders.

Comment

Extensive support for consolidation has to be founded on practical considerations of safety, finances, and organizational capacities. These steps require supporters and staff personnel to collect or investigate statistics, financial records, and organizational reports to assess the possibilities of consolidation. The results will in turn usually support the idea of consolidation which can then be defended as a good policy option.

Third Part: Making Consolidation Work Well

The process of implementing consolidation begins long before the first bus runs, demands continuous attention throughout the arrangement, and requires periodic assessment of experiences. The cases outlined in this report have been uniform in addressing a core set of implementation activities. The following action items serve to identify these core activities. If performed well, they will help assure consolidation proceeds with a minimum of stress.

Planning

Participants in this research typically emphasize the need for cooperative planning of consolidation services. This planning is often an outgrowth of earlier study efforts associated with making a case for consolidation. In no case have participants said that they had enough preparation time prior to beginning their service. With this is mind, proponents must prepare for as detailed an operations plan as possible given the particular constraints of time and staff resources. Clearly, the organizations that have had less stressful consolidation experiences have been those who start off on a smaller scale. Larger, more complex consolidations have required considerably more lead time and staff resources for planning new services.

Security

Security is always a concern for school and public transportation officials, and is most noticeable in urban environments. Urban transportation providers, because of their

fixed route service profile, need for passenger transfers, and large number of passengers, often require a large facility to make connections and serve riders. The addition of school children places yet more demands on existing facilities. Security arrangements have to be made and agreed upon by the transit agency and school district. Often the school district will assign security personnel to assist the transit agency handling the passengers on school days and during school hours. The bus station becomes one more place where potential security problems may arise, and collaborative efforts must be planned to address them. On-board computer and video cameras installed on buses help in security efforts, as well as in discipline policy noted below.

Student Behavior and Discipline

The school discipline code must be examined and, if needed, amended to include student behavior while waiting for the bus, riding the bus, and disembarking the bus. Typically the school district's discipline policy has been extended to include student behavior to and from school. Transit agencies that have installed cameras on buses have used them to support driver claims of student misbehavior, and often make both the driver and student act more responsibly and in accordance with expectations.

Public Relations

Transportation consolidation represents a major change in the lives of school children unfamiliar with public transportation. Parents and children have to be informed of any new transportation service prior to its inauguration. Conversely, the public transportation agency has to prepare its traditional riders for the new service as well. This can occur by letters to parents, newsletter announcements, on-board bus advertisements, and newspaper advertisements describing the new service.

Driver and Student Training

Consolidation creates new training needs for both staff and riders. Bus drivers on public transportation vehicles will need special training on handling younger passengers and discipline codes and procedures. School-aged passengers will often need training on how to ride public transportation and the kinds of behaviors expected of them. Once established, the training routines can be incorporated into the regular training programs of both drivers and children.

Implementation Committee

The planning committee will often emerge as an on-going implementation committee designed to facilitate the consolidated transportation service. Regardless of the pre-

planning effort, new situations will periodically arise that need attention. Moreover, the service itself needs the on-going cooperation of individuals from such groups as top management, school building administrators, and driver representatives. Consolidation needs to be reaffirmed on a routine basis because it reflects a joining of service by two otherwise independent organizations. In this regard observers have commented that it is a relationship that requires attention if it is to survive and thrive. This committee is a means to provide that attention.

Comment

The idea of starting with small steps toward a larger consolidated transportation service is recommended by many participants in this study, if such an option exists. In some cases, radical change occurred in a short time period. Implementation of large-scale changes can be managed, as shown by cases in Flint and in Grand Rapids. But it is made more manageable if it is done in smaller steps in an incremental manner. Regardless of scope, consolidation implementation must still address the steps noted above.

CAUTIONS TO OBSERVE
WHEN IMPLEMENTING CONSOLIDATED TRANSPORTATION

1. The need for a policy champion is ongoing, and does not cease with the beginning of consolidated service.
2. Participants typically underestimate the time needed for planning consolidation.
3. Do not neglect to use the experience of other people who have consolidated service.
4. Finding accurate cost data is difficult, especially for school districts.
5. Safety concerns are of at least two distinct types. One has to do with the safety of the vehicle and the skills of the driver. The other has to do with the personal security of the child vis-à-vis other riders. Both concerns must be addressed.
6. Proponents must be careful regarding possible economies from reduced labor costs. Factors such as wage differentials between a school district and transit agency, the greater likelihood of unionized school transportation workers, and the need to pay competitive wages to attract employees during periods of low unemployment must be taken into account in projecting cost savings.
7. Seek out ways short of consolidation where participants may coordinate transportation for mutual benefit.
8. Use the power of school principals and their assistants to help enforce discipline on the bus.
9. Parents will usually hold school officials accountable for transportation activities and incidents even though they are not formally directing such service.

LESSONS DRAWN FROM CONSOLIDATED TRANSPORTATION

Lesson 1: Consolidation Requires a Policy Champion

Persons who study organizations note that service coordination or consolidation like the kind examined in this report is not likely to occur even when formal arrangements use incentives or penalties to promote it. This is partly explained by the lack of leadership that values consolidation, regardless of its financial implications. Success in such ventures is explained in part by the presence of a policy champion or "policy entrepreneur" with political skills, knowledge, and experience to effectively join a solution (consolidation) to a problem (transportation) when a political climate encourages it. Consolidation must be compatible with stakeholders' dominant values. Observers identify the presence of both leaders and citizens who possess common values for alternatives like consolidation as critical in a process leading to its adoption as policy.

According to officials from the agencies we surveyed, consolidation can best be introduced and sustained when a political leader champions it. They note that, in introducing and sustaining consolidation initiatives, political leaders should anticipate a need to develop and communicate a consolidated service philosophy and to garner public, private and political support.

From their experiences, officials point out that there are a variety of potential champions for consolidated service. They ranged from one or more transportation board members with a keen interest in promoting a seamless web of transit service to school superintendents and public transit agency managers who carefully, and often in small increments, introduced limited service that was later expanded.

