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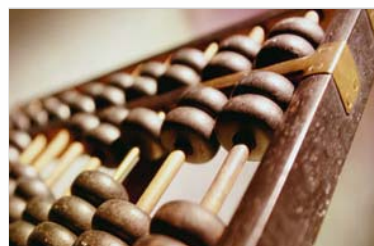
## **A Review of the Outcomes to Date of the Special Education Transportation Pilot Program**

### **Final Report**

**Prepared for the  
Massachusetts Department of Elementary and Secondary Education**

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**August 2008**



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## Executive Summary

The University of Massachusetts Donahue Institute was engaged by the Massachusetts Department of Elementary and Secondary Education to review the outcomes to date of the Special Education Transportation Pilot Program. The pilot program, begun in FY06, was designed to test the concept that the transportation of students to out-of-district placements can be provided at a lower cost and with improved quality of service by delegating the planning and contracting for such transportation to educational collaboratives.

The role of the Institute was to describe and document the experiences of the collaboratives and districts participating in the Special Education Transportation Pilot Program using the best available information as provided by the educational collaboratives, districts, pilot consultants, and other key project stakeholders. The Institute was asked to review the program history and background, assess costs and benefits, and identify the challenges faced and lessons learned by collaboratives when developing their programs. The following represents a summary of the findings. Detailed information is available within the body of the report.

### Pilot Program Background and History

Since the early 1970's, with the passage of Massachusetts' special education law, educational collaboratives have developed as organizations that provide districts with opportunities to partner on programs and services that benefit from economies of scale, in both cost and quality. Collaboratives consist of multiple school districts and often provide direct student services, predominantly in special education. Some collaboratives also provide management support, cooperative purchasing, student transportation, research, technology development, the implementation of health and safety programs, and professional development<sup>1</sup>.

While a number of educational collaboratives in Massachusetts provide out-of-district special education transportation services to districts (several have been providing these services for over three decades<sup>2</sup>), many districts contract on their own with private vendors to provide these services and others provide their own district transportation services. Growing costs, however, have strained district budgets. The Massachusetts Association of School Superintendents (MASS) Special Needs Task Force estimates that the cost to transport students to private out-of-district day placements has increased by 64.3% from 1997 to 2005<sup>3</sup>.

With this reality in mind, in FY06, the Massachusetts Legislature (through the Department of Elementary and Secondary Education) provided approximately \$1.15 million over three years through the Circuit Breaker line item to enable three educational collaboratives to explore possible strategies to

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<sup>1</sup> <http://www.doe.mass.edu/moec/history/05summary.html>

<sup>2</sup> Massachusetts Organization of Educational Collaboratives (MOEC). *The Educational Collaboratives of Massachusetts: An Overview*, 2007.

<sup>3</sup> <http://www.massupt.org/>. Special Education: Finance Policy MASS/MASC

reduce costs and to improve the quality of transporting special education students to out-of-district private schools.

The ACCEPT, Assabet Valley (AV) and the Lower Pioneer Valley Educational Collaborative (LPVEC), all veteran transportation providers, each received state funds to support the implementation of the pilot program. The pilot was designed to identify and explore possible strategies to reduce the high cost of out-of-district transportation, improve the quality of transportation services, and avoid route overlap, congestion, and long waits at private schools.

In the first year of the pilot, the grantees undertook extensive data collection. The grantees surveyed collaboratives and districts on the costs to transport their students to out-of-district placements. With this data, the grantees developed baseline vehicle costs of approximately \$200 per day per vehicle. Later in the pilot, these average costs would serve as a guide for collaboratives developing new programs and as a tool for negotiation with vendors.

Concurrent to establishing baseline costs, the grantees explored a destination-based model of service delivery. Under this premise, educational collaboratives would be responsible for the transportation of all students attending specific private schools operating within their geographic area, regardless of the location of the sending district. While the modeled routes indicated that savings could be potentially substantial, the grantees eventually realized that the logistics of destination-based routing were unrealistic and impractical. Specifically, the ability to oversee and monitor the quality of services from a distance, on both the part of districts and of collaboratives, was an overwhelming challenge. In addition, it was highly unlikely that districts would feel comfortable placing their students in the care of collaboratives on the other end of the state.

As a result, in the second and third year of the pilot, the grantees focused on the development of a new strategy: regional transportation networks. The regional transportation networks consist of geographically connected areas of the state partnering to more efficiently transport students to out-of-district placements. In eastern Massachusetts, due to the density of the population and the extensive number of active educational collaboratives, the networks were developed as groups of cooperating collaboratives that would be able to reach a large number of districts. In Western Massachusetts, the small number of collaboratives along with the low population density, but large geographic areas, led to the development of a county-wide approach which consisted of four separate transportation networks under the auspices of the Western Massachusetts Consortium.

After the third and final year of the pilot program, the regional transportation networks are still in the development stage. The following are some important highlights and outcomes of the pilot program and the newly developing networks:

- Eleven collaboratives (including the grantees) were providing various types of out-of-district transportation services before the pilot. ACCEPT leased its vehicles, Assabet Valley contracted with vendors, and Lower Pioneer Valley operated its program with vehicles owned by the collaborative.
- During the pilot program, 10 regional inter-collaborative transportation networks were formed and are currently at various stages of development. In Western Massachusetts, the networks are organized by county. In the remainder of the state, the networks consist of groups of regional collaboratives.

- As a direct result of the pilot program, two collaboratives (North River and LABBB) started providing new out-of-district special education services to their regional networks. GLEC and SEEM, which were previously providing services on their own, partnered to provide additional network services. Assabet Valley, a pilot grantee, assumed new routing responsibilities in an effort to reap additional savings.
- After the third year of the pilot, a total of 41 new routes with 174 students from 27 districts (17 of these districts had never used collaborative transportation services before) are now serving 24 different destinations, including collaborative programs and out-of-district private schools.
- According to interviews with districts, over 85% of districts utilized a private vendor for out-of-district special education transportation services and one in five districts operated their own services prior to the pilot program.

## Costs and Benefits

### Program Costs

North River (Southeast Network) was the only collaborative able to provide detailed information about the costs to the collaborative to run their program. Other networks were unable to do so because many of the programs are still in the start-up phase of program implementation.

- North River is running the most comprehensive new program (they have purchased vehicles and hired transportation staff) and estimates annual program costs of approximately \$370,000. During the last year of the pilot, \$62,500 of these costs were subsidized by pilot grant funds.
- Daily costs to operate the vehicles, including administrative overhead, ranged between \$208 and \$224 per day per vehicle.
- The program is growing; North River estimates that it will need to triple in size if it is to be self-supporting and predicts that this will be possible in FY10.

### District Savings

- According to the networks, new districts are experiencing cost savings that range from \$1,000 to over \$44,000 annually.
- Seven of 10 districts stated that they have realized cost savings, however almost all of the districts characterized the savings as modest.
- Assabet Valley, a long-term transportation services provider, changed the way it negotiates contracts with vendors by taking on routing responsibilities and estimates that it will save its districts over \$415,000 in FY08.

### Quality

- Half of the districts indicated that in addition to cost savings, an added benefit to working with a collaborative was increased interaction and communication between districts. Other districts cited utilizing collaborative expertise, saving staff time, the use of GPS to increase quality and efficiency of routes, and more carefully screened and monitored driver staff as additional benefits to the collaborative-managed services.

- Nine out of 10 districts were satisfied with the quality of transportation services provided by collaboratives.
- Two-thirds of those districts report that students are receiving a better quality of service by using the collaborative.
- To date no assessment of parental perceptions have been undertaken by the collaboratives, but at least one (North River) has plans to conduct an evaluation at the end of this school year.

## Challenges and Lessons Learned

The Institute conducted extensive field interviews with key stakeholders. While the development of programs within each collaborative and network has been different, there were a number of common themes in regards to the challenges and lessons learned during the implementation of new collaborative-managed transportation.

### **Information is essential.**

- More informed districts and collaboratives are better able to negotiate competitive prices from their vendors.
- CHARMS ran an open procurement process (sharing all the bids with all the bidders) resulting in several more competitive bids than otherwise would have been available. CHARMS determined the exact level of service needed by using routing software and student data and by being able to specify service needs. Instead of leaving it up to the vendor, they were able to get the best deal.
- Assabet Valley solicited bids from several vendors based on per day per vehicle costs, kept the routing in house and reported savings of over \$400K this year.

### **Implementing routing software is a challenge for some collaboratives and isn't necessarily the only way to negotiate better pricing.**

- A number of collaboratives report that they have staff that are resistant to learning the new technology and that they need to focus on developing the skills and technological comfort-level of their team.
- The three networks that instituted new routing in FY08 are currently not using routing software—two are relying on their private vendors to do the routing and another is preparing its routes manually. The Southeast Network and the Metro Boston Network used the baseline costs developed during the pilot to inform their negotiations with vendors and assess cost-effectiveness of transportation services.

### **Getting districts to make more informed decisions is a hurdle.**

- Of the districts that opted out of participation in collaborative-managed transportation, 75% report that they are receiving cost-effective services from their private vendor. However, without the ability to compare their service costs with those of other transportation options and without the tools to know exactly the level of service they need (by having access to routing technology), it is likely that they are not able to effectively compare services.

- While collaborative-managed inter-district routing can be one means to substantial cost savings, districts on their own might be able to negotiate with private vendors for better rates if they were willing to become more informed consumers.

### **Strong leaders, both within collaboratives and districts, make programs happen.**

- Collaborative leadership, some with extensive experience in transportation and others new to providing the service, propelled new programs forward with their ability to build consensus, problem-solve, and maintain momentum.
- District leadership, however, may be even more important because they are the customer and have the ability to bring decision-makers to the table, delegate responsibilities, and “sell” the importance of the program to staff, parents, and sometimes other districts.
- Both North River (Southeast Network) and LABBB (Metro Boston Network) had member districts that expressed frustration about skyrocketing out-of-district transportation costs and declining quality; both collaboratives used that feedback to propel their new programs forward.
- In the Metro Boston Network, all decision-makers are in the loop because representatives from the Business Office and the Special Education Department of each participating district attend meetings for the program.

However, challenges are apparent:

- Some of those interviewed cited the trend of district superintendents holding their positions for only couple of years as an obstacle to successful partnerships because of a lack of continuity.
- Others felt that districts have a “wait and see” attitude and that more partnerships will arise when programs have proven to be successful.
- Not all educational collaboratives are interested in getting into the transportation business. In all likelihood, some districts aren’t encouraging their collaboratives to do so either.

### **Starting small helps build trust and develops experience.**

- Metro Boston began with three districts and will build to five districts next year. The Southeast Network also plans to build slowly and next year will maintain the same number of districts but gradually expand the number of students.
- Starting small may be a challenge for those regions with fewer students and greater geographic areas. Berkshire County encompasses over 931 square miles and the initial student data collected by the Berkshire County Network found that only 44 students from 11 districts are traveling to out-of-district placements. In a case like this, developing a critical mass of committed districts will be necessary to starting a program and experiencing cost savings.

### **Partnering isn’t for everyone.**

- For collaboratives that already run comprehensive transportation programs, there isn’t necessarily an incentive to partner with other collaboratives to provide services and there may be a point at which



adding new districts comes at the expense of existing districts, in regards to quality. Financial benefits will also not be as evident for collaboratives that already run efficient programs.

- CASE, MEC, and Cape Cod each run substantial, out-of-district transportation services for their member districts and opted out of participating in a regional network early on in the pilot.
- During the field interviews, LPVEC leadership felt that the collaborative would not take on new members, nor would they be likely to incorporate all non-member districts into their routing. Instead, they indicated that their role in the network might be to provide technical assistance and to share their knowledge and expertise.
- Assabet Valley indicated that it was unsure as to the direction its district leadership would take and did not know what role, if any, the member districts would want the collaborative to play in the Central Mass Network.
- Collaboratives may also not be able to meet every district's transportation needs due to size differences, geographic constraints and feasibility, and dissimilar services needs. Alternative forms of collaboration might need to be explored in these cases.
- In the Hampden County Network, the districts not currently served by LPVEC present some logistical challenges. Springfield is larger than the other five districts combined and already has an economy of scale. Additionally, while Palmer and Monson are contiguous, they are separated geographically from Holyoke, Chicopee, and Westfield and this could make partnering a challenge.

#### **New relationships can lead to other links between districts and collaboratives.**

- Increased communication between districts and collaboratives has the possibility to lead to other partnerships. When asked about other benefits of working with the collaborative, more than half of the districts interviewed felt that the increased communication between districts was an important by-product of the pilot.
- Hampshire County Network officials noted the possibility of partnering to negotiate better pricing for regular education transportation, in addition to special education.
- In Franklin County, when districts convened to discuss their student placements, they realized that seven of their students were attending an out-of-district program in another county and have discussed the possibility of developing a program to meet those students' unique needs within the county.
- In the Northeast Network, according to officials, new inter-collaborative professional development offerings have arisen as a result of the pilot.
- Several networks discussed the challenges they face in the transportation of homeless students, under the McKinney-Vento Act, and indicated that inter-district discussions on this topic need to continue.

## Conclusion

### Pilot Successes

- Three new networks plan to expand and at least one new collaborative will provide services next school year.
- 90% of participating districts are satisfied with the new collaborative-run services and most report that they are saving money.
- Closer interaction and communication between districts offers the promise of the development of other partnerships (e.g. regular education transportation bids and new joint programs).
- Establishing baseline per day per vehicle costs has helped collaboratives negotiate more effectively with vendors.

### Obstacles to Implementation

- Negotiating is more difficult for regions with less private vendor competition.
- Developing the skills and technological comfort-level of collaborative and district staff enabling them to effectively use routing software remains a challenge.
- Some districts are reluctant to give up control of their out-of-district special education transportation.
- Not all educational collaboratives are interested in getting into the transportation business.
- There is no incentive for collaboratives that already run efficient transportation programs to participate in the Networks.
- Collaboratives might not be able to meet all district transportation needs due to size differences, geographic feasibility, and dissimilar service needs.

While more hard work is needed to continue the momentum, the initial results of the pilot program indicate that there has been cost savings and an increase in the quality of transportation services. Districts new to collaborative-managed transportation services report that they are satisfied with the services they are receiving, while collaboratives managing new programs are beginning to develop the skills and experience they need to create sustaining programs and prepare for expansion. The development of new transportation services has been modest; however the opportunities for collaboration are encouraging. Access to information and strong leadership will be the keys to continued growth in collaborative-managed transportation and perhaps also in the development of alternative forms of collaboration for districts and regions that face unique challenges.

## Project Overview

### Introduction

The University of Massachusetts Donahue Institute (the Institute) was engaged to assist the Massachusetts Department of Elementary and Secondary Education in reviewing the outcomes to date of the Special Education Transportation Pilot Program.

Currently in the third and final year, the pilot program is testing the concept that transportation of students to out-of-district placements can be accomplished at a lower cost and with improved quality of service by delegating the planning and contracting for such transportation to educational collaboratives.

### Key Research Questions

The role of the Institute was to describe, report, and summarize the outcomes to date of the Special Education Transportation Pilot Program. The Institute was not engaged to perform a financial audit or prepare a formal evaluation of the effectiveness of the program, but rather to conduct research designed to address the key research questions outlined below using the best available information provided by the educational collaboratives, districts, pilot consultants, and other key project informants.

#### Program Background and History

The program background and history component of this report describes the experience and the activities of the three grantee collaboratives during the project, focusing specifically on the development of the new networks of collaboratives. Key questions examined were:

- What types of transportation services were the three pilot education collaboratives providing before the pilot program? What services are they providing now? What types of transportation services were other collaboratives in the state providing? What services are they providing now?
- How many new students/districts/collaboratives/networks are participating in out-of-district private school transportation since the start of the pilot?
- How were transportation services for out-of-district private school special education students provided before the pilot? How are services provided now?

#### Costs and Benefits

Wherever possible, the Institute documented costs incurred by educational collaboratives related to program implementation (administrative overhead, software purchases, new staff, etc.) as well as any cost savings to districts that resulted from their participation in these programs. Relevant research questions include the following (but in a number of cases a systematic analysis of program costs and benefits was not possible):

- How much does it cost collaboratives to deliver relevant services?

- Are districts experiencing cost-savings by delegating the planning and contracting of out-of-district private school special education transportation to the collaboratives?

A structured telephone interview was undertaken with a sample of districts that have recently become involved or anticipate becoming involved with the program, as well as, with districts that have elected not to participate. The research questions investigated through these interviews include the following:

- Other than cost savings, are districts experiencing any “efficiencies” by delegating the planning and contracting of out-of-district private school special education transportation to the collaboratives (e.g. saving staff time, redirecting resources, training, taking advantage of expertise at the collaboratives)?
- Are students receiving improved or comparable quality special education transportation services through the collaboratives? What formal methods (e.g. surveys or review procedures) are the collaboratives using to document participant satisfaction and ensuring quality control? Are the quality of the services and the cost savings to the districts sufficient for the program to be operational without state subsidy?

The perception of private schools on the program was gleaned through interviews with schools serviced by new pilot routes.

### **Conclusions and Implications**

The summary of research findings and conclusions includes the identification of challenges faced and lessons learned by educational collaboratives and districts as they begin to build their programs.

- What challenges do collaboratives face when developing their programs? What lessons have been learned during the pilot program by participating collaboratives that might be helpful to others?

## Background and History

Since the early 1970's, with the passage of Massachusetts' special education law, Chapter 766, educational collaboratives have developed as organizations that provide districts with opportunities to partner on programs and services that benefit from economies of scale, in both cost and quality. Educational collaboratives consist of multiple school districts and often provide direct student services, particularly in special education. Some collaboratives also provide management support, cooperative purchasing, student transportation, research, technology development, the implementation of health and safety programs, and professional development<sup>4</sup>.

About forty percent of educational collaboratives in Massachusetts provide out-of-district special education transportation services to their districts and a number have been providing these services for over three decades<sup>5</sup>. In Massachusetts, school districts are responsible for all costs associated with transporting students to out-of-district placements. Some districts utilize collaborative-managed out-of-district transportation services where students from a number of districts are transported together to common destinations. Many districts contract on their own with private vendors to provide these services and others provide their own district transportation services.

There are unique challenges in special education transportation, including time limits for travel, meeting Individualized Education Plan requirements and particular vehicle needs. As a result, special education transportation is very costly and those costs appear to be rising. The Massachusetts Association of School Superintendents (MASS) Special Needs Task Force estimated that the cost to transport students to private out-of-district day placements increased by 64.3% from 1997 to 2005<sup>6</sup>.

With these challenges in mind, in FY06, the Massachusetts Legislature provided funding through the Department of Elementary and Secondary Education enabling three educational collaboratives to explore possible ways to reduce costs and to improve the quality of transporting special education students to out-of-district private schools. The ACCEPT, Assabet Valley (AV) and the Lower Pioneer Valley (LPVEC) Educational Collaboratives each received state funds beginning in FY06 to support the implementation of this pilot project. The pilot was designed to identify and explore possible strategies to:

- Reduce the high cost of out-of-district transportation
- Improve the quality of transportation services
- Avoid route overlap, congestion, and long waits at the private schools

Funding for the pilot continued in FY07 and will be exhausted following FY08. In the final year, an additional \$85,000 per grantee was funded to support the expansion of regional transportation networks.

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<sup>4</sup> <http://www.doe.mass.edu/moec/history/05summary.html>

<sup>5</sup> Massachusetts Organization of Educational Collaboratives (MOEC). *The Educational Collaboratives of Massachusetts: An Overview*, 2007.

<sup>6</sup> <http://www.massupt.org/>. Special Education: Finance Policy MASS/MASC

**Special Education Pilot Program Funding, FY06 to FY08**

	<b>ACCEPT</b>	<b>Assabet Valley</b>	<b>Lower Pioneer Valley</b>	<b>Program Total</b>
FY06	\$100,000	\$100,000	\$100,000	<b>\$300,000</b>
FY07	\$100,000	\$100,000	\$100,000	<b>\$300,000</b>
FY08	\$185,000	\$185,000	\$185,000	<b>\$555,000</b>
	<b>\$385,000</b>	<b>\$385,000</b>	<b>\$385,000</b>	<b>\$1,155,000</b>

Source: Pilot Program Grantees, 2008

Additional funding from the legislature has been requested for FY09 on behalf of the developing transportation networks to support new programming developed through the pilot.

**Pilot Grantees**

*ACCEPT Educational Collaborative* in Natick has been coordinating and providing special education transportation services to its member districts since the late 1970's. ACCEPT initially served as a liaison between districts and vendors and later increased its involvement in transportation services. In the early 1980's, the collaborative began to provide out-of-district special education transportation for its member districts. With a fleet of almost 100 leased vehicles, and drivers on staff, ACCEPT has developed a transportation program that now serves almost 400 students from 19 districts and over 120 out-of-district destinations.

*Assabet Valley Educational Collaborative* in Marlborough has been coordinating transportation services for its member districts, as well as additional non-member districts, for out-of-district special education transportation for almost thirty years. Working with external transportation vendors, Assabet Valley is the primary point of contact for parents and districts and coordinates out-of-district transportation for 350 students from 20 districts to 71 destinations.

*Lower Pioneer Valley Educational Collaborative* in West Springfield has been providing transportation services to its member districts since 1991. Five of its seven member districts utilize LPVEC for all their special education and regular transportation and one other for its out-of-district special education transportation. LPVEC has a fleet of 213 buses and vans and runs 82 out-of-district special education routes for over 370 students 49 destinations.

## Pilot Year One Activities: FY06

### Data Collection and Testing the Premise

#### Pilot School Student Data

After the release of funding in late 2005, data collection was the first task of the three grantee collaboratives. The grantees explored the feasibility of “destination-based routing” as a strategy for utilizing collaboratives to increase efficiency and lower transportation costs. Under this premise, educational collaboratives would be responsible for the transportation of all students attending specific private schools operating within their geographic area, regardless of the location of the sending district. Destination-based routing would centralize out-of-district transportation services with individual regional collaboratives. ACCEPT and AV each selected two nearby private schools as pilot locations. LPVEC selected eight private schools as pilot locations. The pilot schools included:

Collaborative	Private School	Location
ACCEPT	The Learning Center for the Deaf	Framingham
ACCEPT	Gifford School	Weston
AV	New England Center for Children	Southborough
AV	Carroll School	Weston
LPVEC	Willie Ross Middle School	Longmeadow
LPVEC	Willie Ross Elementary School	Longmeadow
LPVEC	Springdale Education Center	Holyoke
LPVEC	White Oak School	Westfield
LPVEC	Curtis Blake School	Springfield
LPVEC	New England Adolescent Research Institute	Holyoke
LPVEC	Experiment With Travel School (RFK Children's Action Corps)	Holyoke
LPVEC	American School for the Deaf	West Hartford, CT

As an initial step, student data were collected from the private schools as well as the sending districts. Next, transportation routing software was purchased by ACCEPT and AV to develop cross-district hypothetical routes for all students currently attending each “pilot” private school. LPVEC already owned and operated the software for their transportation services program.

LPVEC collected student data for all children attending the eight selected private schools. Data were collected for 230 students hailing from 29 districts (predominantly from Hampden and Hampshire counties) and with several students traveling from as far away as Middlesex and Berkshire counties. New potential routes were modeled by LPVEC using the VersaTrans software and integrating existing LPVEC routes. Using the modeled, combined routes, LPVEC estimated a potential savings of 60 routes per day.

ACCEPT and AV collected data from their pilot schools on 354 students who were transported to those schools daily. Data collected for the Gifford School indicated that 96 students currently transported on 40 routes could be combined more efficiently, eliminating the need for five routes. The routing software originally recommended 29 routes but practical considerations such as stopping and loading times for various special needs students, age differences, behavioral issues, traffic conditions, and some districts “opting out” of collaborative-run transportation, increased the final number of routes.

While modeled routes indicated that savings could be potentially substantial, the grantees eventually realized that the logistics of destination-based routing were unrealistic and impracticable. The grantees concluded that providing services and maintaining quality to students hailing from many different regions of Massachusetts, would be an overwhelming challenge and highly unfeasible. For example, LPVEC is only one of three collaboratives operating in Western Massachusetts and the only one currently providing transportation services, but there are 29 approved private education schools in western Massachusetts that attract students from across the state. Typically, districts and collaboratives that contract for transportation services work with a local vendor which enables oversight of the quality of services being provided. Personal relationships with vendors, parents and students, as well as geographic accessibility help districts monitor quality. Districts and collaboratives that own or lease their vehicles have even more control over the quality of their services by being able to hire their own drivers and staff and also manage their fleet on a daily basis. Not only would it be difficult for collaboratives to manage and ensure quality, it is highly unlikely that districts would feel comfortable placing their students in the care of collaboratives on the other end of the state.

### Per Day per Vehicle Cost Data

Concurrent to the student data collection, the grantees collected data from collaboratives statewide about the transportation services they were providing. In May 2006, they developed “Pilot Program for Educational Collaboratives: Special Education Transportation Interim Report”, which captured an overview of the compiled data. The report offered information about the collaboratives that were already providing transportation services and detailed the types of services that they were providing. In FY06, seven collaboratives were providing transportation services using owned or leased vehicles. In addition, five collaboratives managed the transportation services for their districts by contracting with private vendors.

### Collaboratives Providing Out-of-District Special Education Transportation Services, FY06

Collaborative	Location	Contracting w/vendors	Owned/Leased Vehicles
ACCEPT	Natick		✓
Assabet Valley	Marlborough	✓	
BICO	Franklin	✓	
Cape Cod	Otis ANGB		✓
CASE	Concord		✓
GLEC	Lawrence	✓	✓
LPVEC	West Springfield		✓
MEC	Chelmsford		✓
Project SPOKE	Norton	✓	
SEEM	Stoneham	✓	
Southern Worcester County	Southbridge		✓

Source: “Pilot Program for Educational Collaboratives: Special Education Transportation Interim Report”, May 2006.

According to the report, each collaborative which owned or leased vehicles was asked to provide detailed information about the costs of the transportation services that they provide. The report outlines the daily cost, as reported by six collaboratives, for one 7D vehicle<sup>7</sup> making a hypothetical four-hour trip

<sup>7</sup> M.G.L. c. 90, Sec 7D allows “school pupils” to be transported in vehicles other than school buses. These vehicles are called “school pupil transport vehicles” (or “7D vehicles” after the Section number creating the law) and are generally vans and station wagons. The law restricts them to carrying a maximum of eight (8) passengers ([www.mass.gov/rmv](http://www.mass.gov/rmv)).



in FY06. Based on the information provided, the report concludes that the cost ranges from \$189 to \$278 per day and the average collaborative cost is \$214 per vehicle per day.