Yates Dial-A-Ride

In this case, three notable champions emerged to promote consolidated public and pupil transportation. First, the long-time agency manager was able to cross organizational lines and address school issues directly as an elected school board member. In this way, she used her voice on the school board to reassure fellow board members, school administrators, and parents that the public transportation alternative, if it were to occur, would safely and adequately meet their needs. The manager was able to point to a record of successfully guiding the agency's growth to a stage where it had the capacity and support to consider providing service to the Baldwin Public School district.

The other two policy champions were State Senator John Prednia and State Representative John Llewellyn who each represented Lake County. They took an active role in brokering relations between the transit agency, school district, the Michigan Department of Transportation, and the Michigan Department of Education. Rep. Llewellyn's efforts on behalf of service consolidation included promoting legislation to allow school districts to use a portion of their "at-risk" financial aid to support transportation costs. In combination, these three policy champions created supportive constituencies for transportation consolidation at both the local and state levels.

Manistee County Transportation, Inc.

The successful consolidation of public and special education transportation in Manistee County resulted in large measure from the efforts by a politically skilled member of the Manistee County Transportation Inc. (MCTI) board. This person has held a variety of policy and political leadership positions, including that of an elected county commissioner. Her stature in the local community made her an exceptional pro-public transportation advocate. On a trip to another state, she became aware of a transportation service model whereby all population groups use a single transportation system. This idea prompted this policy leader to work toward transportation consolidation and expansion of service. It led to efforts to contract with a variety of stakeholder agencies to expand MCTI's services. These efforts were reinforced by a like-minded transportation agency manager who sought to expand service by developing contracts with a variety of transportation-dependent agencies. One result was that the transit agency took important responsibilities for pupil transportation.

Progressive leadership at the Manistee Intermediate School District responded to its initial experience with the MCTI by expanding the relationship in an effort to reduce costs and maintain existing service levels. The Superintendent and Transportation Director were willing to champion the service extension within their own organization.

Big Rapids Dial-A-Ride

The City of Big Rapids provides a different version of public and pupil transportation service: an informal transit service arrangement for parents and school children. Yet even this service has its policy champions. In particular, the Big Rapids city council and city manager support full utilization of the Dial-A-Ride transportation service. They encourage the agency manager to seek accommodation for parents, who in turn can increase the ridership. In this case, the efforts promote full use of an existing service rather than service expansion per se. There are no efforts to expand the service, but rather efforts to promote its full use. The manager has responded in an informal way to address constituent service needs.

Flint's Mass Transportation Authority

There are a variety of local policy champions spanning Genesee County and the City of Flint that collectively promote consolidated public and pupil transportation. Several dozen community leaders, representing a variety of organizations each with a stake in public transportation, participated in a strategic planning exercise for the Mass Transportation Authority. These persons fit the definition of policy champions in that they possessed political standing and represented constituencies. Their close involvement with the public transportation strategic planning process directly connected the service to highly visible community leaders. This involvement also reinforced the community's sense that public transportation is a priority within the mix of local public services because it plays such a supportive role.

The MTA's director is also viewed as a visible and active proponent of consolidated public and pupil transportation. He has, for example, demonstrated a willingness to make numerous presentations to groups across the state to raise the level of awareness and the quality of informed discussion on the topic. His experience in providing service to the Flint Community School District has led him to champion the idea among his peers and other interested parties.

Finally, and importantly in this case, the Flint Community Schools' leadership made a deliberate decision to act in the district's best long-term financial interests. At the same time, it sought to remain a key community-minded institution by demonstrating its willingness to take political risks for the benefit of the broader community.

Grand Rapids Area Transit Authority

The Grand Rapids experience shows that perhaps the most prominent roles in consolidation belong to the respective leaders of the public and pupil transportation organizations. Officials of the Grand Rapids Public School (GRPS) system initiated the discussions on consolidated service for high school students. Administrative officials from both the Grand Rapids Area Transit Authority (GRATA) and the school district were encouraged by their respective board members to investigate the potential costs and benefits of consolidating services. Without such support, it would have been difficult for administrators to pursue the option.

Policy champions must also work to support the consolidated service once it is established. The Grand Rapids experience shows that policies and procedures must be continuously improved to address unanticipated administrative problems and concerns. New and perhaps innovative solutions to problems must be developed, sometimes under intense outside pressures, in order to maintain service support and commitment among important constituencies. The necessity for policy support is ongoing.

Lesson 2: Safety

In each case reported here, officials clearly demonstrated to their constituencies that school-aged riders are as safe riding public transit buses as they are on school buses. In the area of Safety, public and pupil transportation providers have their greatest potential for common ground. Paradoxically, this may also be the item over which there is most divergence. For this reason, we offer the following analysis of the safety issue to help identify the common ground, as well as points of difference, in the two transportation industries.

Although the survey data analyzed elsewhere in this report suggest that Safety is less of a concern for public transit than for pupil transportation, we cannot presume this means recklessness is rampant in public transit. The survey data are, perhaps, more a function of the singularity of focus on school transportation's young, vulnerable clientele. Schools, in general, and pupil transportation in particular, must focus on the well-being of children. Exclusive

focus on one demographic segment is one point of separation between schools and general public transportation providers.

Death and injury statistics indicate that school transportation providers should be concerned with those who are not able to care for themselves. For example, approximately 40 students are killed annually in incidents associated with school bus operations. The majority of these deaths are among children age eight (8) or younger. Experts in child development hypothesize that lower elementary children have not yet learned to be wary of the world.

This explicit age awareness must drive safety systems in school transportation. While no publicly funded entity or vehicle operator is eager to be involved in a fatality, it is especially wrenching if the victim is a child. Schools are forced to operate transportation for youngsters who are captive to the system AND limited in their ability to care for themselves. Public transit does not have these foci. Public transit riders are not likely to be both independent and less than eight (8) years old. Transit riders are captive only to the public bus system.

These market differences make public and pupil transportation different, in both the legal underpinnings and the operating psychology. Both types of operations must license drivers according to Commercial Drivers Licensing (CDL). This commonality quickly dissolves when the patchwork of other laws, rules and regulations is applied. After a public transit driver is licensed, per state and federal statutes, there are no other minimums for training. (One concern of the pupil transportation industry is that the basic CDL for school bus, inter-city carrier, public transit operator and truck driver is the same instrument.)

In public transit operations there are no legal mandates for stop location or for how a transit coach must "work" (activate lights/deploy signs) at the stop. There are significant procedures and rigorous specifications for establishing a school bus stop. In Michigan, understanding these laws can be difficult. Law defines when it is most appropriate to deploy the red light and stop arm system. In order to invoke a "best practice," many school systems deploy the red light system at all stops. This may create false security (the bus' lights will stop a car) and irregular operations ("red light" stop laws are different in every state). By contrast, local logistics, its own common sense, and risk management principles guide public transit when establishing stops and standards for serving those stops.

It is in the areas of minimums, training, and operating specifications where public transit and pupil transportation paradoxically diverge and collide. Other than driver licensing and vehicle specifications, public transit has no minimums. By contrast, pupil transportation minimums exist, over and above driver credentials and vehicle requirements. Minimum standards make sense, when one is concerned about baseline operations. The unfortunate part of minimums is this: once reached, individuals and entities are not legally compelled to do more.

Public transit has no minimums of training or stop locations specifications; public transit systems may be driven by their sense of risk management to go beyond that which merely protects them from liability. And, since that protection from liability is not defined by a legal

minimum, they must seize the opportunity to be more than what may be commonly perceived to be "minimum."

The Michigan Department of Education (DOE) recommends minimum hours of classroom instruction, practice range, and over-the-road driving before a school district allows a driver to operate with students on board. This recommendation constitutes less than one week of full-time employment. The minimum training is supported by appropriate licensure. It must be stressed that the DOE minimum is only a recommendation. It is not legally required, but will ensnare the risk management profile of any district that does not follow the recommendation.

When a Michigan school bus driver is hired, he/she is issued a provisional "white card." This card says, in effect, that the driver has received sufficient training to satisfy the district school bus supervisor and/or practices of the district. The "fail-safe" portion of the intake and training system is that, at some point, a driver had to pass a CDL road test with a certified, third-party examiner. It is also possible, however, for an already-licensed CDL driver to "back into" school bus eligibility**, without any school bus training**.

Once a school bus driver has been preliminarily certified (or "white carded"), he/she must take the state-mandated training within 90 days. This is a three (3) day, 24 hour course devoted to explaining federal, state, and local statutes regarding licensing and driving. It also concentrates on stop procedures, evacuations, and other mandated operating items of the Pupil Transportation Act **(**P.A. 187 of 1990**).**

In sum, a school bus driver/pupil transportation vehicle operator is created by a Michigan Secretary of State written test, a CDL road test, and approximately 50 hours of district and state-level training.

By contrast, a public transit driver is created by the same Michigan Secretary of State written test, a somewhat differently constituted CDL road test, and other training of the transit authority's choosing. Most transit operations require at least 80 hours of training. Some approach 300 hours before a driver is allowed to operate independently a transit vehicle. Lacking minimums, public transit drivers are trained in a wide variety of circumstances, which are not devoted primarily to the protection of lower elementary students.

Any community which hopes to be safely successful in consolidated public and pupil transportation operations will demand the best of both pupil and public transportation safety: Extreme care for the youngest riders and a broad appreciation of safety and customer care issues for all publicly-transported citizens.

The licensure and training requirements shown in Figure 2 on page 19 and the oversight features shown in Figure 3 on page 20 illustrate that this community will serve many masters. As shown in these figures, given the variety of regulatory, fiduciary, and safety oversight, pupil and public transportation communication difficulty is inevitable.

Within each industry, there is ambiguity and vagueness regarding what may be law, what may be regulation, what may be policy, and what may be sound business sense. As a consequence, transportation oversight bodies will wrestle for control with one another and with local units. When the discussion moves to consolidated transportation service and crossing the traditional lines of authority and responsibility, severe anxiety develops. It is then possible, if not "profitable," for each industry segment to create confusion and misinformation about the other. It is easy to leverage the safety concerns of children to keep the entities separate.

Pupil transportation is rightfully proud of its safety record. Recently developed data suggest that school-aged children riding in private vehicles have a much higher incidence of injury and death than do school bus riders.

We know of no comparison/contrast for school-aged incidents on public transit. Studies to date only contrast private automobiles with school buses. Public transit is not included in these data. The National Pupil Transportation Safety Institute suggested, in a 1995 research proposal, that on a per seat/per mile basis, public transit safety is equivalent to pupil transportation safety.

There can be much din, confusion, and background noise created over the difference in systems, although they seem similar. The citizen groups which will be charged with evaluating local consolidated transportation prospects may be confused by the seeming contradictions of laws for

- **licensing drivers** (pupil, public, inter-city, truck and chauffeur)
- **inspecting vehicles** (state police, state department of transportation, local authority)
- **business definitions** (public, pupil, common carrier, taxi, chauffeur)
- **service delineation** (pupil, public, open door, charter, fixed route, contracted service, home-to-school, extra curricular, etc.).

FIGURE 2. LICENSURE AND TRAINING

	PUBLIC TRANSPORTATION	PUPIL TRANSPORTATION
Secretary of State Written Exam for vehicle size, endorsements, and removal restrictions. (The tests are identical.)	Yes	Yes
Third Party Road Test (The tests are different, depending upon the vehicle the candidate brings to the test.)*	Yes	Yes
Minimum Training Recommendation from oversight body	No	No
Legally-mandated, Minimum Training Program for Drivers	No	Yes
Legally-mandated Training Program for Supervisors	No	No
Periodic Re-training Requirement	No	6 Hours Every 2 Years
Department of Transportation Physical	Bi-Annual	Annual

* A driver who has been road tested for inter-city or public transit may become a school bus driver, without taking another road test. The driver may or may not take the recommended training, depending upon what the school district or private contractor may require. The driver may drive a school bus for 90 days, before taking school-bus specific training or passing any form of school bus test. A truck driver may also become a 90-day school bus driver by adding the **P**assenger endorsement to the CDL.