#### Daily Cost per Day per Vehicle, FY06

Collaborative	Cost per Day
GLEC	\$189
CASE	\$190
LPVEC	\$194
Southern Worcester	\$205
Cape Cod	\$231
SEEM	\$278
<b>Average</b>	<b>\$214</b>
<b>Median</b>	<b>\$200</b>

Source: "Pilot Program for Educational Collaboratives: Special Education Transportation Interim Report", May 2006.

Throughout our interview process, grantees and other key stakeholders consistently cited \$200 per day per vehicle as a baseline for daily per vehicle costs and indicated that these cost estimates were developed through the pilot data collection. The median, or the exact middle, of the compiled collaborative daily cost for a 7D vehicle is approximately \$200. According to Robert Kurtz, a pilot project consultant, in addition to collecting cost data from collaboratives, additional data was collected from school districts regarding the cost of transporting students to out-of-district private schools and as the data was compiled, the average costs also emerged as approximately \$200 per day per vehicle. These district data were not included in the report.

## Pilot Year 2 Activities: FY07

### Development of Regional Networks

With the realization that destination-based routing might be cost-effective, but highly impractical and armed with newly compiled baseline per vehicle per day cost data, the grantees began considering a new transportation strategy: regional transportation networks. Regional transportation networks would consist of geographically connected areas of the state that would partner to more efficiently transport students to out-of-district placements.

ACCEPT, AV, and LPVEC began exploring the possibility of developing regional networks to help facilitate more coordinated out-of-district special education transportation collaboration between school districts. In eastern Massachusetts, due to the density of the population and the extensive number of active educational collaboratives, the networks were developed as groups of cooperating collaboratives that would be able to reach a large number of districts. In Western Massachusetts, the small number of collaboratives along with the low density, but large geographic areas, led to the development of a county-wide approach which consisted of four separate transportation networks under the auspices of the Western Massachusetts Consortium. The pilot grantees, along with the program consultants, began initial meetings to develop interest on the part of collaboratives and districts in partnering. The grantees and consultants grouped Networks based on their geographic locations and their interest in participating with input from interested collaboratives.

LPVEC began outreach to the non-member districts of Hampden County. It also began working with the Hampshire Educational Collaborative (HEC) as an organizing entity in Hampshire County, Franklin County Technical School (FCTS) in Franklin County and the South Berkshire Educational Collaborative (SBEC) in Berkshire County to explore the possibilities of extending the cost-savings of managed inter-district special education transportation.

ACCEPT and AV began to reach out to the collaboratives in their respective geographic areas and helped coordinate the development of other regional networks. Through a voluntary process, ACCEPT joined with CHARMS, TEC, BICO, and Project Spoke. AV joined with CAPS, FLLAC, Blackstone and Southern Worcester. ACCEPT began providing technical assistance to the newly developing networks in the Southeast (North River, South Shore and Pilgrim Area) and the South Coast (South Coast, READS, and Southeastern). AV began providing technical assistance to the Northeast Network (GLEC, SEEM, Coastal, Shore and North Shore) and Metro Boston (LABBB and EDCO). These “networks” consisted of the following entities. The particular organizations that have taken the lead in organizing services for their networks are in bold below. Although some networks have initially agreed to explore working together, no collaborative has taken the lead to organize the overall transportation services.

### Regional Network Development, FY08

Network	Collaborative/Members
Metrowest	ACCEPT
Metrowest	CHARMS
Metrowest	TEC
Metrowest	BICO
Metrowest	Project Spoke
Southeast	<b>North River</b>
Southeast	South Shore
Southeast	Pilgrim Area
South Coast	South Coast
South Coast	READS
South Coast	Southeastern
Central Mass	Assabet Valley
Central Mass	CAPS
Central Mass	FLLAC
Central Mass	Southern Worcester
Central Mass	Blackstone
Northeast	<b>GLEC</b>
Northeast	<b>SEEM</b>
Northeast	Coastal
Northeast	Shore
Northeast	North Shore
Metro Boston	<b>LABBB</b>
Metro Boston	EDCO
<b>Western Massachusetts Consortium</b>	
Hampden County	LPVEC
Hampshire County	<b>HEC</b>
Franklin County	<b>Franklin County Technical School (FCTS)</b>
Berkshire County	<b>SBEC</b>

## Pilot Year 3 Activities: FY08

### Expansion of Regional Networks

In the final year of the pilot, the grantees report that there are currently ten transportation networks at various stages of development. Three networks began providing transportation services in September 2007 and all three expect to expand their services in September 2008. At least one collaborative within a network will begin providing new services in September 2008 and possibly as early as Summer 2008. The remaining networks are still in the developmental stage and report that they are pursuing the possibility of collaboration for out-of-district special education transportation.

Network	Service Start Date	Status
Metro Boston	September 2007	Currently providing collaborative inter-district routes. Anticipating expansion to network routes in September 2008
Northeast	September 2007	Currently providing network inter-district routes. GLEC and SEEM also providing non-network routes as usual. Anticipating expansion in September 2008.
Southeast	September 2007	Currently providing inter-collaborative network transportation. Anticipating expansion in September 2008
Metro West	September 2008	Anticipating new inter-district routes in September 2008. ACCEPT, BICO and Project SPOKE providing transportation services as usual. CHARMS to provide new services to its member districts.
Franklin County	TBA	In development.
Hampshire County	TBA	In development.
Berkshire County	TBA	In development.
Central Mass	TBA	In development. (AV and Southern Worcester providing transportation services as usual)
Hampden County	TBA	In development. (LPVEC providing transportation services as usual)
South Coast	TBA	In development.

An additional \$85,000 per grantee (for a total of \$185,000) was funded by the legislature in FY08 to support the expansion of these networks. The grantees distributed the funds in the following ways:

Grantee	Name of Network (Funding Receiving Organization)	Pilot Funding, FY08	Use of Funding
ACCEPT	Metro West (ACCEPT)*	\$107,500	<ul style="list-style-type: none"> <li>• Pilot Administration</li> <li>• State-wide Project Coordinator</li> <li>• Metro West Project Coordinator</li> <li>• Routing Specialist</li> <li>• Software</li> </ul>
	Southeast (North River)	\$ 62,500	<ul style="list-style-type: none"> <li>• Transportation Coordinator</li> </ul>
	South Coast (Consultant)	\$ 15,000	<ul style="list-style-type: none"> <li>• Consultant—Data collection and analysis</li> </ul>
AV	Central Massachusetts (AV)*	\$119,600	<ul style="list-style-type: none"> <li>• Pilot Administration</li> <li>• State-wide Project Coordinator</li> <li>• Routing Specialist</li> <li>• Software</li> </ul>
	Northeast (GLEC and SEEM)	\$ 50,000	<ul style="list-style-type: none"> <li>• Software</li> <li>• Staff time</li> </ul>
	Metro Boston (LABBB)	\$ 15,000	<ul style="list-style-type: none"> <li>• Staff time</li> </ul>
LPVEC	Hampden (LPVEC)*	\$ 85,000	<ul style="list-style-type: none"> <li>• Pilot Administration</li> <li>• State-wide Project Coordinator</li> <li>• Project Consultant</li> <li>• Transportation Mgr</li> <li>• Routing Specialist</li> <li>• Software</li> </ul>
	Hampshire (HEC)	\$ 44,529	<ul style="list-style-type: none"> <li>• Transportation Coordinator</li> <li>• Software</li> </ul>
	Franklin (FCTS)	\$ 24,382	<ul style="list-style-type: none"> <li>• Transportation Coordinator</li> <li>• Software</li> </ul>
	Berkshire (SBEC)	\$ 31,089	<ul style="list-style-type: none"> <li>• Transportation Coordinator</li> <li>• Software</li> </ul>
<b>TOTAL</b>		<b>\$554,600</b>	

Source: Special Education Transportation Pilot Program Grantees and Networks, 2008.

\*The overall pilot funding is included in these totals because these networks include the pilot grantees.

## Regional Network Participation

Participation in the regional transportation network was voluntary and of the eleven collaboratives providing transportation services before the pilot, all but three opted to join a regional network during the three-year pilot program. Cape Cod, CASE, and MEC already operate extensive transportation programs and consequently are not participating in a regional network.

Additionally, collaboratives without previous out-of-district transportation experience had the option of joining a regional transportation network during the pilot. The Central Massachusetts Special Education

Collaborative was the only collaborative of this type that opted not to participate, on any level, in a regional transportation network.

The degree to which collaboratives are participating in the regional networks varies greatly. Some collaboratives are managing and participating in new programming, others simply have districts that are participating, and still others are not actively participating in any way.

### New Pilot-Related Transportation Services

Three networks, Southeast, Northeast and Metro Boston, began providing new collaborative-run transportation services in September 2007 and will complete their first year of service in June 2008. Of the 27 participating districts, almost two-thirds had never before participated in collaborative-run transportation.

#### Total New Out-of-District Collaborative-run Transportation, FY08

Network	# of Routes	# of Students	# of Districts	# of Destinations
Southeast	13	40	11	13
Northeast	23	113	13	11
Metro Boston	5	21	3	5
<b>Total</b>	<b>41</b>	<b>174</b>	<b>27</b>	<b>24*</b>

Source: North River, GLEC, SEEM, and LABBB Collaboratives, 2008.

\*Total number of *different* destinations

The Southeast Network purchased eight vehicles and contracted with a private vendor for three inter-district routes and ran a total of 13 routes with 40 students for 11 districts. Metro Boston served as the coordinator and managed the contracting and ongoing operation of five inter-district routes for three districts with a local vendor. In the case of the Northeast Network, GLEC and SEEM had been providing transportation services to their member districts for many years, but this year joined together to provide additional inter-district routes and incorporated new districts from the Coastal and Shore Educational Collaboratives. Working with a long-time SEEM transportation vendor, the network was able to negotiate new, desirable rates on 23 inter-district, inter-collaborative routes.

Network	Collaborative	District	Participating in new Collaborative-run Transportation, FY08
<b>Southeast:</b>  13 routes 40 students 11 districts 13 destinations	North River	<b>Abington</b>	<b>YES</b>
		<b>Bridgewater-Raynham</b>	<b>YES</b>
		<b>East Bridgewater</b>	<b>YES</b>
		Hanover	
		<b>Rockland</b>	<b>YES</b>
		West Bridgewater	
		Whitman-Hanson	
	South Shore	Braintree	
		Cohasset	
		<b>Hingham</b>	<b>YES</b>
		Hull	
		<b>Norwell</b>	<b>YES</b>

		Quincy	
		<b>Randolph</b>	<b>YES</b>
		<b>Scituate</b>	<b>YES</b>
		<b>Weymouth</b>	<b>YES</b>
	Pilgrim Area	Duxbury	
		Halifax	
		Kingston	
		Marshfield	
		<b>Pembroke</b>	<b>YES</b>
		Plymouth	
		Plympton	
		Silver Lake	
	READS	<b>Middleborough</b>	<b>YES</b>
	GLEC	<b>Andover</b>	<b>YES</b>
		Boxford	
		Haverhill	
		Lowell	
		Lawrence	
		<b>Metheun</b>	<b>YES</b>
		Middleton	
		<b>North Andover</b>	<b>YES</b>
		Topsfield	
	SEEM	Lynnfield	
		Melrose	
		<b>North Reading</b>	<b>YES</b>
		<b>Reading</b>	<b>YES</b>
		Saugus	
		<b>Stoneham</b>	<b>YES</b>
		<b>Wakefield</b>	<b>YES</b>
		<b>Wilmington</b>	<b>YES</b>
		<b>Winchester</b>	<b>YES</b>
		<b>Woburn</b>	<b>YES</b>
	Coastal	Amesbury	
		<b>Georgetown</b>	<b>YES</b>
		Hamilton-Wenham	
		Ipswich	
		Manchester Essex Regional	
		<b>Newburyport</b>	<b>YES</b>
		Pentucket	
		Triton	
	Shore	Cambridge	
		<b>Chelsea</b>	<b>YES</b>
		Everett	
		Malden	
		Medford	
		Revere	
		Saugus	
		Somerville	

		Winthrop	
	North Shore	Beverly	
		Danvers	
		Gloucester	
		Hamilton-Wenham	
		Lynn	
		Manchester Essex Regional	
		Marblehead	
		Masconomet	
		Nahant	
		Peabody	
		Reading	
		Salem	
		Swampscott	
<p><b>Metro Boston:</b></p> <p>5 routes 21 students 3 districts 5 destinations</p>	LABBB	<b>Arlington</b>	<b>YES</b>
		Bedford	
		Belmont	
		<b>Burlington</b>	<b>YES</b>
		<b>Lexington</b>	<b>YES</b>
	EDCO	Acton	
		Acton-Boxborough	
		Arlington	
		Bedford	
		Belmont	
		Boston	
		Boxborough	
		Brookline	
		Carlisle	
		Concord	
		Concord-Carlisle	
		Lexington	
		Lincoln	
		Lincoln-Sudbury	
		Newton	
		Sudbury	
		Waltham	
		Watertown	
	Weston		
	Winchester		

## Regional Transportation Networks: In Operation

Three regional networks began providing out-of-district special education services in Fall 2007. The Metro Boston, Northeast, and Southeast Networks each chose different models of operation for their services and all three plan to expand in FY09.