FIGURE 3. OVERSIGHT

	PUBLIC TRANSPORTATION	PUPIL TRANSPORTATION
Secretary of State (If more than 6 points on license)	No Standard	Yes
Department of Education (M-DOE)	No Oversight	Monitor Licenses, Fleet, & Expenses
Department of Transportation (M-DOT)	Fiduciary Oversight	No Oversight
State Police	No Oversight	Vehicle Inspections
Federal Highway Administration	No Oversight	Drug Testing
Federal Transit Administration	Fiduciary Oversight	No Oversight
National Transportation Safety Board	Vehicle and system safety for all forms of transportation, including pupil and public	
National Highway Traffic Safety Administration	Vehicle and system safety for highway transportation, including pupil and public	
Intermediate School Districts/ Regional Education Service Areas	No Oversight	Conduit to DOE
Americans with Disabilities Act (ADA)	Specific Transit Requirements	Implicit Requirements
Individuals with Disabilities Education Act (IDEA)	Passed-through responsibilities, when applicable	Specific Requirements

These issues are further complicated by public perceptions relating to school bus stop laws. (Many rightly presume that yellow means Caution and red means Stop, but fail to apprehend under what conditions the lights are legally activated.) For example, a statewide survey of Florida's licensed drivers showed that most respondents could not correctly identify the proper driver response to school bus flashing red lights in a variety of common situations.

There can also be misunderstanding about the rights of employees in the areas of drug testing and child protection. There are "second chances" available for failed drug tests. These are more likely to exist in public than in pupil transportation. School bus drivers also face criminal record reviews and drivers license inspection. In Michigan, these are law for school bus drivers. They are good ideas, but not law, for public transit.

Safety is a primary concern for members of the general public and for the transporting of pupils. School districts and public transit authorities are or should be obligated to follow the safest and most effective path for executing the public's business. Barriers like different perceptions of safety that seem to exist can be eliminated, if stakeholders are dedicated to elimination of barriers. If they are not willing to champion the issues, the barriers, with safety in the forefront, will seem insurmountable.

It must be noted that public transit operators, with certain exceptions, may not willingly enter the pupil transportation market. Public transportation battled challenges to its existence for almost 20 years. Recent changes in funding at both state and national levels may eliminate adopting pupil transportation as a near-term survival strategy. It will be local choices, not federal or state desires, that determine whether a particular transit authority and its school district/s decide to combine customers and other portions of operations.

The initial step for local units should be to seek common ground and terms of understanding. This may involve a consultant's help on how to understand one another's legal requirements, local policies, budgets, state/federal reports and other matters of concern. When a common view of the transportation world is adopted, the parties may move forward to mutual success.

With this in mind, one can begin to recognize the immediacy and prominence of safety issues in the consolidation cases presented in this report. In each case, constituents' safety concerns had to be addressed. Safety was a prominent issue in two larger systems.

Flint's MTA and the Flint Community Schools

During the public debate of a consolidated transportation service, opponents raised the safety issue. Specifically, some parent and community activists were concerned that school children would not be safe while riding on MTA buses with general public passengers. The MTA Director vigorously defended the agency's safety performance record. As mentioned earlier, state or national safety statistics on relative safety records are unavailable. Consequently, proponents can only use their local track records to blunt safety-related criticisms. Vehicular safety was less of a concern because the MTA purchased, rehabilitated, and painted over 100 former school buses to transport school-aged children. During the implementation stage, a liaison committee of MTA and Flint Community

Schools officials focused on safety issues, among others. Policy and procedural changes emerged over time, such as the MTA effort to ensure child safety in certain threatening neighborhoods.

Grand Rapids Area Transit Authority and Grand Rapids Public Schools

The safety experience in Grand Rapids was similar to that of Flint's. Some community leaders, parents and students raised the safety issue during the public debate over consolidation. School principals also resisted the idea. However, unlike the service in Flint, consolidation in Grand Rapids would only affect high school students (9th – 12th grades), a group of students who would do better than younger students at avoiding unsafe conditions. Nonetheless, transit and school officials created a liaison committee to monitor implementation and safety issues. Today, school administrators in Grand Rapids count as some of consolidation's strongest supporters, in part due to the careful and consistent committee attention given to safety concerns. Experience in both Flint and Grand Rapids also demonstrates the significant amount of top administrative time and effort to make consolidated transportation work safely and effectively.

Safety concerns were less problematic in the smaller districts.

Yates Dial-A-Ride

Safety was relatively less influential in debates in Lake County. In this case, the basis for safety comparison was public transportation or that offered by family and friends. Also, the buses provided by the Michigan Department of Transportation for consolidated service were hybrids that blended school and public transit features.

Alger and Manistee Counties

Safety was not an important issue with either ALTRAN and MCTI services for special education students, mostly because of the nature of the service. The agencies were experienced in providing individualized service to disabled and wheel-chair bound passengers. There are only slight differences between the school districts and transit agencies in terms of their service and vehicles. Furthermore, many students use public transit after school and on non-school days.

Bay Area Transportation Authority

This is the latest case of movement toward coordinated or consolidated transportation service. As in Flint and Grand Rapids, safety issues have emerged from the community. BATA's response has also been similar in that it holds up its own safety record. Given the lack of state-wide or national evidence, this is the best that a public transit agency can do in support of consolidation.

Lesson 3: Experience and Confidence

Public transit and school districts must have a gradually evolving relationship in transporting students on public transit buses. This provides positive experiences and growing trust and confidence that public transit is a safe and effective transportation alternative.

The pattern for most of the transit agencies in this study seems to be one whereby a small agency grew over a period of time, and did so as opportunities to provide additional services became available, and as additional sources of revenue came into being. This has been partly the case for the pupil transportation tasks these public transit agencies have taken on. First, it is useful to discuss the four smaller transit agencies in the study; these all clearly illustrate the pattern of incremental addition of pupil transportation.