### Metro Boston Network

#### Out-of-District Transportation Services, FY08 and Projected Services, FY09

	# of Districts	# of Routes	# of Students	# of Destinations	Estimated Savings
FY08	3	6	21	5	\$92,482
FY09 (projected)	5	TBA	90	22	TBA

Source: LABBB Collaborative, 2008.

The Metro Boston Network is made up of the LABBB Collaborative and the EDCO Collaborative. LABBB is the lead in the development of the pilot network and is made up of five member districts: Lexington, Arlington, Bedford, Belmont and Burlington. Before the pilot, LABBB was providing transportation services to collaborative-run vocational programs with leased vehicles and staffed by LABBB employees. During FY07, the LABBB Board of Directors, made up of member district superintendents, expressed concerns about rising out-of-district transportation costs. Gerry Mazor, the former Executive Director of the CASE Collaborative and now the Director of Special Projects for LABBB, was tasked with investigating the options. Mazor had a great deal of experience in special education transportation in his role at CASE. CASE, a long-time special education transportation provider, has a fleet of over 90 vehicles and transports almost 400 students daily.

In early 2007, with the help of business managers, special education directors, and administrative staff, student transportation data was collected for 220 out-of-district students and mined for common placements. After this process, Arlington, Burlington and Lexington elected to participate in the pilot year. Bedford, a member of CASE, was already receiving collaborative-run transportation services and Belmont had just entered the first year of a three-year contract with a vendor. Both opted out of participating in the pilot.

Five private schools were chosen as pilot schools by the districts. Due to the high capital costs of purchasing vehicles, the districts decided to continue working with private vendors for the new inter-district routes, but agreed to negotiate more cost-effective rates. Two of the seven vendors serving the communities at the time were asked to participate in an information session. One vendor attended the session. Afterward, the districts discussed their past experiences with this vendor and the quality of service received. This final vendor was chosen by the districts for the first year of district collaboration starting in September 2007.

There was some apprehension on the part of districts regarding collaboration, though. They were accustomed to being in complete control of their own services and knew that if one member was unhappy and pulled out during the pilot, it would affect the bottom line of the whole group. The



districts decided to start small and the finalized routes in August 2007 had 26 students. By the start of school, the number had decreased to 21 due to characteristic last minute adjustments.

Throughout the interview process for this report, the struggle to find qualified drivers was frequently mentioned. Therefore, it is not surprising that the vendor had already been running some inter-district routing. But, without the districts communicating and organizing, the vendor had no incentive to pass the cost savings on to its customers. The vendor came up with a funding model that the participating districts approved. The model consisted of zone pricing based on distance to the destination and base costs with incremental increases based on the number of participating towns on the route. Each district is individually billed by the vendor monthly.

**Per Day per Vehicle Costs, Metro Boston Network, FY08**

<b>FY08 Cost Sharing Model—Metro Boston Network</b>			
<ul style="list-style-type: none"> <li>• Vehicle prices are for one town. For each additional town, add \$25.00.</li> <li>• If going to two or more towns, a vehicle can only have 6 students because of time, instead of 8 students in same town.</li> <li>• A vehicle can fit up to 3 wheelchairs with one monitor.</li> <li>• If schools are in same town and transit times work, a route can be combined for the same price, if under 6 students.</li> </ul>			
<b>Zone</b>	<b>7D-8 PASSENGER</b>	<b>WHEELCHAIR</b>	<b>MONITOR</b>
<b>BLUE</b>	\$125.00	\$150.00	\$40.00
<b>YELLOW</b>	\$150.00	\$175.00	\$60.00
<b>GREEN</b>	\$175.00	\$200.00	\$75.00
<b>PINK</b>	\$200.00	\$225.00	\$85.00

Source: LABBB Collaborative as provided by JSC Transportation, 2008.

**Costs and Benefits**

As part of the pilot and in an effort to inform its expansion, LABBB compiled data on cost savings from the participating districts. LABBB requested that the participating districts estimate what their FY08 costs for transporting these students would have been without collaboration and also estimate a full year of costs for these students based on billing to date. According to the data received, the three districts projected that they are saving over \$92,000.

**Special Education Transportation Pilot District Cost Savings, FY08**

District	FY08 Costs Without Collaborating	FY08 Costs Via Collaborating	Savings	% Saved	# of Receiving Schools	# of Students
Arlington	\$ 79,445	\$ 48,188	\$ 31,257	39%	4	6
Burlington	\$ 102,092	\$ 57,563	\$ 44,529	44%	4	8
Lexington	\$ 61,695	\$ 45,000	\$ 16,695	27%	3	7
	<b>\$ 243,232</b>	<b>\$ 150,751</b>	<b>\$ 92,481</b>	<b>38%</b>		<b>21</b>

Source: LABBB Collaborative, 2008.

**Special Education Transportation Pilot per Pupil Cost Savings, FY08**

District	Cost Per Pupil w/out Collaborating	Cost Per Pupil Via Collaborating
Arlington	\$ 13,241	\$ 8,031
Burlington	\$ 12,762	\$ 7,195
Lexington	\$ 8,814	\$ 6,429

Source: LABBB Collaborative, 2008.

While the districts meet regularly to plan and discuss the program, currently, there is no formal mechanism in place for assessing the quality of services as perceived by parents. According to LABBB, while overall the new service went smoothly, some parents were initially dissatisfied with the change. It was an easier transition for the districts that had already been using the selected vendor, as the vendor was a known provider. There were also some issues in which parents from different towns had various negative attitudes about their children riding with children from other towns. As a result, LABBB feels that the more awareness parents have about the transportation process, the better the outcomes and has discussed bringing parents together to dialogue about the service, changes, etc in the future.

LABBB is in the process of developing its plans for expansion in FY09 and anticipates using the same vendor. Waltham and Watertown, EDCO collaborative members, are expected to participate and the Network is looking to expand to 22 destinations and 90 students. A few other districts expressed interest in participation, but they are not contiguous with participating districts and it would be very difficult to route within the time constraints.

**Challenges and Lessons Learned**

The ultimate goal of the program is to be self-sustaining, but the governance and organization of the program, as well as the role of the collaborative, has not yet been fully developed. Currently, LABBB is the organizing entity that brings stakeholders together, helps facilitate the program development process with districts and coordinates contract negotiations with the vendor. The collaborative does not administer the billing or routing for the districts or the vendor and does not oversee day-to-day operations or quality control. The districts have retained all fiscal and quality control responsibilities. Staff time spent organizing the program by the Director of Special Projects was covered, in small part, by pilot funding. Due to the very early stage of development, however, no mechanism is currently in place to create a program that is self-sustaining because the model yet to be developed. The cost savings exhibited by districts make it likely that the program can be self-sufficient in the future, but it will be up to participating districts to decide how to implement the structure to do so.

Starting small and maintaining constant communication between districts, the collaborative has enabled the program to get off the ground. While there was a willingness on the part of districts to participate, without the leadership and persistence on the part of the collaborative, the program would likely not have moved forward as expeditiously and with as much success.

## Southeast Network

### Out-of-District Transportation Services and Future Projected Services, FY08

	# of Districts	# of Routes	# of Students	# of Destinations	Estimated Savings
FY08	11	13	36	13	\$54,439
FY09 (projected)	11	TBA	80	TBA	TBA
FY10(projected)	11	TBA	110	TBA	TBA

Source: North River Collaborative, 2008.

The Southeast Network consists of the North River Collaborative, South Shore Collaborative and Pilgrim Area Collaborative. Over the years, North River had discussed the possibility of providing transportation services, but there was no collective will on the part of their districts to move forward. The pilot funding, coupled with district concerns about some recent and serious quality issues with vendors, initiated a conversation amongst the collaboratives in the region. North River volunteered to take the lead in the development of out-of-district transportation services.

With the approval of their board, made up of one school committee member from each of its districts, North River opted to try a mixed model of service delivery, a more conservative approach than purchasing a full fleet of vehicles all at once. North River purchased two wheelchair vehicles and six vans with a 100% financed loan at 7% interest and they also solicited proposals for several additional routes from vendors currently serving districts in the region. Although one vendor was very upset with this process, presumably because they anticipated losing business, the collaborative received four proposals. Only one proposal, according to the collaborative, was competitive based on the baseline cost data developed early in the pilot. The collaborative collected student data from districts interested in participating and chose the most popular out-of-district placements as pilot schools. Eight private schools and five collaborative-run programs were selected. A master grid was created and much time was devoted to mapping potential routes by hand (with the help of free online mapping software). With the pilot funding, North River hired a transportation coordinator, but did not have enough to purchase the routing software.

North River asked that participating districts make a three-year commitment to the pilot to ensure the stability of the program. Eleven districts from four different collaboratives are participating (one district from the READS collaborative is participating). According to the collaborative, geographic limitations and the perception on the part of some districts that they are already receiving fair pricing led other districts to opt out. Thirty-six students are transported to 13 destinations daily in the first year of the program.

### Costs and Benefits

In an effort to understand the first year of service, North River requested that the participating districts compare last year's costs per student and their estimated total costs this year. The estimated savings do not take into account the likely increase in service costs from FY07 to FY08 that a district would incur if they were to stay with a private vendor. Therefore, the estimated savings attributed to Network participation may be slightly overstated. However, these savings do take into account the overhead and administrative costs incurred by North River to run the program, but not the salary of the transportation coordinator (that cost was covered in FY08 by pilot funding). Based on the data received from nine of

the eleven participating districts, the districts will save an estimated \$54,000 by the end of FY08, ranging from \$1,000 to over \$15,000 per district.

### Special Education Transportation Pilot District Cost Savings, FY08

District	Reported Savings	# of Receiving Schools	# of Students
Abington	\$ 12,361	n/a	6
Bridgewater-Raynham	\$ 5,819	n/a	6
East Bridgewater	\$ 1,080	n/a	2
Rockland	\$ 6,068	n/a	3
Hingham	\$ 2,500	n/a	3
Middleborough	n/a	n/a	1
Norwell	n/a	n/a	1
Pembroke	\$ 999	n/a	2
Randolph	\$ 4,590	n/a	3
Scituate	\$15,147	n/a	1
Weymouth	\$ 5,875	n/a	8
	<b>\$ 54,439</b>	<b>13</b>	<b>36</b>

Source: North River Collaborative, 2008.

The total administrative and overhead costs incurred to operate the eight vehicles are approximately \$95,620. The transportation coordinator salary, two-thirds of the total overhead costs, is covered through pilot funding. North River is anticipating additional grant funding to assist their growth during the next development year. Next year, North River is expecting to increase service to 75-80 students and purchase additional vehicles. They will maintain the same number of contracted routes with private vendors, but plan to eventually eliminate the use of private vendors. North River estimates that next year's savings to districts will be three times this year's savings. The collaborative also calculates that tripling the number of routes/students would enable them to be self-sustaining and cover their costs to operate the program by FY10. North River's cost per day per vehicle is in line with the baseline costs developed in the first year of the pilot. The cost per day for a van is \$208 and for a wheelchair vehicle, \$224.

### North River Transportation Costs per Vehicle, FY08 \*

	Annual Cost	Per Day Cost	# of Vehicles	Total Cost
Cost per Wheelchair Van	\$ 40,386	\$ 224	2	\$ 80,772
Cost per Van	\$ 37,526	\$ 208	6	\$ 225,156
				\$ 305,928

Source: North River Collaborative, 2008.

\*includes all overhead costs except the salary of the transportation coordinator (this cost was covered by pilot funding)

### Challenges and Lessons Learned

According to North River, owning its own vehicles enables a level of quality not possible otherwise. North River hires its own drivers, has total control over the vehicles, and closely monitors the day-to-day operation of the program. The transportation coordinator sees drivers off every morning because the vehicles are garaged at the collaborative. One of the biggest challenges the collaborative faced,

however, was finding qualified drivers. While they received at least nine applications for each available position, finding drivers that met the standards set by the collaborative and its board proved to be very difficult. It is the collaborative's hope to develop a cadre of loyal and reliable drivers who will help build and sustain the program's quality. As North River expands its fleet, this challenge may intensify.

In the first year of service, all routing was done by hand by the North River administrative and transportation staff. The collaborative would like to purchase and utilize routing software in the future but the technological comfort level of transportation staff must be developed in order to make it as effective and efficient as possible. In addition, budgeting the purchase of the software into North River's program overall must be taken into account as pilot funding at this pilot site was used for staffing and not software.

While no routing technology was utilized, each vehicle was equipped with GPS which enables North River to be able to monitor the exact location of each of its vehicles. The ability to give up-to-date information to parents, districts and schools on the location of a vehicle and its students has proven invaluable according to the North River, and enables its staff to be very responsive to district and parent needs.

## Northeast Network

### Out-of-District Transportation Services, FY08, and Projected Services, FY09

	# of Districts	# of Routes	# of Students	# of Destinations	Estimated Savings
FY08	13	23	113	11	>\$86,044
FY09 (projected)	TBA	100	TBA	TBA	TBA

Source: North Reading Transportation, 2008.

The Northeast Network is made up of the GLEC, SEEM, Coastal, Shore, and North Shore Collaboratives; GLEC and SEEM have taken the lead in the development of the network. Both collaboratives have had extensive experience providing special education transportation services to their districts. SEEM, over a decade ago, began coordinating the bidding and contractual arrangements for the transportation of 12 students and today almost 500 students participate in its' transportation services. As SEEM has grown, so has their local vendor, which has provided the collaborative's transportation services since the program's inception. GLEC uses a mixed model approach and has 23 of its own vehicles on the road with 21 drivers on staff and also contracts with private vendors for various routes to transport over 300 students daily.

SEEM and GLEC convened interested districts from the regional collaboratives and chose a select list of private school locations as well as collaborative-run programs as pilot destinations. Although a majority of participants in the pilot hailed from GLEC and SEEM, Coastal and Shore also had participating districts. There are no participating districts from North Shore. As part of the original conception of the Northeast Network, SEEM would manage the billing for the districts with the vendor and serve as the "bank" between the vendor and the districts. GLEC, using the VersaTrans software purchased with pilot program funds, would coordinate Network student intake and routing. The Network negotiated with SEEM's longtime vendor for competitive rates by assuming some of the responsibilities that are typically the vendor's (i.e., routing) and by guaranteeing payment of invoices within two weeks of billing (an incentive to vendors as districts frequently do not honor invoices in a timely manner). As part of the negotiated agreement, the vendor sends a monthly bill to SEEM with costs itemized by district. SEEM then bills each Network district for their individual costs. SEEM pays the vendor minus a \$15 per day per route administrative fee to support the extra responsibilities that the Network has undertaken to manage the relationship with the vendor. GLEC was unable to assume the responsibility of routing students this school year because of a lack of staff resources and the \$15 per day per route Network fee was decreased to \$8.50 per day per route. As previously noted, districts often have challenges paying on time and in order to keep up the Network's end of the arrangement and pay invoices within two weeks of billing, SEEM has floated money to the Network to cover costs. SEEM anticipates getting paid back by the Network in full, but a full year of service has not yet been completed.

### Costs and Benefits

Without a complete full year to compare, no cost savings analysis has been done by the lead collaboratives or their districts. The vendor, however, has done an analysis that compared transportation costs of students who were on SEEM routes last year and Network-negotiated routes this year. The vendor estimated savings for those 39 students as approximately \$73,000. This estimate does not take into account the 3% cost increase that was built into the SEEM contract for FY08 and would have been applied had these districts opted not to participate in the Network. Assuming the accuracy of the vendor

data, cost savings for those districts that had students on SEEM routes last year and Network routes this year might realistically be closer to \$86,000.

#### Estimated Cost Savings Comparison, FY08

# of Students (participating last year and this year)	% of Total # of Students in Network	Network Cost FY08	SEEM Cost FY07	Estimated SEEM Cost FY08 (3% increase)	Total Estimated Savings
39	35%	\$ 354,208	\$ 427,430	\$ 440,252	\$ 86,044

Source: North Reading Transportation, 2008.

While the savings to these districts means an obvious loss of revenue to the vendor for these particular students, according to the Network, the ability to obtain new districts as customers through the Network was incentive enough for the vendor to agree to participate. With the assumption that only SEEM districts were served by this vendor last year, the vendor is now serving six new districts and 69 new students through the Network.

The costs to the two collaboratives for running these services have not yet known. As the program develops, discussions on equitable distribution of the administrative revenue between SEEM and GLEC will have to be negotiated based on the tasks associated with administering the program. If the current model stays in place, the tasks will include, but may not be limited to: transportation routing and maintenance, software administration, and billing management. The Network anticipates that 100 routes, the estimated growth for next year, would enable the program to become self-supporting and fiscally feasible to the two lead collaboratives. If the current model stays in place, 100 routes would generate approximately \$270,000 in administrative revenue (100 routes x 180 days x \$15/day per route). In its first year of operation, the Northeast Network is transporting 113 students from 13 districts to 11 destinations on 23 routes and will likely generate approximately \$35,000 (23 routes x 180 days x \$8.50/per day).

Calls from parents and districts regarding Network transportation services are currently fielded by GLEC and the vendor. While no formal evaluation of the new services has been done, the two collaboratives report high satisfaction citing the fact that no calls have warranted the involvement of the Executive Directors. They report that districts have been generally positive about the service. There was likely no discernable change in service for the SEEM district students because they were already being served by this vendor last year.

#### Challenges and Lessons Learned

SEEM and GLEC are committed to working together as a Network and bringing together other collaboratives, despite the fact that they are both veteran special education transportation service providers and each collaborative used a very different service model. As the organizational structure of the Network continues to develop, some challenges remain. Ensuring that the fiscal structure of the Network is fair to all involved is a primary concern. Currently, the Network financial organization falls under the umbrella of SEEM, but making sure that each lead collaborative is equitably compensated for the services they provide will be essential to the program's ultimate success. The collaboratives noted that more experience and understanding of the tasks and time involved in the administration of the program is needed before decisions about this issue can be undertaken.



Cash flow is also an issue. The agreement with the vendor specifically guarantees payment within two weeks regardless of the promptness with which districts pay. SEEM has taken on the responsibility of loaning money to the Network to cover the costs of servicing these routes on a month-to-month basis. The collaboratives anticipate that as the Network grows, its' assets will grow as well and will become a self-supporting enterprise with sufficient cash reserves to support this arrangement. Other organizations/collaboratives without the capital that this Network already possessed would not be able to run new services in this manner.

As GLEC gears up to provide routing coordination services, the issue of staff resources and back-up resources was raised and is highly pertinent to the development of all the networks across the state. While one staff member will likely be involved in the coordination of the services on a day-to-day basis, it is essential that more than one staff member know the operations sufficiently to be able to cover those services when necessary. Developing the staff and the organization to provide the highest level of service possible is something that will become important as each new program grows.

## Regional Transportation Networks: In Development

The Metro Boston, Southeast and Northeast Networks began providing services through their programs in September 2007 and will complete a full year with the end of school in June 2008. Other regional networks have yet to provide services but are at various stages in their development.

### Central Massachusetts Network

The Central Massachusetts Network consists of Assabet Valley (AV), CAPS, FLLAC, Southern Worcester and Blackstone. Both AV (a pilot grantee) and Southern Worcester were already providing out-of-district special education services to districts before the start of the pilot. AV manages and coordinates the bidding with private vendors for out-of-district special education services for twelve member districts and eight non-member districts. Southern Worcester leases vehicles and provides services to four of its member districts. The development of inter-collaborative routing through the Network is still in the preliminary planning stage. The participating collaboratives and their districts have not yet established how the Network will be organized, who will take the lead, and what inter-collaborative network transportation services will look like. While AV has been an integral part of the original pilot, the district leadership of this collaborative has yet to decide the role it will play, if any, as part of the Network.

### Costs and Benefits

While the regional Network is still in the development stages, AV saw other benefits from the pilot program. The cost data collected early in the pilot has helped AV develop an understanding of realistic and baseline per day per vehicle costs. In addition, using pilot funding, AV was able to purchase routing software and began developing its own routes. In the past, and with at least seven different private vendors over the years, AV negotiated on behalf of its districts but was not able to provide specific routes for vendors, nor did it have an idea of what a reasonable price for those services would be. Therefore, AV was unable to ensure that the routing and pricing was as cost efficient as it could possibly be.

Armed with new knowledge in May 2007, AV invited vendors to participate in a pre-qualification process for its special education transportation contract. The pre-qualification process asked vendors to submit per vehicle per day prices based on four hours of service and up to one-hundred sixty miles of travel per day. After choosing a vendor, AV would then work with vendors to develop the routes. According to AV, the new vendor began running routes at substantially reduced rates from the previous school year. However, the transition to the new vendor was quite challenging. According to AV, the vendor was not as prepared as they should have been and some early mix-ups caused much consternation on the part of participating districts and parents. As the year went on, the services began to run more smoothly. The collaborative asks districts to evaluate services annually at the end of the school year and this year's assessment will be telling.

According to AV, although a full cost savings analysis was not completed, with more efficient routes and better rates, the savings from last year will be an estimated 12.5% for the collaborative overall. For the town of Westborough, for example, the estimated savings will be 14%. Westborough, because they are a long-term participant in inter-district collaborative-run transportation, was not part of the group of districts that was contacted regarding their perceptions of the pilot. However, according to a February 2008 newspaper article in the *Worcester Telegram and Gazette*, the superintendent in Westborough is expecting the streamlining of the transportation services through the collaborative to “save the town more than \$150,000 this year”.<sup>8</sup> Like the other Networks and collaboratives running new and/or improved pilot-related transportation services, a full year of service has not yet been completed.

**Assabet Valley Transportation Estimated Cost Comparison, FY07 to FY08**

	<b>FY07</b>	<b>FY08</b>	<b>Estimated Savings</b>	<b>% Savings</b>
Westborough	\$567,277	\$488,377	\$78,900	14%
Assabet Valley	\$ 3,371,456	\$ 2,954,636	\$416,820	12.5%

Source: Assabet Valley Collaborative, 2008.

**Challenges and Lessons Learned**

Working with a single vendor instead of several, and being an informed consumer (both on rates and route efficiency) has helped AV save their districts significant amounts of money, but change has been difficult. Managing the expectations and working with their districts through change was demanding.

While AV experienced successes through the pilot, the regional network linking collaboratives has not yet established how it will function. The leadership of each of the collaboratives and the districts that they represent will need to determine how to move forward, which collaborative(s) will take the lead, and what network transportation services will look like.

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<sup>8</sup> Dayal, Priyanka. “Van-pooling cuts costs for special ed students”. *Worcester Telegram and Gazette*, 12 February 2008.

## **Metro West Network**

The Metro West Network consists of ACCEPT, CHARMS, TEC, BICO, and Project SPOKE. Prior to the pilot, ACCEPT, BICO and Project SPOKE were each providing varying levels of out-of-district transportation services to their districts. ACCEPT, a pilot grantee, leased vehicles and hired its own drivers to provide services to its members. BICO managed contracts with private vendors for its districts and Project SPOKE provided a very loose forum for its districts to come together and bid through a private vendor. Concurrent to the pilot, CHARMS undertook the process of managing transportation services for its districts and anticipates becoming operational in Summer 2008.

While the Metro West Network is working towards inter-network collaboration through ongoing discussions, the assortment of transportation services already in operation and the concurrent development of new, stand alone services result in a very complex situation. Each collaborative continues to operate their services as usual though there is the potential for negotiated “network” pricing with vendors to incorporate intra-network collaboration. The challenges of finding qualified drivers may provide an incentive for more intra-network collaboration as ACCEPT may need to outsource some of its runs and as a result there may be opportunity as a result.

### **Costs and Benefits**

While the Network is working on developing an operational structure, additional outcomes of the pilot are evident.

#### **ACCEPT**

As a pilot grantee and experienced provider of transportation services, prior to the pilot, ACCEPT had believed that the services they were providing were competitive and cost-effective but did not have the data to demonstrate that this was in fact the case. According to Mike Palladino, the former Executive Director of ACCEPT and the pilot grantee, the best outcome of the pilot for ACCEPT was that it allowed them to document the competitiveness of their own services as compared to the services provided by other collaboratives and private vendors throughout the state. The statewide baseline as developed through data collection in the first year of the project (referred to consistently as \$200 per day per vehicle), helped ACCEPT show its districts that its’ per vehicle costs (estimated by ACCEPT as \$180 per day per vehicle in a recent presentation) were very competitive. In addition, pilot funding was also utilized to provide driver training and purchase routing software. However, the routing software has not been fully embraced by the transportation staff at ACCEPT and the routing is still done manually.

#### **CHARMS**

Mike Palladino became the interim Director at the CHARMS Collaborative in July 2007 and began using his extensive transportation experience and the knowledge gained through the pilot to begin to develop a transportation program. The member districts were interested in exploring its potential for cost-savings and were supportive of the program. Prior to his arrival, CHARMS solicited an inter-district bid from a local vendor for FY08. Due to unforeseen issues, CHARMS and its districts backed out of that contract and postponed collaborative-managed transportation services for another year.

In early 2008, with a part-time transportation coordinator employed and routing software purchased by the collaborative (not utilizing pilot funding), a new solicitation for bids was developed. Though

CHARMS did not have to go through a formal bid process, they opted to meet with local vendors and have an open proposal process, sharing all bidding information with all the vendors. Student data had been requested from each of the participating districts and using the routing software, CHARMS modeled routes to estimate the number and type of vehicles that would be necessary. Vendors were asked to bid per day per vehicle costs, assuming usage of four hours per day. Using the software, CHARMS was able to construct routes that identified the most efficient vehicle usage schedule. For example, a single bus could be used for two separate destinations depending on the pick-up and delivery times. CHARMS shared the various initial bids with all the vendors and one vendor returned with the most competitive final bid. That vendor was selected by the districts to begin to provide services in Summer 2008.

In anticipation of services beginning this summer, CHARMS has developed a billing model that takes into account the share of services utilized by each district. Each district is assigned costs based on their percentage of participating students and the percentage distance traveled by those students of the total distance. Those two percentages are then averaged and each district is charged proportionately on a monthly basis. The routing software is able to compute the total miles and the miles per student/district that will be used in the billing model. A \$10 per vehicle per day charge is added to the vendor price to cover the administrative and overhead costs of the collaborative. For example, if CHARMS contracts for 49 vehicles, it will generate approximately \$88,200 to cover the costs of operating the program. At CHARMS, those costs include the salary of the transportation coordinator, software updates, and administrative overhead, including billing.

Based on student data compiled from each district during the bid solicitation process, CHARMS anticipates transporting an estimated 194 students from five districts to 64 locations on 146 routes in FY09.

#### **CHARMS Modeled Student Routes, FY08**

	<b># of Districts</b>	<b># of Routes</b>	<b># of Students</b>	<b># of Destinations</b>	<b># of Vehicles</b>
FY08 (current)	5	146	194	64	49

Source: CHARMS Collaborative, 2008.