Yates Dial-A-Ride

The Yates Dial-A-Ride (DAR) system moved into a vacuum when it took on pupil transportation for the Baldwin Public Schools, as that school system was not providing pupil transportation at the time. However, the Yates DAR system had been providing transportation to a couple dozen school children who lived in a particular subdivision of the township. This point-to-point service had involved the children's parents extensively, and provided useful experience to the Yates DAR when it began more large-scale pupil transportation.

Big Rapids Dial-A-Ride

The Big Rapids Dial-A-Ride provides transportation to some Head Start children, and to some children within the city of Big Rapids, on an individual family basis. The agency is not actively seeking to expand its service, as it currently is at the limit of what its funding and fleet will allow, and also needs to devote time to planning for other future client groups (from the Family Independence Agency and from welfare-to-work reforms).

Manistee County Transportation, Inc.

Manistee County Transportation, Inc. (MCTI), in part because of enthusiasm on the part of its board, is seeking to extend its pupil transportation services. However, to date it has taken on such services on an incremental basis. In addition, the school districts within the county are currently in strong enough financial shape that they are not seeking to divest themselves of pupil transportation. Because there would likely be parental opposition to the lower level of service the MCTI would probably provide student riders, further additions to MCTI's pupil transportation tasks are likely to be gradual and modest in scope.

Alger County Transit

ALTRAN enjoys ten years of successful experience in transporting school children. It had six years of experience in smaller service segments before it added a larger summer school transit program, one that closely approximates regular pupil transportation provided by school districts. More recently, ALTRAN has extended its relationships with each of its three school district customers to include more specialized services. By this method of taking small but progressive steps, ALTRAN is positioning itself to be capable of offering

more comprehensive transportation service if and when community leaders come to agreement that it should do so.

The other two transit agencies, each much larger in size than the preceding three, did take larger steps in adding student transportation. Nonetheless, the way this occurred bears mentioning.

Flint's Mass Transportation Authority

The Mass Transportation Authority (MTA) within Flint, now operating across Genesee County, began an extensive student transportation operation at the beginning of the 1991-92 school year. It is important to add, however, that the agency was already good –sized at that time. Furthermore, the agency's venture into extensive pupil transport was preceded by a lengthy and large strategic planning process; this brought together many stakeholders and constituencies for a year or two prior to the 1991-92 school year. It was during this process that the idea of extending the MTA's pupil transportation was put forward, studied, and debated among participants representing a complete spectrum of its constituencies. In the strategic plan adopted at the end of the process, stakeholders called for the MTA to pursue actively the extension of its pupil transportation function. Finally, the experience of the first year provided some successes and some real problems, as even the Authority admits.

Grand Rapids Area Transit Authority

The Grand Rapids Area Transit Authority (GRATA) also began a large-scale pupil transportation service at the beginning of the 1992-93 school year. But there were limits to this service, it must be said. The service involved the Grand Rapids Public School system, but not other school systems in its operating area. Second, it included secondary school students, but not elementary students. Further, of those secondary students, it included about 70 to 80 percent, rather than 100 percent. GRATA does not meet all of the transit needs of even these 70 to 80 percent. For example, it did not offer charter service to student groups and it did not take students on trips outside its own service boundaries. These restrictions apparently continue to the present.

GRATA is interested in expanding its student services, but on an incremental basis, and also, the additional services would have to avoid any conflict with other categories of clients that require transportation services. As is the case with the MTA in Genesee County, a number of these clients are those of the Family Independence Agency.

Lesson 4: Resource Capacity

Public transit agencies have the capacity (in facilities, vehicles, staff and drivers) as well as the revenues and federal and state policy to implement and sustain effective busing for school-aged children.

In each of our cases, supporters made a sound financial case for consolidation. Flint Community Schools saw the benefits of a dramatic cost reduction, as well as a positive community partnership role with other institutions in Genesee County. Grand Rapids Public Schools avoided the likely need of a major fleet expansion because of its move to magnet schools. Munising Public Schools saved substantial resources through its use of public transit to support its summer school. Clearly, a financial case is a necessary, but not sufficient, reason to consolidate transportation.

Scholars who studied coordination found that, in general, it is costly and therefore is not common. First, it appears that the potential cost savings, considered without other related factors, will not be sufficient to stimulate or sustain movement toward coordination. The dollar savings to be derived from a consolidated service, for example, may not be sufficient to attract support of parents who may view it as a loss of service quality (because consolidated service usually does not completely replicate the kind of service typically offered by a school district). Second, many of the benefits derived from service coordination or consolidation are difficult to translate into dollar values and compare to costs. For example, public transit officials in Flint and Grand Rapids noted that the consolidated system offered students a transportation alternative after school that can be used for travel to work and/or recreation activity. Similarly, students riding public buses get accustomed to using public transit. They are more likely to use it after they graduate from high school, thereby reducing road congestion, air pollution, etc. These are real benefits, but it is hard to put a dollar value on them. Third, observers also point out that partnerships can eliminate redundancy and duplication. While redundancy and duplication are usually considered to be costs, they can, under different circumstances, be thought of as benefits: they provide security and certainty. In this study, a consolidated service may eliminate duplication of transportation services, but with a corresponding sense of loss among parents and school children.

In spite of the cost of coordination, one researcher found that it might occur informally among public transportation agencies without the need for formal structural changes. His cases were drawn from agencies providing roughly identical services with similar policy goals and outlooks and using similar technologies. His findings can, with some minor caveats, be readily applied to the issue of pupil and public transportation consolidation. However, his cases did not address the need for relatively large capital outlays and other resource commitments.

It is important to understand what kinds of capital are required for a successful program, as well as what kinds of administrative and technical support need to be present for these programs to do well.

Facilities

Facilities include some sort of building to serve as a garage/maintenance structure, as well as offices for dispatchers, other staff, and managers. Equipment for the building will certainly include bus lifts and hoists, tools and parts for vehicle repair, unless this is contracted out, as well as communication equipment for dispatchers, in addition to office equipment. The question for the transit agency is: Are current facilities adequate, or will the new service being provided as a result of taking on pupil transportation require

additions to such facilities? A further item, of course, is insurance coverage. Note that students of the Baldwin Public School District are covered by the insurance carried by the Yates Township Dial-A-Ride system.

Vehicles

Vehicles include buses that in some instances may need to be handicap-accessible. In some cases, transit agencies may be able to purchase school buses from a school district. For example, BATA purchased four buses from the Traverse City Area Public Schools for "in kind" services to expand its ability to transport students. Situations like this may be a mixed blessing, however. Do the buses need rehabilitation? Furthermore, although school buses are, in principle, constructed to a different standard of safety than the vehicles typically used by public transit agencies, the seat dimensions of school buses are not the same as those typically used in public transit vehicles. This can be problematic if the transit agency envisions running reconverted school buses for dual purposes, that is, for carrying adult passengers as well as students.

Public transportation fleet expansions also raise questions about later capital replacement and MDOT's state bus replacement policy. The state is hard pressed to maintain its existing fleet replacement schedule, let alone expand it to include additional buses acquired for consolidated pupil and public transportation.

Staff and Drivers

Obviously, a public transit agency that is adding student transportation to its tasks may need to hire additional staff. The real issue here, however, has to do with the skills and training of personnel who will be serving school students.

- Special education transportation requires a higher level of training; as a consequence, some transit agencies (e.g. Yates DAR) do not offer the school district special education transportation.
- Intermediate school districts may be able to provide some training. The agency itself, of course, may be able to do some of the training. In addition, MDOT offers some training.
- Smaller agencies, in particular, may run into additional costs because they may in effect need to have all their drivers fully trained, that is, capable of serving all their various types of passenger loads (public, student, student and public, elderly, disabled, etc.).

Lesson 5: Implementation Structure

School districts and public transit agencies have ongoing communication and cooperative management of facilities, schedules, discipline, training, and performance oversight.

Organizations confront a set of administrative hurdles when seeking to coordinate services. Operational control and service priority conflicts, while not insurmountable, are points left to

negotiation over the consolidation relationship. Some researchers argue that general public participation is necessary and productive if the parties continue to maintain communication throughout the negotiation process. Consensus rather than conflict will likely occur under such conditions. Incomplete information is a common problem for coordination efforts generally and rural ones specifically. Finding the complete costs of transportation programs, or allocating overhead costs across programs, is difficult and usually subjective. In some cases, cost estimates become strategic information and may be withheld to prevent agency consolidation. Regardless of these difficulties in achieving consolidation, once begun, the arrangement demands continued effort to ensure service quality and improvement over time.

We discuss the case experiences while moving from smaller to larger providers to show their common concerns regardless of agency size.

Big Rapids Dial-A-Ride

Of the systems examined in this project, the Big Rapids Dial-A-Ride system probably had the least amount of contact between itself and the relevant school district. This was not problematic; it was probably due to the fact that the Big Rapids Dial-A-Ride offers the most modest type of service to student passengers, and in a manner similar to that used by general public passengers. It will be recalled that the Big Rapids transit agency serves only those students who attend the Big Rapids Public Schools, and also who live within the city limits of Big Rapids. In effect, the transit agency informally serves such students, and the coordination is between the agency, each student, and the parents of each student. In our estimation, if the agency were to expand its services to more students, it would probably need to engage in more direct coordination with the school district.

Alger County Transit

ALTRAN, another small system, is exceptionally versatile in its work with school districts. This also demands critical management resources when problems emerge in existing services, or when new services are being investigated. The experience illustrates that implementation concerns are similar across agency size. In fact, such concerns may be more demanding for smaller systems because they lack the more extensive management capacity of larger agencies.

Yates Dial-A-Ride

Here, extensive contact between the transit agency and the school district, even though both are small, was crucial to initiating the student service and is also essential to continuing the service.

Initiation. Assistance came from MDOT and from several other state agencies, as well as from a local state representative. However, assistance from the school district was crucial.

Continuation. The Yates Dial-A-Ride system and the Baldwin Community School District are tied together by a variety of arrangements. Clearly, one such tie is the on-

going payment of $300,000 per year from the District to the Dial-A-Ride system. And at this point, for various reasons, the Dial-A-Ride system can provide transportation for Baldwin students more cheaply than the school district could perform that function.

The public schools do provide Yates Dial-A-Ride with additional services. Students being carried by the system are covered by the school district's insurance. Training for drivers is provided in part by the local Intermediate School District.

The school system does not seem heavily involved at this point in issues of student rider discipline (that seems primarily the focus of the Dial-A-Ride system and the parents of any errant students). And, at this point, coordinating the routes the system takes (it is a point-to-point system, with about 18 pick-up points) does not involve the school system, so much as it involves particular sets of parents in conjunction with the Dial-A-Ride. However, there are means for on-going coordination with the school district in the form an advisory board of 12 citizens that includes a school representative.

Manistee County Transportation, Inc.

This system provides only a series of limited services to a variety of educational institutions. General service to public schools in the County does not exist at this time, as the public schools have their own, adequately funded bus transportation. The services that do exist are of an incremental, "add on" type; however, there seems to be collaboration with the relevant school systems that the MCTI does serve. Thus, the transportation that MCTI provides to students who attend a charter school in the county was initiated through meetings involving MCTI, parents of the students, and representatives of the school itself. It seems likely that the contracts MCTI has with the local intermediate school district and with a parochial school have involved on-going relationships.

Grand Rapids Area Transit Authority

GRATA has a contract with the Grand Rapids Public Schools (GRPS) to provide bus service for secondary school students; seventy to eighty percent of the secondary school students in the district are thus served. This constitutes the vast majority of GRATA's student transportation (an example of GRATA's other services to students: elementary students are carried on field trips within the city by GRATA on regular routes).

The joint GRATA/GRPS Transportation Advisory Committee helps to implement the service. It holds monthly meetings. An examination of selected minutes of committee meetings since its inception revealed significant efforts at different times to address new problems not fully anticipated, and to act as a catalyst for an administrative "re-dedication" to the arrangement.

Flint's Mass Transportation Authority

This organization, initially set up as a municipal authority, has become a county-wide authority. Its board membership, numbering eleven, allocates one position to an individual who is to represent all the educational institutions the authority may serve.