#### **Challenges and Lessons Learned**

With the variety of transportation services already being provided by member collaboratives, organizing and developing inter-collaborative planning and routing is challenging. There is extensive transportation experience within the leadership and staff of this network and harnessing that experience and developing a cooperative program could ultimately help make this Network very successful. A challenge for the Network will be in ensuring that each collaborative and its districts feel that they are benefiting from cooperation; each collaborative already has extensive experience with differing models of transportation. Like the other Networks, changing the way of doing things is difficult, whether it is starting something new or altering a long-standing program. Developing new relationships between collaboratives and districts will take time and consistent leadership.

CHARMS was fortunate and was able to solicit bids from several local vendors. They also were informed consumer and knew realistic baseline per day per vehicle costs. CHARMS also had the benefit of having staff with a tremendous amount of transportation experience. Not only does the

interim director have extensive student transportation services, but the transportation coordinator previously worked in student routing at LPVEC. Her experience and skill with the software and its idiosyncrasies allowed her to construct very efficient tiered routes minimizing the number of vehicles required. By limiting the number of vehicles with efficient routing and using baseline cost per vehicle per day data developed through the pilot, CHARMS gained a lot of control over the procurement process. CHARMS is also trying to be creative with the resources available to them. Sharon Public Schools owns its own vehicles and CHARMS is planning to incorporate those vehicles into the inter-district routing when possible through a special agreement with the district.

A fiscal challenge that CHARMS is currently tackling, and that other networks may face, is the unanticipated purchase of car seats due to the recent passing of the new Massachusetts car seat law that makes it mandatory for children under the age of eight years old, or under 4'9", to ride in a car seat or booster seat. The vans that vendors operate for special education transportation must be equipped with these seats. The collaborative will purchase the appropriate car seats and lend them to the vendor for use. The costs will likely be divided amongst the participating districts. This may also change the routing somewhat as fewer students will be able to fit in a vehicle that needs to be equipped with these seats.

## Western Massachusetts Transportation Consortium

The Western Massachusetts Transportation Consortium is made up of the Hampden County Network, the Hampshire County Network, the Franklin County Network, and the Berkshire County Network and was designed to increase inter-district routing in Western Massachusetts. The transportation networks developed throughout the rest of the state consist of groups of cooperating collaboratives, but Western Massachusetts has only three collaboratives, therefore these networks encompass entire counties to promote maximum participation. Each of the countywide networks is still in the initial development stages and to date none has begun offering services. Ultimately, long-term goals include communication and coordination between each of the county transportation coordinators. Unique challenges, as well as issues common to collaboratives in other regions, have been evident in the development of these networks.

## Hampshire County Network

The Hampshire County Network is coordinated and managed by the Hampshire County Collaborative (HEC) and consists of 16 school districts in Hampshire County. While HEC owns and operates about a dozen vans that provide transportation services for its own collaborative programs, the collaborative had no experience in coordinating inter-district special education transportation prior to the pilot. In 2007, using pilot funds, routing software was purchased and a transportation coordinator was hired and trained. HEC began the process of convening districts to discuss inter-district routing, reviewing the contracts that are currently in place and beginning the student data collection process.

### Costs and Benefits

Currently, most of the Hampshire County districts contract with one vendor for out-of-district transportation services and, according to HEC, most districts are extremely satisfied with the quality of service that this vendor provides. Given that there is only one vendor, it is very likely that inter-district routes already exist, but these routes are not known to the districts. In an attempt to develop a more complete picture of the current routing in place, HEC requested that the vendor provide the current routes for the Hampshire County districts. The vendor has expressed concern over the potential loss of business and has not been entirely cooperative during this process. HEC is currently in the process of trying to work with the vendor to glean this information.

Without the ability to know if inter-district routing was already taking place, HEC modeled routes using the routing software assuming that they originated from single districts and then developed inter-district routes for comparative purposes. Using the student data collected from 11 districts for over 200 students to 54 different destinations, HEC modeled 115 routes originating from individual districts. By modeling inter-district routing, the number of routes was reduced to 96, a potential savings of 19 routes. However, given the attention paid to driver shortages and increased fuel costs, it is likely that the vendor has already combined routes, so there is no way to estimate what the actual savings to districts would be if districts started collaborating for their out-of-district transportation needs.

**Hampshire County Network Modeled District and Inter-district Routes, FY08**

	<b># of Districts</b>	<b># of Students</b>	<b># of Destinations</b>	<b># of Modeled Single-district Routes</b>	<b># of Modeled Inter-district Routes</b>
FY08	11	207	54	115	96

Source: HEC, 2008.

According to HEC, if an agreement can be negotiated between the vendor, the collaborative and its districts regarding inter-district routing, there is interest in testing out routes as early as this summer. Without an agreement in place, the Hampshire County Network and its leadership will need to make some decisions regarding how to proceed. HEC and the Network will either need to build consensus amongst the districts on how to negotiate with the current vendor, reach out to other vendors or even attempt to develop new out-of-district transportation model.

**Challenges and Lessons Learned**

HEC envisions its role as a clearinghouse of information and a coordinator of services for the Hampshire County Network. As the Network begins to develop its program, like many of the networks across the state, building new relationships and trust with and between districts remains a challenge and, as HEC well knows, is the key to a successful partnership. Unlike the experience of some of the other networks in the eastern part of the state though, the relative lack of private vendors in this region substantially decreases competition and consequently, competitive pricing. While currently only one vendor serves the districts in the Hampshire County Network, networks in other parts of the state had the opportunity to review more than one bid (some as many as five or six bids), to make informed decisions about providers. Even without more than one vendor, districts are very satisfied with the level of service they are receiving already and there may be resistance to change.

HEC did experience some uncertainty on the part of districts to disclose student information. While overall district leadership expressed support for the program, gathering data from the appropriate district staff has been a challenge. HEC found lapses in communication between business offices and Special Education departments and locating the appropriate decision-maker on special education transportation data was a challenge.

Given the geographic size and population density of the county, inter-district routing presents other challenges in Western Massachusetts. Some remote Hampshire County hill town routes require four-wheel drive vehicles to transport students, particularly in the winter months. In some cases, given time constraints, proposed multi-district routing may not be feasible.

There seems to be lots of potential for collaboration though, and discussions of longer term goals include the possibility of developing a common bid for regular transportation for all Hampshire County school districts. Working out the logistics, contending with different calendar schedules, as well as developing buy-in from a critical mass of districts will be among the issues that will need to be resolved in advance of any meaningful collaboration.



## Franklin County Network

While there is currently no educational collaborative in Franklin County, the Franklin County Technical School (FCTS), as a result of its existing relationship with the county districts as a regional high school, has agreed to initially coordinate and manage the Franklin County Network. Of the ten Franklin County districts, Orange and Mahar Regional access collaborative services at the CAPS Collaborative in Gardner, part of the Central Massachusetts Network, and are currently not participating in the Network. In recent years, there has been a lot of attention paid to promoting partnerships and collaboration amongst county districts because of growing municipal financial pressures and shrinking school enrollments. While it was noted in the field interviews that prior attempts at forming a county educational collaborative failed due to a lack of strong leadership, a new attempt to form a collaborative, under the auspices of the Franklin County Council of Governments, is currently underway.

Using pilot funding, FCTS hired and trained a transportation coordinator and purchased routing software on behalf of the Network. FCTS also began the process of convening district superintendents, special education directors and business managers to discuss managed inter-district transportation in Franklin County and have started compiling student data. Most of the districts, except Greenfield, independently contract with the same local private vendor for all of their out-of-district special education transportation. Greenfield currently owns its own buses, manages its own transportation and uses a vendor for a small portion of its out-of-district special education transportation.

### Costs and Benefits

Similar to the circumstances in Hampshire County, the vendor is likely to be running inter-district routes, but without the districts coordinating this effort, there has been no incentive for the vendor to pass along savings to the districts. As was the case in Hampshire County, the network reports that the vendor has not been very cooperative in providing the inter-district routing that is currently in place for the districts. Consequently, the network transportation coordinator, using the data collected from the districts, modeled the number of potential current routes as if the routes were operated by single districts. Inter-district routes were then created using the routing software. As a result, 40 single district routes were reduced to 11 inter-district routes and 11 single district routes. This indicates a total of 22 routes and a potential savings of 18 routes.

### Franklin County Network Modeled Inter-district Routes, FY08

	# of Districts	# of Students	# of Destinations	# of Single-district Routes	# of Modeled Inter-district Routes
FY08 Modeled	6	119	22	40	22

Source: FCTS, 2008.

The eleven remaining single district routes are made up of students who are traveling to destinations in which no students from other districts are attending. While there is the potential to eliminate up to 18 routes, given the probability that the vendor has already combined routes, the actual reduction of routes will likely be smaller.

**Franklin County Inter-district Routes, Current and Modeled, FY08**

District	# of Current Single-District Routes	# of Modeled Single District Routes	# of Modeled Inter-district Routes
Total # of Routes	40	11	11

Source: FCTS, 2008.

**Challenges and Lessons Learned**

According to FCTS, convening districts and providing access to new tools for districts to discuss, negotiate, and manage data has been very useful. While the potential for cost savings is an incentive, districts do have concerns about losing control over the quality of services because they report very positive experiences with their current private vendor. FCTS is willing to relinquish the management of the Network if a collaborative is formed. That potential collaborative, whose district members have a strong voice in its operation, might be better able to facilitate partnerships. More clearly defining the role of FCTS, in regards to its management of the transportation program, will need to be established if inter-district routing takes place before the establishment of a collaborative (e.g. taking on billing responsibilities, fielding calls from parents and schools, etc). FCTS is considering seeking assistance or partnerships with HEC and/or LPVEC on these and other issues because of their strength and experience in providing a variety of services to their districts. It is unclear at this time whether or not HEC or LPVEC would be willing to provide services to Franklin County districts.

Additionally, building the student database has been a challenge. Identifying the appropriate district staff and receiving timely responses to data requests was difficult. While superintendents have been supportive, district staff members that were tasked with providing information have been not fully cooperative. In addition, the actual building of the database within the routing software has been time consuming and is a work in progress. While the county maps are installed on the software, given the rural nature of some of the districts, there are often discrepancies between actual street and rural route names. In these situations, the software must be updated manually. Incomplete student data from districts also adds another layer of work as the software requires very specific information and numerous “placeholders” must be created in order to model routes.

While there may be potential for the consolidation of routes in Franklin County, the small number of students and the relatively large geography is challenging. Some students are already traveling on long routes over the mandated hour, and adding students might be unrealistic in those particular cases. Bringing the districts together however, has been eye opening in other ways. The districts have realized that seven of their students are traveling to the same out-of-district program in Hampden County and districts are discussing the possibility of developing a program that could serve those specific students within the county.

There is also discussion of testing some pilot, inter-district routes during summer, but there is no agreed upon plan as of right now. There are also discussions about organizing a county-wide procurement process for regular education transportation as well. Strong leadership, with a willingness to develop partnerships from the districts will need to be in place to keep up the momentum of the project.

## Berkshire County Network

The Berkshire County Network is being organized by the South Berkshire Educational Collaborative (SBEC), which is currently made up of 4 districts: Lenox, Lee, Berkshire Hills Regional, and Southern Berkshire Regional School District. With a new Executive Director joining the collaborative full-time in July 2008 and a movement underway to expand the collaborative to encompass all of Berkshire County, SBEC is undergoing substantial change.

### Costs and Benefits

Pilot funding enabled SBEC to hire a transportation coordinator and purchase routing software in March 2008. The transportation coordinator is currently in the process of reaching out to all Berkshire County districts to begin compiling student data and current route information. The Network requested student data from 14 districts and to date has received data from 11 districts. After collecting the student data, the coordinator plans to obtain the routing software training in an effort to model potential inter-district routing.

### Berkshire County Current District Routes, FY08

	# of Districts	# of Students	# of Destinations	# Routes (estimated)	# of Vehicles
FY08 Modeled	11	44	29	36	22

Source: SBEC, 2008.

### Challenges and Lessons Learned

While there is evidence of support overall for inter-district collaboration and district leadership has endorsed the project, initially compiling student data from districts to build the database had been a challenge. Like most of the other networks in development, bringing districts together, beginning the dialogue, and moving into action steps is a slow and sometimes tedious process. Strong leadership, both from the collaborative and the districts, will be necessary to keep moving the project forward. With the new collaborative director coming on board this summer, one task will be to continue to propel this project, as well as the overall expansion of the collaborative forward.

According to Rich LaBrie, former Executive Director of LPVEC and the consultant hired using pilot program funds, an agreement is in process with the largest special needs transportation provider in Berkshire County that ensures a 0% increase in rates for FY09 and split billing amongst districts. Essential to that agreement becoming a reality will be the ability of districts to continue to communicate, share information, and provide the data necessary for collaboration and inter-district routing.

## Hampden County Network

The Hampden County Network is made up of the seven districts that are currently members of LPVEC (the pilot grantee) and the six districts that make up the balance of Hampden County (Westfield, Palmer, Holyoke, Springfield, Monson, and Chicopee). Brimfield, Holland and Wales, while they are technically part of Hampden County, given their geographic location, belong to the Southern Worcester Educational Collaborative.