The MTA underwent a strategic planning process beginning in 1990, because it perceived that it would have to overcome a series of looming problems, particularly changes in revenue sources as well as requests for additional services. The strategic planning process involved 65 people drawn from all across the community. Once completed, a public-pupil transportation taskforce was created to put that strategic goal into practice. The taskforce dealt with capital acquisition, labor, public relations, and transition issues. Later liaison committees dealt with student training and behavior codes.

Today, on-going contact between the MTA and schools is maintained. Its experience is also similar to that of GRATA and GRPS in that the liaison committee manages problems, strengthens effective practices and revises yet others. But this takes time, effort and commitment by top officials. Interestingly, in both cases, officials likened consolidation to a "marriage." Consolidated transportation in this sense needs continued maintenance if it is to work well.

Lesson 6: Consolidation Requires a Favorable Environment with Opportunities for Change

School districts and public transit agencies take advantage of unique or infrequently occurring opportunities to consolidate transportation service.

The transit agencies reviewed here included no examples of failed consolidations. Thus, care must be taken in attempts to establish guidelines for new consolidations, based on the five successful consolidations presented in this report. In particular, it seems unlikely that a successful consolidation could be constructed in a situation where there had been no previous record of partial linkage – such as cooperation, coordination, or collaboration – between transit agency and school district.

At the same time, successful consolidation can probably be established where local authorities can identify real opportunities, take note of a favorable environment, and then act to take advantage of such conditions. What, then, are such environments and opportunities?
In some instances, it may be a case of a strongly felt need that can only be met via consolidation. An example of this is Yates Dial-A-Ride. In other cases, transit agencies took advantage of particular opportunities to expand services or add services in a piecemeal fashion.

We continue our discussion by examining the experience of smaller transit agencies, followed by the larger operators. The final case illustration is that of BATA in Grand Traverse County, where the opportunities for enhanced public and pupil transportation are only now emerging.

Yates Dial-A-Ride.

This system operates within a geographic area with a quite low median family income. Furthermore, school millage elections had repeatedly failed in the years prior to

consolidation. During this time, the school district itself had eliminated its transportation program. Thus, a service that the school district had provided and that the community relied on no longer existed. This not only provided an opportunity for adding service to the existing transit agency, it meant that the environment was favorable. This was because residents were willing to accept some level of public transportation to and from school for their children, as the alternative was virtually no such service. The fact that the Yates Dial-A-Ride school transit service was not fully equivalent to what a regular school district busing program typically provides was not relevant, as there was no prospect whatsoever for that latter type of service.

It is important to distinguish the Yates experience from the likely experience of other communities considering consolidation. In the Lake County area, a considerable proportion of the children attending the public schools live in rural areas. Because they live too far to walk or bicycle to school, transportation for them is problematic. In addition, because of the low income of many families in the area, it is unlikely that they would possess an extra car that would enable older children to drive themselves to school. Indeed, a number of families have no car at all. This meant that in Lake County, the Yates Dial-A-Ride was not criticized for providing a service that was less extensive than what a school district might offer. By contrast, in an urban area with higher incomes, there might well be more opposition to a consolidation that implied a reduction in the level of service that parents and students were accustomed to.

Big Rapids Dial-A-Ride and Big Rapids Public Schools

The school district in Big Rapids encompasses both the City of Big Rapids and an area beyond the city limits. The school district provides bus transportation for children living outside of the city, but not for those inside the city. Though the city is not large (4.7 square miles), there is a felt need for some transportation to and from school for some of the pupils who live within the city proper. Over the years, the Big Rapids Dial-A-Ride system has gradually taken on this role, but it is not highly formalized. The system exemplifies a typical path by which transit agencies get involved in busing school children: by taking advantage of small opportunities, in an incremental fashion, over a period of years.

Alger County Public Transit

Three of the four school districts within Alger County now use some ALTRAN service. Over the last ten years, ALTRAN has progressively added new services for these district customers, and has forged good working relations with each one. The pattern is one of seeking out niches that can be best filled by existing ALTRAN capacity. The present wide array of services best illustrates the progressive nature of change made possible by an entrepreneurial general manager with an eye open for opportunity.

Manistee County Transportation, Inc. and Manistee Intermediate School District

The Manistee County Transportation, Inc. (MCTI) agency differs from the one in Big Rapids in that it is county-wide. Its involvement in school transportation, however, has

parallels to the situation in Big Rapids, in particular. The MCTI has, over a period of years, responded incrementally to opportunities to provide service that otherwise would not be available. MCTI, at a certain point, took on the transportation of disabled students along one route; previously, this task had been accomplished by the Manistee Intermediate School District. Manistee County Transportation also assumed the transportation to a parochial school within the county for some out-county students. Finally, it undertook to provide transportation for students attending a recently-started charter school that is located in a rural area within the county.

What the experience in this county demonstrates is that as K-12 education continues to change in this state, opportunities for service expansion will arise. Charter schools, for example, may often be small enough that they do not want to undertake the fixed costs of setting up a busing system – but they may often have a somewhat dispersed student population, necessitating some provision for student busing. Other variants within the public school system, such as magnet schools and the schools-of-choice program, may create additional opportunities. Clients of such variants may prefer the level of service that school busing systems often provide, that is, door-to-door service. However, that simply is not going to be an option for some of these variants. Thus, clients interested in such educational options as charter schools may be supportive of transit agencies providing some level of service, as it may be the only alternative to families providing their own transportation of their students.

Grand Rapids Area Transit Authority and Flint's Mass Transportation Authority

These more massive transit agencies have also had the experience of gradually taking on more and more instances of pupil transportation. However, these experiences included a large step for each system: taking on a major order for student transportation at one time. These big steps were accomplished in part because both systems were good-sized at the time, and both systems had some prior experience with pupil transportation. Nonetheless, in the Flint situation especially, the first year of the new service included problems.

Bay Area Transportation Authority

It can be added that some of the opportunities for transit agencies to begin student transportation are opportunities that come about because school districts, on occasion, want to shed transportation responsibilities. Such is the situation for BATA in Grand Traverse and Leelanau Counties. The reason is often financial: the restructuring of school finance under Proposal A has left some districts with very tight budgets. At the same time, school districts in Michigan today have less ability than in the past to raise funds locally through millages. It should be noted that transit agencies, by contrast, may raise some of their revenue through dedicated local millages. In fact, of course, transit agencies that contract for pupil transportation often try to cover their costs for this through the contract itself. The reality that they can carry students for somewhat less cost than school districts can do this may be due to at least three factors: lower labor costs for drivers and other staff; lower level of service provided; and in some cases, their alternate revenue sources, such as monies from state and federal agencies, may exceed what school districts have been able to capture from state and federal agencies for purposes of student transportation.

BATA is using these kinds of advantages at the present time to establish service contracts with Traverse City Area Public Schools (TCAPS), much like those undertaken by ALTRAN.

Lesson 7: Common Expectations for Consolidated Service

All transportation constituencies and rider groups have agreed-upon expectations regarding the nature of service to be provided to them. In particular, school-aged riders receive a service different from that typically provided by a school district.

When transit agencies undertake to transport school children, the expectations of the type of service they are likely to provide should be different from the expectations that students, their parents, and school officials have of what school districts typically offer when transporting students. If in fact the expectations do not differ, it is very likely that parents and students, at the least, will be disappointed. Thus, for this type of consolidation to succeed, transit agencies will have to be successful before implementation in conveying to parents and students, and to school officials, exactly what service they can expect. Transit agencies will also have to convince such constituencies that such service, while differing from school district transportation, will be satisfactory. If these tasks are not completed, there is a strong possibility of disappointment and conflict.

When undertaking to provide pupil transportation, transit agencies need to be clear about such aspects of service as:

- Whether students will receive door-to-door service, or something more akin to point-to-point service. Door-to-door service is usually not done for most students, though it may be done for special-needs students or for very young students. (The Big Rapids Dial-A-Ride, a small system operating within that small city, does provide door-to-door service for student riders.)
- Whether students will take only one bus to get from one destination to another (e.g., home to school), or will need to transfer from one bus to a second bus. (This is the case for some student riders in both Grand Rapids and Flint, for example).
- Whether students will ride on dedicated buses, or on buses that mix student traffic with general traffic, i.e., non-student riders. The latter is by far the more common pattern, unless we are again speaking of special-needs students. It may be that the differences in peak times for student ridership and general public ridership differ enough that students will seldom be on buses with many non-student riders. It may also be that buses that mix types of riders offer quieter environments than buses that are primarily student-transit. Nonetheless, parents will need to be informed if students and the general public will share buses, and will need to be convinced that this is acceptable.
- Which students will be served. It may be easier for a transit agency to begin student transportation by focusing on high school students and/or, through individual contracts, special needs students. As an example, the Grand Rapids Area Transit Authority seems to

have initiated its student transportation service with high school students; this began in fall of 1992.

Transit agencies also need to be clear about likely costs. This includes:

- The revenue streams of such agencies are multiple. The agencies may derive funds from: fares; dedicated millages; contracts with local organizations (e.g., Head Start, parochial schools, charter schools, intermediate school districts); state and federal agencies; and other governmental units, such as city, county or township funds. It is also the case that such agencies may be able to provide services at a lesser cost than school districts.
- At the same time, the cost differential is not huge. Thus, the public should not expect that vast savings can be realized by transferring responsibility from school districts to transit agencies. In some instances, in order to begin student busing, the transit agencies must make considerable capital expenditures on buses and facilities that, for example, comparable school districts have long since paid off.
- By the same token, the public should not expect that the agencies can match the level of service provided by school districts and still save money. This is despite the fact that transit agencies can provide, in principle, somewhat less costly services. The reasons are that the cost differential is not large enough, in most cases, to allow this, and in any event, transit agencies, organizationally and legally, find it difficult to match the level of services of school districts (with some exceptions).

RECOMMENDATIONS TO ENCOURAGE CONSOLIDATED TRANSPORTATION

Consolidation of public and pupil transportation, as shown in these cases, results from homegrown initiatives undertaken by local policy entrepreneurs. Experience also suggests that consolidation can be accomplished under existing state laws and regulations. Nonetheless, the State of Michigan and the Michigan Department of Transportation can support and encourage it as a policy alternative. These are several actions that, if taken by the State, can promote consolidation.

1. Promote awareness of coordinated and consolidated transportation experiences, especially in those areas of Michigan served by public transit agencies.

2. Award discretional spending and grants, in part, on the basis of past successful coordinated transportation between public transit agencies and school districts. This may involve bus fleet expansions and facilities support.

3. Encourage small initial coordination experiences between school districts and public transit agencies, from which broader efforts may come.

4. Monitor and periodically report on the safety performance of transit agencies across Michigan.

5. Initiate a study to review the comparative safety performance of school districts, public transit agencies, private automobiles, Head Start programs, and all eligible recipient agencies (e.g. Senior Citizens and Handicapped Service Agencies) in the transportation of school-aged riders.

6. Create a transit driver training sequence that will match or exceed the Michigan Department of Education recommended minimum standards for Michigan school district bus drivers.

7. Promote stable funding and reimbursement policies based on an explicit and mutual understanding of relevant criteria such that discretionary behavior by state policy makers is limited.

8. Provide training to appropriate public and pupil transportation personnel in the areas of Cost Accounting to help identify and allocate true costs and Child Behavior Management and learning to work within the framework of school discipline practices.

9. Provide Risk Management training to school district personnel as part of driver training. It should include a concentration on implementation of the Americans with Disabilities Act (ADA) and its tension with children's safety needs.

10. Promote the collaboration of public and pupil transportation administrators in identifying appropriate bus stops.

Appendix A

Report on Results of Survey of Pupil / Public Transportation Considerations

Appendix B

Zero Tolerance Policy for Student Behavior on GRATA Buses

Appendix C

GRATA Press Release August 20, 1992

Appendix D

GRPS Superintendent Letters to Parents and Board Members