### Costs and Benefits

LPVEC has long been providing special education and regular education transportation services to its member districts and owns and operates a fleet of over 213 buses and vans. Currently, LPVEC operates 82 out-of-district special education routes for its six member districts, transporting 382 students daily to 49 destinations. Like ACCEPT, the pilot program has enabled LPVEC to further demonstrate the “cost avoidance” that its services provide for its member districts.

Under the leadership of Rich LaBrie, the transportation coordinator at LPVEC began reaching out to the districts in the balance of Hampden County in an effort to compile out-of-district special education student data. LPVEC received student data (home address and destination) from five of the six districts (Springfield did not submit their data) and modeled potential route efficiencies by incorporating them into current LPVEC routes. Data were not collected on the number of current routes in operation in the districts. From five non-member districts, 192 students were incorporated into 99 routes.

### LPVEC Modeled Routes Incorporating the Balance of Hampden County, FY08

	# of Member Districts	# of Non-Member Districts	# of Students*	# of Destinations	# of Routes
FY08	6	5	403	49	99

Source: LPVEC, 2008.

\*There are 192 students from the balance of Hampden County and 211 students from current LPVEC routes in this model.

It is unclear, however, how the Hampden County Network will ultimately organize and operate. During field interviews, current LPVEC leadership felt that the collaborative would not take on new members, nor would they be likely to incorporate all non-member district students into their routing. LPVEC indicated that their role instead, might be one of technical assistance if the districts outside of the collaborative wanted to organize and begin developing their own inter-district routing. They indicated that it is possible, on a case by case basis, that there would be the opportunity to add individual students when space was available, to current LPVEC routes.

### Challenges and Lessons Learned

LPVEC, as a long-term provider, is confronting similar issues that other long-term collaborative transportation providers face across the state. Like Assabet Valley and ACCEPT, there is no incentive for these collaboratives, which already save their districts substantially and run extensive programs, to participate in additional inter-district routing. Questions that member districts of this variety of

collaborative include: At what point does a program get too large and lose control over quality? What is the benefit to the collaborative and its districts, financial or otherwise, to expand a program?

Without LPVEC as the organizing force in developing inter-district routing for the balance of Hampden County, it is unclear which entity can or is willing to play that role. Convening stakeholders, building consensus, and guiding the process will take strong and organized leadership. In addition, there is a challenge in coordinating districts of varying sizes and that are not all geographically contiguous. In Hampden County, Springfield is larger than the other five districts combined. Additionally, Holyoke, Chicopee, and Westfield are substantially larger in size than Monson and Palmer. Palmer and Monson are contiguous, but are separated from the other districts in the “balance of Hampden County”.

## South Coast Network

The South Coast Network is made up of the READS, South Coast and Southeastern Massachusetts Educational Collaboratives and it serves 21 districts. During the formation of regional networks, the collaboratives agreed to work together to assess the interest of their districts in planning and/or providing cooperative transportation. Recently, they contracted for a survey of their districts which includes the collection and analysis of data about current out-of-district student transportation services, vendor information and associated costs. They expect a report in early July and at that time will decide whether to move forward in the development of network-organized inter-district transportation.

## Pilot Perceptions: Districts and Private Schools

The perceptions of the Special Education Transportation Pilot by school districts and private schools were an important aspect of the Institute's analysis. Structured telephone interviews were completed with a sample of districts that recently became involved or anticipate becoming involved in collaborative-run transportation as a result of the pilot. Telephone interviews were also undertaken with districts that elected not to participate in collaborative-run transportation. In addition, the Institute reached out to a sample of private schools that are being served by new pilot project inter-district routes and interviewed the Executive Director of the Massachusetts Association of 766 Approved Private Schools (maaps), which represents approximately 160 Massachusetts-approved private schools.

### Districts

In order to gain the perspective of districts on the Special Education Transportation Pilot, the Institute undertook a series of structured telephone interviews. Interviews were conducted with districts that began working with a collaborative for transportation services in Fall 2007, districts that will begin utilizing a collaborative for services in Fall 2008, and districts that opted out of participating in collaborative-run transportation programs. The interviews were conducted with districts participating in collaborative-run transportation as a direct result of the pilot program's efforts. Interviews with districts that began participating in Fall 2007 were more extensive than those in the other two categories. In total, 53 districts were contacted regarding their experiences to date with the Special Education Transportation Pilot.

#### District Interviews, May 2008

Category	# of Districts Contacted	# of Completed Interviews	Participation Rate
New Participants/Fall 2007	20	10	50%
New Participants/Fall 2008	9	6	67%
Opting Out of Participation	24	12	50%
<b>Total</b>	<b>53</b>	<b>28</b>	<b>53%</b>

In an attempt to promote district participation, the Institute requested that each network reach out to their respective districts to inform them that the Institute would be contacting them. In addition, each district representative received an email from the Institute explaining the project overall and the purpose of the telephone interviews. In early May 2008, the Institute began interviewing districts. The structured interviews allowed for the Institute to capture their responses to a series of questions but also provided the opportunity for districts to expand on their responses if they chose to do so. The results of the interviews are as follows:

## Overall Interview Findings

- Over 85% of districts interviewed used a private vendor for out-of-district transportation services before the pilot and 18% operated their own services.
- 7 of 10 districts are experiencing cost savings though most would characterize their savings as modest.
- 9 of 10 districts are satisfied with the quality of services they are receiving through the collaborative and a majority feel that quality has increased.
- While cost savings is important to districts, they also feel that closer interaction with other districts was an added benefit of participation in inter-district routing.
- Of the districts that opted out of collaboration, three-quarters feel that they are receiving competitive rates from their private vendor.
- More than half of the districts that opted out had concerns about the quality of transportation that would be provided through a collaborative.
- All of the districts that opted out this year say that they would consider participating in the future.

## Interview Results: New District Participants, Fall 2007

### 1. Before working with the collaborative, how were transportation services for out-of-district special education students provided in your district?

	Private Vendor	Operated Own Services	Collaborative	Other	N
# of District Responses	8	2	2	0	10

The vast majority of districts used private vendors for their out-of-district transportation needs before the pilot. Two districts indicated that they used a mixed model of service by operating their own transportation services in addition to accessing the services of private vendors. Two of the 10 districts used a collaborative for services and are now actively participating in a regional network.

### 2. Is your district experiencing cost savings by working with the collaborative this year?

	Yes	No	I Don't Know	N
# of District Responses	7	2	1	10

### 3. If yes, how would you characterize that savings?

	A Small Amount	A Significant Amount	I Don't Know	N
# of District Responses	6	1	3	10



A majority of districts felt that they were experiencing cost savings by working with a collaborative, but several districts interviewed indicated that determining savings at this early stage of participation was difficult. Most felt that their savings would likely be small, although one district characterized the savings as significant. Many felt that with another year of service, savings would be more easily quantifiable.

**4. Is your district satisfied with the quality of service you are receiving through the collaborative?**

	Yes	No	N
# of District Responses	9	1	10

Nine out of 10 districts were satisfied with the quality of service they are receiving through the collaborative. The district that responded that it was dissatisfied indicated concerns about decreased safety for students.

**5. Are parents satisfied with the quality of service being received through the collaborative?**

	Yes	No	N
# of District Responses	8	2	10

While according to districts the majority of parents are satisfied overall with the quality of service being provided through the collaborative, they indicated that the biggest concerns for parents are increased ride times for students, safety, and the change in routine.

One district felt that increasing a student’s time on the bus beyond the hour limit can be written into a student’s IEP, but it is certainly not a long-term solution. Other districts reported that parents become very comfortable with familiar staff and routines and don’t adjust easily to change. Districts indicated that some parents have also expressed concerns about who is monitoring their own, and other children, while on the bus.

**6. Are students receiving increased or comparable quality in special education transportation services through the collaborative?**

	Better	Same	Worse	N
# of District Responses	6	3	1	10

Nine out of 10 districts felt that students were receiving increased or comparable quality of special education transportation services through the collaborative. One district felt that quality had decreased, though, and cited increased time on the bus as the reason.

**7. Has your district conducted any surveys of parents regarding their perception of the quality of these services?**

None of the districts interviewed have conducted formal surveys of parents regarding their perception of quality.

**8. Does your district plan to work with the collaborative for these services next year?**

	Yes	No	N
# of District Responses	10	0	10

All the districts plan to work with the collaborative next year for services. Two of the districts responded that they are working with the collaborative because they are contractually obligated to do so. Another district felt that although some issues needed to be resolved, it was confident that would happen and plans on expanding its participation.

**9. If yes, does your district plan to expand the number of students using collaborative-run transportation services next year?**

	Yes	No	N
# of District Responses	8	2	10

Eight out of 10 districts have plans to expand the number of students using collaborative-run transportation services next year.

**10. If no, why not?**

The districts that do not plan to expand the number of students participating in collaborative-run transportation services expressed concerns about issues that have arisen as a result of more students on the bus. Others cited the need for shorter routes, apprehension on the part of parents, and the need for the resolution of problematic student behavior on bus as concerns.

**11. Other than cost savings, has your district experienced any other benefits from working with the collaborative?**

	Saving Staff Time	Collaborative Expertise	Closer Interaction with Other Districts	N
# of District Responses	2	4	5	10

Half of participating districts felt that a benefit of working with the collaborative has been to have increased interaction with other districts. Four out of 10 districts felt that utilizing the expertise of the collaborative was an advantage gained by using their services. A small number of districts felt that they saved staff time by working with the collaborative. In addition, other districts cited that having a point person to resolve issues, the increase in student safety due to more carefully screened and monitored staff and vehicles, and the use of a GPS system to increase efficiency of routes as benefits of working with the collaborative. Several districts cited one or more benefits to working with the collaborative.

**12. Please answer true or false to the following responses:**

**My district decided to work with the collaborative for out-of-district special education transportation services because...**

District Responses	True	False	N
We wanted to “test drive” a new way of providing services.	10	0	10
We wanted to reduce the costs associated with transporting out-of-district special education students.	9	1	10
We wanted to improve the quality of services our students are receiving.	8	2	10
We wanted to reduce district staff time devoted to these services.	6	4	10
Other	5		5

All of the districts interviewed felt that investigating alternative ways of providing transportation services was one of the main reasons for working with the collaborative. Reducing costs and improving quality were also important drivers. Six out of 10 districts felt that they wanted to reduce the staff time spent on these services.

Districts had a number of other reasons for participating as well. One district indicated that it participated to show collaboration and increased productivity in an effort to promote the inclusion of transportation in the “circuit breaker” formula. Several districts expressed concern that the one hour ride limit for special education students greatly restricts collaboratives and districts from consolidating routes, while at the same time parents are very concerned about the extended ride times. Many districts liked the idea of collaboratives providing a “one-stop”, centralized effort and having a single point person to handle day-to-day transportation issues, such as a child not getting picked up on time. Collaboratives also deal with larger issues, like ensuring that the appropriate CORI checks are done on all staff. Districts indicated that this level of service is usually not immediately available when dealing with a private vendor. One district felt that in order for this pilot to be truly successful, more collaboratives need to get on board other than just the few piloting services.

**Interview Results: New District Participants, Fall 2008****1. Before working with the collaborative, how were transportation services for out-of-district special education students provided in your district?**

	Private Vendor	Operated Own Services	Collaborative	Parents	N
# of District Responses	5	2	1	2	6

A majority of districts currently use a private vendor for their out-of-district transportation needs. Four districts reported using more than one model of service delivery, including parents transporting their children to out-of-district private placement locations.

**2. Please answer true or false to the following responses.**

**My district decided to work with the collaborative for out-of-district special education transportation services because...**

Response	True	False	N
We wanted to reduce the costs associated with transporting out-of-district special education students.	6	0	6
We wanted to reduce district staff time devoted to these services.	6	0	6
We wanted to improve the quality of services our students are receiving.	3	3	6
We wanted to “test drive” a new way of providing services.	4	2	6
Other	3	0	3

Not surprisingly, all districts want to reduce costs. In addition, all of the districts would like to reduce the amount of time their staff spent delivering these services. About half felt that improving the quality of services was an incentive to participate and two-thirds felt that exploring alternative ways of providing services was one of the reasons they will participate in collaborative-managed transportation next year. In addition, some districts felt that having the opportunity to work with a collaborative that was experienced, and had a director that was experienced, in providing transportation services was one of the reasons they decided to commit to participating next year.

### 3. Any other benefits from working with the collaborative besides cost savings?

	Saving Staff Time	Collaborative Expertise	Closer Interaction with Other Districts	N
# of District Responses	3	4	5	6

Many districts made comments regarding accessing the expertise of the collaborative and felt that there were benefits to working with reputable organizations. Five out of six districts cited increasing communication and interaction with other districts as a benefit to working with a collaborative. Having the ability to share information can increase efficiency. For example, routes can be combined and producing network-wide documents, such as a parent transportation handbook, can benefit all the districts involved. Four of the districts interviews cited more than one benefit while one district did not feel that there were other benefits besides cost savings to working with a collaborative.

## Interview Results: Districts Opting Out of Participation

### 1. How are transportation services for out-of-district special education students currently provided in your district?

	Private Vendor	Operated Own Services	Collaborative	Other	N
# of District Responses	11	1	0	0	12

Over 90% of districts that opted out of participation use a private vendor for out-of-district special education transportation services. One district operates its own services.

**2. Recently, your district had the opportunity to participate in collaborative-managed out-of-district special education transportation, but decided not to. Why did your district decide to not participate?**

Response	True	False	n
My district receives cost effective services from a private vendor.	9	3	12
My district was concerned about the quality of services through the collaborative.	7	5	12
My district is in the middle of a multi-year contract with a private vendor.	4	8	12
My district provides cost-effective services on its own.	3	9	12
My district uses a different collaborative for transportation services.	0	12	12
My district was not aware of these services provided by the collaborative	0	12	12
Other	3		3

While all of the districts were aware that new transportation services were being provided by the collaborative, a majority of the districts decided not to participate because they felt that they are already receiving cost effective services from a private vendor. Slightly more than half of the districts had concerns about the quality of service that the collaborative would be providing. Additionally, some districts were unable to participate because they were in a multi-year contract with a private vendor. For many interviewed, the time a student spends on the bus is a large district and parental concern. Districts mentioned geographic hurdles, such as rural roads and large parcels of state preserved land, as a reason for less collaboration. This challenge forces vehicles to drive for longer periods of time and reduces the ability to do inter-district routing with other districts. One district stated that a strong loyalty to its long time drivers made the district reluctant to change services and suggested that when these employees retire, the district plans to gradually transition over to working with a collaborative to manage their special education transportation. Another district wanted to participate but the collaborative was not yet ready to accommodate their large number of students.

**3. Would you consider participating in the future?**

All twelve districts expressed interest in working with a collaborative in the future, but one district stressed the importance of keeping programs and services in town to keep community and social connections strong while keeping the costs down.

## Private Schools

In an effort to obtain the perspective of private schools on the pilot and its outcomes, the Institute interviewed the Executive Director of the Massachusetts Association of 766 Approved Private Schools and also reached out to private schools that were served by at least two of the three new regional transportation networks providing services in the current school year.

The Massachusetts Association of 766 Approved Private Schools is very supportive of efforts toward greater coordination amongst private schools, districts and collaboratives. While the private schools themselves don't play a role in the coordination of student transportation, they are very interested in supporting regional coordination and cite the reduction in the number of transportation points of contact, fewer buses idling, and stronger linkages between private schools, transportation vendors, districts and collaboratives as some of the advantages for the schools. In addition, according to maaps, a key issue for many of the private schools is improvement in driver training which could potentially be addressed through collaborative-managed transportation services. Each school serves a unique student population

and focusing the training of drivers, and overseeing and standardizing that training, on the needs of unique student populations would be incredibly valuable.

The Institute was also able to speak with one private school director regarding his perceptions of the pilot. With the small amount of new service instituted in Fall 2007 by the three regional networks, it is not surprising that no substantive changes in service were discernable to his school. It was stressed, however, that collaboration is important and whatever means private schools can take to be supportive, they will do so. In general, the school is very happy with the transportation services the students receive. Typically, the parents and the districts, without the input of private schools, interact regarding this aspect of service. However, he thinks there may be additional opportunities for collaboration. Parents, who send their children to private school on their own, and not through the district, have expressed interest in having their children on school bus routes. Some parents are willing to pay the district/collaborative for transportation services and this may be an opportunity for additional collaborations and revenue.

## Summary of Findings

In its third and final year, the Special Education Transportation Pilot Program was designed to test the concept that the transportation of students to out-of-district placements can be provided at a lower cost and with improved quality of service by delegating the planning and contracting for such transportation to educational collaboratives. The role of the Institute was to describe and document the experiences of the collaboratives and districts participating in the Special Education Transportation Pilot Program using the best available information as provided by the educational collaboratives, districts, pilot consultants, and other key project stakeholders.

While the development of programs within each collaborative and network has been different, there were a number of common themes in regards to the challenges and lessons learned during the implementation of new collaborative-managed transportation.

## Challenges and Lessons Learned

### **Information is essential.**

More informed districts and collaboratives are better able to negotiate competitive prices from their vendors. Utilizing routing software has been an invaluable tool to a number of collaboratives and districts, but it is clear in order to gain the best advantage, they must also be fully informed about the transportation services currently in place, competitive baseline costs, and have staff that is effectively trained in the software. Not surprisingly, those collaboratives that have been able to solicit bids from several vendors have reaped the greatest savings when using the best available information to negotiate competitive rates.

- CHARMS, in preparation for providing services next year, ran an open procurement process (sharing all the bids with all the bidders) which resulted in several more competitive bids than otherwise would have been available. CHARMS determined the exact level of service needed by using routing software and student data and by being able to specify service needs. Instead of leaving it up to the vendor, they were able to get the best deal.
- Similarly, Assabet Valley solicited bids from several vendors based on per day per vehicle costs and kept the routing in house. Using this method, they report savings of over \$400K this year.

The implementation of routing software has been a challenge for some collaboratives, though, and a number of collaboratives report that they have staff that are resistant to learning the new technology. These collaboratives have found that they will need to focus on developing the skill and technological comfort-level of some veteran staff.

Routing software, however, is clearly not a prerequisite for obtaining the information needed to negotiate a better price for transportation services. The three networks that have instituted new routing in FY08 as a result of the pilot are currently not using routing software—two are relying on their private vendors to do the routing and another is preparing its routes manually.

- The Southeast Network, aware of the per day per vehicle baseline costs developed through the pilot, focused its attention on hiring quality staff and achieving competitive per day rates and routed all of their newly purchased vehicles by hand.
- The Metro Boston Network also used the baseline costs developed during the pilot to negotiate with transportation providers, but relies on the vendor to plan the routes.

Finally, getting districts to make more informed decisions is a hurdle.

- Of the districts that opted out of participation in collaborative-managed transportation, 75% report that they are receiving cost-effective services from their private vendor. However, without the ability to compare their service costs with the service costs of other transportation options and without the tools to know exactly the level of service they need (by routing it themselves), it is likely that they are not able to effectively compare services.

While collaborative-managed inter-district routing can be one means to substantial cost savings, districts on their own would be able to negotiate with private vendors for better rates if they were willing to become more informed consumers.

**Strong and entrepreneurial leadership is a key component to success.**

Strong leaders, both within collaboratives and districts, make programs happen. Collaborative leadership, some with extensive experience in transportation and others new to providing the service, propelled new programs forward with their ability to build consensus, problem-solve, and maintain momentum. However, district leadership might be more important. Without district buy-in, collaborative programs don't exist. District leadership must bring the appropriate staff to the table (business, special education and transportation), they must delegate responsibilities effectively to ensure the timely delivery of information, and they must sell the importance of the program to staff, parents, and sometimes other districts.

- Both North River (Southeast Network) and LABBB (Metro Boston Network) had districts inform them that they were frustrated by out-of-district transportation costs and quality; both collaboratives used that feedback to propel the new program forward.
- In the Metro Boston Network, decision-makers from the Business Office and Special Education Department of each participating district attend meetings for the program.

However, challenges are apparent:

- Some of those interviewed cited the trend of district superintendents holding their positions for only couple of years as an obstacle to successful partnerships because of a lack of continuity.
- Others felt that districts have a “wait and see” attitude and that more partnerships will arise when programs have proven to be successful.
- Not all educational collaboratives are interested in getting into the transportation business. In all likelihood, some districts aren't encouraging their collaboratives to do so either.

**Starting small helps build trust and develops experience.**

Two networks that are currently running pilot routes are completely new to collaborative-managed transportation. They opted to start small and have plans to expand gradually over the next several years.



By piloting a small number of routes, these collaboratives have been able to gain necessary experience, build confidence, and use their successes to market and entice new districts to participate. Districts appear to be happy with the services they are receiving and 10 out of 10 districts currently participating intend to work with a collaborative again next year. Eight out of 10 plan to expand the number of students using collaborative-managed transportation.

- Metro Boston began with three districts and will build to five districts next year. The Southeast Network plans to maintain the same number of districts but expand to more than twice as many students.

Starting small may be a challenge, though, for regions with fewer students and greater geographic areas.

- Berkshire County encompasses over 931 square miles and the initial student data collected by the Berkshire County Network found that only 44 students from 11 districts are traveling to out-of-district placements.

In a case such as this, developing a critical mass of committed districts will be necessary to starting a program and experiencing cost savings.

### **Partnering isn't for everyone.**

While the concept of regional networks seems logical, partnering on a larger scale has its challenges. Each of the three grantee collaboratives, along with a number of other collaboratives in the state, have years of experience providing transportation services to their member districts. Their expertise in collaborating with districts, developing programs, and implementing services is substantial. But, it is unclear as to what their role will be within the networks. For collaboratives that already run comprehensive transportation programs, there isn't necessarily an incentive to partner with other collaboratives to provide services and there may be a point at which adding new districts comes at the expense of existing districts, in regards to quality. In addition, the financial benefits won't be as evident for collaboratives that already run efficient programs.

- CASE, MEC, and Cape Cod each run substantial, out-of-district transportation services for their member districts and opted out of participating in a regional network early on in the pilot.
- During the field interviews, LPVEC leadership felt that the collaborative would not take on new members, nor would they be likely to incorporate all non-member districts into their routing. Instead, they indicated that their role in the network might be to provide technical assistance and to share their knowledge and expertise.
- Assabet Valley indicated that it was unsure as to the direction its district leadership would take and did not know what role, if any, the member districts would want the collaborative to play in the Central Mass Network.

In addition, collaboratives may not be able to meet every district's transportation needs and alternative forms of collaboration might need to be explored in these cases. Size differences, geographic constraints and feasibility, and different service needs are some of the issues that contribute to whether or not it makes sense for some districts and collaboratives to work together. Cooperative purchasing and smaller district-to-district collaboration may be other options to consider in these cases.

- In the Hampden County Network, the districts not currently served by LPVEC present some logistical challenges. Springfield is larger than the other five districts combined and already has an

economy of scale. Additionally, while Palmer and Monson are contiguous, they are separated geographically from Holyoke, Chicopee, and Westfield and it could make partnering a challenge.

### **New relationships can lead to other links between districts and collaboratives.**

While inter-district routing as a result of the pilot is still in the early stages, increased communication between districts and collaboratives has the possibility to lead to other partnerships. When asked about other benefits of working with the collaborative, more than half of the districts interviewed felt that the increased communication between districts was an important by-product of the pilot.

- Hampshire County Network officials noted the possibility of partnering to negotiate better pricing for regular education transportation, in addition to special education.
- In Franklin County, when districts convened to discuss their student placements, they realized that seven of their students were attending an out-of-district program in another county and have discussed the possibility of developing a program to meet those students' unique needs within the county.
- In the Northeast Network, according to officials, new inter-collaborative professional development offerings have arisen as a result of the pilot.
- Several networks discussed the challenges they face in the transportation of homeless students, under the McKinney-Vento Act, and indicated that inter-district discussions on this topic need to continue.

## **Conclusion**

### **Pilot Successes**

- Three new programs plan to expand and at least one new collaborative will provide services next school year.
- 90% of participating districts are satisfied with the new collaborative-run services and most report that they are saving money.
- Closer interaction and communication between districts offers the promise of the development of other partnerships (e.g. regular education transportation bids and new joint programs).
- Establishing baseline per day per vehicle costs has helped collaboratives negotiate more effectively with vendors.

### **Obstacles to Implementation**

- Negotiating is more difficult for regions with less private vendor competition.
- Developing the skills and technological comfort-level of collaborative and district staff enabling them to effectively use routing software remains a challenge.
- Some districts are reluctant to give up control of their out-of-district special education transportation.

- Not all educational collaboratives are interested in getting into the transportation business.
- There is no incentive for collaboratives that already run efficient transportation programs to participate in the Networks.
- Collaboratives might not be able to meet all district transportation needs due to size differences, geographic feasibility, and different service needs.

While more hard work is needed to continue the momentum, the initial results of the pilot program indicate that there has been cost savings and an increase in the quality of transportation services. Districts new to collaborative-managed transportation services report that they are satisfied with the services they are receiving, while collaboratives managing new programs are beginning to develop the skills and experience they need to create sustaining programs and prepare for expansion. The development of new transportation services has been modest; however the opportunities for collaboration are encouraging. Access to information and strong leadership will be the keys to continued growth in collaborative-managed transportation and perhaps also in the development of alternative forms of collaboration for districts and regions that face unique challenges.

## Appendix A: Field Interviews

Interview	Title	Role	Organization
Rich LaBrie		Grantee/Consultant	Western Massachusetts Consortium
Bob Kurtz		Consultant	Eastern Massachusetts Networks
Dennis Laabs		Consultant	MetroWest Network
Anne McKenzie Anna Bishop Crystal Neimer William Hearn	Exec. Director Business Manager Transportation Coord. Transportation Mgr.	Grantee	Lower Pioneer Valley
Mike Palladino	Exec. Director	Grantee/New Network	CHARMS Collaborative/ MetroWest Network
Gerry Mazor	Director of Special Projects	New Network	MetroBoston Network
George Flynn Bob McArdle Anne Curry	Exec. Director, SEEM Exec. Director, GLEC Business Mgr, SEEM	New Network	Northeast Network
Jim Major	Exec. Director	Private School Industry Group	maaps
Colleen Cavanaugh	Exec. Director	Grantee	Assabet Valley Collaborative
Mike Ciesla Kim Payne	Business Manager Transportation Coord.	New Network	Hampshire County Network
Joanne Haley Sullivan Mike Laliberte	Exec. Director Business Manager	New Network	Southeast Network
Richard Lane Russ Kaubris Barb Williams	Superintendent, FCTS Business Mgr Transportation Coord.	New Network	Franklin County Network
Lou Senecal	Transportation Coord.	New Network	Berkshire County Network
Bob Broudo	Executive Director	Private School	The Landmark School

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